



Microsoft Cloud for Financial Services **in a Day**

Unified customer profile

Step-by-Step Lab

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Overview

Learning Objectives

In this lab, you will learn how to do the following:

- Explore the Data Model related to UCP
- Explore the Unified customer profile (UCP) application and controls
- Create new records within Unified customer profile (UCP)
- Extend Unified customer profile (UCP)

Prerequisites

- None

Unified customer profile

The **Unified customer profile** application shows a 360-degree perspective of the customer consolidated into a unified dashboard. It offers an accurate, consistent, and cohesive source of truth about the customer. This customer information can be leveraged to provide personalized experiences, reveal important opportunities, prevent potential loss, or churn, and improve customer satisfaction.

Key capabilities of Unified customer profile include:

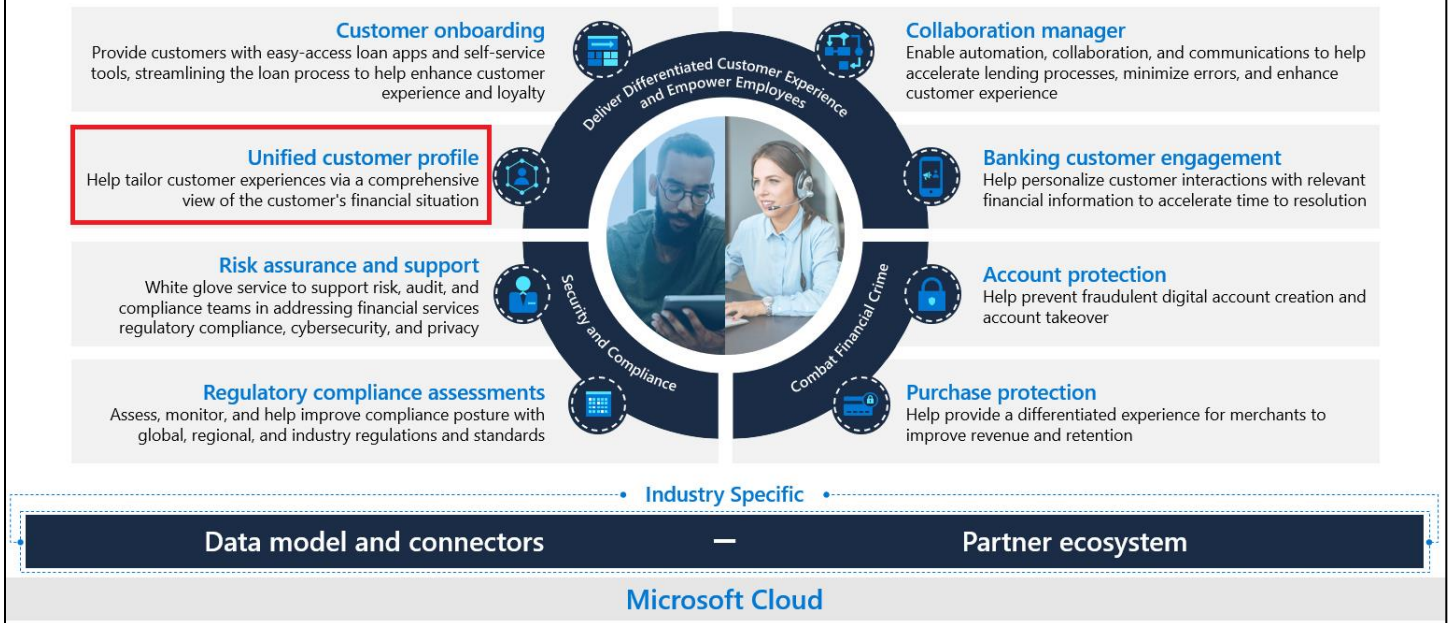
- **Summary:** Consists of an at-a-glance summary of the customer, their personal details, life moments, financial holdings, and credit and debit cards.
- **Connections:** Help capture relationships between a customer and its related Groups and contacts. This helps in understanding the overall financial strength of the customer in reference to the relationships/groups (such as household) that they participate in.
- **Financial holdings:** View detailed information about all the financial holdings associated with the customer.

Industry Prioritized Scenarios

- Unified customer profile focuses on both **Deliver differentiated Customer Experience and Empower Employees** priority scenarios. It helps you benefit from a data-first experience that brings together financial details, Life events, and household information into a single view. It also helps centralize your customer data in a single place via Microsoft Dataverse and the industry data model.

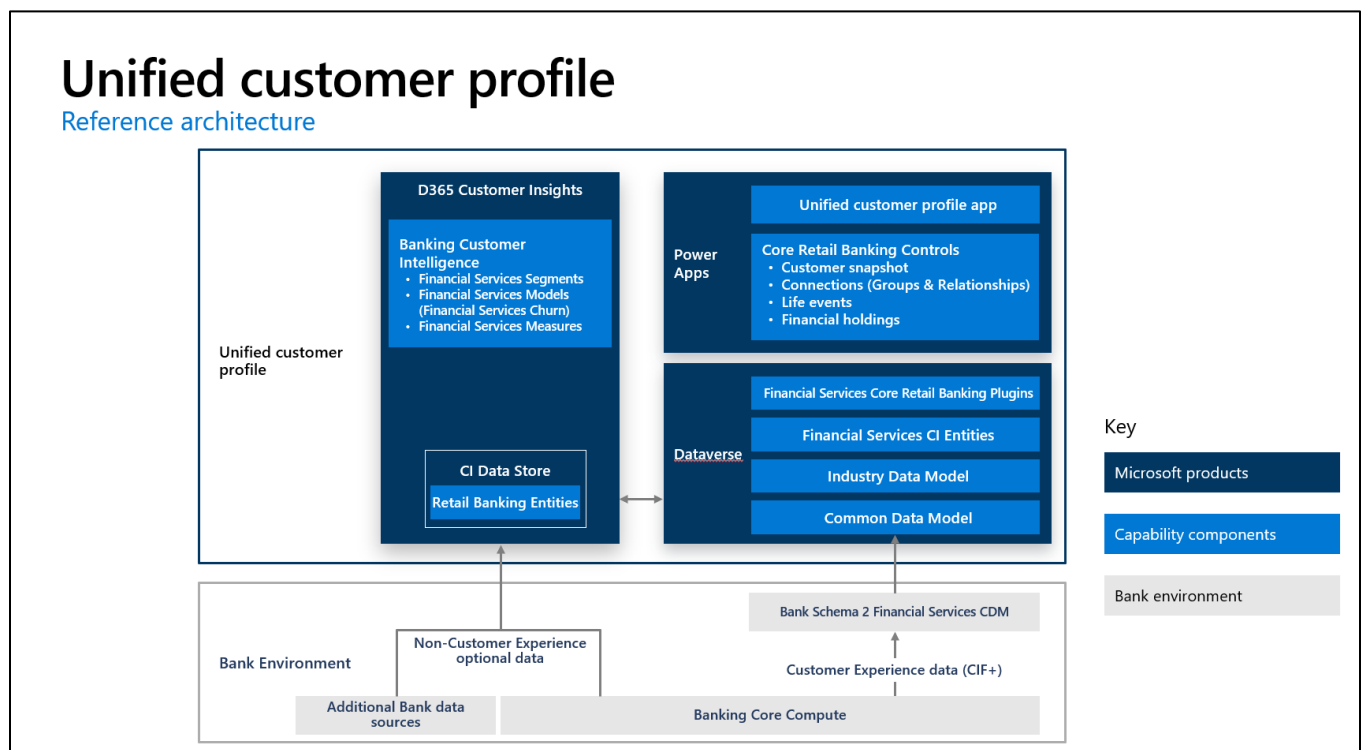
Microsoft Cloud for Financial Services

Capabilities for Retail Banking



Reference Architecture

- Below is the reference architecture of Unified customer profile



Exercise 1: Explore the Unified customer profile (UCP) Data Model

In this exercise, you will learn about the Unified customer profile (UCP) data tables.

The UCP data model is built atop the FinancialServiceCommon and RetailBankingCoreDataModel layers in Dataverse.

Visit [FSI docs for Data model link](#) on Microsoft Docs to learn more about the FSI data model.

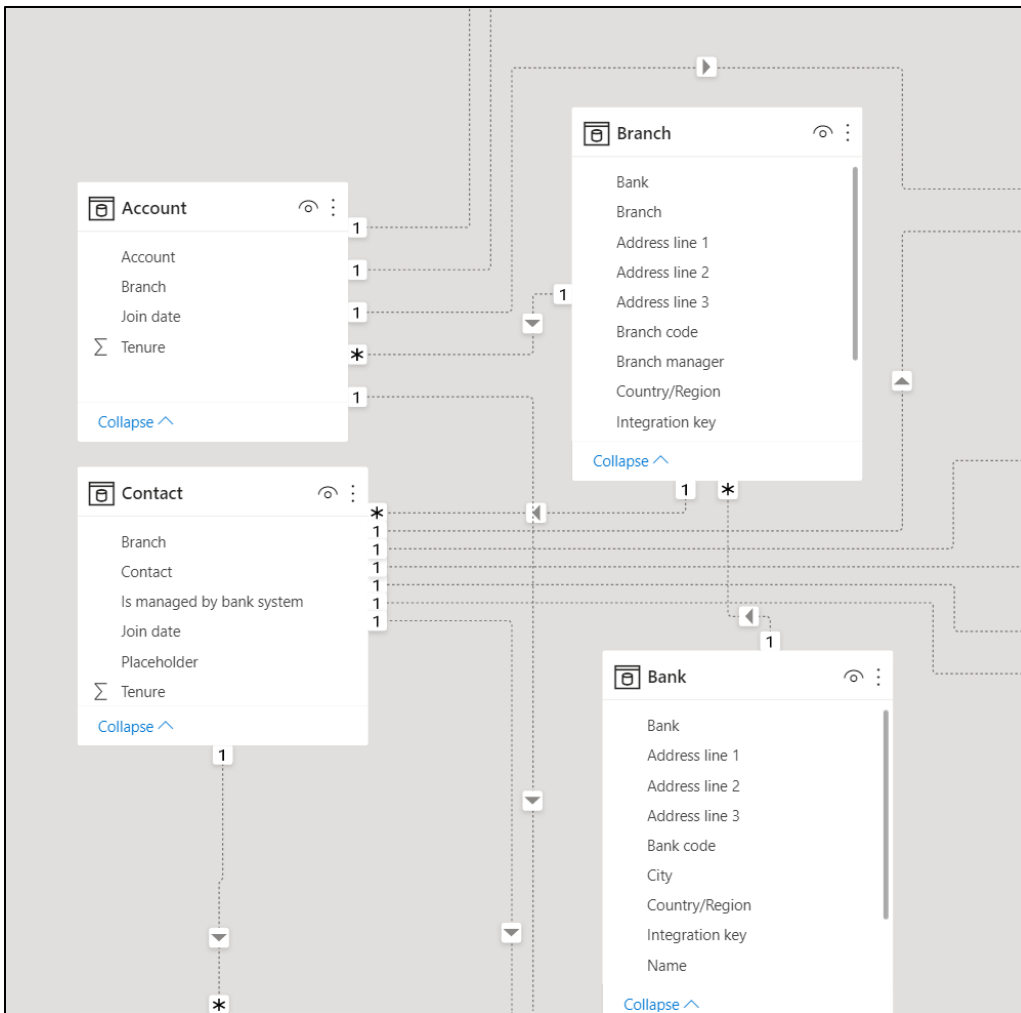
Task 1: Navigate Customer and Bank data and relationships

In this task, you will explore the main tables related to Unified customer profile. Select each table name to navigate to the Microsoft Docs page that goes into detail about each table.

UCP Table Definitions

Contact (customer)	Person with whom a business unit has a relationship, such as customer, supplier, and colleague.
Account	Business that represents a customer or potential customer. The company that is billed in business transactions.
Bank	The bank that the branch is associated with.
Branch	The branch of the main bank, when borrower applies for a loan at a branch

See next page for the UCP Entity Relationship Diagram.



