



**Dynamics 365 &  
Power Platform**  
UK User Groups

# **WELCOME TO THE SOUTH WEST USER GROUP**

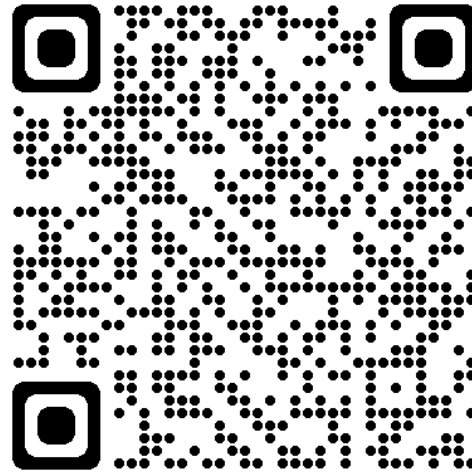
Based in the South West of England this user group is set up for all to benefit from shared knowledge and experience. All levels of skill and experience are welcome, we hope to provide content for all.

Presented by | Dan Barber, Sumit Kumar & Adrian Cole  
23 Feb 2023



# Upcoming Events

- Bristol – 23rd Feb
- Cambridge – 9<sup>th</sup> March
- Birmingham – 22<sup>nd</sup> March
- Birmingham – 25<sup>th</sup> May
- **Bristol – 25<sup>th</sup> May**
- Cambridge – 8<sup>th</sup> June
- **London – 8<sup>th</sup> June**
- Birmingham – 20<sup>th</sup> July
- **Bristol – 24<sup>th</sup> August**
- Cambridge – 16<sup>th</sup> November
- **Bristol – 23<sup>rd</sup> November**



[www.d365ppug.com](http://www.d365ppug.com)

# Your Hosts



**Dan Barber**

CTO

Cloud 9 Insights

D365 PP UG Management Team



**Sumit Kumar**

Snr Solution Architect

HCL Power Objects



**Adrian Cole**

CTO

Bespoke.xyz

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# TODAY'S AGENDA

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1. Introduction
2. Dynamics 365 and Power Platform 2023 Wave 1 Release
3. Refreshments
4. Power platform end to end demo

# SPEAKER



## Sumit Kumar

Senior Solution Architect at HCLTECH

Fast track Certified Power Apps Solution Architect & User group Leader & Community member(Southwest) with over 16+ years of professional experience specializing in implementations of Dynamics CRM & Power platform solutions, working in the delivery/Presales



# 2023 Wave 1

D365 CE and Power Platform



# Release Planner

## Power Platform and Dynamics 365

[Release planner \(PREVIEW\) \(dynamics.com\)](https://dynamics.com/release-planner)

Dynamics 365 and Microsoft Power Platform release planner

Find out what's new and planned (PREVIEW) \*

\*This is a preview experience, check out [what's new](#) in the portal. Share your [feedback](#) and help us improve.

All release plansMy release plans

Dynamics 365

Power Platform

Power Apps

Governance and administration

Pro development

Power Pages

Power Apps portals

ISV experiences

Microsoft Dataverse

Power Automate

AI Builder

Power Virtual Agents

Power BI

Data integration

Planned  
18 upcoming features included in release plans

Coming soon  
18 upcoming features available next month

Try now  
61 new features recently released to market

Oct 2022

Appointment description supports rich text

Connect to external data from Dataverse

Create and join Teams meetings in-app or from appointments

Custom pages are responsive by default with rich layouts

Dataverse tables integrated inside Power Apps Studio

Easily copy links to records

Filter grid data, save results as view

Form component enhancements - support for command bar, business process flow, header, and tabs

Form UX improvements

Grid control support for grouping, aggregation, nested grids

Model-driven app client toasts moved to the toast stack

UPDATED

UPDATED

UPDATED

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GA  
Oct 1, 2022

Public Preview  
Oct 1, 2022

GA  
Oct 1, 2022

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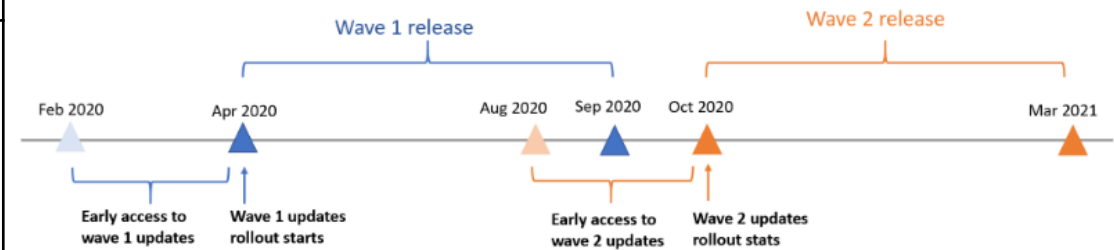
Public Preview  
Oct 1, 2022

GA  
Oct 1, 2022



# Key dates for the 2023 Release Wave 1

Milestone	Date	Description
Release plans available	January 25, 2023	Learn about the new capabilities coming in the 2023 release wave 1 (April 2023 – September 2023) across <a href="#">Microsoft Dynamics 365</a> and <a href="#">Microsoft Power Platform</a> .
Early access available	February 6, 2023	Test and validate new features and capabilities that will be a part of the 2023 release wave 1, coming in April, before they get enabled automatically for your end users. You can view the list of <a href="#">Dynamics 365 early access features</a> and <a href="#">Microsoft Power Platform early access features</a> now.
Release plans available in 11 additional languages	February 21, 2023	The Dynamics 365 and Power Platform release plans published in Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	April 1, 2023	Production deployment for the 2023 release wave 1 begins. <a href="#">Regional deployments start on April 1, 2023.</a>



# Highlights

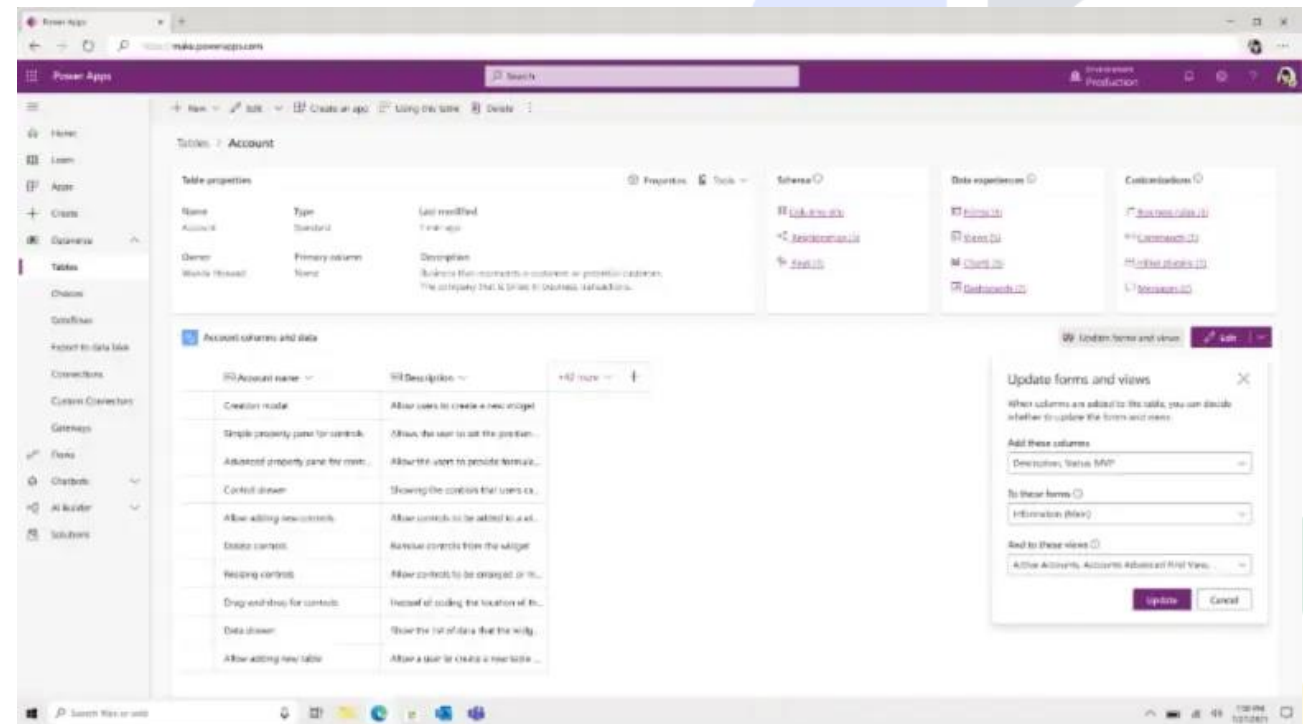
Power Platform

# Power Apps

Efficient maker experiences

## Add table columns to forms and views automatically

- Currently when adding columns to a table when building a model-driven app, you have to also edit the forms and views using that table to expose the new column. With this feature, makers can update their forms and views on the fly as they work on their table schema



- Public Preview Jan 2023 / General Availability April 2023

# Power Apps

Efficient maker experiences (Model Driven Apps)

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## Be more productive with modern app designer improvements

- The modern model-driven app designer will now open all component designers (forms, views, and custom page designers) directly inline by default, with the option to open in a new tab. This incremental improvement to the designer should make it quicker and easier to navigate, thereby making build activities more intuitive.

- General Availability April 2023

# Power Apps

Model Driven Apps

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## Coauthor with other makers in the modern app designer

- Co-authoring in the modern model-driven app designer allows multiple makers—whether pro or citizen developers—to make changes to the app at the same time and see those changes in real time. That's going to be really useful where we have multiple people working on the same app at the same time – regardless of location multiple people will be able to see the changes, collaborate and be productive.

