

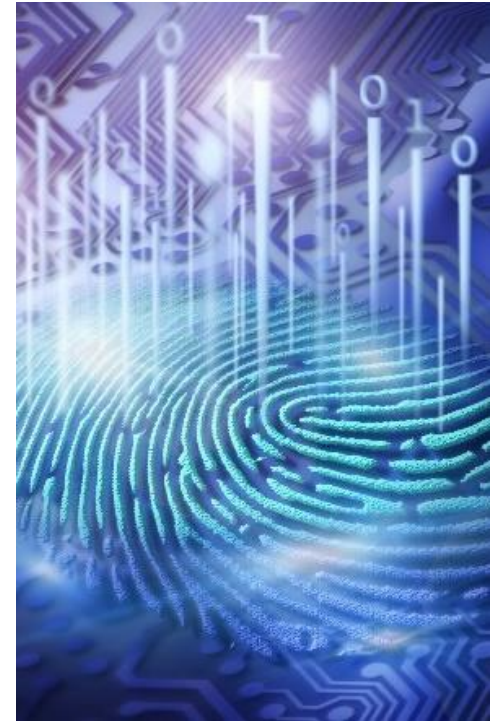
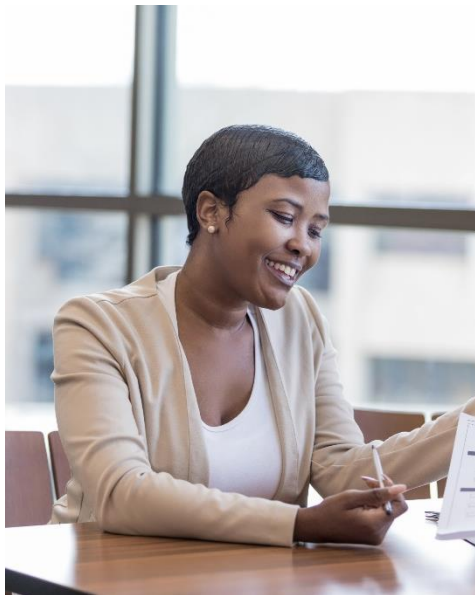


Module 3

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)	● <i>(up to 20 hours)</i>
	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 <i>(Up to 2 hours)</i>
	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							

Deploy via Microsoft Cloud Solution Center



New portal-based experience to simplify industry cloud deployments



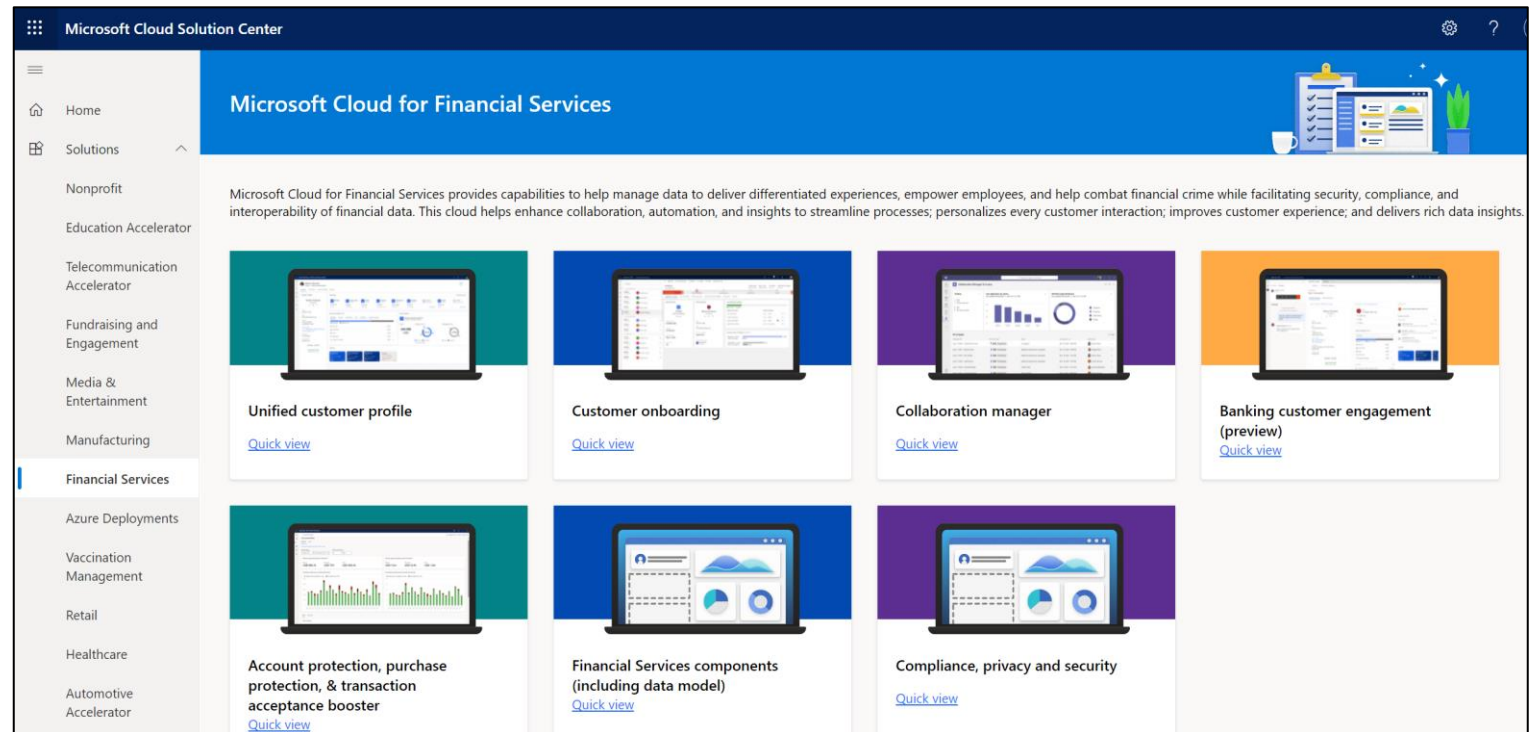
In-built licensing and pre-requisite checks to simplify deployment process



