



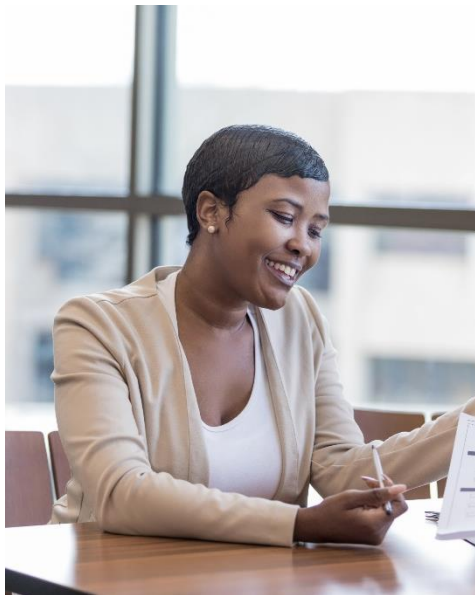
Module 3

# 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<br>\$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) | ●<br><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<br><i>(Up to 2 hours)</i>                      |
|   | D365 fraud protection (Trial)                         | AP 50,000 transactions<br>Limited PP and LP (5,000)                                |

# Features and Solution Dependencies

|   |               |   |             |
|---|---------------|---|-------------|
| ● | Pre-requisite | ◆ | Recommended |
|---|---------------|---|-------------|

| Solution Play                      | Capability                             | FSI add-on SKU | M365 | Power Platform |                        |          | Microsoft Dynamics 365 |                             |                  |                      |                | Viva  |
|------------------------------------|--|----------------|------|----------------|------------------------|----------|------------------------|-----------------------------|------------------|----------------------|----------------|-------|
|                                    |  |                | E3 + | Power Apps     | Power Automate         | Power BI | Customer Insights      | Customer Service Enterprise | Sales Enterprise | Marketing Enterprise | Customer Voice | Sales |
| Differentiated Customer Experience | Unified Customer/Client Profile        | ●              |      | ●              | Included in Power Apps | ◆        | ◆                      |                             |                  |                      |                |       |
|                                    | Banking Customer Engagement            | ●              | ●    | ●              | Included in Power Apps | ◆        | ◆                      |                             |                  | ◆                    | ◆              | ◆     |
|                                    | Customer Onboarding                    | ●              |      | ●              | Included in Power Apps | ◆        | ◆                      | ◆                           | ◆                |                      |                |       |
| Empower Employees through Teamwork | Collaboration Manager                  | ●              | ●    | ●              |                        |          |                        |                             |                  |                      |                |       |
| Manage risk across organization    | Compliance Program for Microsoft Cloud | ●              |      |                |                        |          |                        |                             |                  |                      |                |       |

