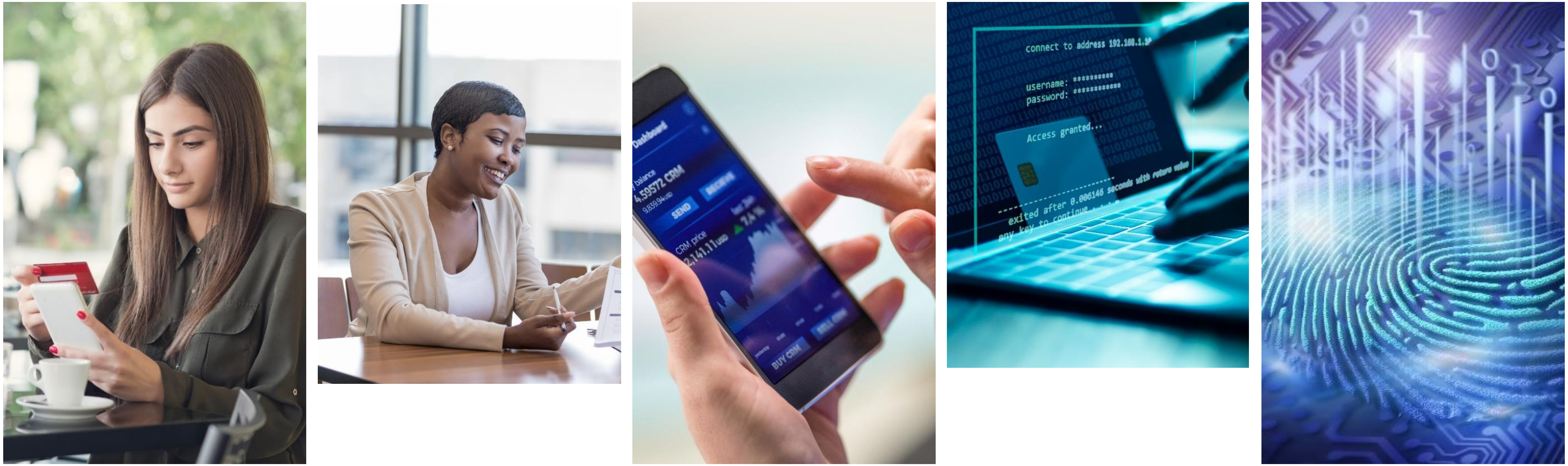
Module 3

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)	● *(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)

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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

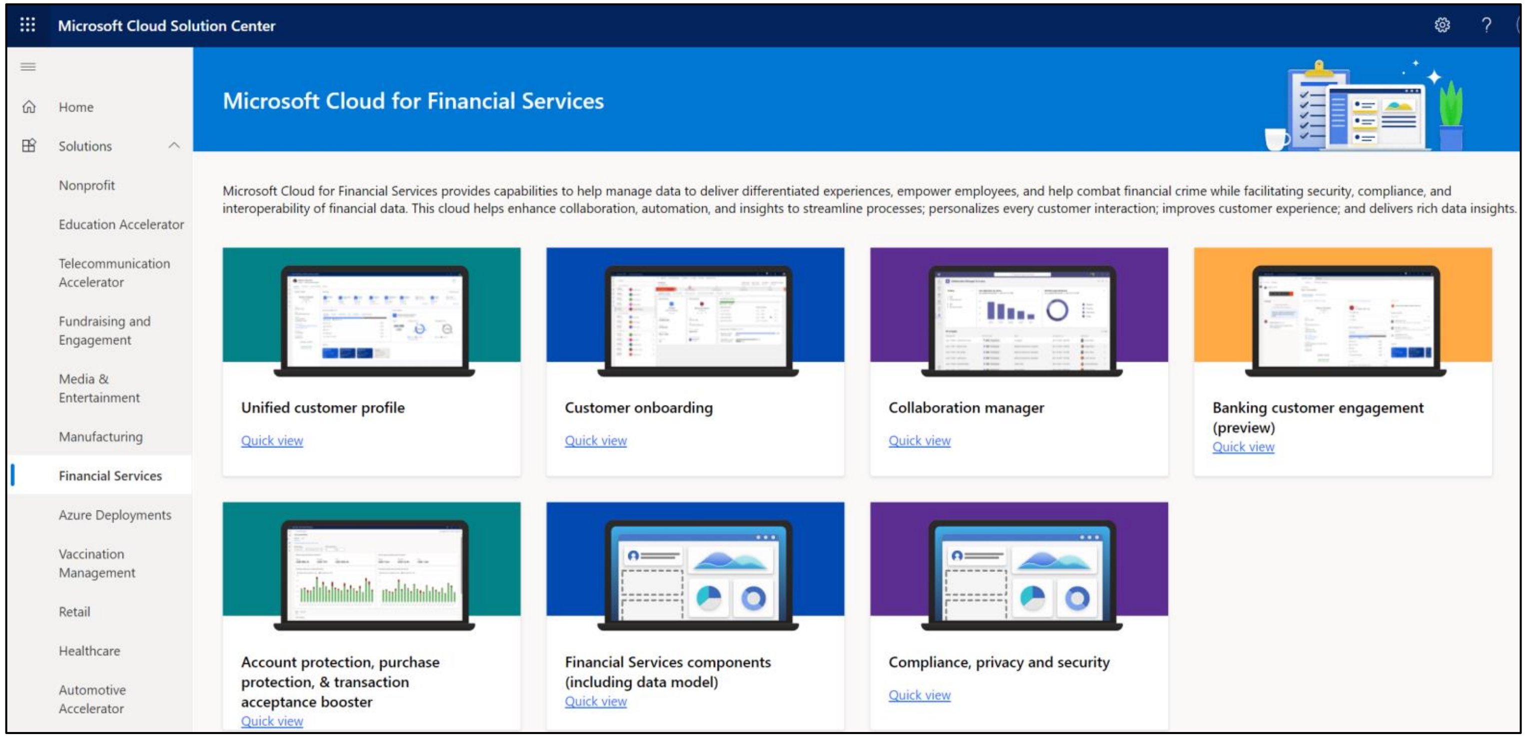
New portal-based experience to simplify industry cloud deployments