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



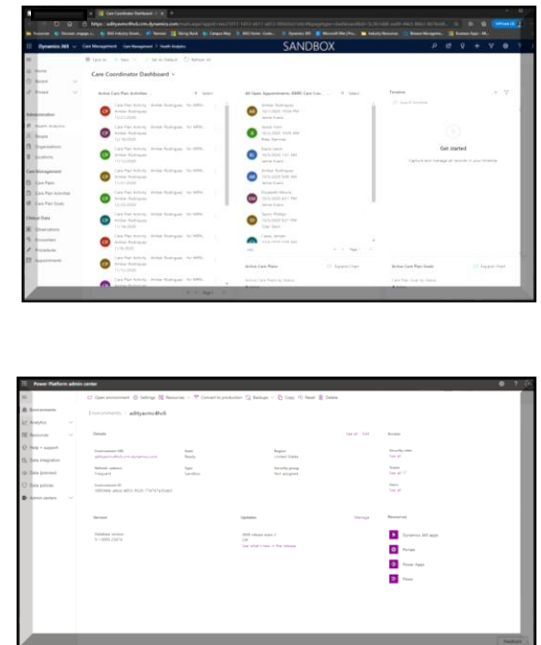
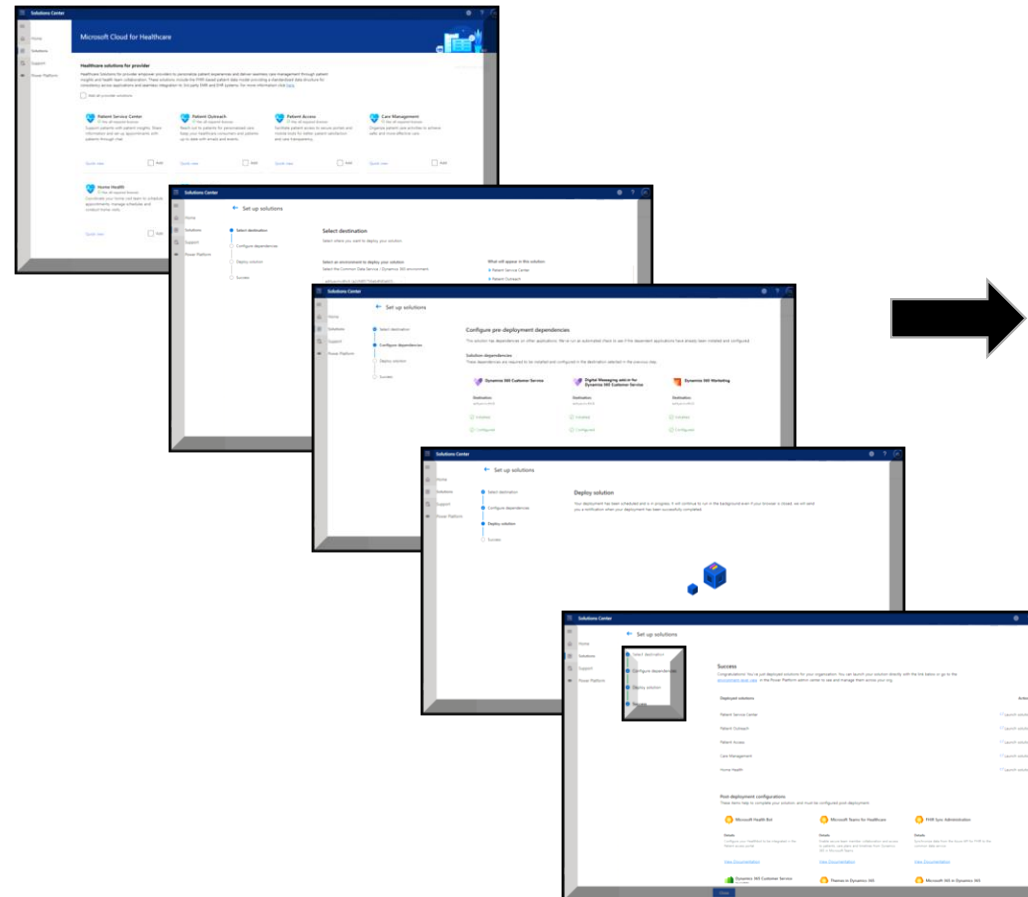
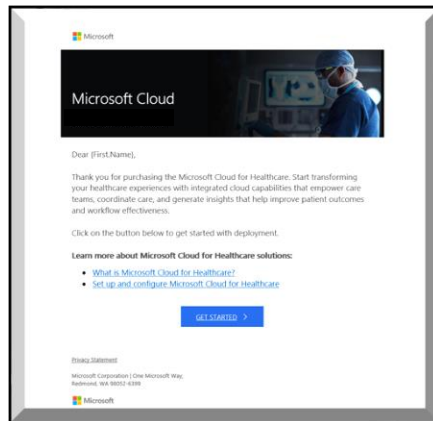
Deploy via Microsoft Cloud Solution Center