- Public Preview Sep 2022 / General Availability April 2023

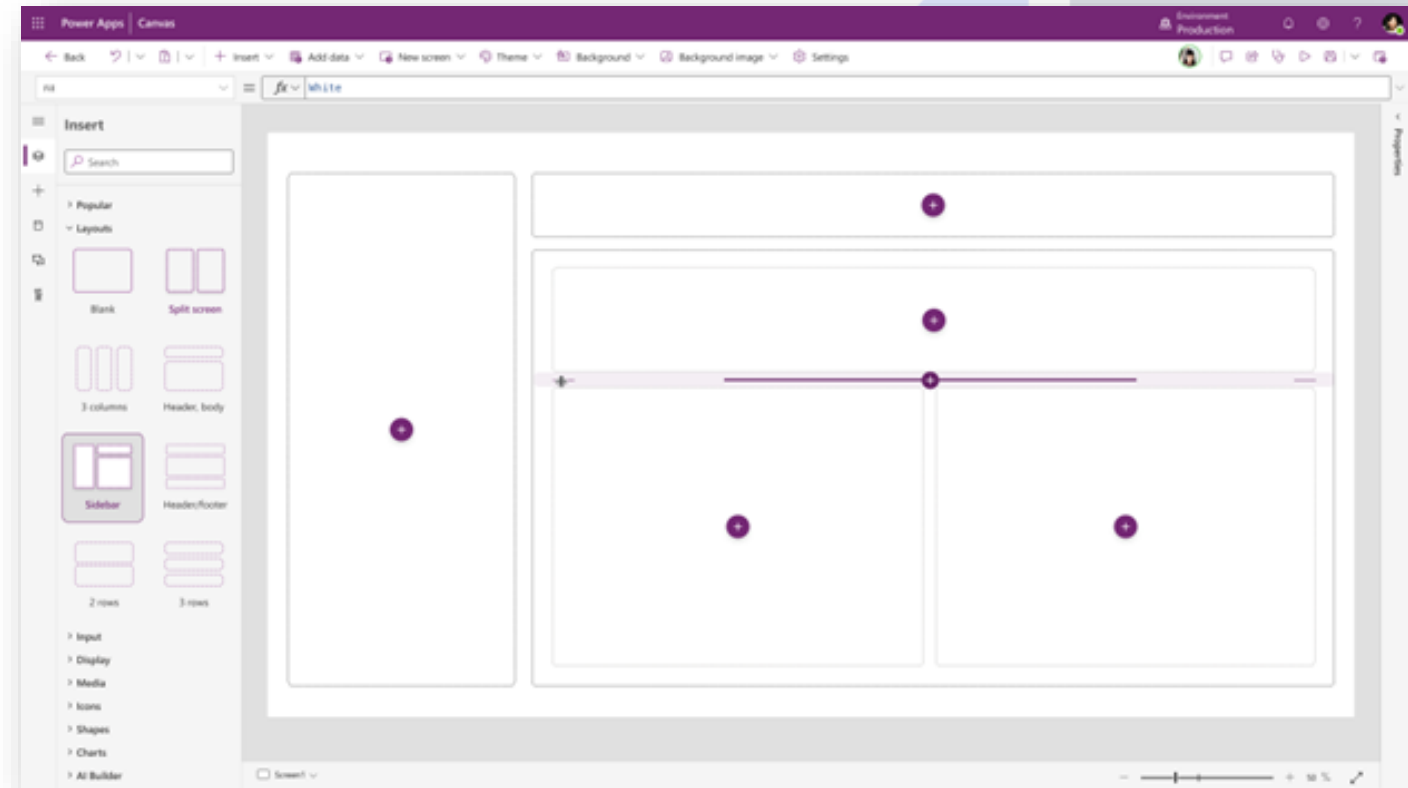


# Power Apps

## Canvas Apps

Drag and drop to build responsive pages more easily

- Another major enhancement in terms of Canvas Apps look and feel. Previously, you either designed for say Phone or Tablet, or wrestled with screen size breakpoints to build responsive apps. The new layout configuration allows makers to add and easily reorder controls within responsive layout containers. Makers can resize controls and adjust the spacing between them right in the authoring canvas.



- Public Preview July 2023 / General Availability Sep 2023



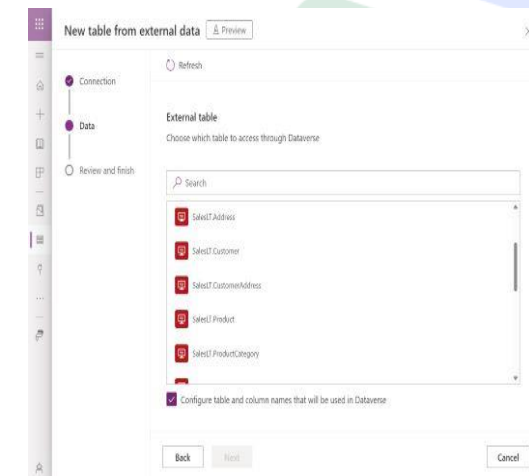
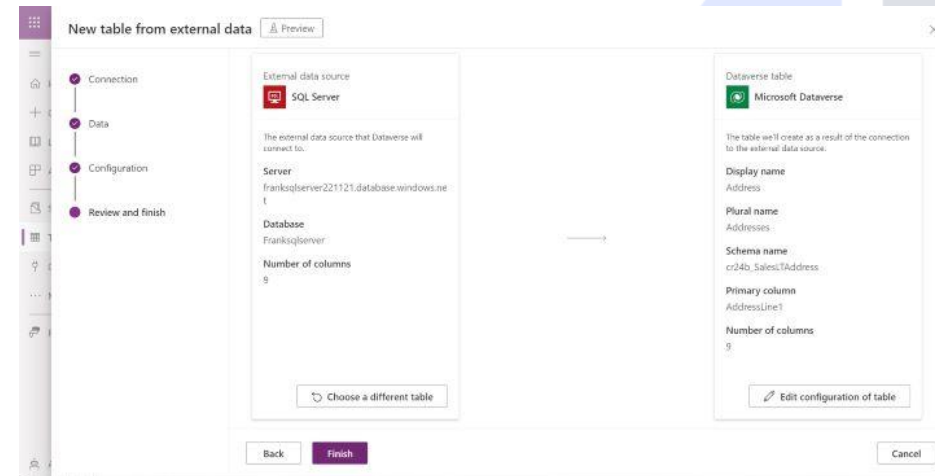
# Power Apps

Efficient maker experiences

## Create virtual tables easily in Maker Portal

- Bringing external data in Dataverse is always been challenging. With support for Virtualization, the data can continue to live in the source, without being migrated into Dataverse. Once virtualized, the tables act like standard Dataverse tables. For example, makers can create relationships between virtual tables and other Dataverse tables. In addition, makers can use virtual tables to work with data from SQL directly in a model-driven app.

- Public Preview Jan 2023 / General Availability April 2023



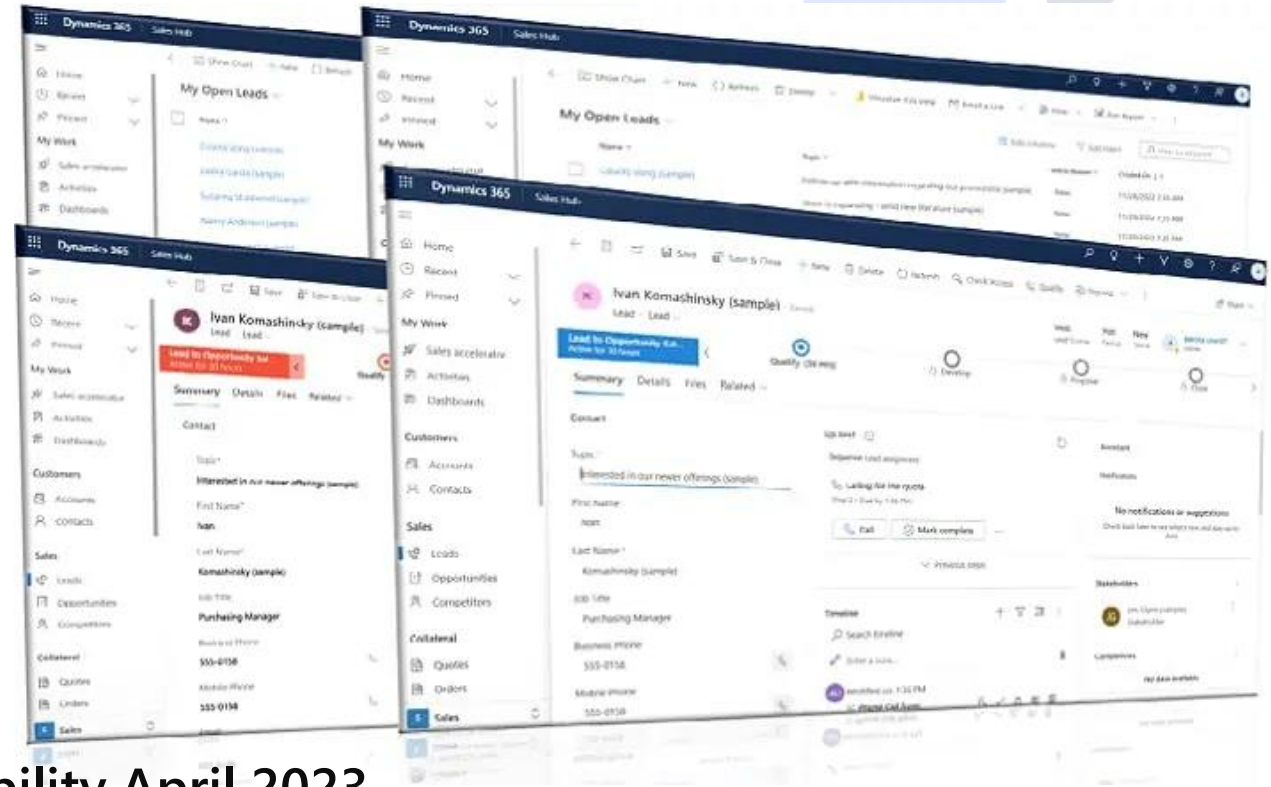


# Power Apps

Modern user experiences(Model Driven Apps)

Enjoy the new look and feel for model-driven Power Apps

- Model driven apps are aligning with the Microsoft Fluent Design System. This will mean an even more familiar interface as Fluent UI is used in many other products.



- Public Preview Jan 2023 / General Availability April 2023



D365PPUG UK

# Power Apps

Modern user experiences(Canvas Apps)

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## Build canvas apps by using new and refreshed controls

- The maker studio will allow canvas apps to use the Microsoft Fluent Design System. This is a massive leap forward in terms of native look and feel – previously we had control over styling using themes and individual component properties, but if you wanted Fluent UI then you were using additional controls like the Canvas App Creator Kit from the PowerCAT team. This is bringing Fluent UI controls directly to the maker studio which will make their usage and adoption much easier.