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


Microsoft Cloud Solution Center
Home
Solutions
Nonprofit
Education Accelerator
Telecommunication Accelerator
Fundraising and Engagement
Media & Entertainment
Manufacturing
Financial Services
Azure Deployments
Vaccination Management
Retail
Healthcare
Automotive Accelerator

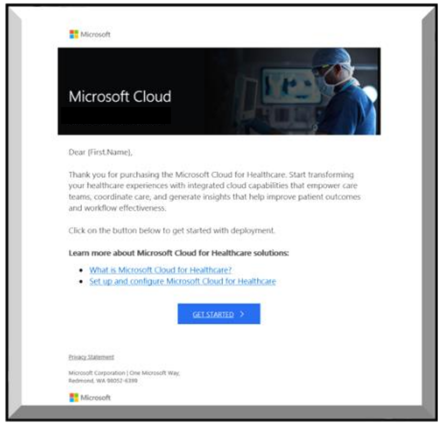
Microsoft Cloud for Financial Services

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 via Microsoft Cloud Solution Center

Post purchase mail



Microsoft

Microsoft Cloud

[redacted]

Dear {First.Name},

Thank you for purchasing the Microsoft Cloud for Healthcare. Start transforming your healthcare experiences with integrated cloud capabilities that empower care teams, coordinate care, and generate insights that help improve patient outcomes and workflow effectiveness.

Click on the button below to get started with deployment.

Learn more about Microsoft Cloud for Healthcare solutions:

- What is Microsoft Cloud for Healthcare?
- Set up and configure Microsoft Cloud for Healthcare