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

- No additional dependencies

Unified Customer Profile

- Power Apps
- Dynamics 365 Customer Insights (recommended)

Customer Onboarding

- Power Apps

Collaboration Manager for Loans

- Power Apps
- Teams

Account and purchase Protection

- 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 regarding their primary group and role within their group.

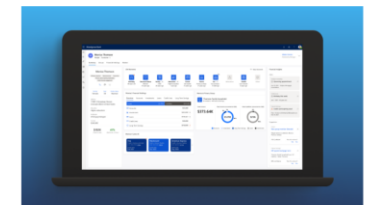
Life moments: Bank agent has an at-a-glance view of the customer and their life milestones, identifies moments associated with financial opportunities, personalized offers, and delivers a consistent engagement experience.

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

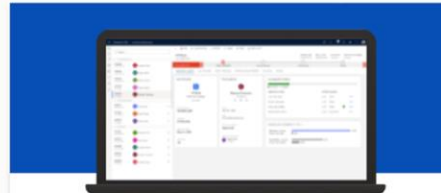


Microsoft Cloud for Financial Services provides capabilities to help manage data to deliver differentiated experiences, empower employees, and help combat financial crime while facilitating security, compliance, and interoperability of financial data. This cloud helps enhance collaboration, automation,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



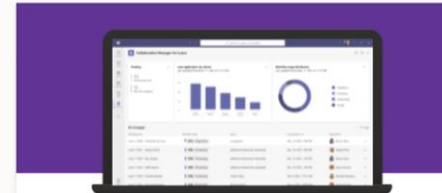
Unified customer profile

[Quick view](#)



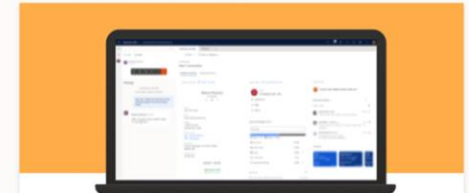
Customer onboarding

[Quick view](#)



Collaboration manager

[Quick view](#)