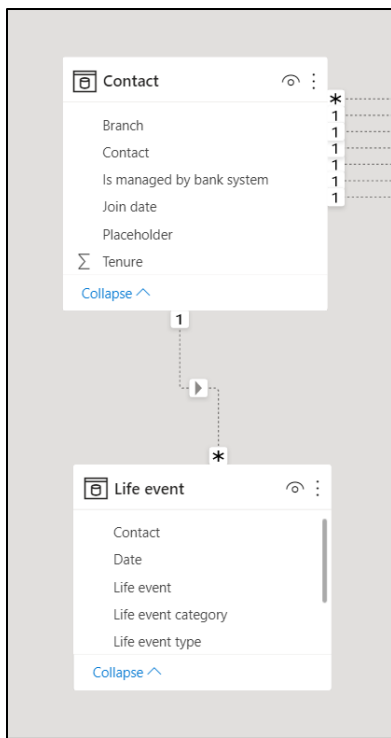
Task 2: Navigate Life event data tables and relationships

In this task, you will explore the main tables related to Life event data. Select each table name to navigate to the Microsoft Docs page that goes into detail about each table.

Life event Data Table Definitions

Life Moment	Significant milestones in a customer's personal life which can impact their financial situation, such as attending college, marriage, having a child, retirement, etc.
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See next page for the Life event data Entity Relationship Diagram.



Task 3: Navigate Financial data tables and relationships

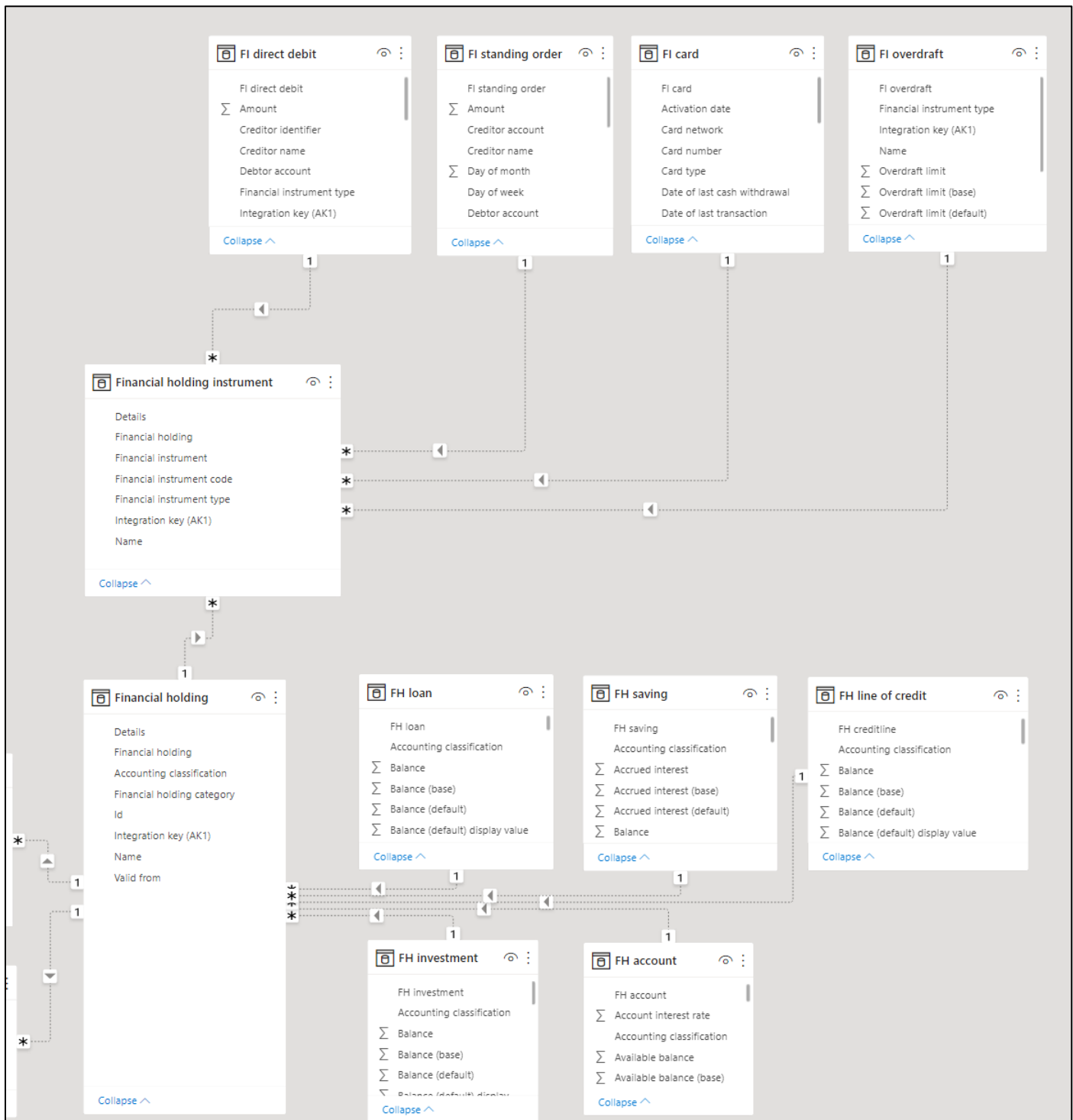
In this task, you will explore the main tables related to customer financial data – including different types of financial holdings, financial instruments and customer financial holdings. Select each table name to navigate to the Microsoft Docs page that goes into detail about each table.

Financial Data Table Definitions

Financial holding	Accounts, loans, investments, credit lines and savings accounts held by a customer.
FH loan	Loans held by the customer with the financial institution.
FH saving	Savings accounts held by the customer at the financial institution.
FH line of credit	A deposit account holding that allows the holder to make deposits and withdrawals through financial holding instruments. An account can be interest bearing.
FH investment	A deposit account holding that allows the holder to make deposits and withdrawals through financial holding instruments. An account can be interest bearing.
FH account	A deposit account holding that allows the holder to make deposits and withdrawals through financial holding instruments. An account can be interest bearing.
Financial holding instrument	A deposit account holding that allows the holder to make deposits and withdrawals through financial holding instruments. An account can be interest bearing.
FI direct debit	An automated payment system whereby an account holder authorizes a creditor to debit the customer's bank account at regular intervals.
FI standing order	An instruction order from an account holder for a set amount of money to be removed from an account at regular intervals and paid to or transferred to another account.

FI card	An instruction order from an account holder for a set amount of money to be removed from an account at regular intervals and paid to or transferred to another account.
FI overdraft	An extension of credit associated with a checking account allowing the account holder to continue withdrawing funds when an account reaches zero.
Customer financial holding	Financial holdings owned by the customer.

See next page for the Financial Data Entity Relationship Diagram



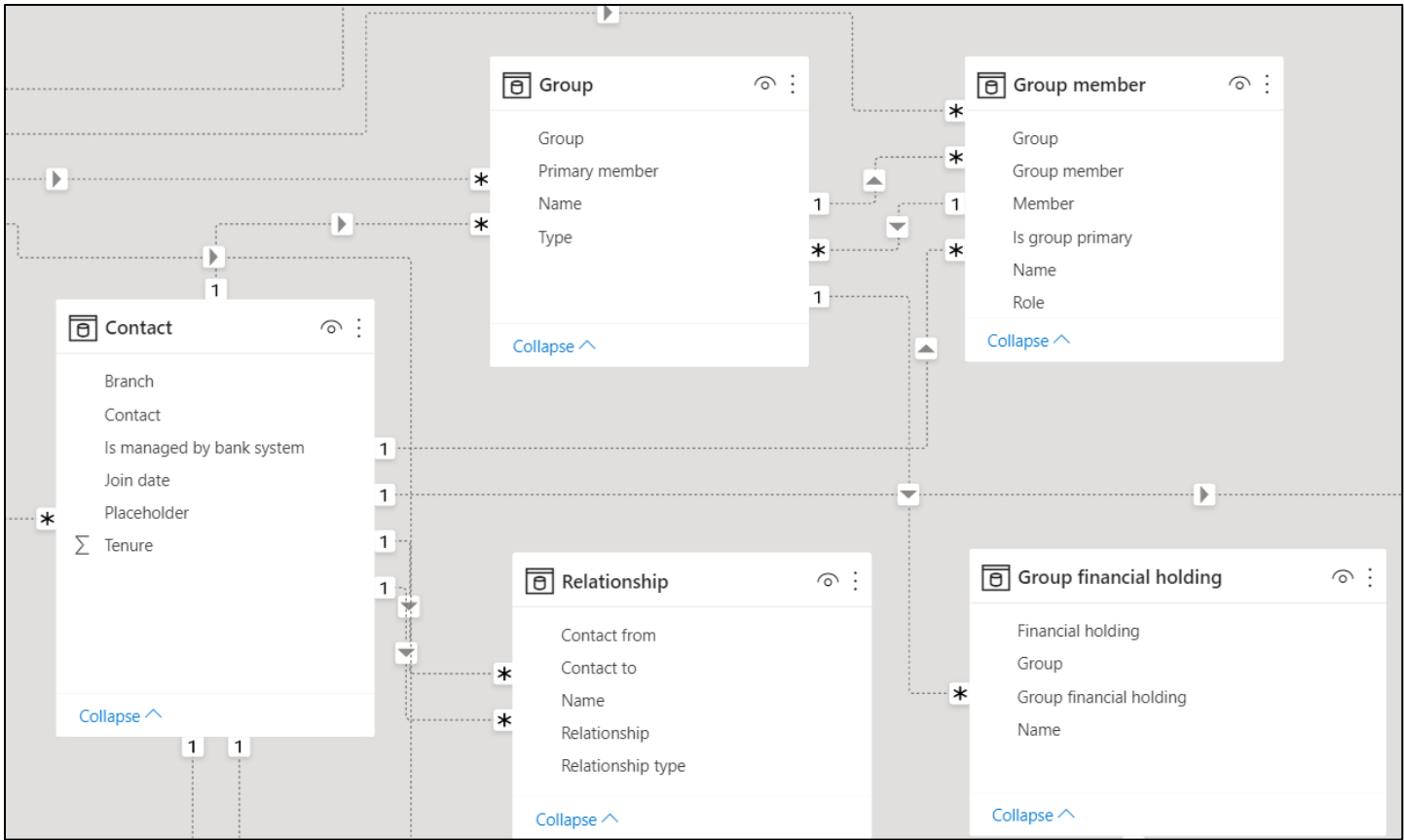
Task 4: Navigate Connections data tables and relationships

In this task, you will explore the main tables related to customer connections – including groups (eg: households) and relationships . Select each table name to navigate to the Microsoft Docs page that goes into detail about each table.

Connections Data Table Definitions

Group	An association of several customers allowing e.g. the representation of households
Group member	An association between a customer and a Group
Group Financial Holding	Financial holdings associated with a Group, to be included in the group's total assets and liabilities.
Relationship	Denotes an association between one contact to another (not as part of the larger group) where there is not necessarily a direct association of finances. For example, a spouse, lawyer, child or grandparent.

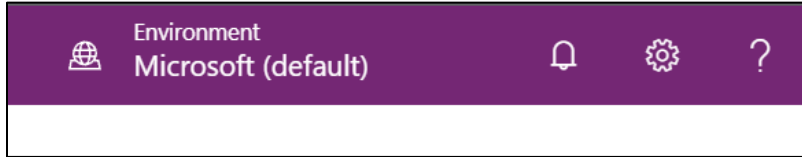
See next page for the Connections Data Entity Relationship Diagram