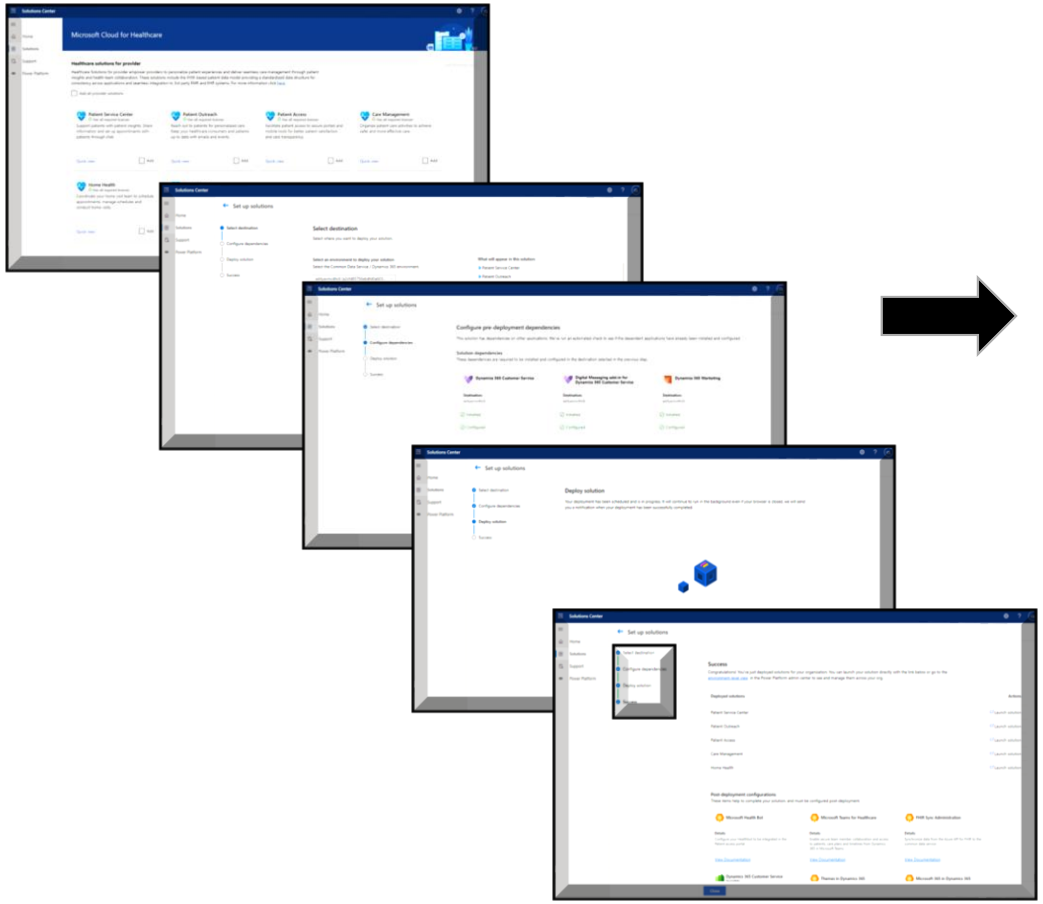
GET STARTED >

Privacy Statement

Microsoft Corporation | One Microsoft Way,
Redmond, WA 98052-6399

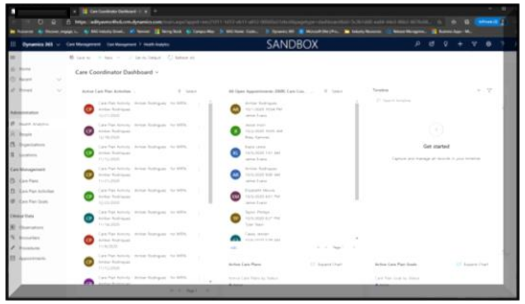
Microsoft

Microsoft Cloud Solution Center

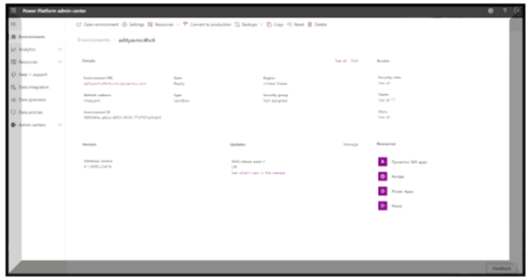


Solutions Center
Microsoft Cloud for Healthcare
Set up solutions
Select destination
Configure pre-deployment dependencies
Deploy solution
Success

Launch/Manage solution



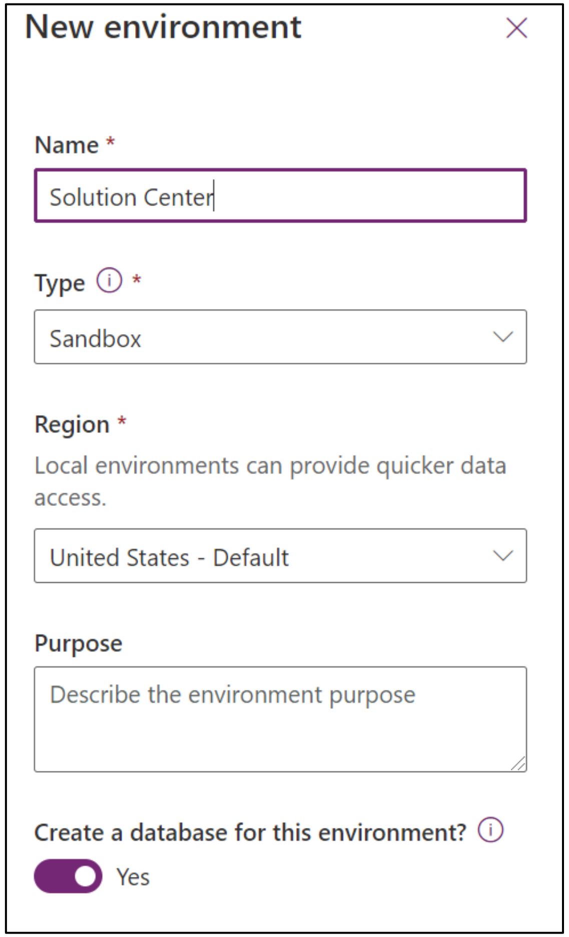
SANDBOX
Care Coordinator Dashboard



Power Platform admin center

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

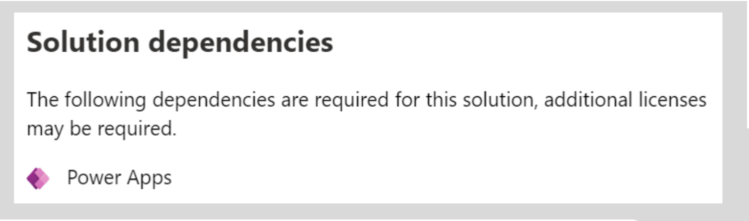
Describe the environment purpose

Create a database for this environment?

Yes

Pre-install dependencies

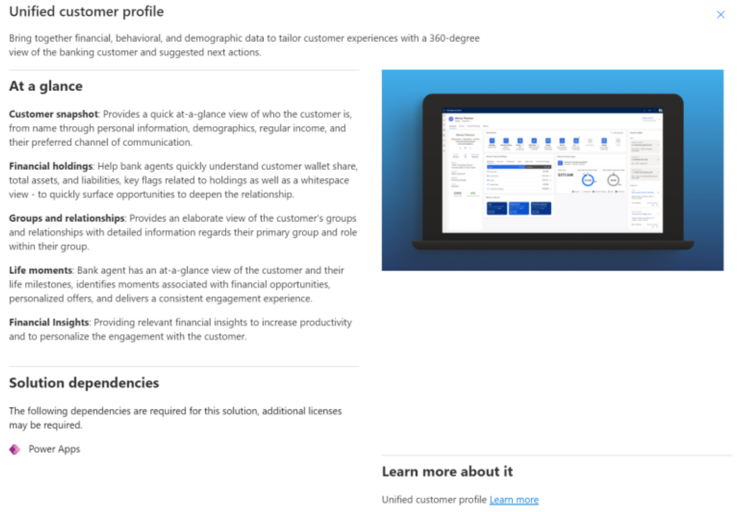
Financial Services Data Model	Unified Customer Profile	Customer Onboarding	Collaboration Manager for Loans	Account and purchase Protection
• No additional dependencies	• Power Apps • Dynamics 365 Customer Insights (recommended)	• Power Apps	• Power Apps • Teams	• Dynamics 365 Fraud Protection



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.