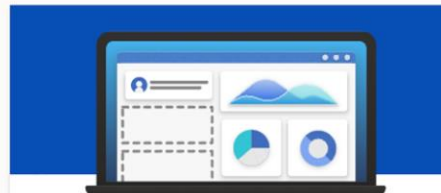
Banking customer engagement
(preview)

[Quick view](#)



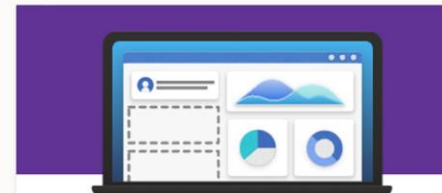
Account protection, purchase
protection, & transaction
acceptance booster

[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

- Additional components
- Set up new deployment
- Configure dependencies**
- Deploy solution
- Success

Configure pre-deployment dependencies

This solution has dependencies on other applications. We've run an automated check to see if the dependent applications have already been installed and configured.

Re-check dependencies

Solution dependencies

These dependencies are required to be installed and configured in the destination selected in the previous step.



Environment:

Power Fx

✓ Installed

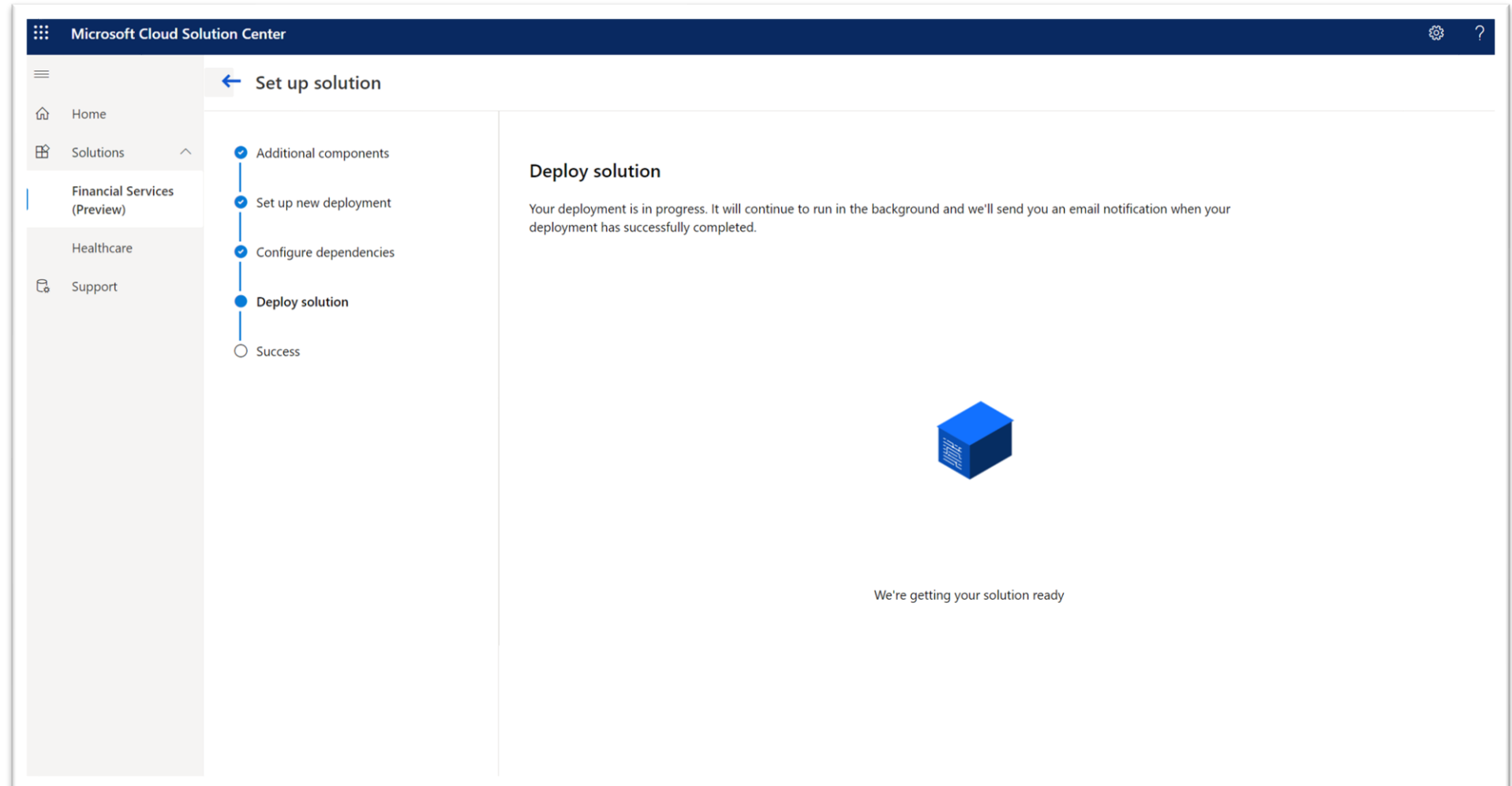
✓ Configure

Back

Deploy

Cancel

Deploy | Step 5 : Install FSI solutions



Install solutions

Deploy | Step 6 : Track solution status



admin.powerplatform.microsoft.com/environments/instance/77c22ed2-6571-4249-b75c-29ce2c55f65f/hub?geo=Na

Power Platform admin center

Open environment Settings Resources Convert to production Backups Copy Reset Delete

Environments

Analytics Resources Help + support Data integration Data (preview) Data policies Admin centers

Environments

Details		See all	Edit
Environment URL	State Ready		
Region United States	Refresh cadence Frequent		
Type Sandbox	Security group Not assigned		
Environment ID defc6bf0-89e7-464d-af11-03ed97a69e06			

Version	Updates
Database version 9.1.0000.24647	2020 release wave 2 On See what's new in the release

Access

Security roles
[See all](#)

Teams
[See all](#)

Users
[See all](#)

Resources

- Dynamics 365 apps
- Portals
- Power Apps
- Flows

Track solution
status in Power
Platform Admin
Center

Configure | Post deployment configuration



← Set up solution

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

Success


Congratulations! You've just deployed solutions for your organization. You can launch your solution directly with the link below or go to the [environment-level view](#) in the Power Platform admin center to see and manage them across your org.

Deployed solutions	Actions
Unified customer profile app	Launch solution
Sample data	

Explore our ecosystem

Our solutions come backed with a rich ecosystem to help enhance any solution you choose. [View all financial services apps](#)

Learn More



Learn More
[View Documentation](#)