- Public Preview Feb 2023 / General Availability June 2023



# Power Apps

Every System connected(Canvas Apps)

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## Power Fx supports direct calls to Dataverse actions

- Power Apps users will find it much easier to access specialized Dataverse actions and better app performance. For apps that need to call many Dataverse actions, this will provide a significant performance boost. It'll be much easier to directly call Dataverse actions from the new Power Fx language element Environment. The Environment object allows authors to dot into actions available in the environment.

- Public Preview Jan 2023 / General Availability March 2023



# Power Automate

Cloud flows

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## Use natural language to create flows

- Using state-of-the-art AI models like GPT3, Power Automate can take natural language as input to create flows. Makers can use everyday natural language to describe the cloud flow that you want, and Power Automate will create it based on your written description of the scenario to automate.

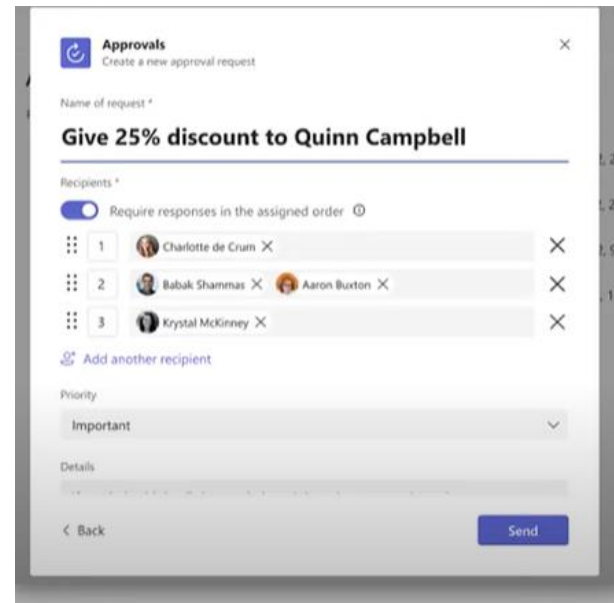
**General Availability May 2023**

# Power Automate

Cloud flows

## Define sequential approvals in Power Automate

- Allows user to create more complex approval workflows within teams and using power automate flows



**General Availability May 2023**

# Power Automate

## Cloud flows

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### Store cloud flow execution history in Microsoft Dataverse

- Currently cloud flow execution history is stored for 28 days, it's also challenging to report on the flows in terms of metrics, repeated errors, etc.
- This will allow you to store the flow run history in Dataverse, which should alleviate reporting and retention challenges.
- We'll need to look at which storage this is allocated and what the cost implications are, as that may lead to a requirement to extract into a data lake longer term.

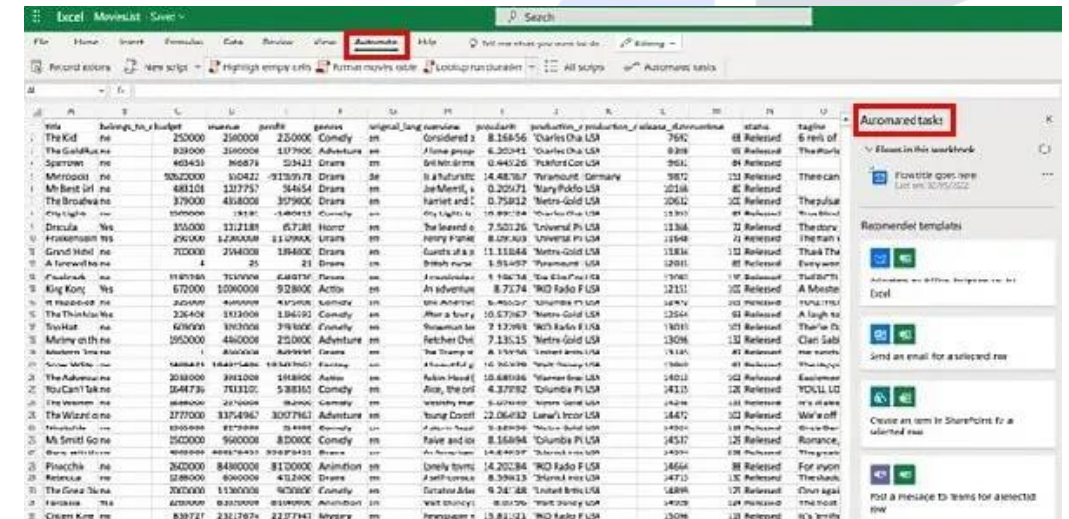
**General Availability Sep 2023**

# Power Automate

## Cloud flows

### Use native Integrations for flows in Excel

- Enables users to create and execute flows directly from within Excel, making it easier to work with Power Automate flows.
- From the 'Automate' menu in Excel, users can access Excel-specific templates. There is a template onboarding experience to support users setting up and also the ability to manage flows associated with the Excel file they are currently accessing.



- Public Preview March 2023 / General Availability May 2023



# AI Builder

## AI Builder

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### Retrain documents using the feedback loop feature

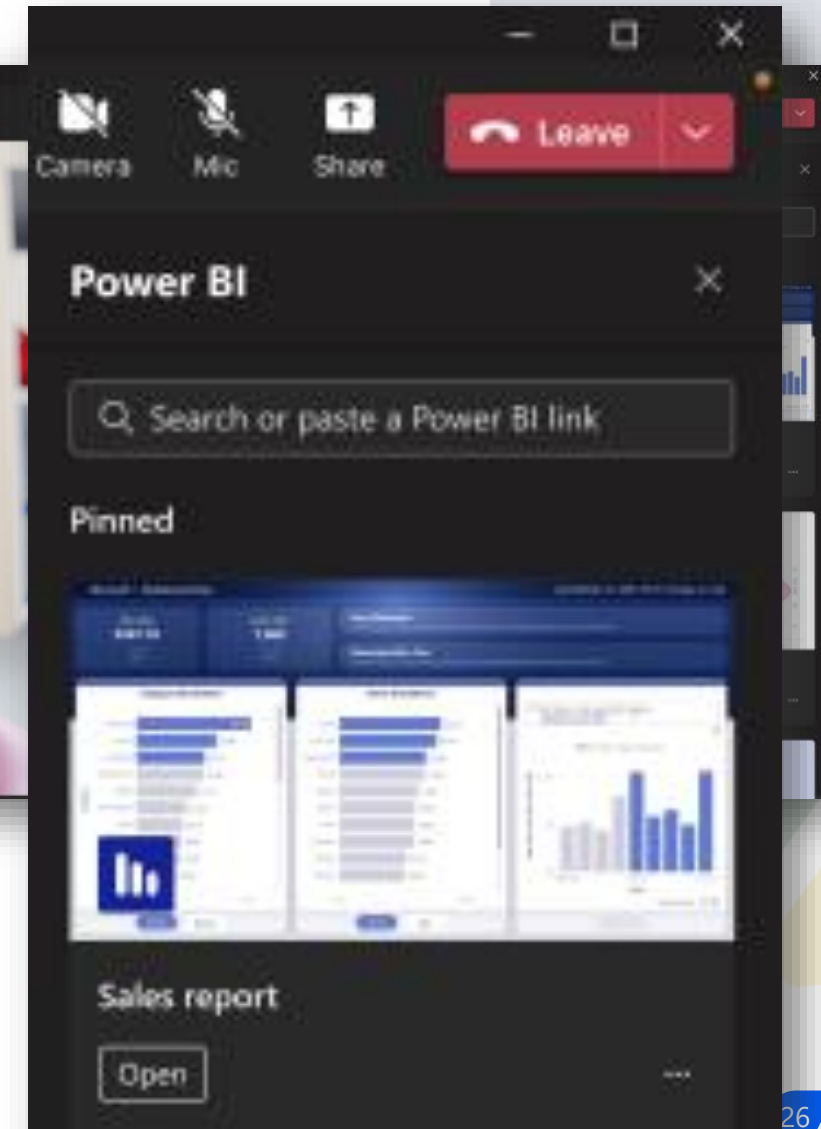
- A new feedback loop feature will allow documents which didn't yield sufficient confidence scores when analysed by AI Builder to be fed back into the training wizard queue for retraining. This could happen for example if new inbound document formats were being received which the model has not yet been optimized for. The training wizard queue will then allow users to correctly retag the documents and update the AI Builder model, so that similar documents are better analysed in the future.

# Power BI

## Power BI and Teams

### Integrate Power BI into Teams meetings

- A new Power BI tab will be available for meetings in Microsoft Teams. Users can add content like reports to Teams meetings, making it easier for attendees to find reports quickly, organize reports for attendees, and help them present those reports during meetings. Just imagine if every Teams user was also a potential Power BI user.

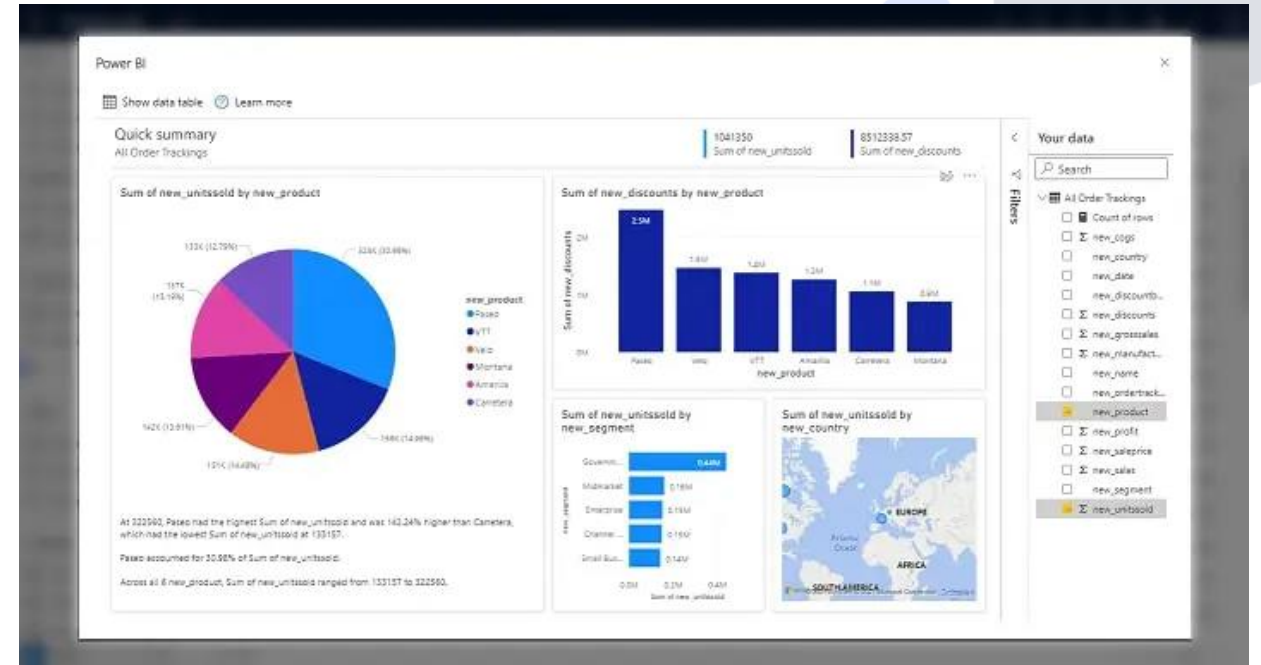


# Power BI

Power BI and Power Apps

## Power BI quick reports in Power Apps enabled by default

- Power BI quick report visualisations on a table, across all grid pages. This will be enabled by default across all apps, however the setting to disable this per app will be available