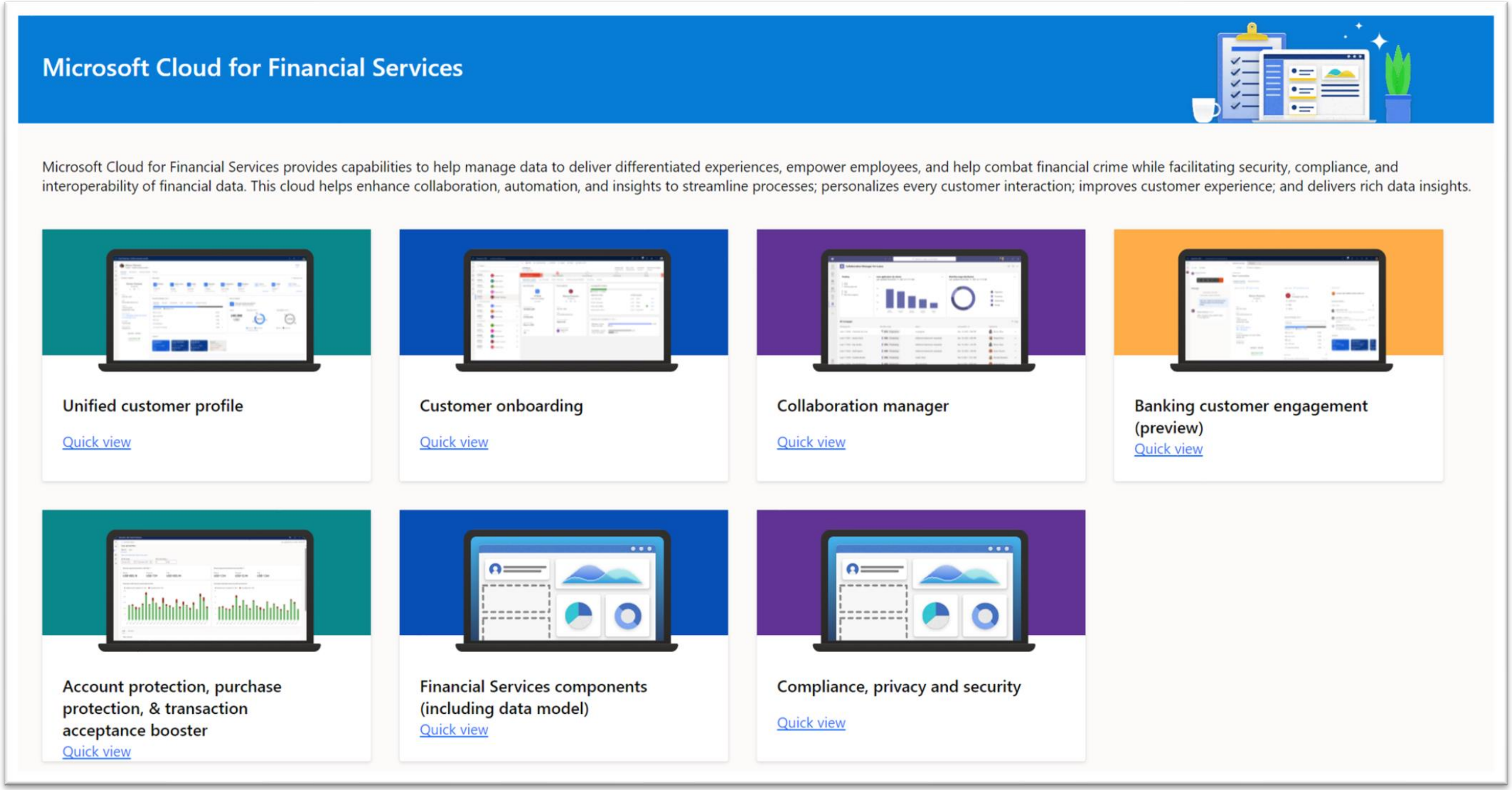
Power Apps

Learn more about it

Unified customer profile Learn more

Deploy | Step 2 : Select FSI solutions

View solutions



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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)