# Deploy via Microsoft Cloud Solution Center



New portal-based experience to simplify industry cloud deployments



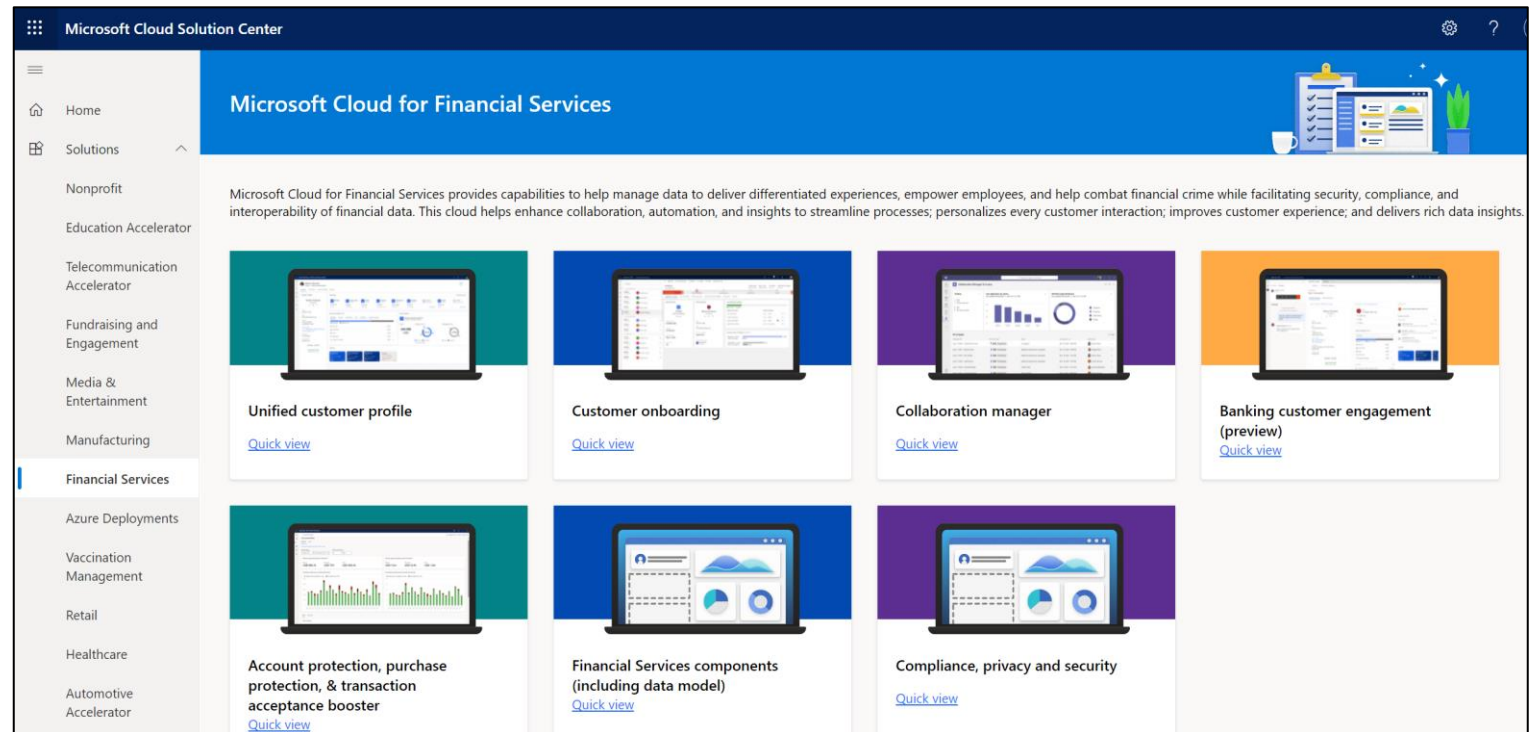
In-built licensing and pre-requisite checks to simplify deployment process