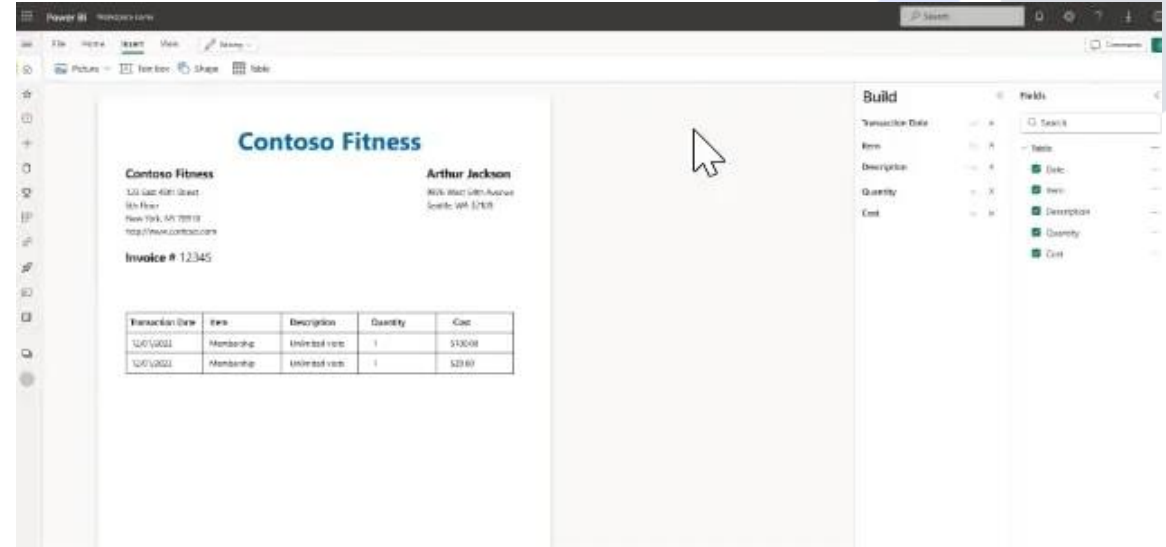
Public Preview July 2023/GA September 2023

# Power BI

Power BI

## Create and Share paginated reports on Web

- Makers will be able to create various operational reports, such as invoices or financial statements, with the low-code web-authoring experience





# Power Pages

Administration and governance

## Implement DLP sites

- Administrators will be able to enforce additional security measures through a data policy. By configuring this data policy, admins can avoid accidental exposure of their organizational data by makers to anonymous users.

Public Preview April 2023/GA June 2023







### Assign connectors

Business (0)

Non-business (879) | Default

**Blocked (1)**

Blocked connectors can't be used where this policy is applied.

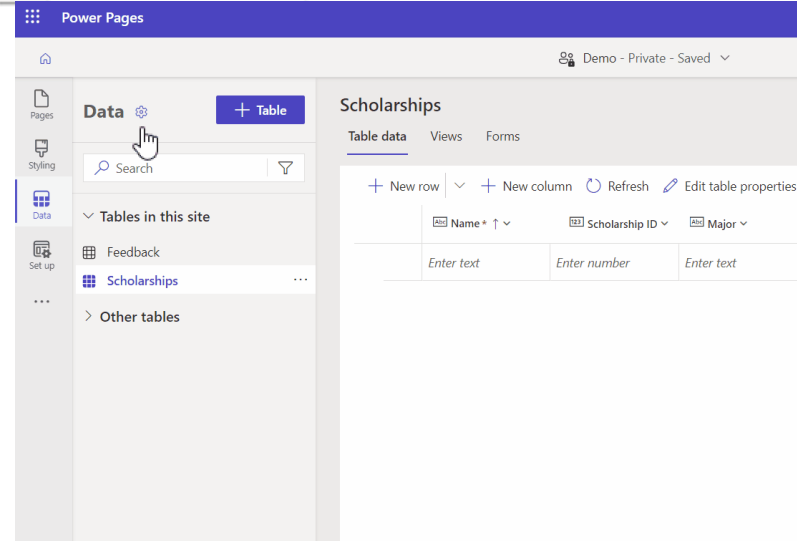
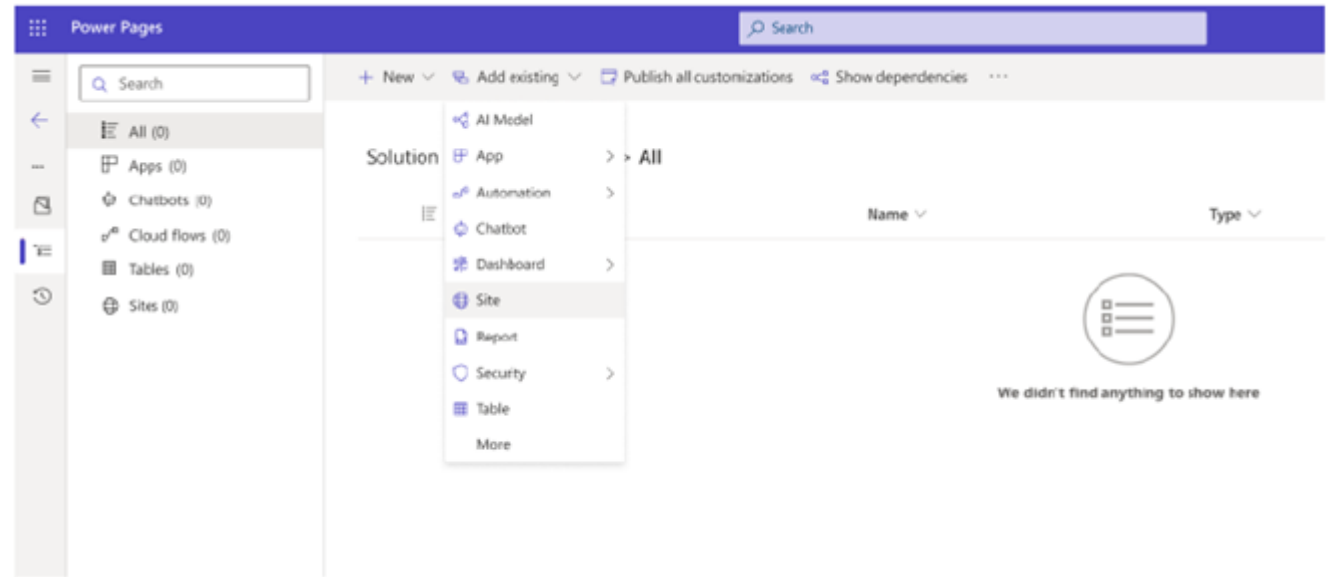
		Name 
		Access Dataverse data as an anonymous user in Power Pages 

# Power Pages

Manage Power Pages ALM using solutions

- Solution awareness for Power pages
- Makers will be able to effortlessly move a site and its components from one environment to another, thereby simplifying application lifecycle management (ALM) for Power Pages
- Data workspace now understands solutions.

**Public Preview April 2023**





# Power Pages

UX Support

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- Support for Bootstrap 5

**Public Preview April 2023**

# Dataverse APIs

Dataverse

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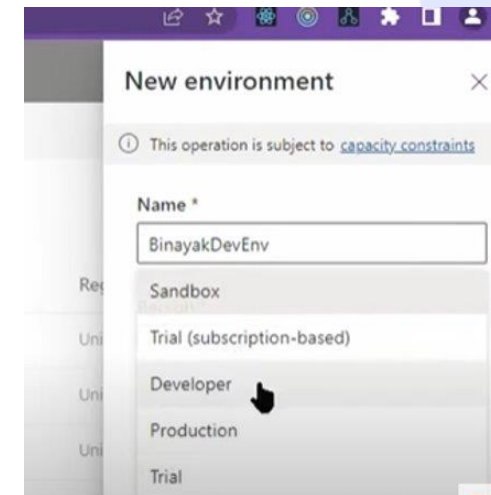
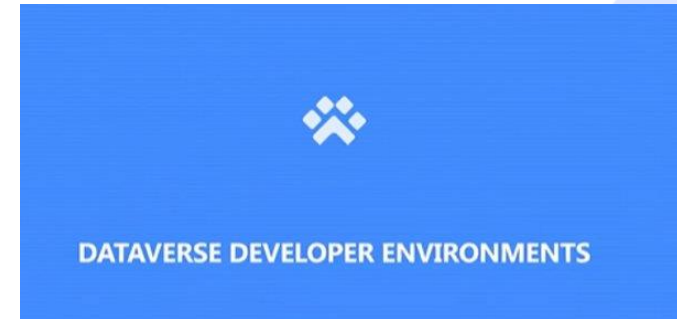
## Send alerts when Dataverse API hits usage limit

- When Dataverse API usage limits are reached, your experience of the platform's performance may decline as throttling is invoked. There is not clear indication in the admin portal of the cause. This feature will provide alerts, throttling reports and recommendations so that remedial action can be taken.