Close

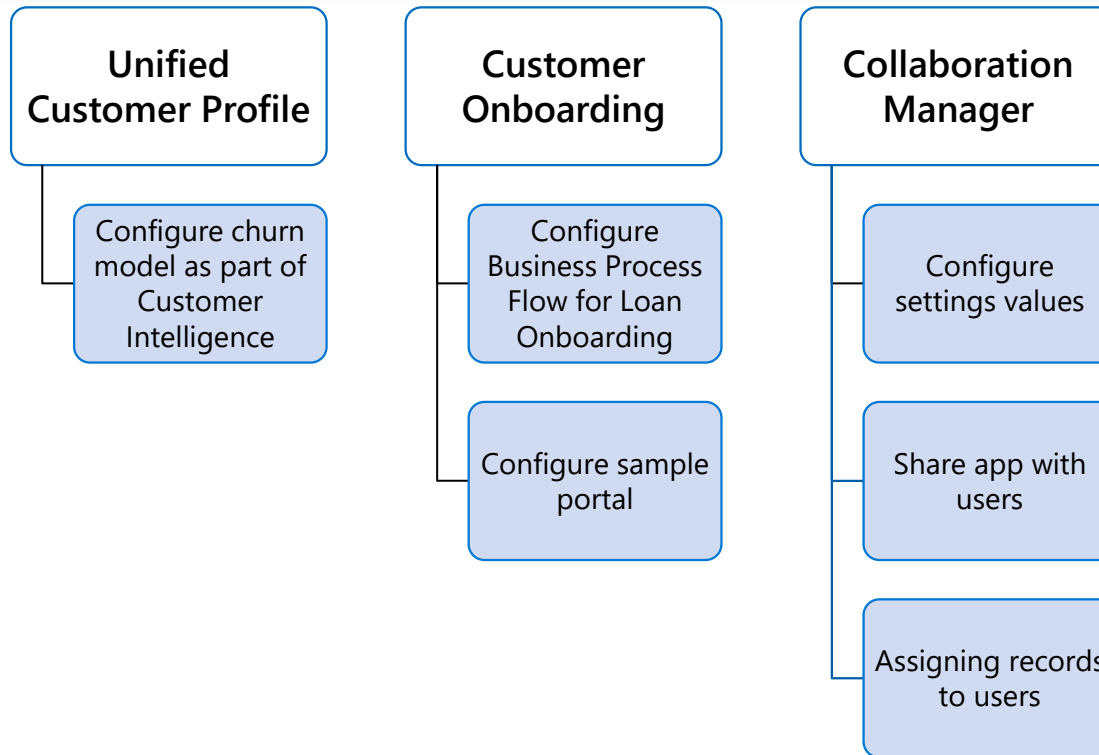
Post deployment
configurations

Configure | Post deployment solution configuration

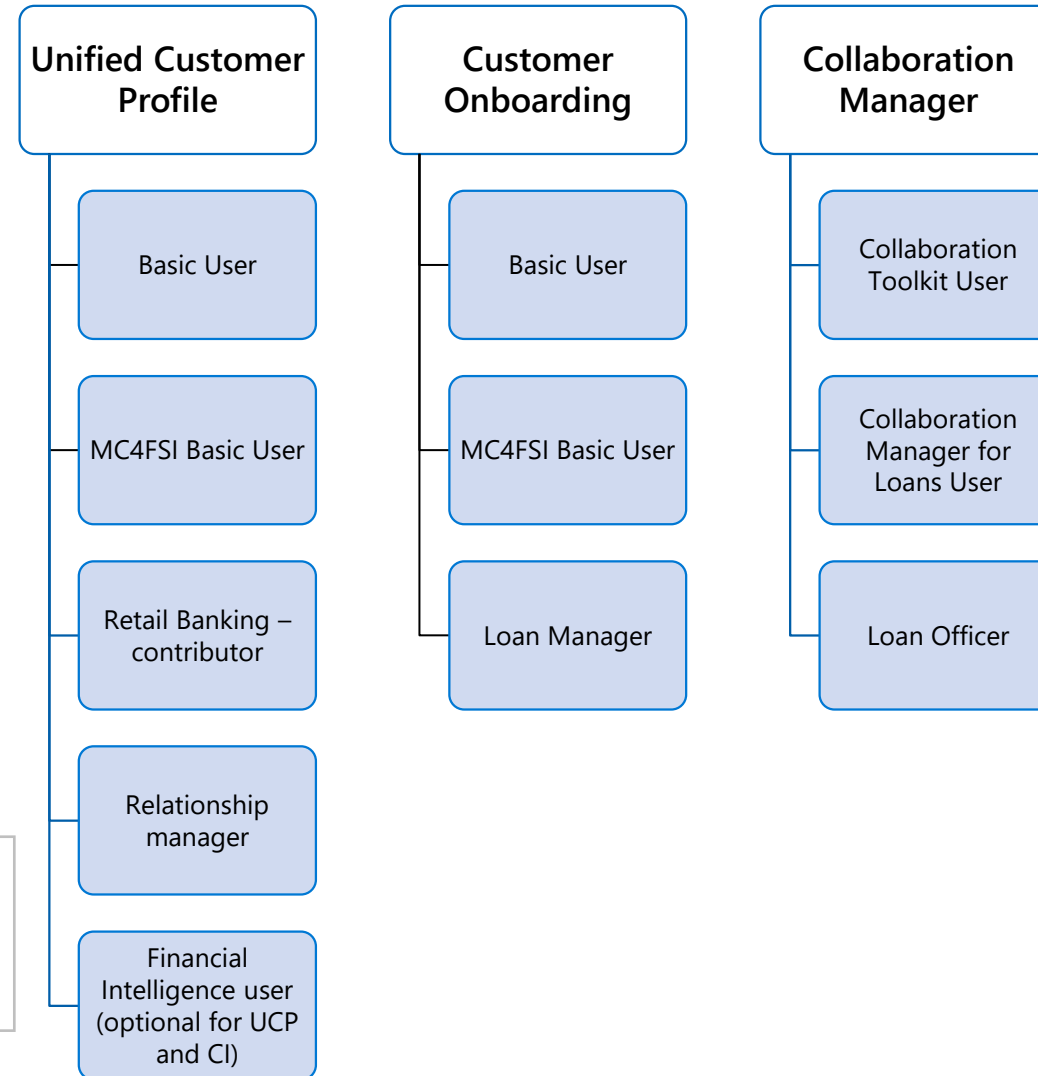


Configure Microsoft Teams solution for collaboration

Dynamics 365 solution enhancements



Configure | Post deployment user configuration



Add additional user licenses and assign security user roles in Power Platform Admin Center

Live Demo of Solution Center