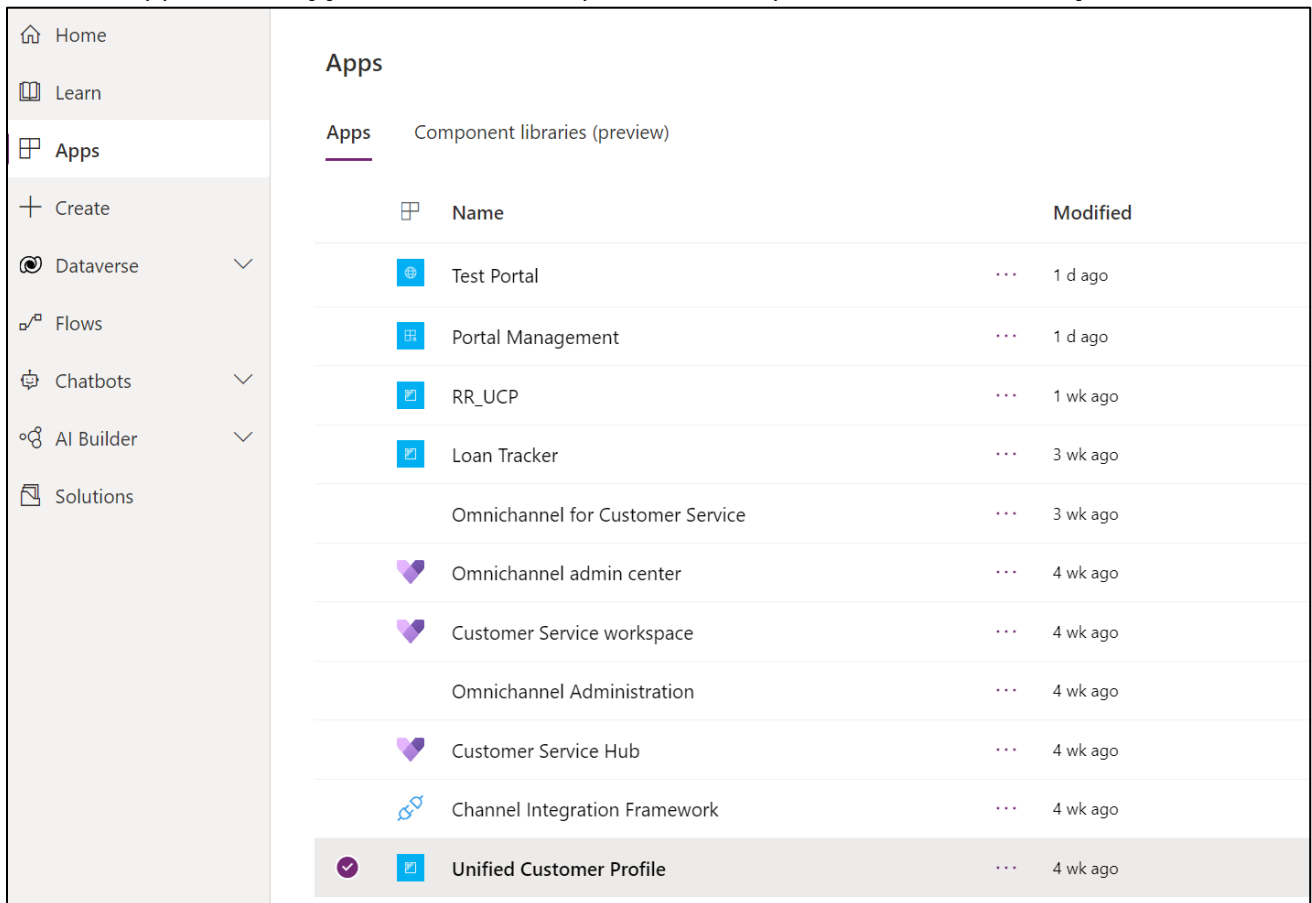
Exercise 2: Explore Unified customer profile application

In this exercise, you will launch the Unified customer profile application and navigate through the tabs and controls to understand each component and how it wires to the Data Model behind.

1. Navigate to [Power Apps](#) in an In-Private or Incognito window.
2. Select the proper **Environment** in the upper right.



3. In Power Apps, select **Apps** in the left sitemap. Select and open **Unified customer profile**.



4. It should launch the application in a new tab and you should land in the **Contacts** view showing a list of all contacts.

Dynamics 365 | Unified Customer Profile SANDBOX

Show Chart
Refresh
Email a Link
Export to Excel
Open Dashboards
Create view

All Contacts Search this view

Full Name	Email	Mobile Phone	Preferred Method of Contact	Address 1: City
Abigail Lewis (Sample)	Abigail@example.com	(912) 555-0430	Any	Savannah
Adrian Lawson (Sample)	Adrian@example.com	(202) 555-0313	Any	Mexico Beach
Amber Rodriguez (Sample)	Amber@example.com	(859) 555-0274	Any	Louisville
Andre Lawson (Sample)	Andre@example.com	(954) 555-0823	Email	Mexico Beach
Avery Howard (Sample)	Avery@example.com	(918) 555-0739	Mail	Oklahoma City
Brandon Flores (Sample)	Brandon@example.com	(860) 555-0254	Any	Fremont
Brandon Stuart (Sample)	Brandon@example.com	(928) 555-0688	Any	Glendale
Cameron Baker (Sample)	Cameron@example.com	(951) 555-0651	Any	Oakland
Cameron Richardson (Sample)	Cameron@example.com	(912) 555-0116	Any	Anchorage
Corey Gray (Sample)	Corey@example.com	(918) 555-0659	Any	Oklahoma City
Elizabeth Howard (Sample)	Elizabeth@example.com	(334) 555-0392	Mail	Oklahoma City
Elizabeth Irwin (Sample)	Elizabeth@example.com	(912) 555-0473	Any	Nashville
Grace Taylor (Sample)	Grace@example.com	(954) 555-0416	Any	Panama City Beach
Graham Barnes (Sample)	Graham@example.com	(931) 555-0486	Any	Nashville
Hailey Clark (Sample)	Hailey@example.com	(970) 555-0612	Phone	Arvada
Hayden Reyes (Sample)	Hayden@example.com	(334) 555-0777	Any	Savannah
Jessie Irwin (Sample)	Jessie@example.com	(931) 555-0102	Phone	Nashville
Kayla Lewis (Sample)	Kayla@example.com	(912) 555-0931	Any	Savannah

- Click on **Grace Taylor (Sample)** to open up the record in the application. This should launch the **Unified customer profile** form for the customer.

Dynamics 365 | Unified Customer Profile SANDBOX

Close
Assign
Email a Link
Create Invitation
Change Password
Refresh
Share

Grace Taylor (Sample)
Contact · Unified customer profile

Summary | Connections | Financial holdings | Related

Customer snapshot

Grace Taylor (Sample)
59, Married

Phone
(954) 555-0416

Email
Grace@example.com

Address
456 White Cap Way
Panama City Beach, FL 22494
United States

Primary Branch
121 - Woodgrove Panama City
Beach branch
456 Prestwood Drive

Occupation
Youth initiatives lead advisor

Annual Income
150,314 USD

Low churn risk
Likelihood to Churn

Life events + Add new event

Birthdays 1 events 59 years old Jul 02	Marital status 1 events Marriage 32 years ago	Family 2 events Grandchild 5 years ago	Education 2 events Bachelor's degree 36 years ago	Employment 1 events Job started 14 years ago	Residence 2 events Purchase 2 years ago
Vehicle 3 events Sale 8 years ago	Health No events yet <a>+ Add event	Other No events yet <a>+ Add event			

Financial holdings (in USD)

Overview | Accounts | Investments | Loans | Lines of credit | Long-term savings

Assets 42,497 | Liabilities -31,016

Accounts	4,948
Investments	
Loans	-23,342
Lines of credit	-125
Long-term savings	30,000

Now that the UCP form has loaded, we will explore all the tabs on the form and its controls one by one.

Task 1: Explore the Summary Tab

The **Summary** tab consists of the below PCF controls that are componentized to provide the flexibility to choose and customize the views you want to develop –

- Customer Snapshot
- Life events
- Financial Holdings
- Main Household
- Cards

1. Examine the **Customer Snapshot** control. The snapshot of the customer shows personal information (for example, name, demographics, and branch information) and the preferred channel of communication.




Note - The Customer snapshot area can be enriched with customer intelligence-driven information like churn score. This information is enabled through Customer Intelligence add-in for UCP which will be covered in another lab.

Note the information showing up on the control and the Dataverse table columns it is derived from

Customer snapshot

Grace Taylor (Sample)

59, Married



Phone

(954) 555-0416

Email

Grace@example.com

Address

456 White Cap Way
Panama City Beach, FL 22494
United States

Primary Branch

121 - Woodgrove Panama City
Beach branch
456 Prestwood Drive

Occupation

Youth initiatives lead advisor

Annual Income

150,314 USD

Low churn risk

Likelihood to Churn ⓘ

Customer Snapshot fields and table column mappings


<i>Grace Taylor(Sample)</i>	Contact.fullname
<i>59,Married</i>	Contact.Birthdate, Contact.familystatuscode
<i>Symbols for Preferred symbols of communication</i>	Contact.preferredcontactmethodcode
<i>Phone</i>	Contact.telephone1
<i>Email</i>	Contact.emailaddress1
<i>Address</i>	Contact.address1_composite
<i>Primary Branch</i>	Contact.msfsi_branch
<i>Occupation</i>	Contact.jobtitle
<i>Annual Income</i>	Contact.annualincome


- Examine the **Life events** control. It provides insight into the customer and their family's past and future milestones. It can help identify upcoming opportunities, devise personalized offers, and provide a consistent engagement experience. Each category in the Life events area, such as Marital Status, can include multiple Life event entries.


Note the information showing up on the control and the Dataverse table columns it is derived from


Life events


+ Add new event



Birthday
1 events
59 years old
Jul 02



Marital status
1 events
Marriage
32 years ago



Family
2 events
Grandchild
5 years ago



Education
2 events
Bachelor's degree
36 years ago


Employment
1 events
Job started
14 years ago


Residence
2 events
Purchase
2 years ago


Vehicle
3 events
Sale
8 years ago


Health
No events yet
+ Add event


Other
No events yet
+ Add event

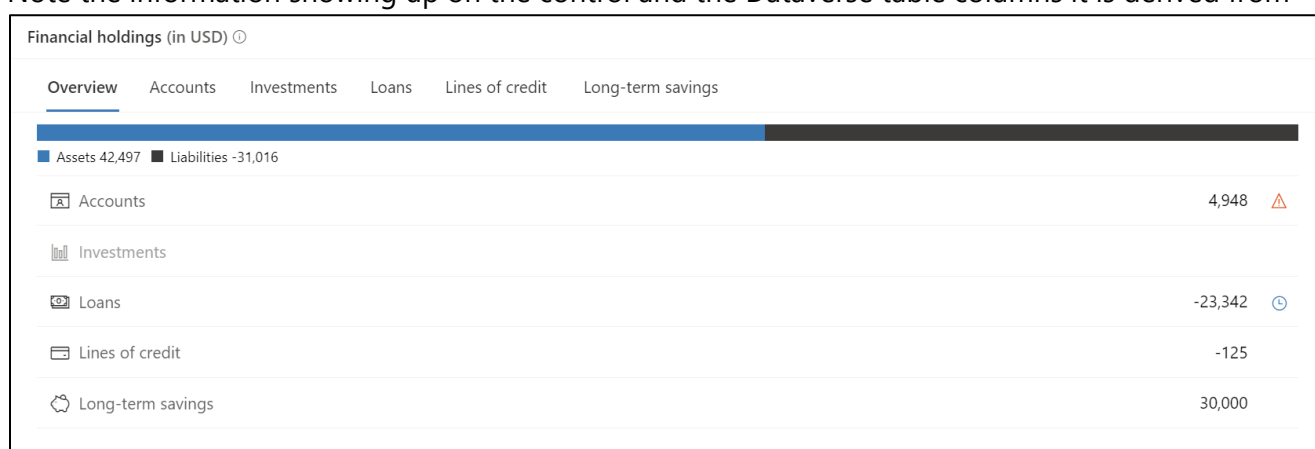
Life events fields and table column mappings

<i>Family</i>	msfsi_lifemoment.msfsi_lifemomentcategory (Only Birthday Life event category maps to Contact.birthdate field)
---------------	--

<i>2 events</i>	<Number of Life event records in that Life event Category >
<i>Grandchild</i>	msfsi_lifemoment.msfsi_lifemomenttype
<i>5 years ago</i>	<Time elapsed since last event in that Life event Category>

- Examine the **Financial Holdings** control. It provides an at-a-glance view of the customer's relationship with the bank, showing wallet share, assets and liabilities, and other aspects of the customer's holdings with the bank. The **Overview** tab in the **Financial Holdings** area provides high-level information on the customer's financial holdings. The default selection is an overview of the customer's assets and liabilities, including relevant alert indicators on the right of the area.