# Developer Plan

## Dataverse

- Each user now gets up to 3 developer environments regardless of licensing and capacity
- Self service creation (unless it's been disabled)
- Supports modern ALM practices like ALM Accelerator for Power Platform



# Demo – Power platform

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- Describe the flow – natural language processing - [Apps | Flows](#)
- Look up records easily with Modern advanced find- [Security Role risk assessments All Security Role risk assessments - Power Apps \(dynamics.com\)](#)
- Power BI Quick report in power apps enabled by default- [Security Role risk assessment: Information: SRA-001000 - Power Apps \(dynamics.com\)](#)
- Virtual table setup

# Highlights

Dynamics 365 Customer Engagement

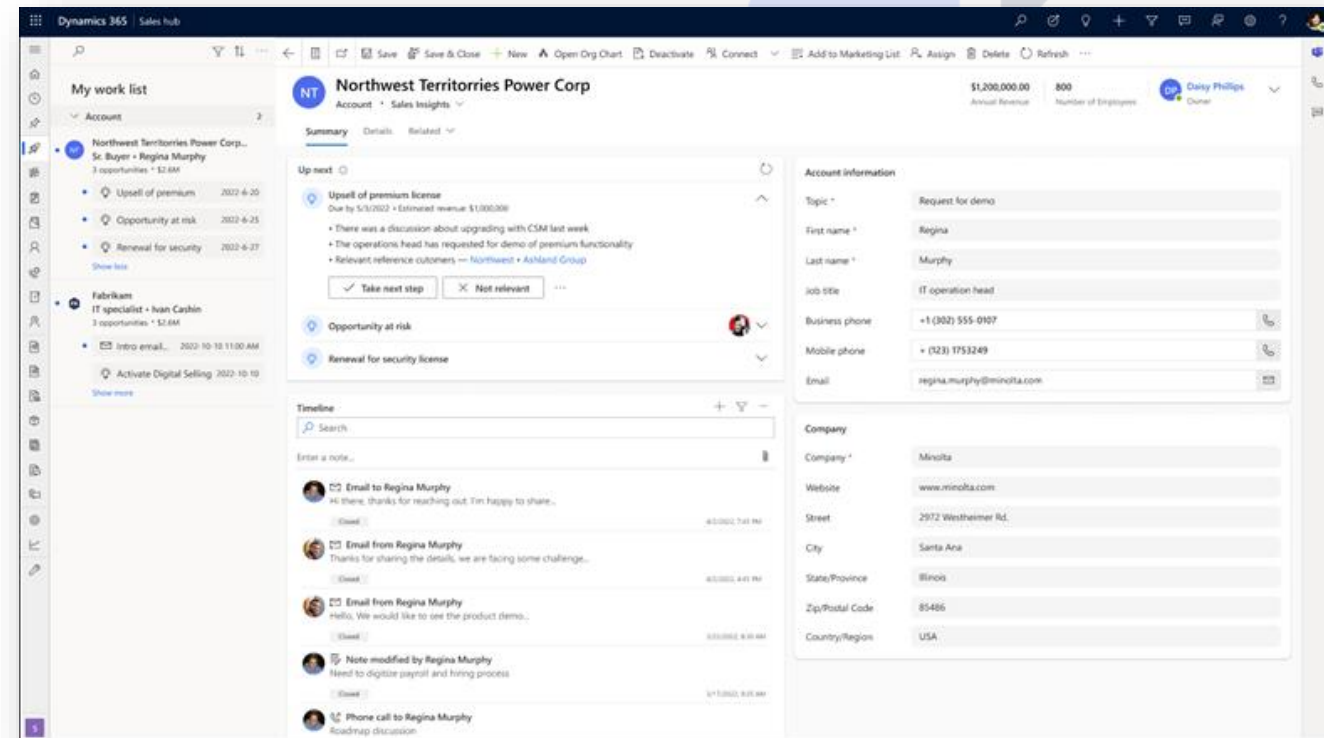


# Dynamics 365 Sales

Sales execution and sales force automation

Provide intelligent suggestions to improve seller effectiveness

- An easy-to-use, AI-powered suggestions solution to deliver the following information:
- A curated list of account-based suggestions for targeting the prioritized list of accounts.
- Sellers can follow the precise workflows to leverage the suggestions for improving sales effectiveness.
- Sellers can seamlessly collaborate with the team to collectively work on suggestions.



Public Preview May 2023

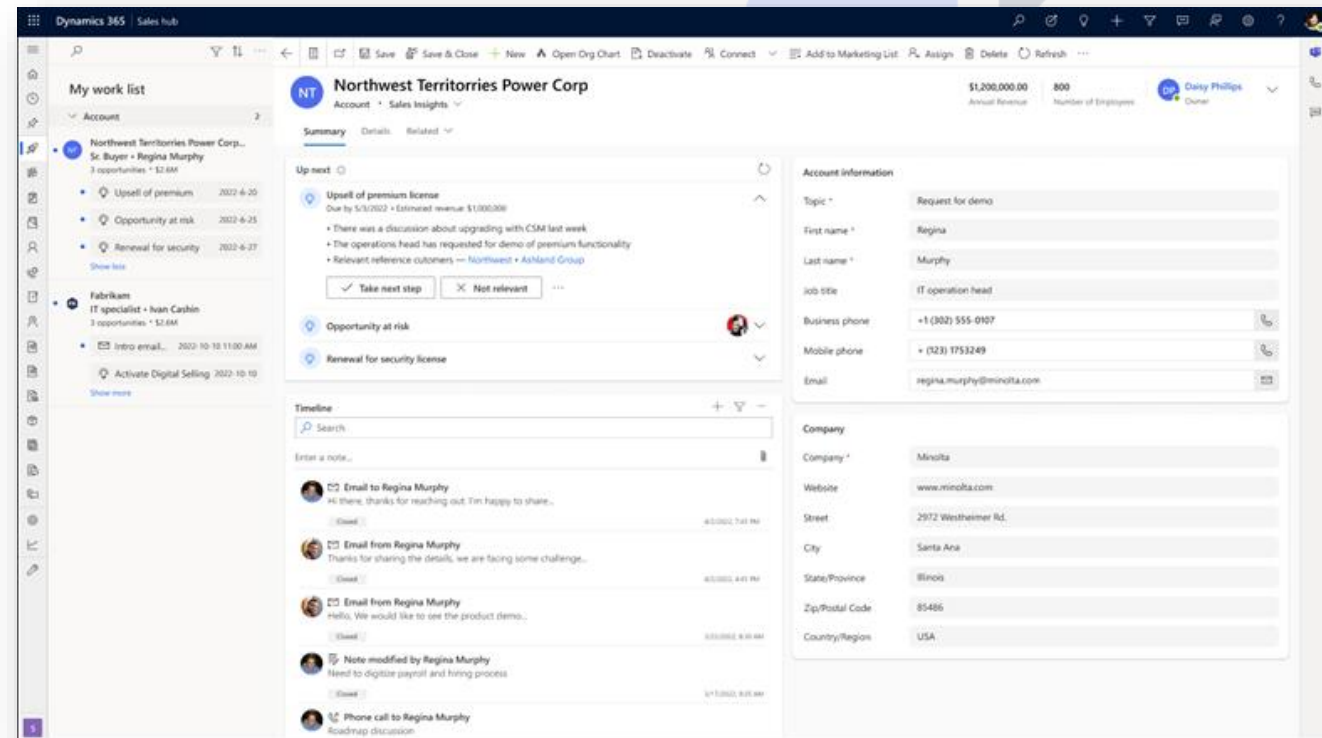
# Dynamics 365 Sales

Sales execution and sales force automation

## Automate the creation of follow-up tasks

- With this new AI-based feature, you can automate the creation of follow-up tasks, giving you back valuable time to focus on higher-priority items and avoid important tasks from falling through the cracks.
- The system automatically captures your follow-up tasks from various Office applications like emails, Teams messages, and Teams call transcripts, then nudges you with friendly reminders, thus enabling you to take them toward completion.

Public Preview July 2023





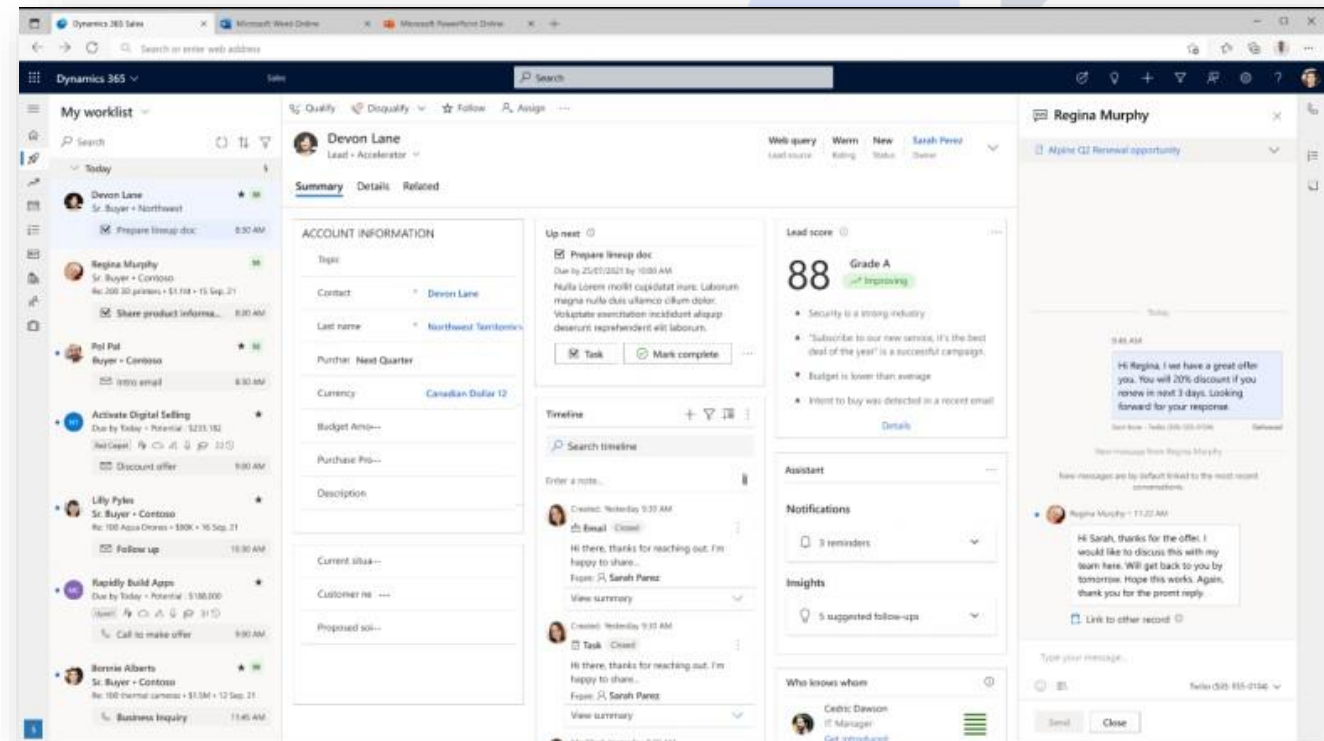
# Dynamics 365 Sales

## Sales engagement

### Engage with your Customers using SMS conversation

- The key capabilities that your sellers will be able to use as part of this feature include:
- Admins will be able to assign specific numbers to any user/team for SMS.
- Receive customer responses for SMS sent and revert to build an ongoing conversation.
- Send and receive SMS from all relevant Dynamics 365 Sales entity forms.
- Get real-time notifications for incoming SMS.