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



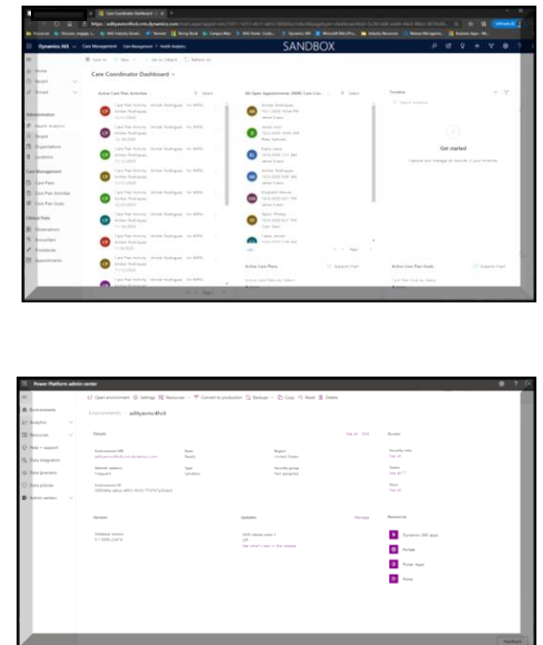
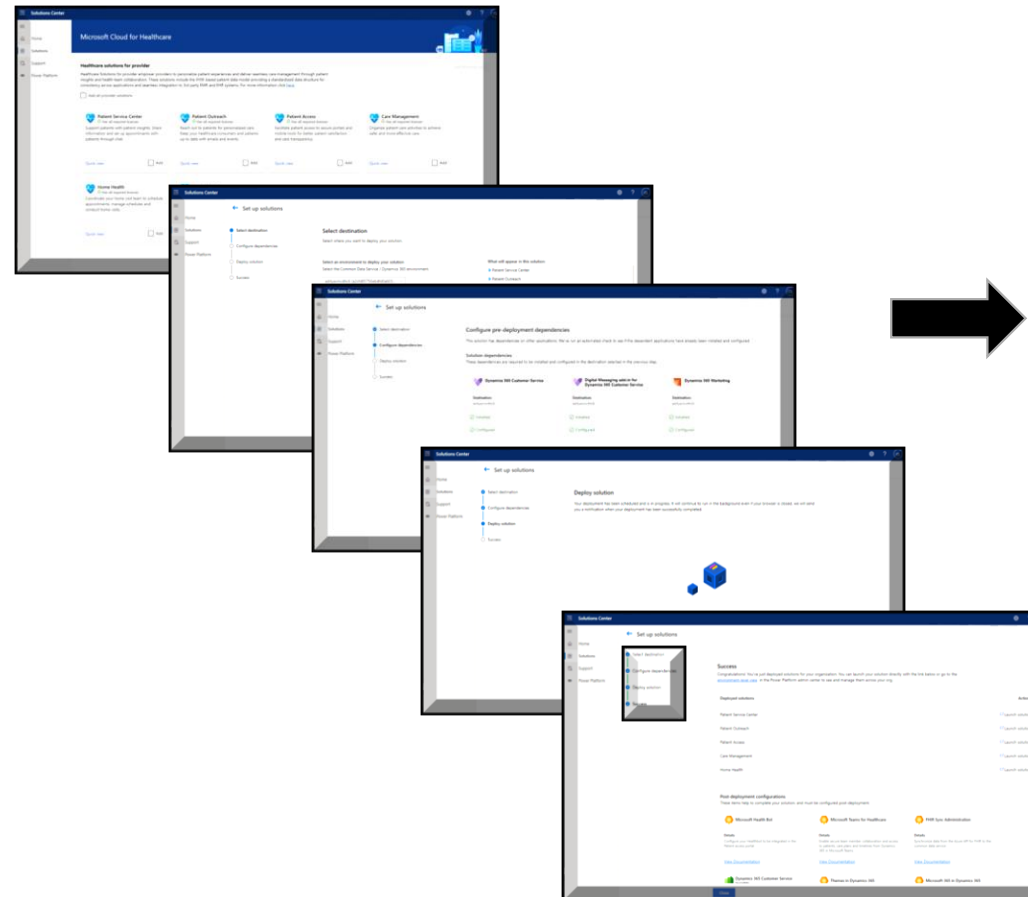
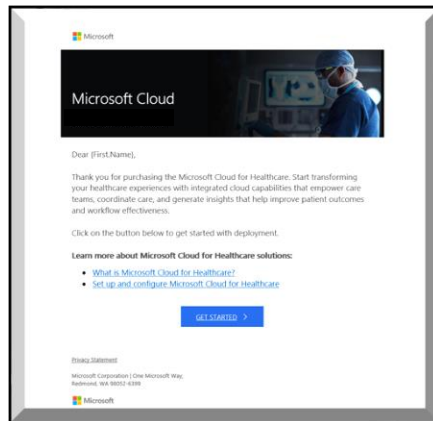
# Deploy via Microsoft Cloud Solution Center



Post purchase mail

Microsoft Cloud Solution Center

Launch/Manage solution





# Deploy | Step 1 : Prepare Environment



## Create new environment

**New environment** ✕

**Name \***

**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.

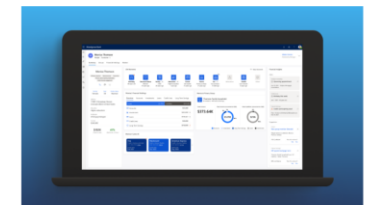
**Life moments:** Bank agent has an at-a-glance view of the customer and their life milestones, identifies moments associated with financial opportunities, personalized offers, and delivers a consistent engagement experience.