Note the information showing up on the control and the Dataverse table columns it is derived from



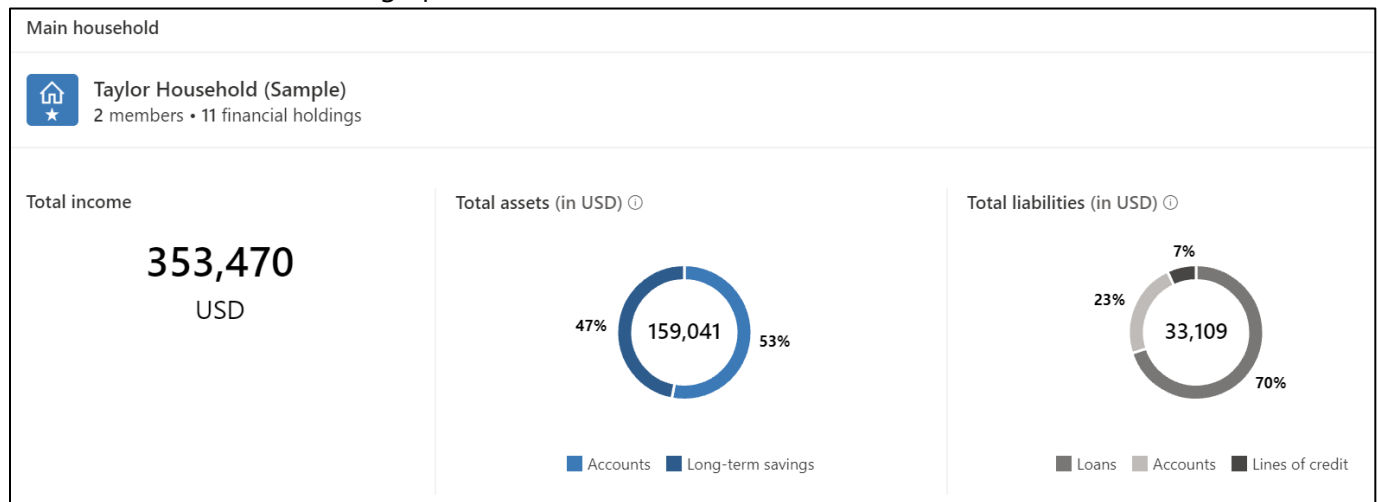
Financial Holdings fields and table column mappings

Overview tab	
<i>Assets (Bar)</i>	Sum of positive Balance amounts
<i>Liabilities (Bar)</i>	Sum of negative Balance amounts
<i>Accounts</i>	FH_accounts [sum of balances by type of account; in the summary view this is based on balance_default (i.e. in the bank's default currency)]
<i>Investments</i>	FH_investments [sum of balances by type of investment; in the summary view this is based on balance_default (i.e. in the bank's default currency)]
<i>Loans</i>	FH_loans [sum of balances by type of loan; in the summary view this is based on balance_default (i.e. in the bank's default currency)]
<i>Lines of Credit</i>	FH_linesofcredit

	[sum of balances by type of line of credit; in the summary view this is based on balance_default (i.e. in the bank's default currency)]
<i>Long-term savings</i>	FH_longtermsavings [sum of balances by type of line of credit; in the summary view this is based on balance_default (i.e. in the bank's default currency)]

4. Examine the **Household** control. It shows

Note the information showing up on the control and the Dataverse table columns it is derived from



Household fields and table column mappings

<i>Taylor Household(Sample)</i>	Group.msfsi_Name
<i>2 members</i>	Count of GroupMember.id
<i>11 financial holdings</i>	Count of GroupFinancialHolding.id (connected to that Group)
<i>Total income</i>	
<i>Total assets (in USD)</i>	Sum of positive balances for FinancialHolding.balance_default retrieved via relevant GroupFinancialHolding)
<i>Total liabilities (in USD)</i>	Sum of negative balances for FinancialHolding.balance_default retrieved via relevant GroupFinancialHolding)

5. Examine the **Cards** control. It shows the credit and debit cards held by the customer. It can be enriched with insights such as alerts on expiring cards and cards pending activation.

Note the information showing up on the control and the Dataverse table columns it is derived from

Cards (4)			
Mastercard Debit • Sapphire **** * 6785 ● NOT ACTIVE Apr 28, 2023 Owner	Visa Credit • Freedom unlimited **** * 5191 EXPIRES Aug 15, 2022 Owner	American Express Credit • Sapphire preferred **** * 9763 EXPIRES Jun 29, 2023 Owner	Visa Debit • Freedom **** * 9204 EXPIRES Jul 28, 2025 Owner

Cards fields and table column mappings

<i>Mastercard</i>	msfsi-fi_card.msfsi_cardnetwork
<i>Debit</i>	msfsi-fi_card.msfsi_cardtype
<i>Sapphire</i>	msfsi-fi_card.msfsi_productname
**** * 6785	msfsi-fi_card.msfsi_cardnumber
<i>Not Active</i>	msfsi-fi_card.status
<i>Apr 28, 2023</i>	msfsi-fi_card.msfsi_expirydate

Congratulations! You have explored the Unified customer profile app and its featured data within a customer record.

Exercise 3: Edit details in Unified customer profile

In this exercise, you will be adding and editing records and see those changes reflect in UCP. Most of the information in UCP comes in from financial core systems and hence is not editable. But a few edit scenarios are supported and those will be covered here.

Task 1: Add, edit, delete a Life event

In this task, we will create a new life event, edit its details and then delete it.

1. In the UCP view we have been working with, locate the Life events control. Click on **Add new event**.

Life events

+ Add new event

Category	Events	Event	Time Ago
Birthday	1 events	59 years old	Jul 02
Marital status	1 events	Marriage	32 years ago
Family	2 events	Grandchild	5 years ago
Education	2 events	Bachelor's degree	36 years ago
Employment	1 events	Job started	14 years ago
Residence	2 events	Purchase	2 years ago
Vehicle	3 events	Sale	8 years ago
Health	No events yet		
Other	No events yet		

2. In the dialog box that opens, set the following properties and click on **Add new event** button.
 - a. **Select category and type** – Residence, Purchase
 - b. **Event date** - <Any date in future>
 - c. **Add additional information** – Bought a new house

Residence

Select category and type *

Residence Purchase

Event date *

Add a timeframe relative to today or a specific date below

12/15/2021

Or

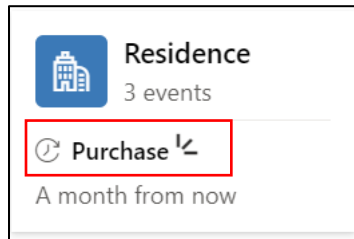
e.g. 4 e.g. years Ago From Today

Add additional information

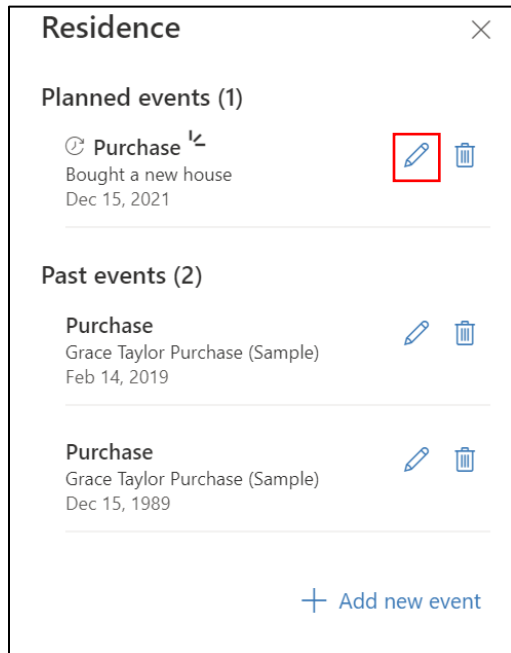
Bought a new house

Add new event Cancel

3. Note the add event reflecting in the **Residence** Life event control.



4. Click on the **Residence** control to view details. Click on the **Edit** icon to edit the Life event details



Life event edit dialog will pop up, edit any of the details and see it reflect back in the Life event control.

Residence

×

Select category and type *

Purchase

Event date *

Add a timeframe relative to today or a specific date below

12/15/2021

Or

e.g. 4

e.g. years

☒ Ago
 ☐ From Today

Add additional information

Bought a new house

Save

Cancel

5. You can also delete the newly added event by clicking on the delete icon

Residence

×

Planned events (1)

🕒

Purchase

↳

Bought a new house

Dec 15, 2021

✎

🗑

Past events (2)

Purchase

Grace Taylor Purchase (Sample)

Feb 14, 2019

✎

🗑

Purchase

Grace Taylor Purchase (Sample)

Dec 15, 1989

✎

🗑

+ Add new event

Confirm deletion and click on **Delete** button

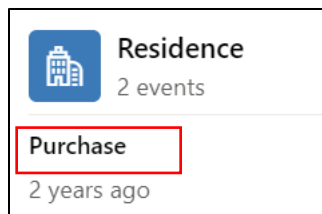
Confirm deletion

Delete life event?

Delete

Cancel

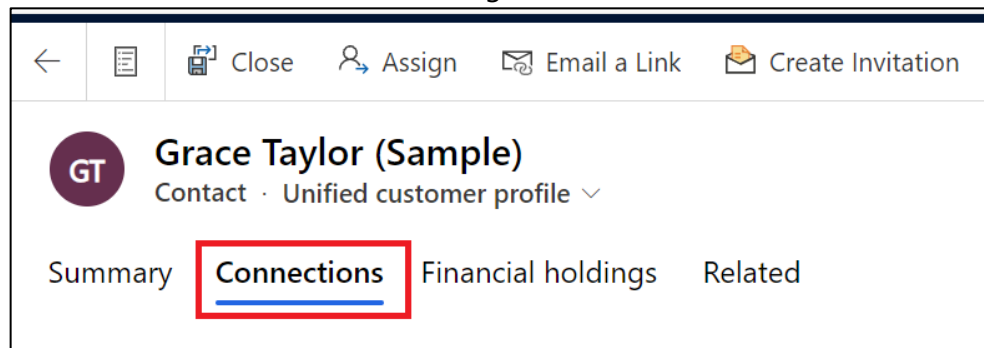
6. Note the change reflect on the **Residence** Life event control



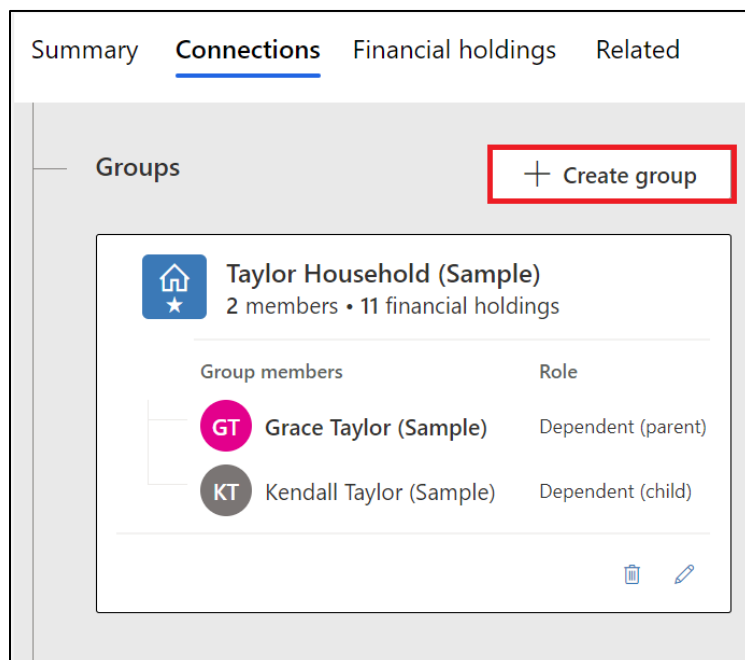
Task 2: Add, edit, delete a Group

In this task, we will create a new group, edit its group members, its group financial holdings and then delete it.

1. In the UCP view we have been working with, click on **Connections** tab.



2. Click on + **Create Group**



3. In the window that opens, set the following values and click on **Next**
 - a. **Group title** – Custom Group
 - b. **Group type** – Custom group

Create group

☒ Group details

☐ Group members

☐ Group holdings

① Set up your group. Set up your group.

Group title

Custom Group

Group type

Custom group

Next

4. In the group member search, type in **Abigail Lewis (Sample)** and select the record that appears in the search results.

Create group

☒ Group details

☒ Group members

☐ Group holdings

① Add members. You can change the primary member later. The primary member's address is the group's address.

Group members (1)

Abigail Lewis (Sample)

Suggested People

AL Abigail Lewis (Sample)

Grace Taylor (Sample)

Primary member *

☒

Role

Member

5. Set the **Role** of Abigail Lewis as **Member** and click on **Next**.

Summary **Connections** Financial holdings Related

✓ Your group is created.

Groups [+ Create group](#)

Taylor Household (Sample)
2 members • 11 financial holdings

Custom Group
2 members • 2 financial holdings

Group members

Member	Role
GT Grace Taylor (Sample)	Member
AL Abigail Lewis (Sample)	Member

Relationships [+ Add relationship](#)

Add relationships here

Custom Group [✎](#)

Address: 456 White Cap Way Panama City Beach, FL 22494 United States
Custom group group • 2 members • 2 financial holdings

Total income
354,034 USD

Total assets (in USD)
41,228
100%
Accounts

Total liabilities (in USD)
There are no liabilities

Group financial holdings Group by: Category **Owners** [✎](#)

Owner	Category	Type	Balance	Currency
Grace Taylor (Sample) & Kendall Taylor (Sample) (1)				
Grace Taylor Account (Sample)	Accounts	Saving	12,497	USD

8. Now that the Group is created, we will edit it. Click on the **Edit** icon next to the **Custom Group**

Summary **Connections** Financial holdings Related

✓ Your group is created.