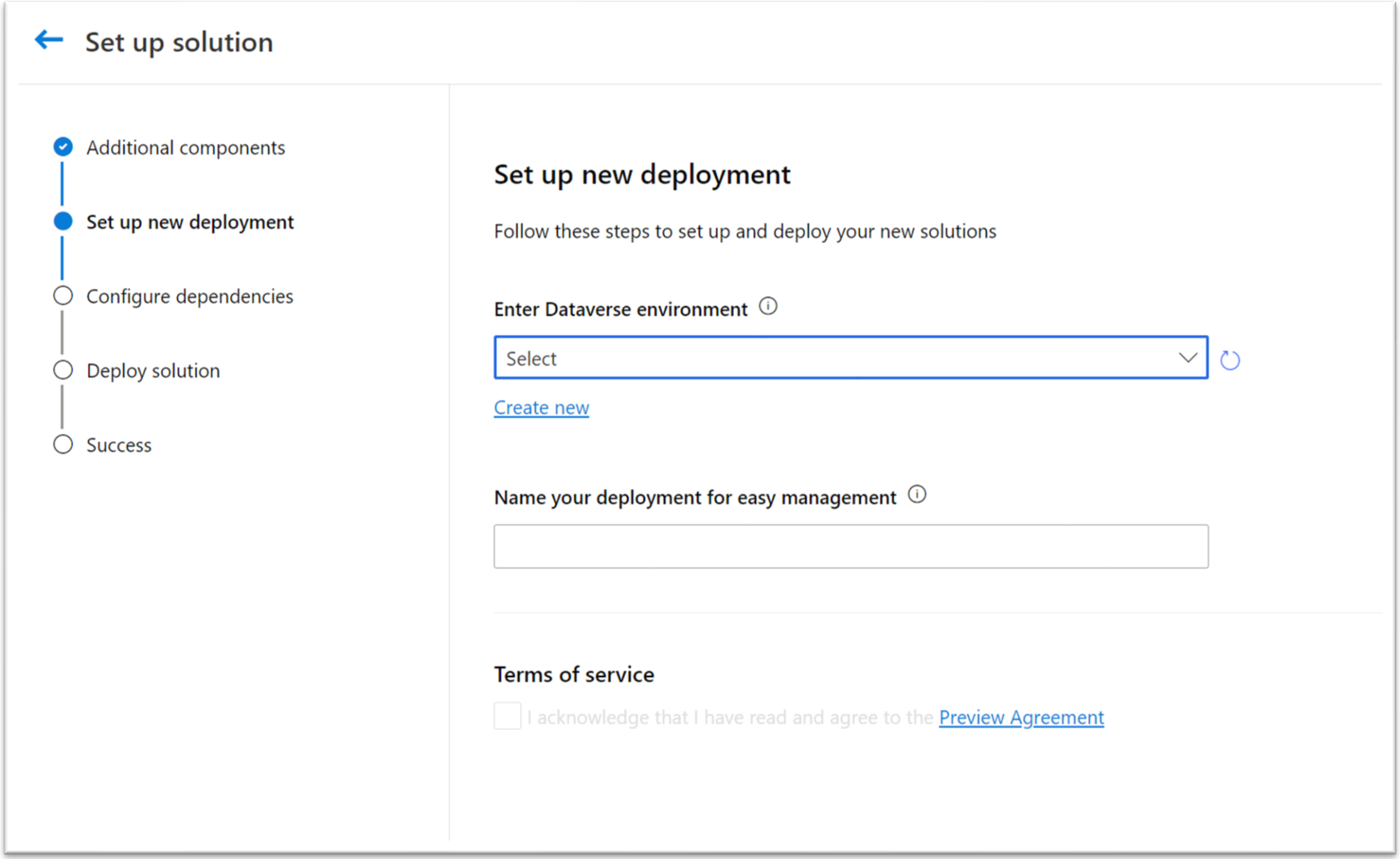
Quick view

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

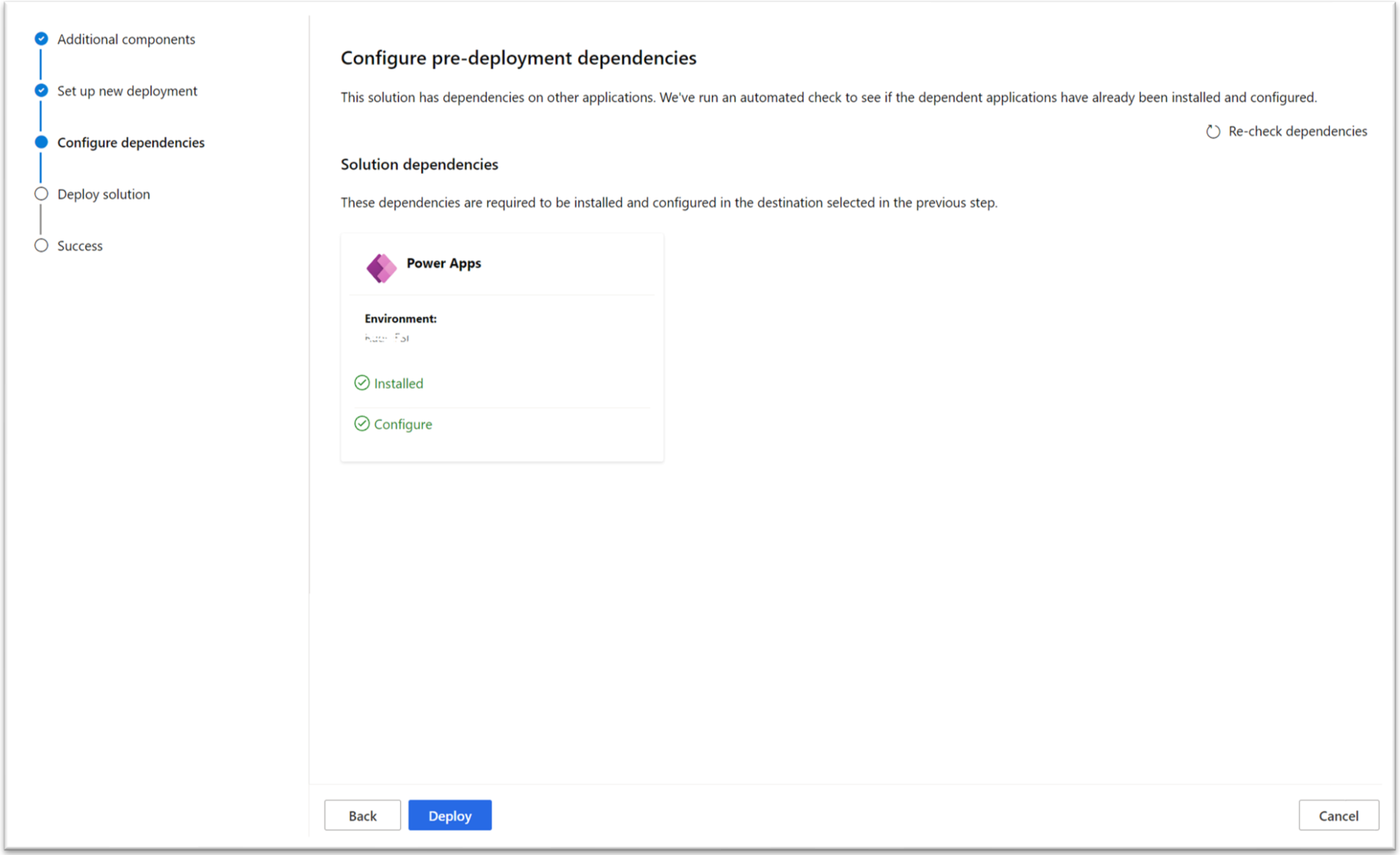
Name your deployment for easy management

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