Public Preview April 2023/ GA May 2023



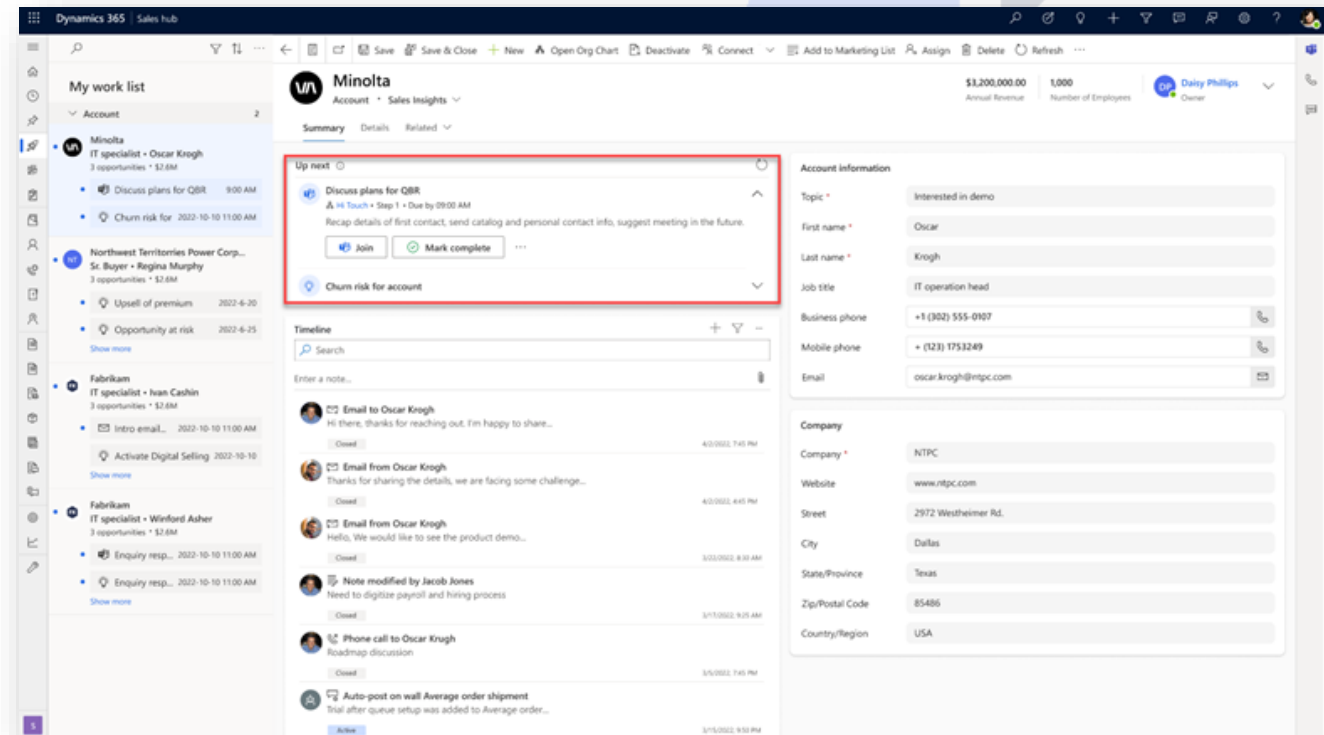
# Dynamics 365 Sales

## Sales engagement

### Guide sellers to favorable sales outcomes with next best step

- The up next widget displays the upcoming actions assigned to that record. In the current release, you can see any scheduled activities to be completed, whether manually created or via a sequence.
- This new feature will enhance this working area to include intelligent AI-based suggestions within the same widget to help guide the seller on follow-up actions. Sellers will see the suggestion surface and can decide to take action or dismiss it. Typical suggestions can be as follows:
- Help in composing emails.
- Automatic follow-up tasks.
- Suggestion on product recommendations.

**Early Access – Feb 2023/GA April 2023**



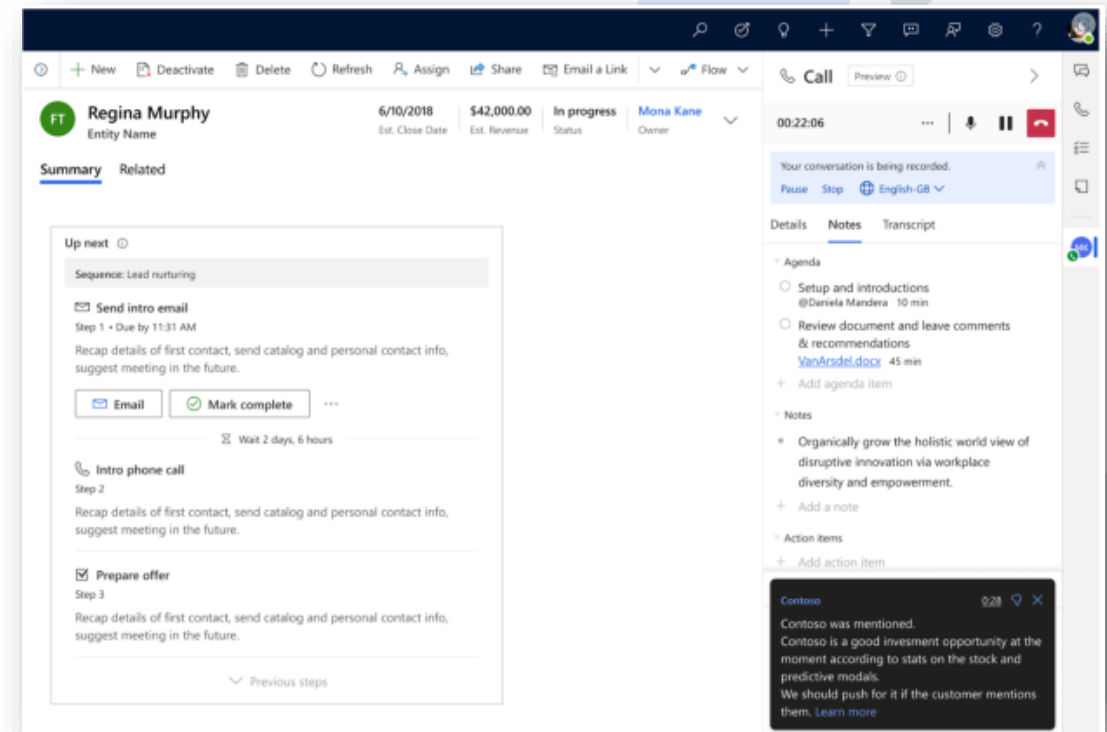
# Dynamics 365 Sales

## Sales engagement

### Get tips and suggestions while on a call with customer

- To make remote selling more powerful than face-to-face selling, it's important to surface real-time suggestions and tips while sellers are on a phone call with a customer. With this feature, sellers get real-time, AI-driven insights that enable them to easily access information on what to say when a sales call gets tough.
- With this feature, conversation intelligence automatically surfaces real-time suggestions and tips while sellers are on a phone call with a customer
- Get suggestions on product and service details, competitive battle cards, brand info, pricing, and more, while you are on a call with a customer.

Public Preview – July 2023/GA Sep 2023

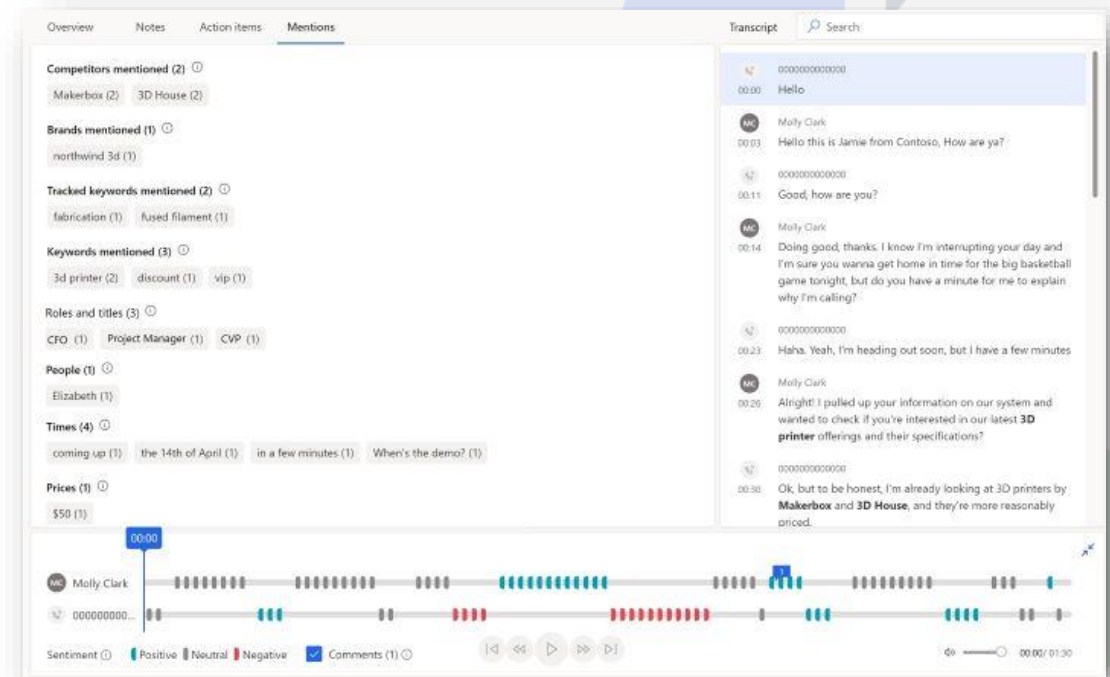


# Dynamics 365 Sales

## Sales engagement

### Capture crucial details of a sales call

- Make sure you never miss the most crucial sales call details, such as budget, authority, need, and timeline (BANT). In this release, conversation intelligence identifies discovery and sales-oriented mentions, surfacing these details in the call summary to ensure important signals are noticed to help progress their sale.
- As a seller or manager, you'll be able to see information related to budget, authority, need, and timeline (BANT) in the following places:
  - BANT classification for detected questions.
  - BANT-oriented call notes.
  - BANT grouping of mentions, including a new category for a person's role, such as manager, VP, accountant, etc.
  - BANT topics for playback segmentation.