Groups [+ Create group](#)

Taylor Household (Sample)
2 members • 11 financial holdings

Custom Group
2 members • 2 financial holdings

Group members

Member	Role
GT Grace Taylor (Sample)	Member
AL Abigail Lewis (Sample)	Member

Relationships [+ Add relationship](#)

Add relationships here

Custom Group [✎](#)

Address: 456 White Cap Way Panama City Beach, FL 22494 United States
Custom group group • 2 members • 2 financial holdings

Total income
354,034 USD

Total assets (in USD)
41,228
100%
Accounts

Total liabilities (in USD)
There are no liabilities

Group financial holdings Group by: Category **Owners** [✎](#)

Owner	Category	Type	Balance	Currency
Grace Taylor (Sample) & Kendall Taylor (Sample) (1)				
Grace Taylor Account (Sample)	Accounts	Saving	12,497	USD

9. When the Group edit dialog opens up, click on **Group Holdings** and add any Group Financial Holdings record on the grid. Once done, click **Done**.

Custom Group

Group details

Group members

Group holdings

Select at least one member or their holdings to display.

Group financial holdings (3)

Group by: Category Owners

Owner	Category	Type	Balance	Currency
Grace Taylor (Sample) (2 of 6 selected)				
<input checked="" type="checkbox"/> Grace Taylor Account (Sample)	Accounts	Saving	12,497	USD
<input checked="" type="checkbox"/> Grace Taylor Account (Sample)	Accounts	Checking	-7,549	USD
<input type="checkbox"/> Grace Taylor Secured Loan (Sample)	Loans	Secured	16,693	USD
<input type="checkbox"/> Grace Taylor Credit Line (Sample)	Lines of credit	Revolving	125	USD
<input type="checkbox"/> Grace Taylor Provident Fund (Sample)	Long-term savings	Provident fund	15,000	USD
<input type="checkbox"/> Grace Taylor Deposit (Sample)	Long-term savings	Deposit	15,000	USD
Abigail Lewis (Sample) (1 of 6 selected)				

Back

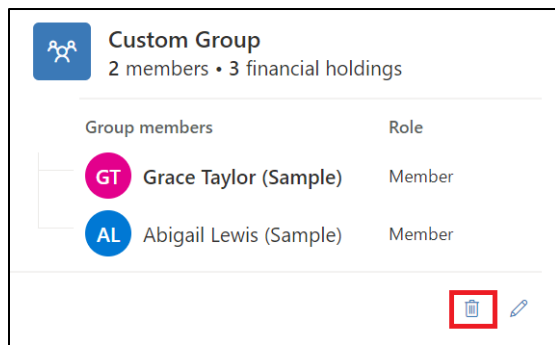
Done

Cancel

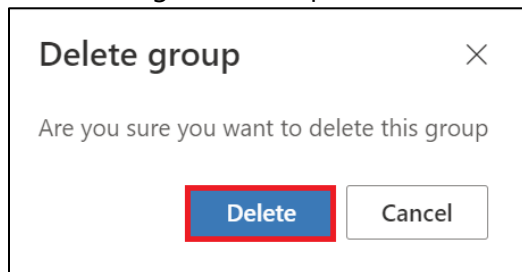
10. Note the changes show up on the **Connections** tab in **Group Financial Holdings** list.

Group financial holdings					Group by:	Category	Owners	
Owner	Category	Type	Balance	Currency				
Grace Taylor (Sample) (1)								
Grace Taylor Account (Sample)	Accounts	Checking	-7,549	USD				
Grace Taylor (Sample) & Kendall Taylor (Sample) (1)								
Grace Taylor Account (Sample)	Accounts	Saving	12,497	USD				
Abigail Lewis (Sample) (1)								
Abigail Lewis Account (Sample)	Accounts	Saving	28,731	USD				

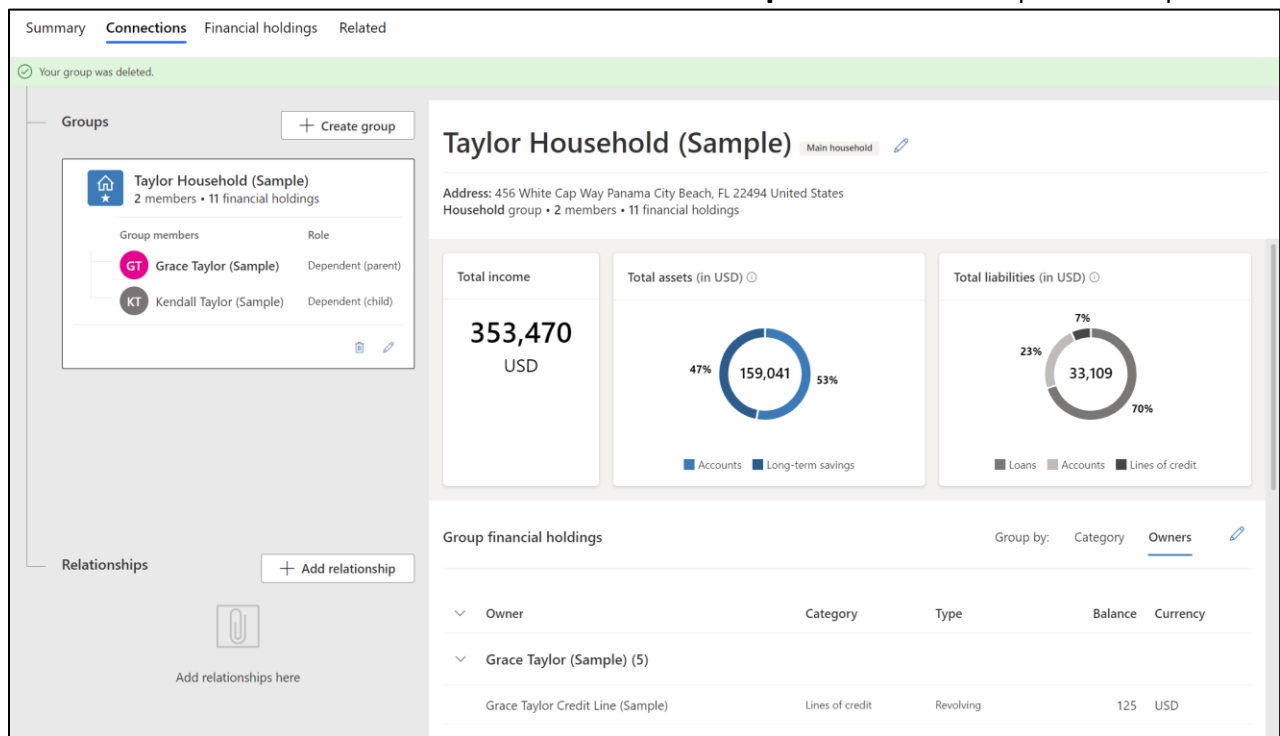
11. Now that we added and edited a new Group, we will delete it. Click on the **Delete** icon next to the **Custom Group**.



12. In the dialog box that opens, click on **Delete**.



13. Note that the **Connections** tab removes the **Custom Group** and resets to the previous experience.



Task 3: Add, edit, delete a Relationship

In this task, we will create a new relationship, edit its relationship type, and then delete it.

1. In the UCP view we have been working with, click on **Connections** tab.

A screenshot of a contact profile for "Grace Taylor (Sample)". The profile header includes a circular icon with "GT", the name "Grace Taylor (Sample)", and the text "Contact · Unified customer profile" with a dropdown arrow. Below the header are four tabs: "Summary", "Connections" (which is highlighted with a red box and a blue underline), "Financial holdings", and "Related". At the top of the window, there is a toolbar with icons for "Close", "Assign", "Email a Link", and "Create Invitation".

2. Click on + **Add Relationship**

A screenshot of the "Relationships" section. The word "Relationships" is on the left. On the right, a button with a plus sign and the text "+ Add relationship" is highlighted with a red box. In the center, there is a large paperclip icon and the text "Add relationships here".

14. In the search box, type in **Abigail Lewis (Sample)** and select the record that appears in the search results.

A screenshot of the "Add relationship" dialog box. It has a title bar with "Add relationship" and a close button (X). Below the title bar is a search input field containing "Abigail Lewis (Sample)". Below the search field is a "Suggested People" section. In this section, a suggestion for "Abigail Lewis (Sample)" with a circular icon containing "AL" is highlighted. To the right of the suggestions is a dropdown menu with a downward arrow. At the bottom right of the dialog are two buttons: "Add relationship" (disabled) and "Cancel".

15. Set Relationship type value and click on **Add relationship**
a. **Relationship type** = Lawyer

Add relationship ✕

Abigail Lewis (Sample) ✕

Lawyer ✓

Add relationship

Cancel

16. Note the **Connections** tab reflect the newly added relationship.

Summary
Connections
Financial holdings
Related

✓ Your relationship is created.

Groups

Taylor Household (Sample)
2 members • 11 financial holdings

GT

KT

Relationships

AL

Abigail Lewis (Sample)

Relationships

AL

Abigail Lewis (Sample)

Relationships

AL

Abigail Lewis (Sample)

17. Now that we added the relationship, we will edit it. On the **Relationships** grid on the right, hover over the contact name record and click on the edit icon.

Relationships ✕

Contact name
Relationship type

AL

Abigail Lewis (Sample)
Lawyer

✎

🗑

18. Set the relationship type to *Accountant* and click on **Save**.


Add relationship

Abigail Lewis (Sample) X



Accountant

SaveCancel

19. Note the change reflect on the **Relationship** grid.

Relationships		+ Add relationship
Contact name	Relationship type	
 Abigail Lewis (Sample)	Accountant	

20. Similarly, you can delete the newly added relationship by clicking on the delete icon.

Contact name	Relationship type	
 Abigail Lewis (Sample)	Accountant	 

Congratulations! You have now added, edited, and deleted life moments, groups, group financial holdings and relationships in the UCP application.

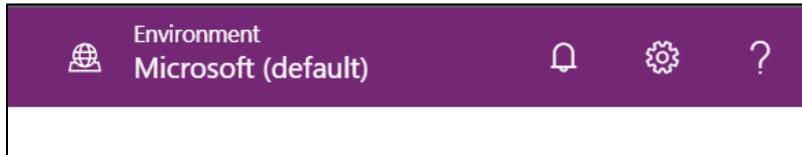
Exercise 4: Extend Unified customer profile application

In this exercise, you will be customizing UCP application in the following ways – 1) Take UCP application as base and edit it to add a new control to it 2) Edit UCP controls such as Life Event Type to add a new Life Event Type.

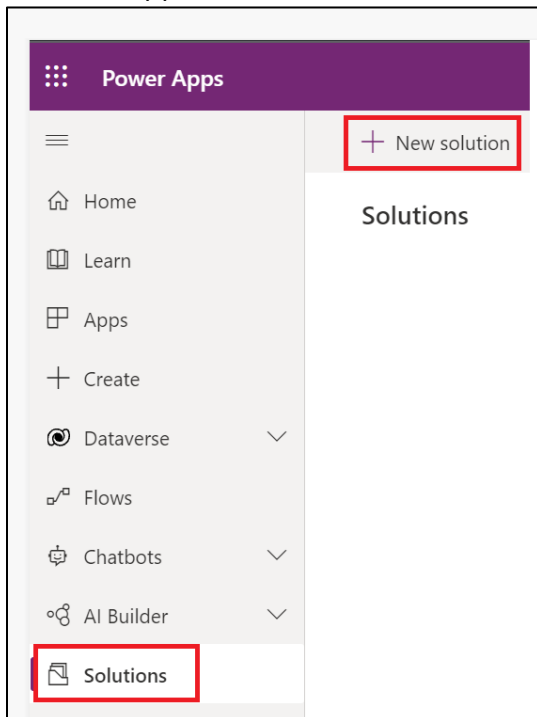
Task 1: Add new controls to UCP

In this task, we will first create a new solution and then customize UCP to add new controls.

1. Navigate to [Power Apps](#) in an In-Private or Incognito window.
2. Select the proper **Environment** in the upper right.