Re-check dependencies
Back
Deploy
Cancel

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.

Solution dependencies

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

Power Apps

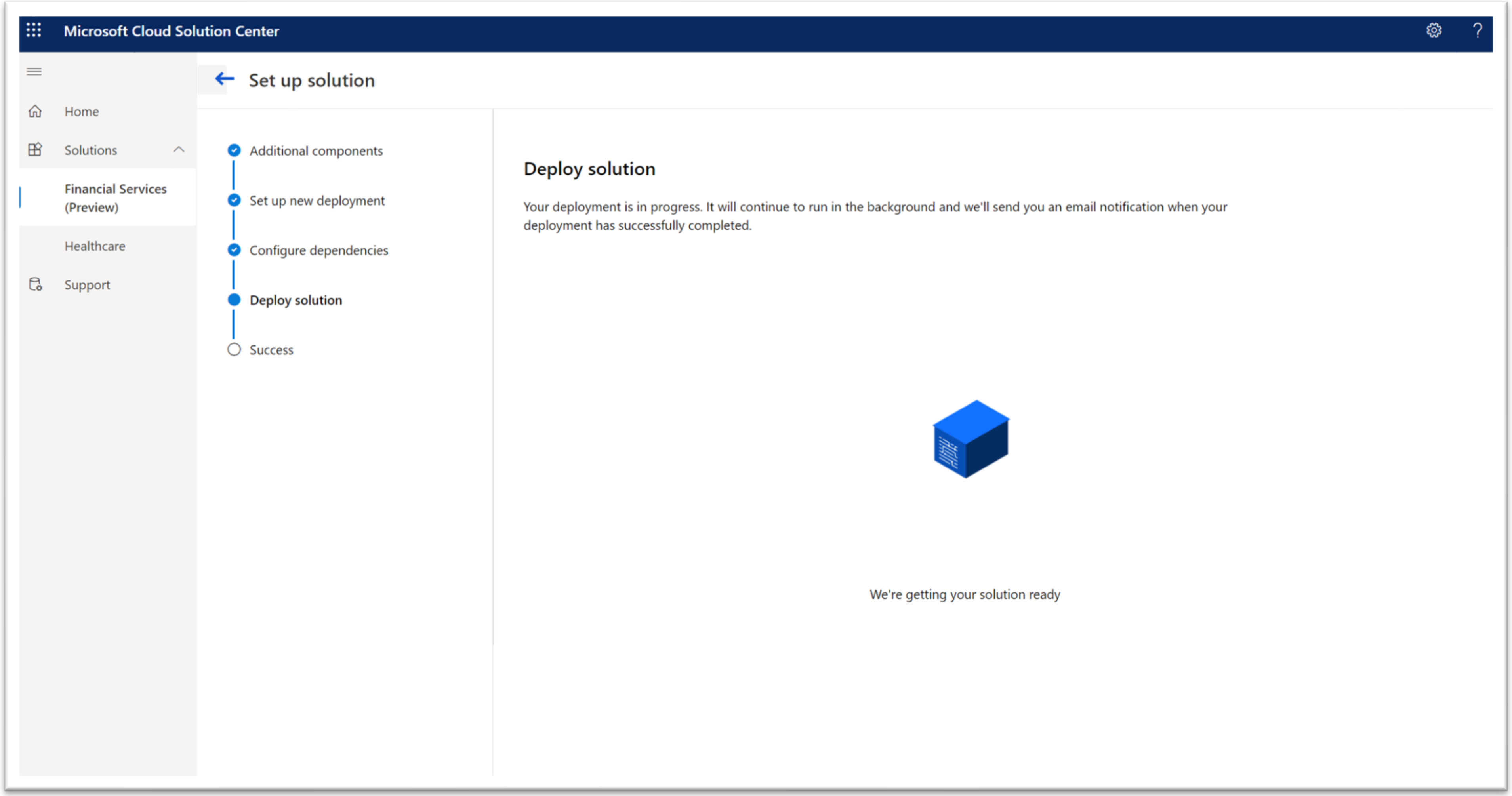
Environment: [redacted]