**Public Preview – August 2023/GA Sep 2023**

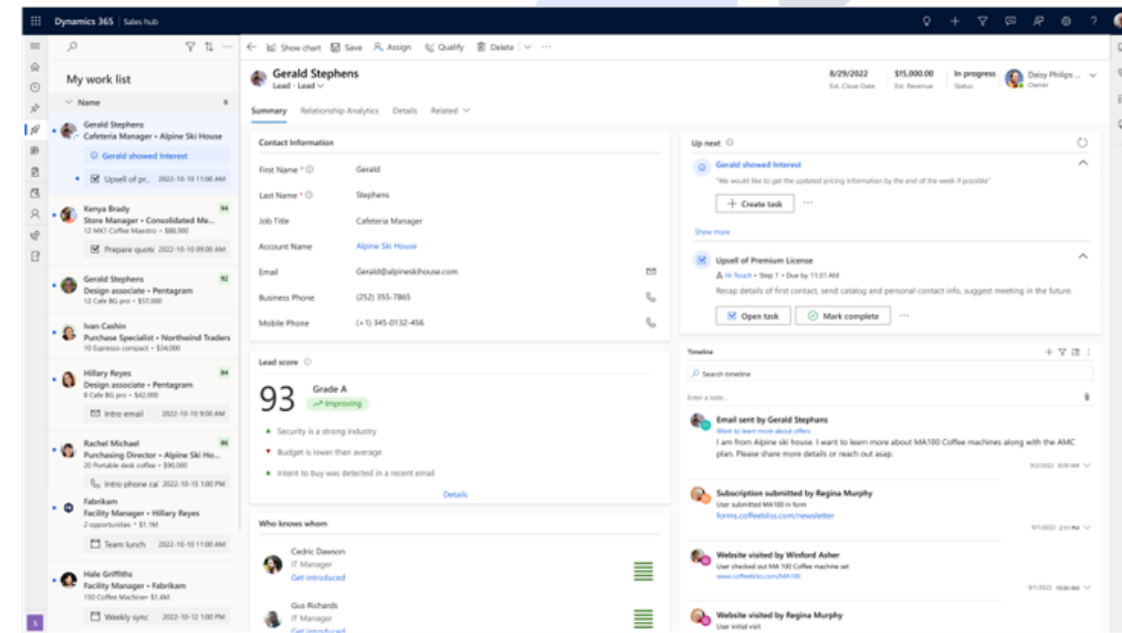
# Dynamics 365 Sales

## Sales engagement

### Improve lead qualification with intent detection

- Sales teams receive millions of potential leads each year. Each lead requires a seller's time to analyze, engage and determine the potential customer's needs. Sellers' capacity and efficiency must be maximized while working on these leads.
- This new AI-based feature would detect customer intent from emails and ensure that good quality leads are acted upon by the sellers at the right time, thus saving precious time for the sellers. It helps sellers proactively engage with their customers.
- This feature helps fast-track the lead qualification process, increasing sales effectiveness and creating operational efficiencies in the lead management process.

Public Preview – Sep 2023

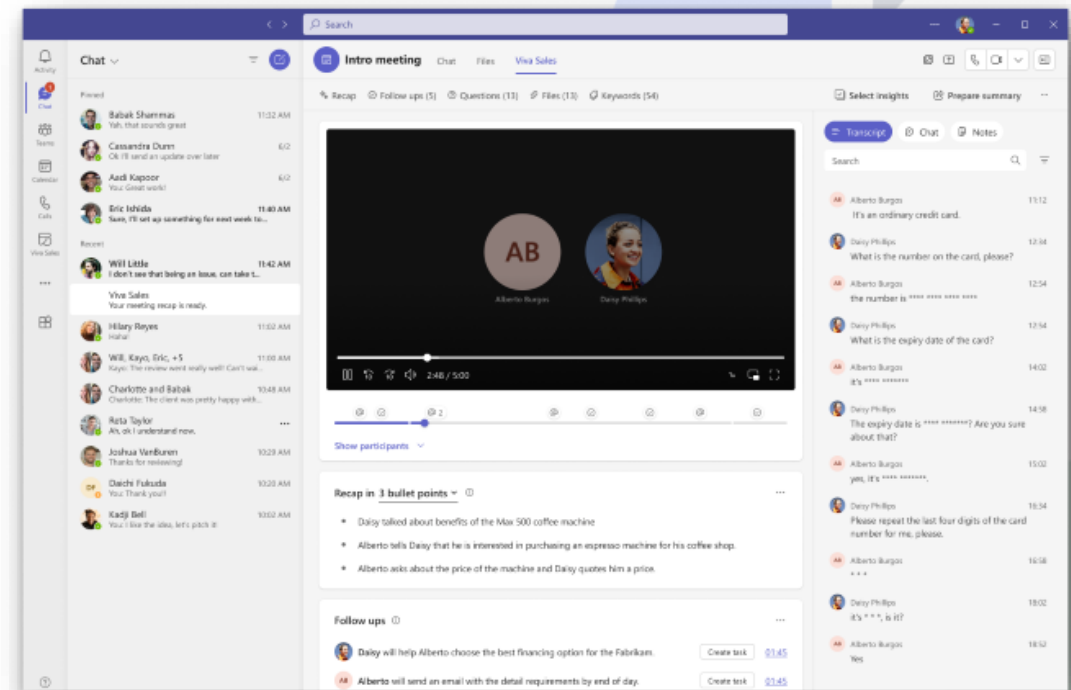


# Dynamics 365 Sales

## Sales engagement

### Redact sensitive personal data from customer calls

- When sellers engage with customers over a call, customers may share their data, such as credit card information, purely based on trust. It's vital to protect such sensitive data to help organizations build trust with their customers and comply with strict privacy regulations
- As part of the personal data redaction process, our AI technology identifies and masks sensitive information, such as credit card numbers and identifiers, in customer calls



Public Preview – Sep 2023

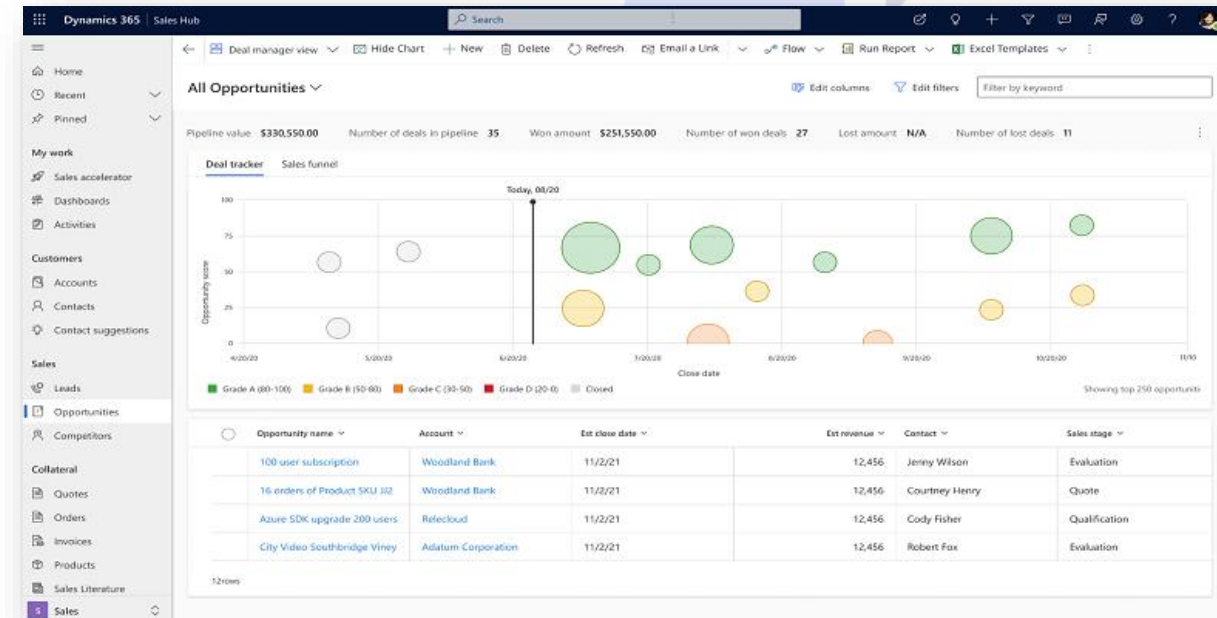


# Dynamics 365 Sales

Revenue intelligence

Manage opportunities more effectively using the new pipeline view

- The new opportunity view in Dynamics 365 Sales enables you to get a bird's-eye view of your pipeline and manage your opportunities more easily and intuitively than ever before. The new opportunity experience has been designed with sellers in mind, saving time for selling by removing many redundant steps and improving sales efficiency. It eliminates many processes that sellers would normally need to do and streamlines everything into a single workspace. Sellers can uncover the deals that need their attention and act right away. Additionally, they can tailor their experience and personalize the view.