3. In Power Apps, select **Solutions** in the left sitemap. Click on **+New Solutions** and set following values



4. Create a new solution with the following properties and click on **Create**

New solution ✕

Display name *

Name *

Publisher *

CDS Default Publisher (Crb1287) ▼

✚ New publisher

Version *

More options ▼

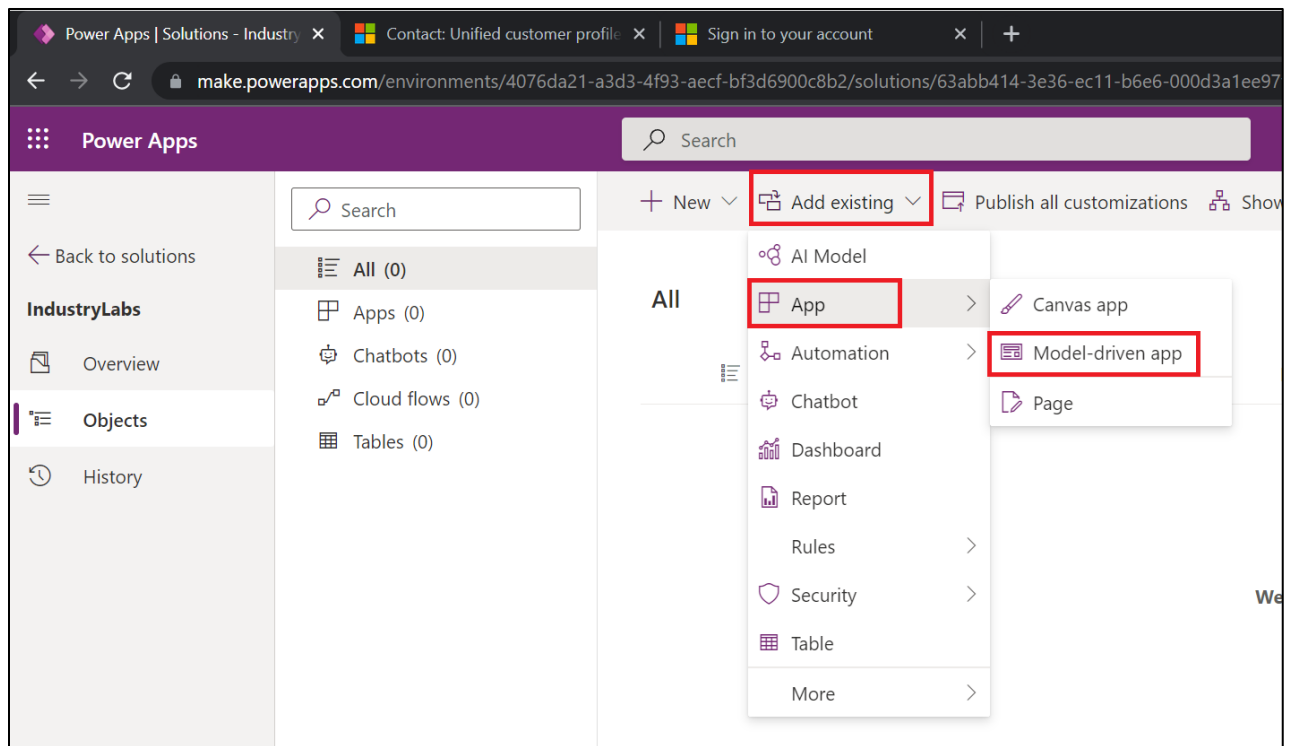
Create

Cancel

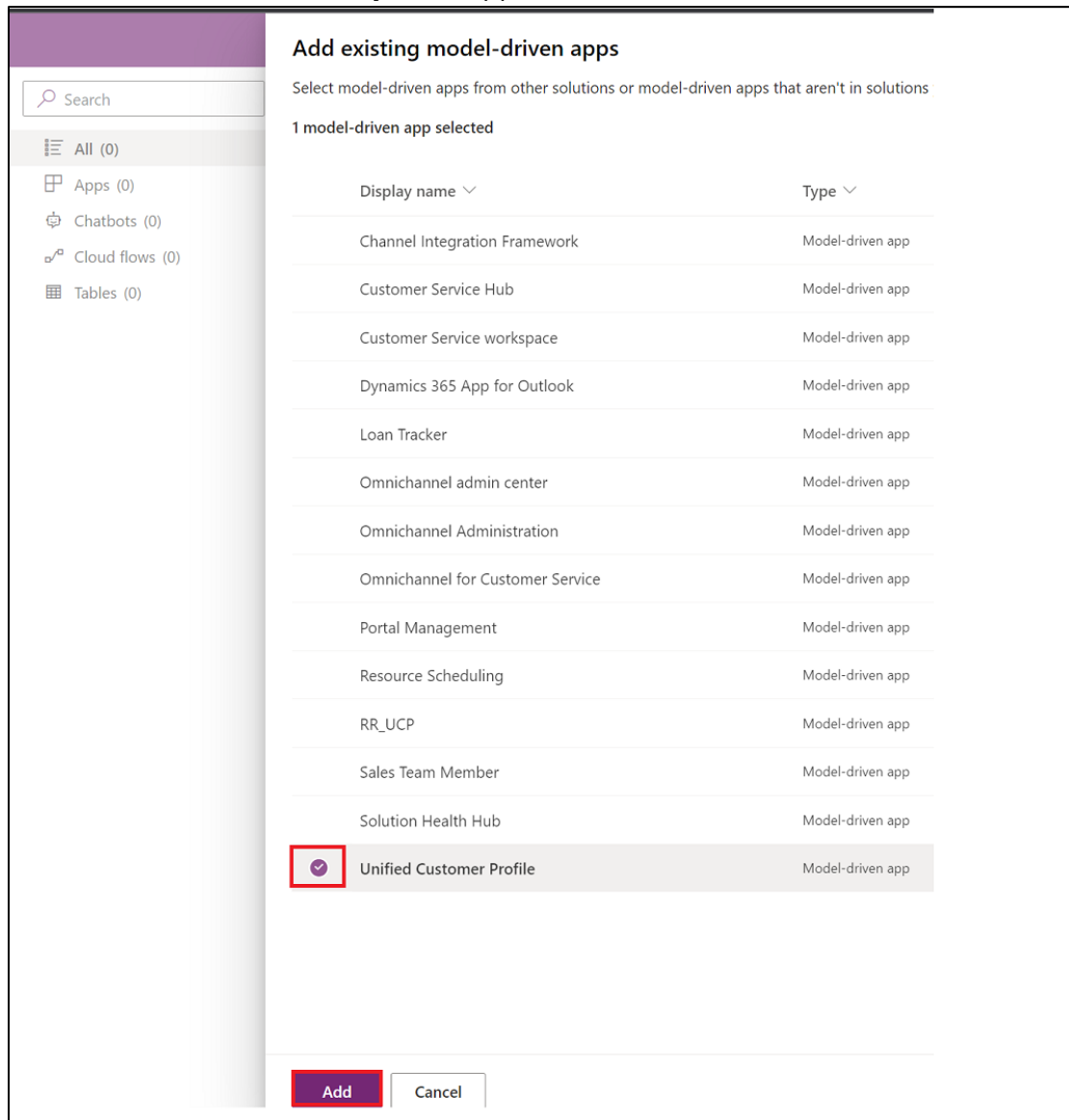
5. Once the solution is created, click on the solution name to begin adding components.

Display name	Name	Created ↓	Version	Managed externally?	Solution check
IndustryLabs	... IndustryLabs	10/26/2021	1.0.0.0	🔒	Hasn't been run

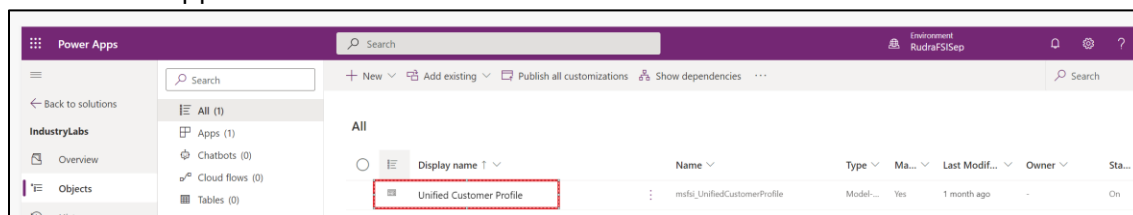
6. In the solution explorer, click on **Add existing** -> **App** -> **Model-driven app**.



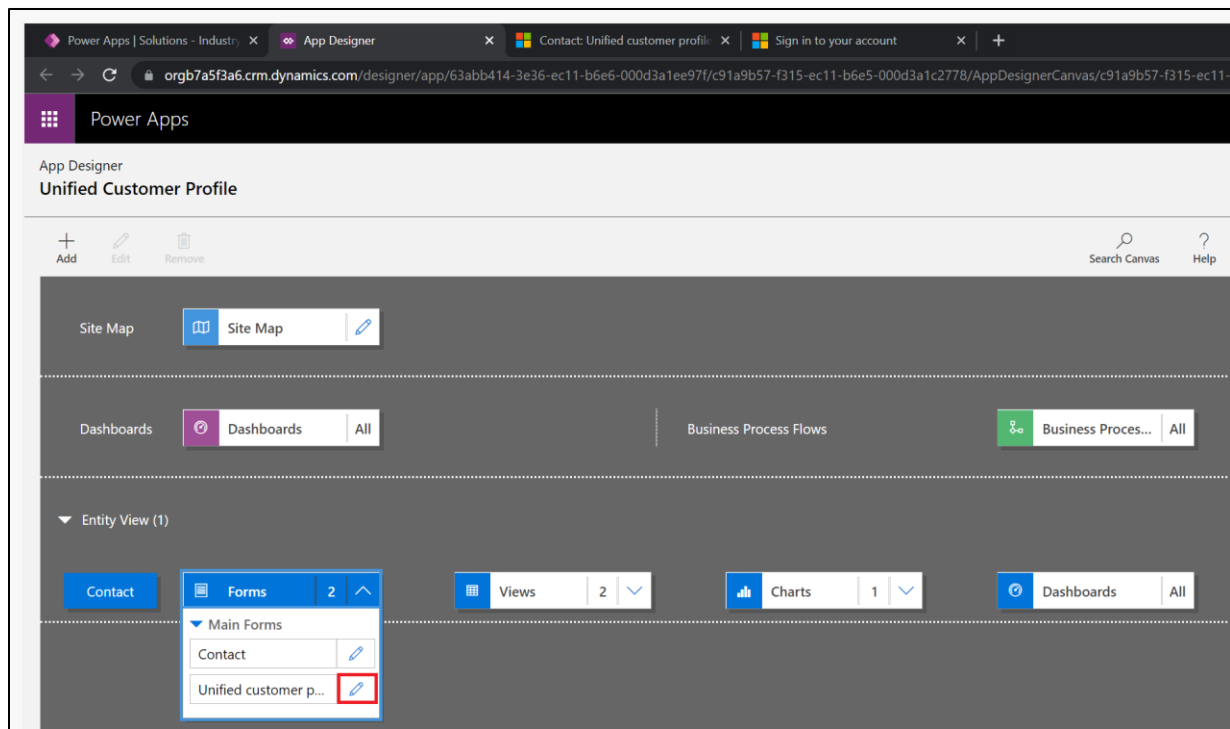
7. Select the **Unified customer profile** application from the list and click **Add**.



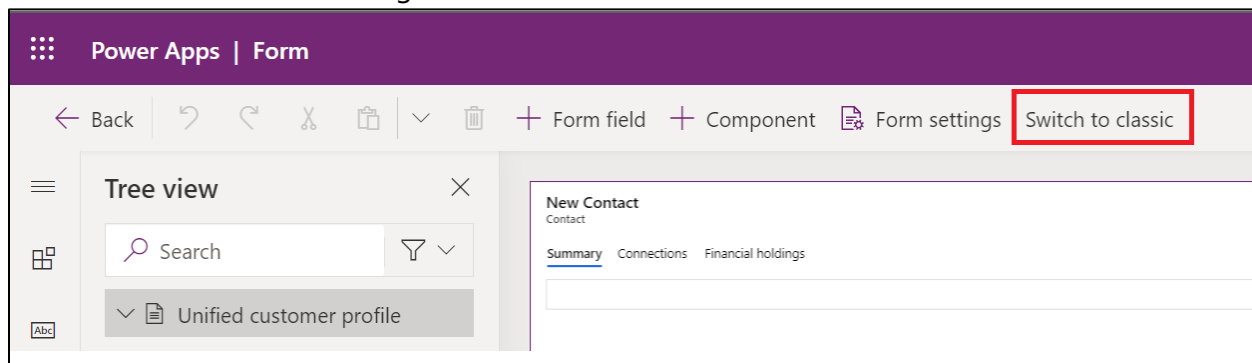
8. Click on the application name **Unified Customer Profile** to edit it.