✓ Installed

✓ Configure

Deploy | Step 5 : Install FSI solutions

Install solutions



Microsoft Cloud Solution Center
Home
Solutions
Financial Services (Preview)
Healthcare
Support
Set up solution
Additional components
Set up new deployment
Configure dependencies
Deploy solution
Success

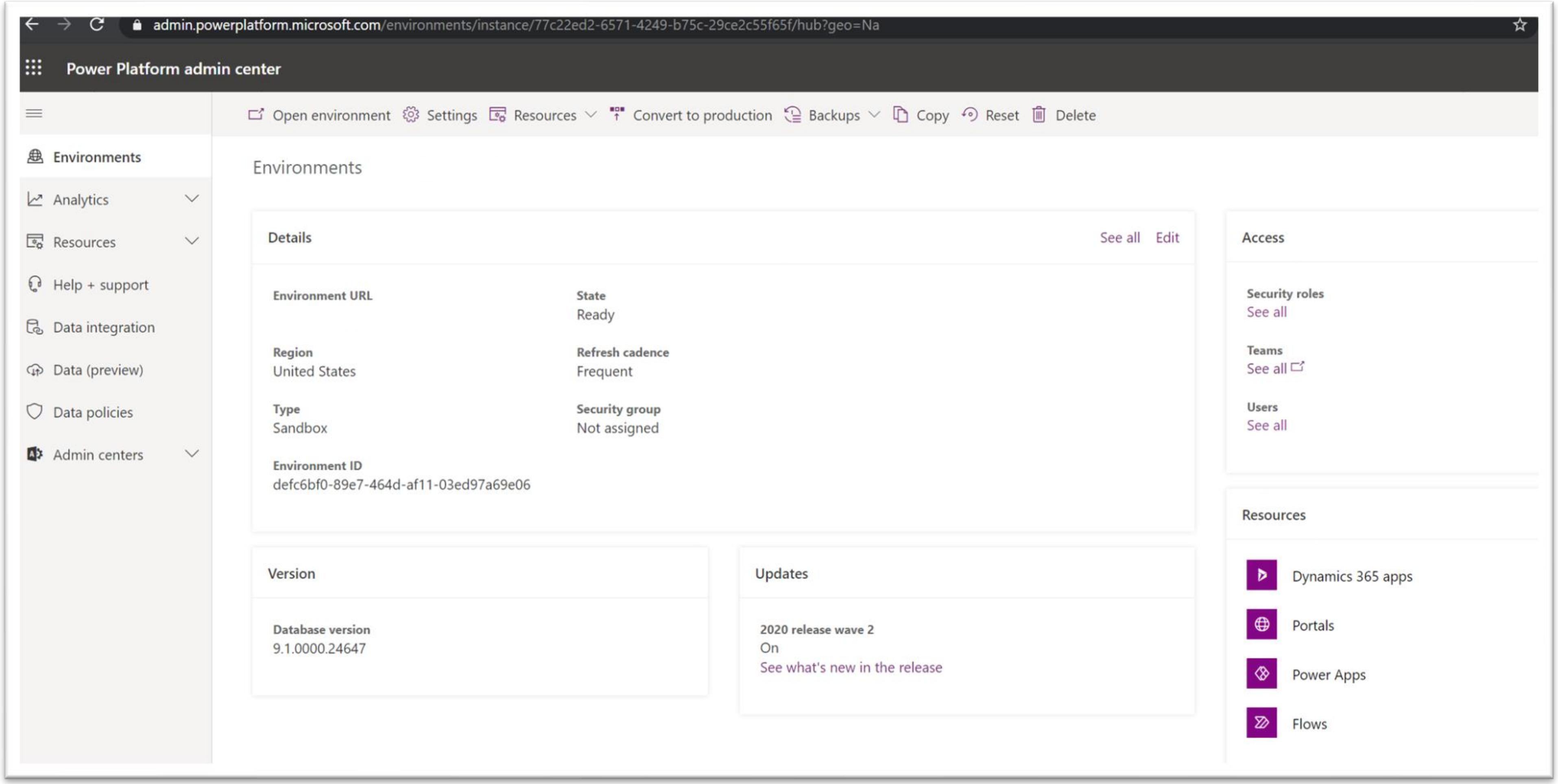
Deploy solution

Your deployment is in progress. It will continue to run in the background and we'll send you an email notification when your deployment has successfully completed.