**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

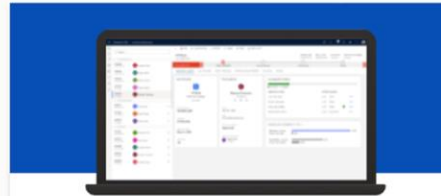


Microsoft Cloud for Financial Services provides capabilities to help manage data to deliver differentiated experiences, empower employees, and help combat financial crime while facilitating security, compliance, and interoperability of financial data. This cloud helps enhance collaboration, automation,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



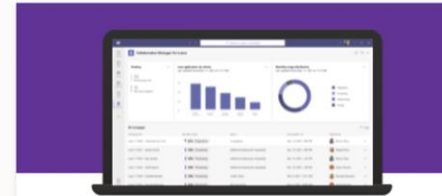
Unified customer profile

[Quick view](#)



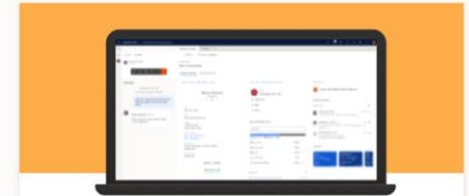
Customer onboarding

[Quick view](#)



Collaboration manager

[Quick view](#)



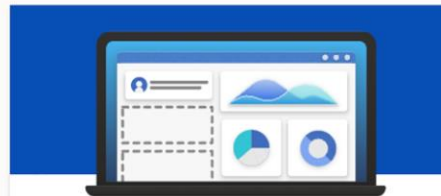
Banking customer engagement  
(preview)

[Quick view](#)



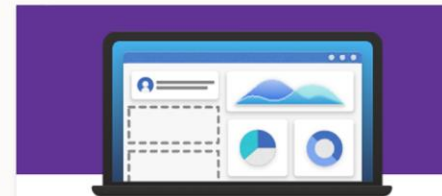
Account protection, purchase  
protection, & transaction  
acceptance booster