9. This will open the application editor in another tab.
10. Click on the Forms dropdown and then on the edit icon for **Unified customer profile**.





11. This will open the form designer for Unified customer profile. Click on the **Switch to Classic** menu item to launch the classic form designer.



12. In the form designer, click on the **Summary** tab to select it

 Solution: IndustryLabs
Form: **Contact**


 Header

 Owner*
Owner

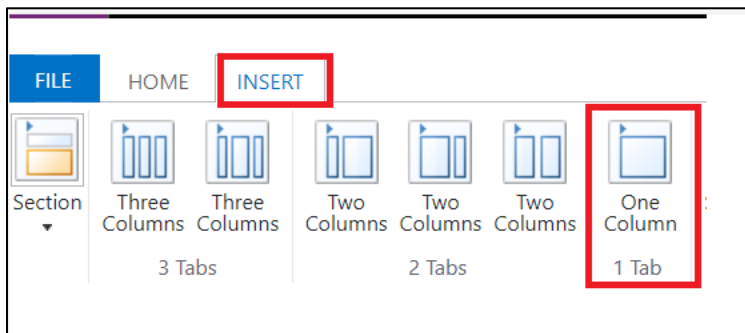
▶ **Summary**

▶ **Connections**


▶ **Financial holdings**


 Footer


13. Click on **Insert** and then **One Column** tab



14. This will add a new tab to the form under **Summary**

 Solution: IndustryLabs
Form: **Contact**

 Header

 Owner*
Owner


▶ **Summary**

◀ **Tab**

Section

▶ **Connections**

▶ **Financial holdings**

 Footer

15. Once the tab is added, uncheck the **Only show unused fields** checkbox

Field Explorer ▶

Filter All Fields ▼

☐ Only show unused fields

Payment terms

Placeholder

Portal Terms Agreement Date

16. In the fields list, look for **Placeholder** field. Drag and drop it to the newly added tab.

The screenshot shows a form layout with the following sections:

- Header**: Contains an 'Owner' field with an asterisk.
- Summary**: A section header.
- Tab**: Contains a 'Section' header and a 'Placeholder' field, which is highlighted with a red box.
- Connections**: A section header.
- Financial holdings**: A section header.
- Footer**: A section header.

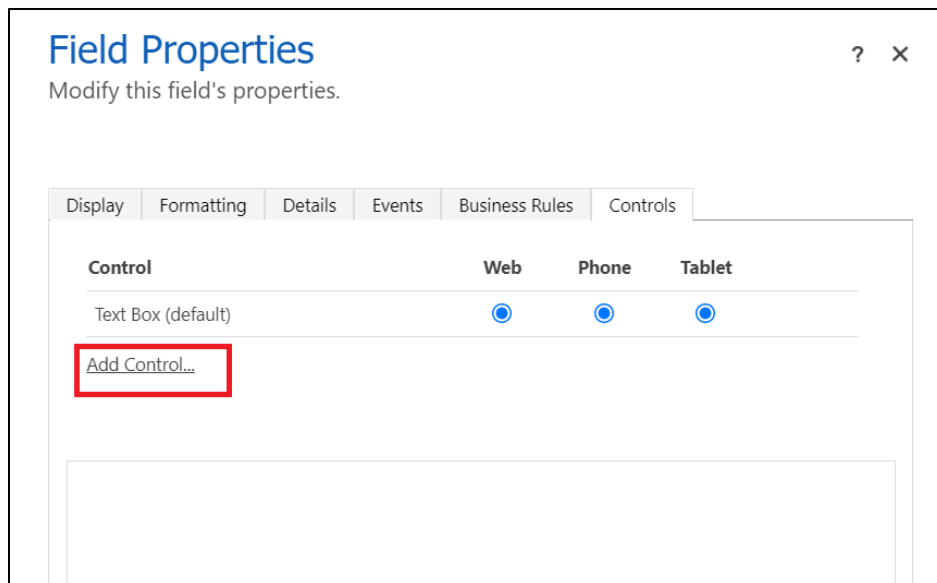
17. Now double click the **Placeholder** field on the form to open the field properties. Select the **Controls** tab on the dialog.

The screenshot shows the 'Field Properties' dialog box with the 'Controls' tab selected. The dialog has the following structure:

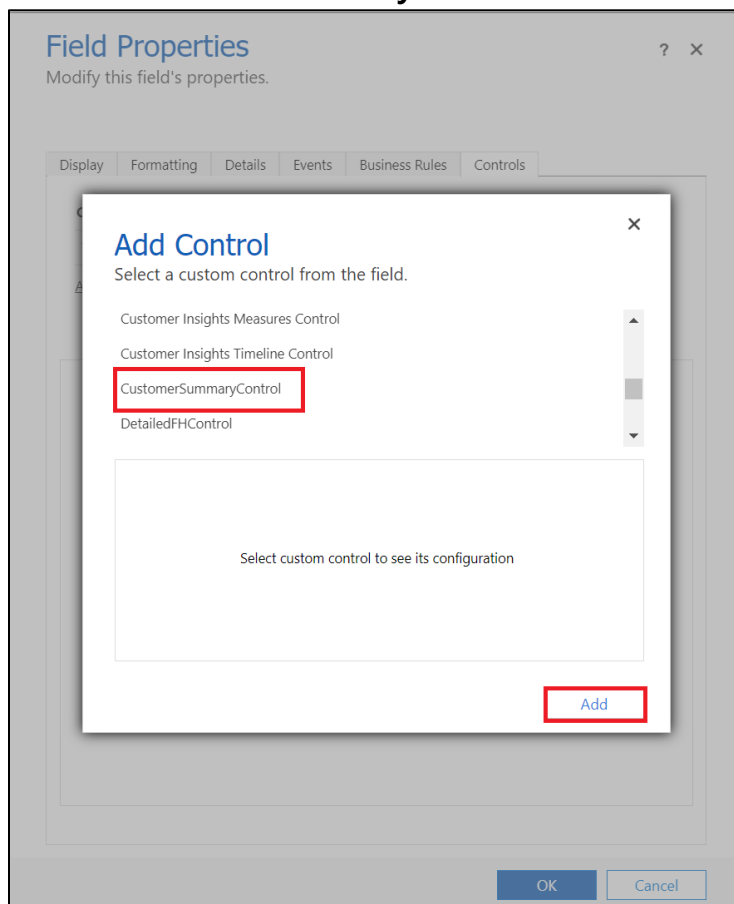
- Title Bar**: 'Field Properties' with a help icon (?) and a close icon (X).
- Subtitle**: 'Modify this field's properties.'
- Tabs**: 'Display', 'Formatting', 'Details', 'Events', 'Business Rules', and 'Controls' (highlighted with a red box).
- Table**:

Control	Web	Phone	Tablet
Text Box (default)	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Add Control...			
- Footer**: 'Select or add a custom control to see its configuration.'

18. Now click on **Add Control** and look for **Customer Summary** control in the list



19. Select the **Customer Summary** control and click on **Add**.



20. Once the control is added, edit properties one by one. First, click on edit icon for **Contact** property

Field Properties

Modify this field's properties.

Display

Formatting

Details

Events

Business Rules

Controls

Control	Web	Phone	Tablet
Text Box (default)	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
CustomerSummaryControl	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Add Control...

CustomerSummaryControl

Property	Value
Dummy_Key *	msfsi_placeholder
Contact *	
Component *	Customer summary view (bundle) (Enum)

☐ Hide Default Control

21. In the dialog box that opens, set the **Bind to a value on a field** value to **contactid(SingleLine.Text)** and click **OK**.

Field Properties
Modify this field's properties.

Display Formatting Details Events Business Rules Controls

Control	Web	Phone	Tablet
Text Box (default)	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
CustomerSummaryControl	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[Add Control...](#)

CustomerSummaryControl

Property	Value
Dummy_Key *	msfsi_placeholder
Contact *	contactid (SingleLine.Text)
Component *	Customer summary view (bundle) (Enum)

Contact (required)
Compatible types: SingleLine.Text, Lookup.Customer, Lookup.Simple
Contact ID/Lookup

☐ Hide Default Control

OK Cancel

23. Set the **Bind to static options** property to **Life events** and click on **OK**.

Field Properties
Modify this field's properties.

Display Formatting Details Events Business Rules Controls

Configure Property "Component"

☒ **Bind to static options**

Customer summary view (bundle) ✓

Customer summary view (bundle)

Customer snapshot

Life events

Financial holdings

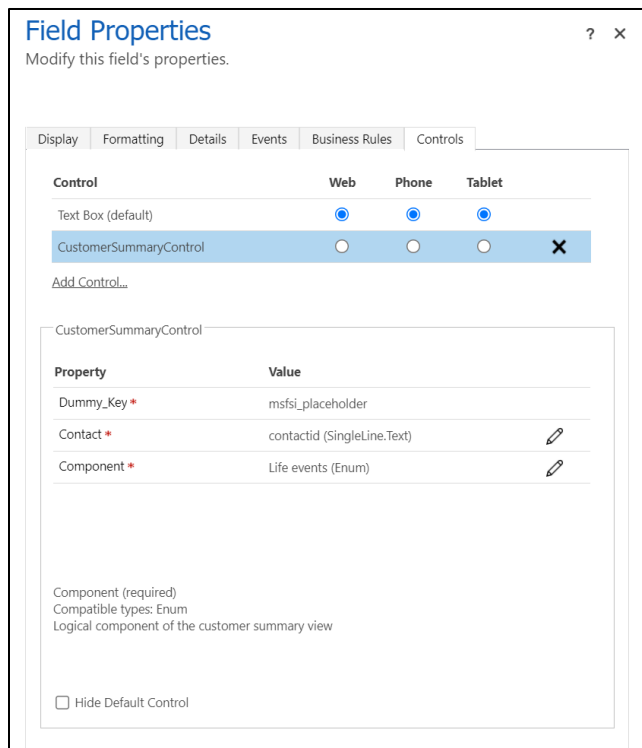
Banking cards

Main household

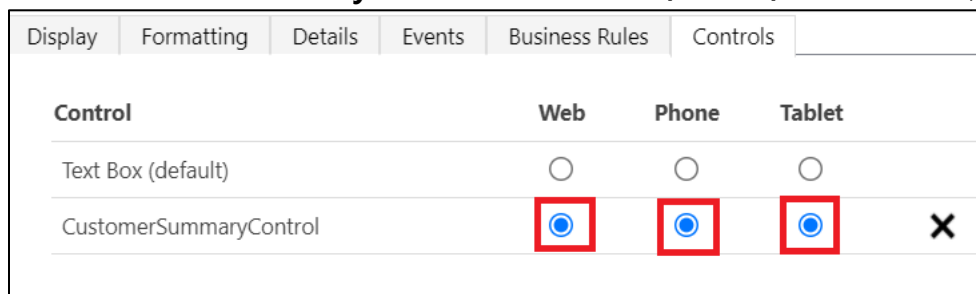
Log

OK Reset

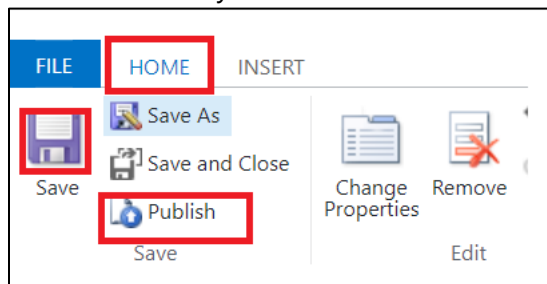
24. The Field Properties dialog should now look like below. Click **OK**



25. Set the **CustomerSummary** radio buttons for **Web, Phone, Tablet** to true, and then click on **OK**.



26. The form is ready now, click on the **Home** menu on the ribbon and then click **Save** and **Publish**



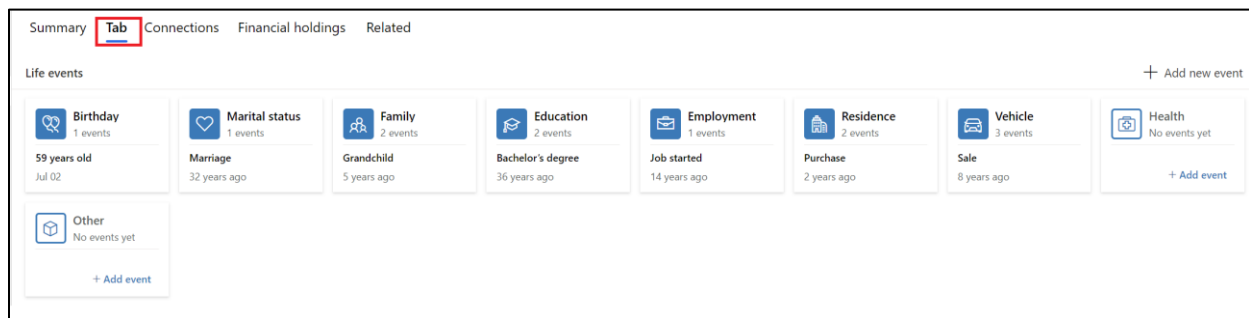
27. Close the tab– this will close the classic editor.