We're getting your solution ready

Deploy | Step 6 : Track solution status

Track solution status in Power Platform Admin Center


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
See all
Edit

Environments

Details

Environment URL

State
Ready

Region
United States

Refresh cadence
Frequent

Type
Sandbox

Security group
Not assigned

Environment ID
defc6bf0-89e7-464d-af11-03ed97a69e06

Access

Security roles
See all

Teams
See all

Users
See all

Version

Database version
9.1.0000.24647

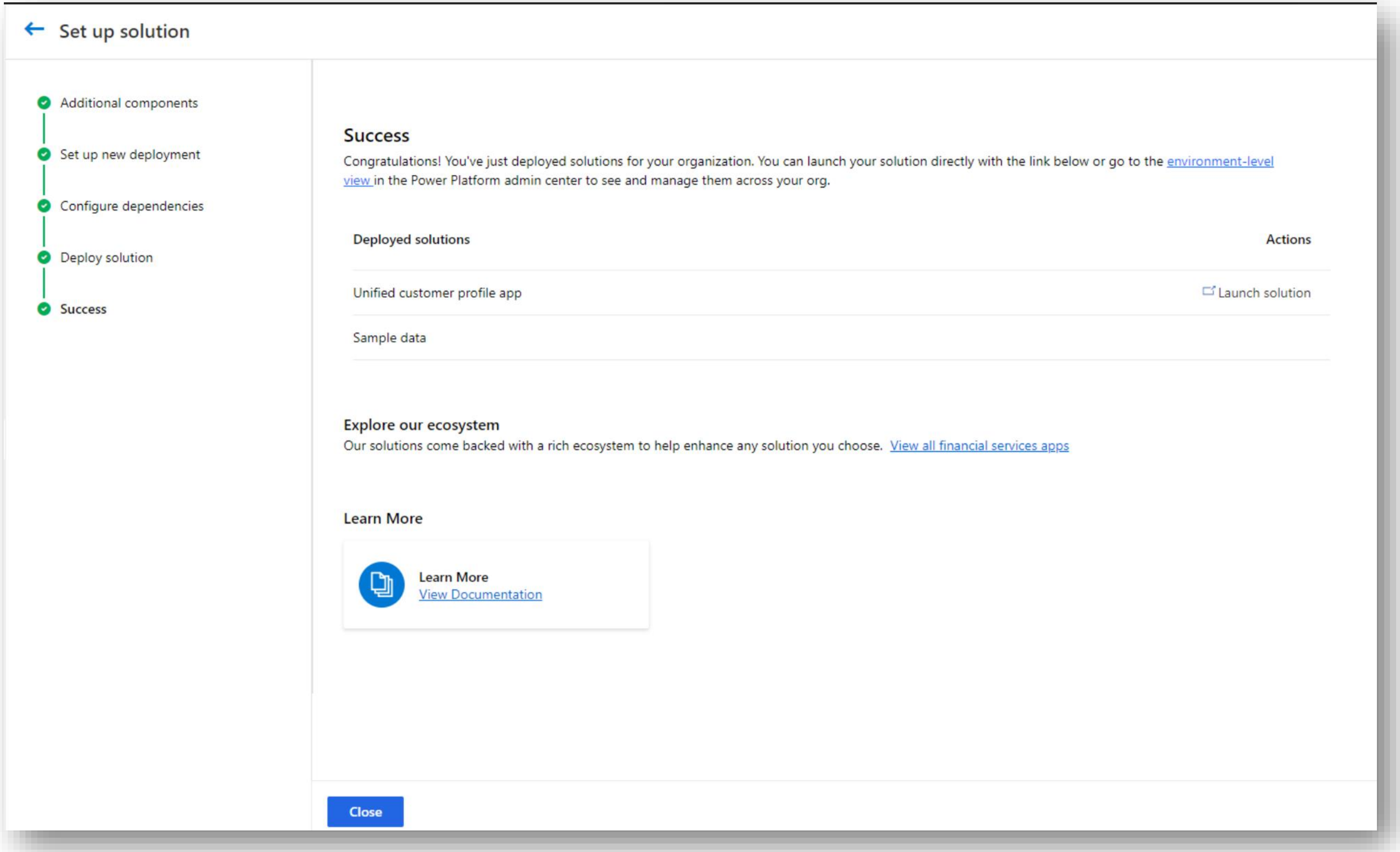
Updates

2020 release wave 2
On
See what's new in the release

Resources

- Dynamics 365 apps
- Portals
- Power Apps
- Flows

Configure | Post deployment configuration



- 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

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**
  - Basic User
  - MC4FSI Basic User
  - Retail Banking – contributor
  - Relationship manager
  - Financial Intelligence user (optional for UCP and CI)
- **Customer Onboarding**
  - Basic User
  - MC4FSI Basic User
  - Loan Manager
- **Collaboration Manager**
  - Collaboration Toolkit User
  - Collaboration Manager for Loans User
  - Loan Officer

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

Live Demo of Solution Center