[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

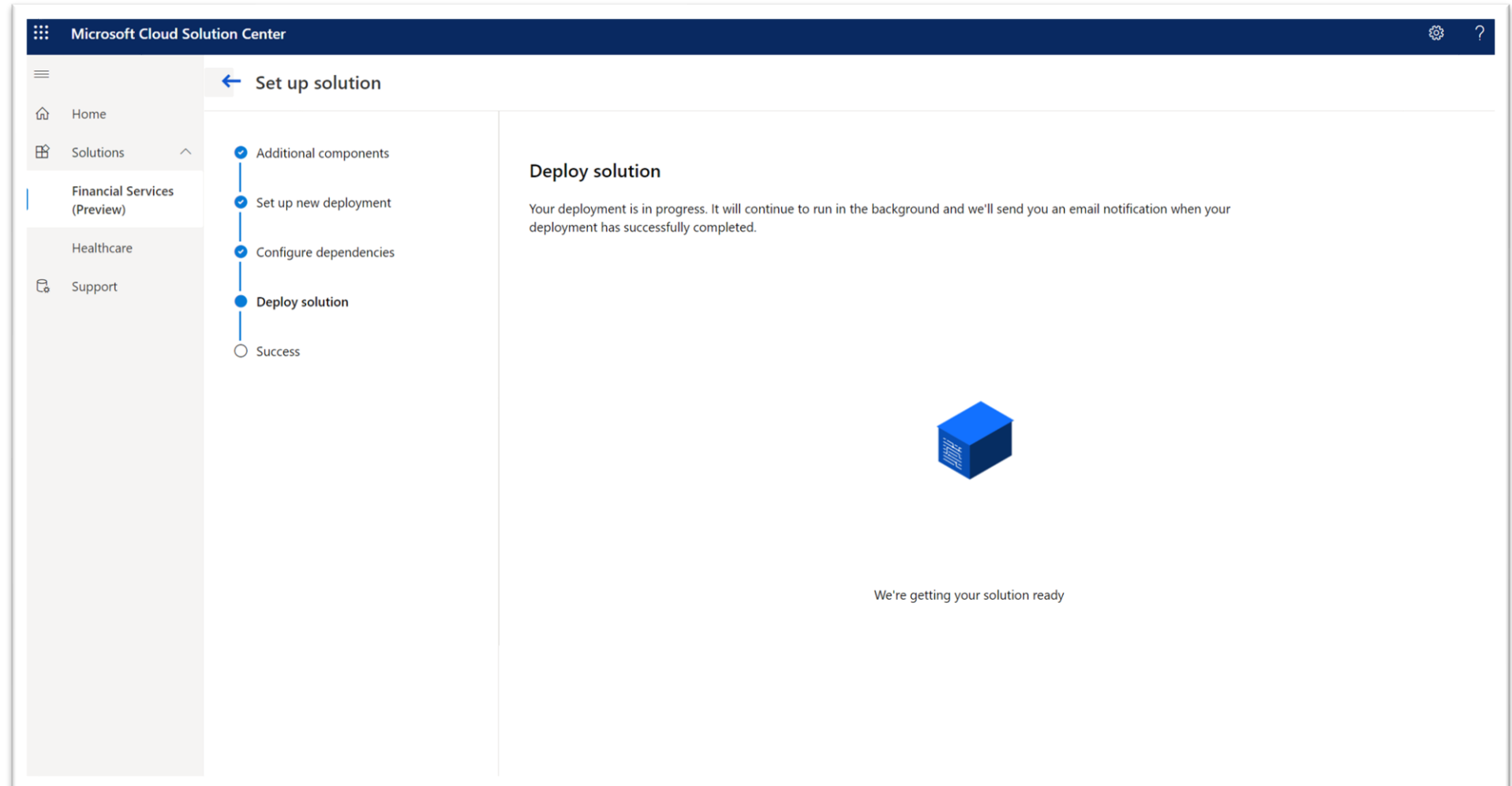
Back

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  |                                | <a href="#">See all</a> | <a href="#">Edit</a> |
|--|--------------------------------|-------------------------|----------------------|
| Environment URL  | State<br>Ready                 |                         |                      |
| Region<br>United States                                | Refresh cadence<br>Frequent    |                         |                      |
| Type<br>Sandbox  | Security group<br>Not assigned |                         |                      |
| Environment ID<br>defc6bf0-89e7-464d-af11-03ed97a69e06 |                                |                         |                      |

| Version                            | Updates  |
|------------------------------------|--|
| Database version<br>9.1.0000.24647 | 2020 release wave 2<br>On<br><a href="#">See what's new in the release</a> |

### 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 | <a href="#">Launch solution</a> |
| 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