28. Go back to the modern editor and select the newly created tab in the tree view. Ensure the properties are set as below



29. **Save** and **Publish** the changes.

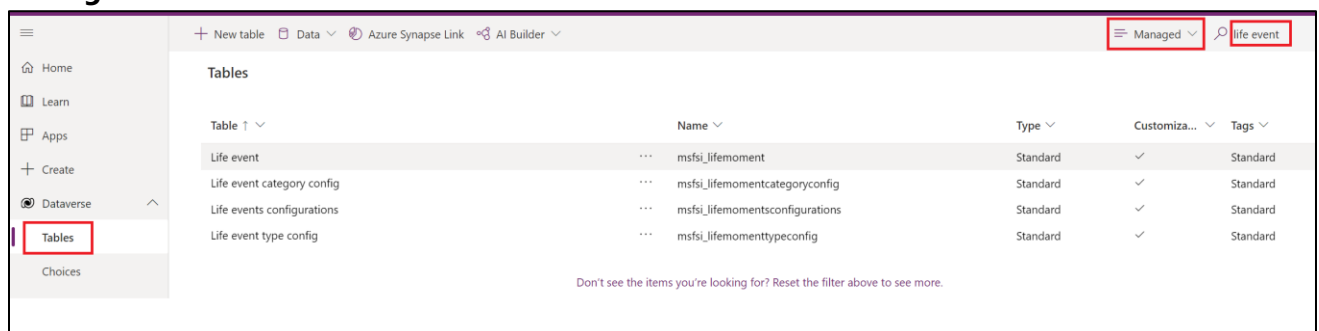
30. Launch **Unified customer profile** again from any contact record. Note the new tab reflect along with the **Life Event** control.



Task 2: Add a new Life Event Type

In this task, we will extend the data model to add a new Life Event Type to the Life Event table, and note that it reflects in the **Unified customer profile**.

1. In Power Apps, select **Dataverse** -> **Tables** in the left sitemap. Then set the search dropdown to **Managed** and search for **Life event** table



2. In the search results, select **Life event** table

[+ New table](#)
[Data](#)
[Azure Synapse Link](#)
[AI Builder](#)
Managed
life event

Tables

Table ↑ ↓	Name ↓	Type ↓	Customiza... ↓	Tags ↓
Life event	msfsi_lifemoment	Standard	✓	Standard
Life event category config	msfsi_lifemomentcategoryconfig	Standard	✓	Standard
Life events configurations	msfsi_lifemomentsconfigurations	Standard	✓	Standard
Life event type config	msfsi_lifemomenttypeconfig	Standard	✓	Standard

Don't see the items you're looking for? [Reset the filter above to see more.](#)

- In the table columns tab, Click on **Life event type** column name to edit it. Then click on **Edit choice** to add the new life moment type

[+ Add column](#)
[Delete column](#)

Tables > Life event

[Columns](#)
[Relationships](#)
[Business rules](#)
[Views](#)
[Forms](#)
[Dashboards](#)
[Charts](#)
[Keys](#)
[Commands](#)
[Data](#)

Display name ↑ ↓	Name ↓	Data type ↓	Type ↓
Contact	msfsi_contact	Lookup	Managed
Created By	createdby	Lookup	Standard
Created By (Delegate)	createdonbehalfby	Lookup	Standard
Created On	createdon	Date and Ti...	Standard
Date	msfsi_lifemomentdate	Date Only	Managed
Import Sequence Number	importsequencenumber	Whole Nu...	Standard
Life event	msfsi_lifemomentid	Unique Ide...	Standard
Life event category	msfsi_lifemomentcategory	Choice	Managed
Life event type	msfsi_lifemomenttype	Choice	Managed
Modified By	modifiedby	Lookup	Standard
Modified By (Delegate)	modifiedonbehalfby	Lookup	Standard
Modified on	msfsi_modifiedon	Date and Ti...	Managed
Modified On	modifiedon	Date and Ti...	Standard
Name	msfsi_name	Text	Managed
Owner	ownerid	Owner	Standard

Life event type

Display name *

Life event type

Name *

msfsi_LifeMomentType

Data type *

Choice

Choice *

Local choice

Edit choice

Default value

[No default value]

Required *

Required


☒ Searchable

Description

The type of the life event. Act as a subcategory

Advanced options

- In the choice edit dialog, click on **Add new item**

Life event type 

Divorce	...
Widowhood	...
Child	...
Grandchild	...
Job started	...
Job ended	...
Business started	...
Business closed	...
Purchase	...
Sale	...
High school	...
University Enrolment	...
Skills training	...
Loss of loved one	...
Associate degree	...
Serious illness	...
Bachelor's degree	...
Procedure	...
Master's degree	...
Other	...
Doctorate degree	...
Add new item	

Done Cancel

5. Type in **University Enrolment** in the new item row

University Enrolment ...

Done Cancel

6. Click on the ... next to the newly created row and select the **View More** option

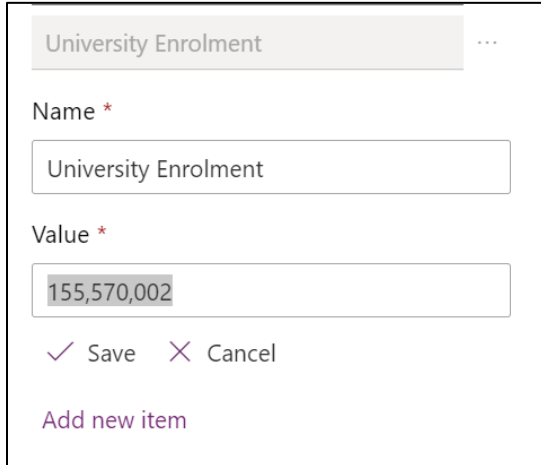
University Enrolment ...

Remove

Done Cancel View more

7. It will open the optionset details. Copy the **Value** field and save it for the next steps.

****Note that your environment's value might be different from the value shown below**



University Enrolment ...

Name *

University Enrolment

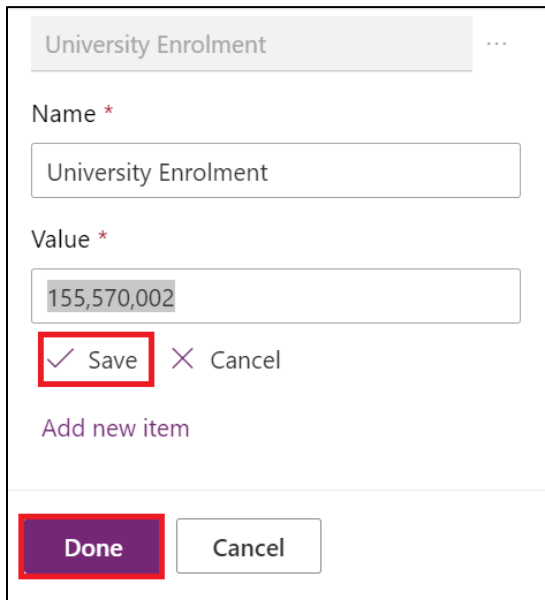
Value *

155,570,002

✓ Save ✕ Cancel

Add new item

8. Click on **Save** and then on **Done**



University Enrolment ...

Name *

University Enrolment

Value *

155,570,002

✓ Save ✕ Cancel

Add new item

Done Cancel

9. Click on **Done** on the table edit dialog as well

Life event type

×

Display name *

Life event type

Name * ⓘ

msfsi_LifeMomentType

Data type * ⓘ

Choice

Choice *

Local choice

Edit choice

Default value

[No default value]

Required * ⓘ

Required

☒ Searchable ⓘ

Description ⓘ

The type of the life event. Act as a subcategory

Advanced options

Done

Cancel

10. Click on **Save table**

[+ Add record](#)
[Refresh data](#)
[Data](#)
[Azure Synapse Link](#)
[AI Builder](#)
[Settings](#)

Tables > Life event type config

[Columns](#)
[Relationships](#)
[Business rules](#)
[Views](#)
[Forms](#)
[Dashboards](#)
[Charts](#)
[Keys](#)
[Commands](#)
[Data](#)

Name	Created On
Associate Degree	9/15/2021 12:36 PM
Bachelor's degree	9/15/2021 12:36 PM
Birth date	9/15/2021 12:36 PM
Business Closed	9/15/2021 12:36 PM
Business Started	9/15/2021 12:36 PM
Child	9/15/2021 12:36 PM

14. Click on **+Add record**

[+ Add record](#)
[Refresh data](#)
[Data](#)
[Azure Synapse Link](#)
[AI Builder](#)
[Settings](#)

Tables > Life event type config

[Columns](#)
[Relationships](#)
[Business rules](#)
[Views](#)
[Forms](#)
[Dashboards](#)
[Charts](#)
[Keys](#)
[Commands](#)
[Data](#)

Name	Created On
Associate Degree	9/15/2021 12:36 PM
Bachelor's degree	9/15/2021 12:36 PM
Birth date	9/15/2021 12:36 PM
Business Closed	9/15/2021 12:36 PM
Business Started	9/15/2021 12:36 PM
Child	9/15/2021 12:36 PM

15. A new tab will open up. Set the following values to create a new Life event type config. Click on **Save**.

- Name** = University Enrollment
- Type code** = <enter the value you copied in step 7 above>
- Display order** = 1

← Save Save & Close + New Flow ▾

New Life event type config - Unsaved

General

Name	*	University Enrollment
Owner	*	
Type code	*	
Display order		1

16. After the record is saved, click on **Related** tab and then **Category types relations**.

University Enrollment - Saved
Life event type config

General **Related**

Name	Related - Common
Owner	Audit History
Type code	Category types relations
Display order	Related - Process sessions
	Background Processes

17. In the **Category types relations** tab, click on **+New Category types relations** to create a new record.

University Enrollment - Saved
Life event type config

General **Category types relations** Related

Show Chart + New Category types r... Refresh Flow ▾

18. Set the following values to create a new **Category types relations** record and click on **Save**

- Name** = University Enrollment category types relations
- Lifemomentcategory configurations** = <Select **Education** record>
- Life event type configurations** = <Select **University Enrolment** record>

← Save Save & Close + New Flow ▾

New Category types relations - Unsaved

General

Name	* University Enrollment Category Types Relations
Owner	*
Lifemomentcategory configurations	Education X
Life event type configurations	University Enrollment

19. The Life event configurations are now complete.

20. Launch the **Unified customer profile** application, and click on **Add new event**

Life events + Add new event

Birthday 1 events 59 years old Jul 02	Marital status 1 events Marriage 32 years ago	Family 2 events Grandchild 5 years ago	Education 2 events Bachelor's degree 36 years ago	Employment 1 events Job started 14 years ago	Residence 2 events Purchase 2 years ago
Vehicle 3 events Sale 8 years ago	Health No events yet + Add event	Other No events yet + Add event			

21. Note the new Life event type reflect in the **Education** category

Education X

Select category and type *

Education ▾ Type ▾

Event date *

Add a specific date for an event

m/d/yyyy University Enrollment

Or enter a timeframe relative to today

e.g. 4 e.g. years From Today

High school

Skills training

Associate degree

Doctorate degree

Master's degree

Bachelor's degree

Add additional information

Event notes

[Add new event](#) [Cancel](#)

Congratulations! You have extended the Unified customer profile application to edit controls on the view and add new life event configurations.

Summary

Nice work! You have completed the **Unified customer profile** lab.

In this lab, you learned how to do the following:

1. Explore the Retail Banking Data Model
2. Navigate Unified customer profile application and controls
3. Create new records within Unified customer profile
4. Create a new Life event type and show on the application