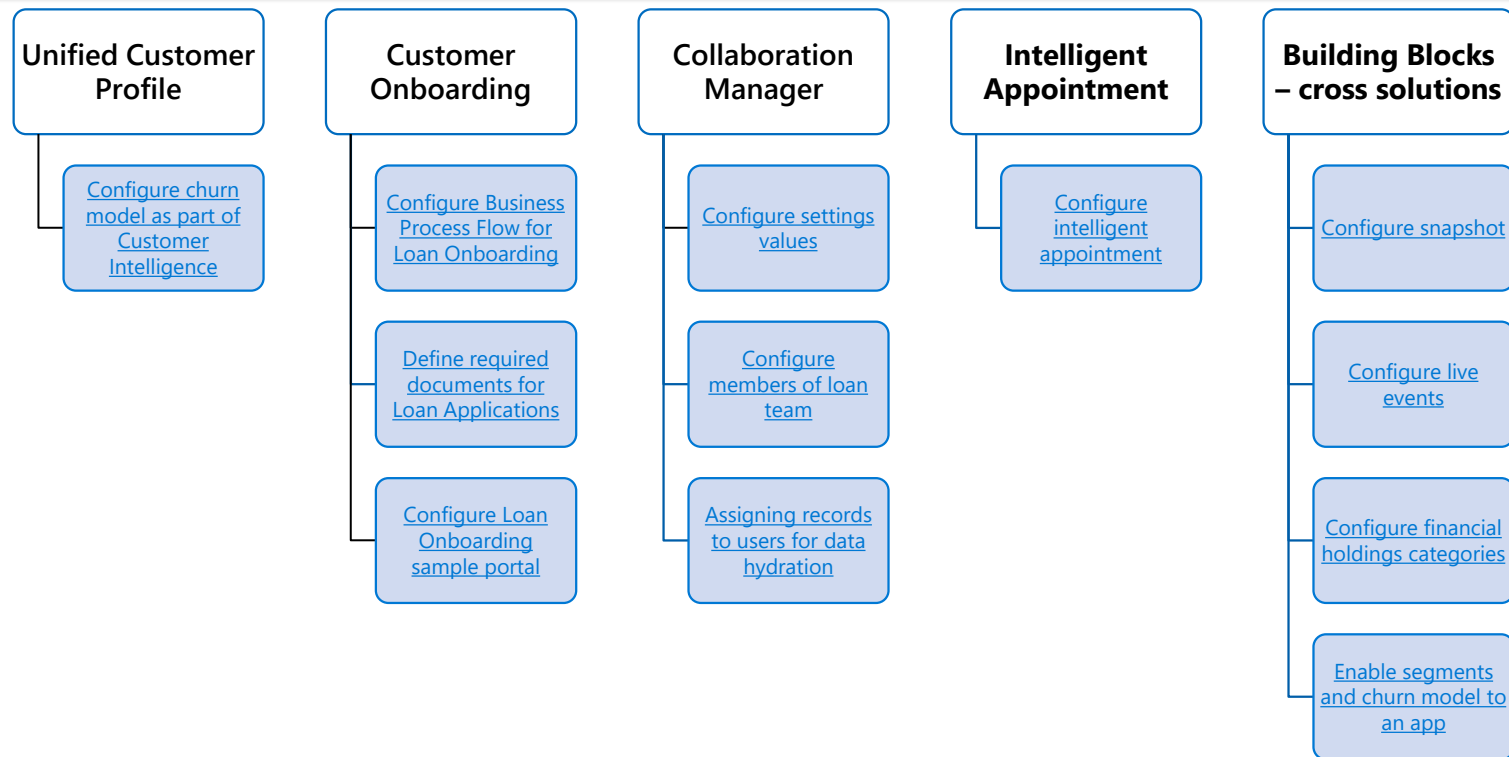


# Configure | Post deployment solution configuration

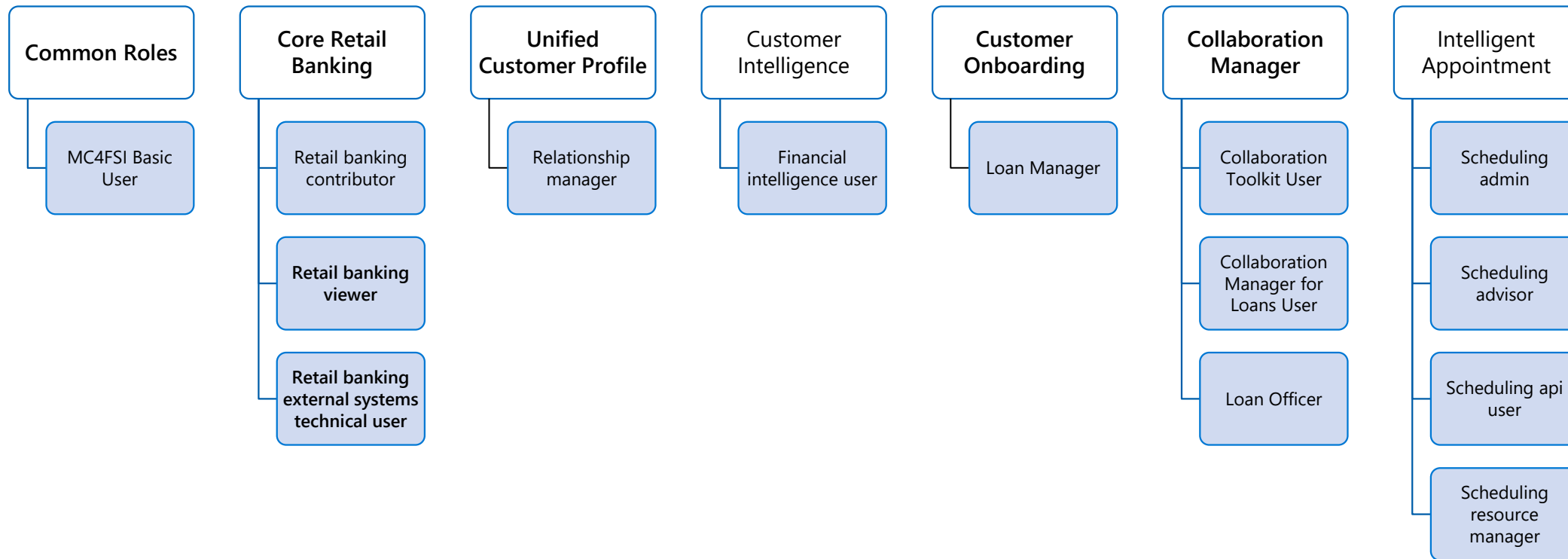


## Configure Microsoft Teams solution for collaboration

### Dynamics 365 solution enhancements



# Configure | Post deployment user role configuration



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

# Live Demo of Solution Center