GA– April 2023

# Dynamics 365 Customer Service

Agent experiences

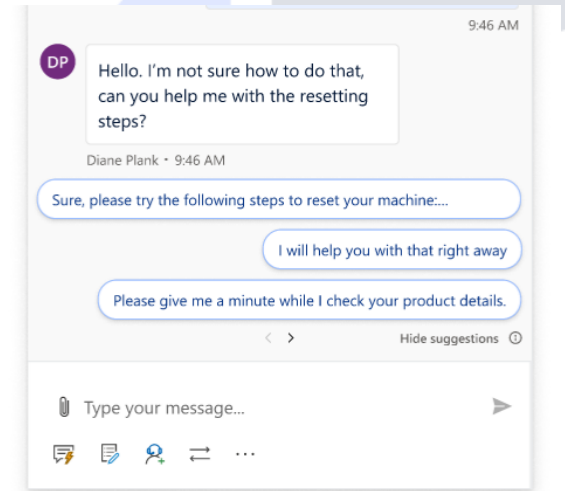
## Artificial Intelligence

### Accelerate time to resolution with AI-suggested replies

- Suggested replies in Customer Service will be powered by the state-of-the-art natural language processing technology used in Nuance Agent Coach

### Keep track of conversations with AI-generated summaries

- AI-generated conversation auto-summarization makes it easier to get and share conversational context, whether you're catching up on a conversation, wrapping up a case, or working with other agents to solve a customer's issue. Using these AI-generated summaries, you can quickly share context about the customer's issue, and the resolutions tried. With structured context, you can collaborate with other agents and subject matter experts to resolve the customer's problem faster and more effectively.



### Why does the AI-summary seem unhelpful?

- ☒ The issue description isn't accurate

What would be a more accurate issue summary?

- ☒ The resolution summary isn't accurate

What would be a more accurate resolution summary?

Submit

Cancel

GA— April 2023



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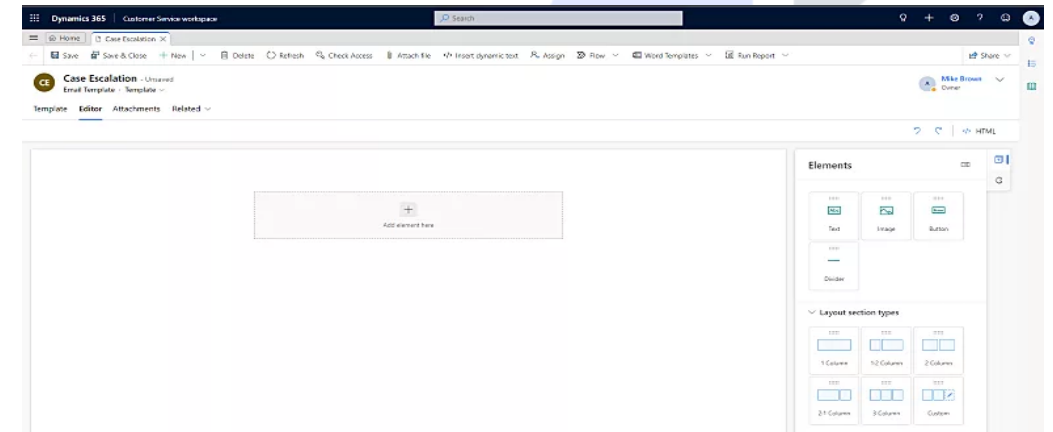


# Dynamics 365 Customer Service

Agent experiences

## Create email templates with new template designer

- Designer from drag and drop editor from D365 marketing
- Enables users to quickly create consistent, professional email templates with images, buttons and other components



GA– April 2023



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# Dynamics 365 Customer Service

Agent experiences

Create and manage cases efficiently with enhanced case form

- Find info quickly and manage cases
- Add key information to the case quickly without losing sight of customer details
- Provide updates on existing customer cases without interrupting the case creation flow or switching tabs
- Take notes during case creation
- Upload multiple attachments directly to the case

The screenshot displays the Dynamics 365 Customer Service workspace interface. The main window is titled 'New Case' and shows a form for creating a new case. The form is divided into several sections: 'Basic details', 'Attachments (2)', 'Description', and 'Notes'. The 'Basic details' section includes fields for Type (Question), Customer (Angel Chiu), Title (How to clean Contoso CX300 coffee machine), Product (CX300), Serial Number, Subject, Origin, Priority (High), Case Status (In Progress), Entitlement (Premier support), and Parent Case. The 'Attachments (2)' section shows two attachments: 'Contoso coffee machine.jpg' (5 kb) and 'CX300 descaling guide.docx' (12 kb). The 'Description' section contains a text area with a placeholder image and a description of the issue. The 'Notes' section has a text area with a placeholder note. On the right side, there is a 'Customer Details' panel showing contact information for Angel Chiu, including company name, email, mobile phone, preferred method of contact, and address. Below this, there is a 'Recent Cases' section listing several cases with their status and priority.

# Dynamics 365 Customer Service

Supervisor experiences

Create and manage cases efficiently with enhanced case form

- Find info quickly and manage cases
- Add key information to the case quickly without losing sight of customer details
- Provide updates on existing customer cases without interrupting the case creation flow or switching tabs
- Take notes during case creation
- Upload multiple attachments directly to the case

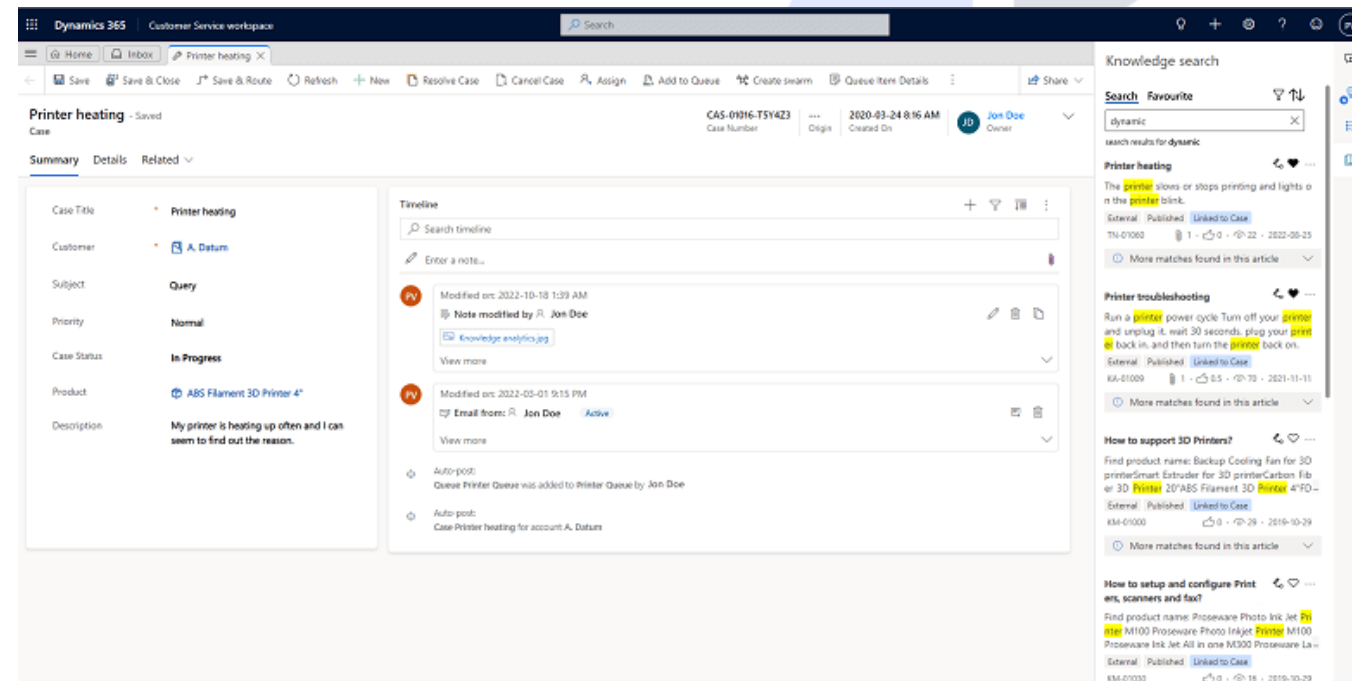
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# Dynamics 365 Customer Service

Agent experiences

## Mark knowledge articles as favorite

- Add or remove articles from a favourite list , saving time spent searching for articles
- Can be viewed in the form-embedded knowledge search , app-side- panel based knowledge search contrns and independent knowledge search control



Public Preview – Jan 23/ GA – April 2023

# Dynamics 365 Customer Service

Omnichannel

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## Updates and Enhancements

Making the Customer Service workspace app visible by default for certain Omnichannel security roles.

Previously additional roles had to be added to users to give them access, but now assigning these roles will give them access by default. The roles are:

- Omnichannel agent
- Omnichannel administrator
- Omnichannel supervisor

Enable customers to keep queue spot, get callbacks

This feature lets customers request a call back from an agent instead of waiting on hold. So yes, this relates to the voice channel in Customer Service. Admins can set configure this feature for specific queues using the Direct Callback overflow action. When a customer requests a call back and that work item is assigned and accepted by an agent, the call back to the customer will automatically be initiated.

# Dynamics 365 Marketing

Data and AI

Measure marketing activity, web traffic and conversion goals using automatic UTM tagging

- UTM Codes track sources of web traffic for effective conversion attribution.
- Auto tag messages with UTM markups. This ensures that each link includes default UTM codes or custom parameters.

Public preview from Feb 2023/ GA – April 2023

Turn on UTM tracking



Once turned on, the UTM values will be automatically added to every link in your messages.

UTM parameters and values

UTM source	Dynamics 365 Marketing
UTM campaign	Journey name
UTM medium	Channel (e.g. Email, Text message, etc.)
UTM content	Message name
UTM term	N/A

Turn on

Cancel

# Dynamics 365 Marketing

Moments - based

Prevent message fatigue by limiting the messages sent to a customer in a specific period

- Caps can be set for daily, weekly and monthly frequencies across email, SMS and other channels.
- Marketers can decide which journeys will have frequency caps enabled or disabled.

Public preview from Feb 2023/ GA – April 2023

## New frequency cap setting

### Business unit \*

Choose a business unit to apply the frequency cap to

West US

### Maximum frequency per contact point ⓘ

Define the maximum number of commercial messages your customers can receive per channel in real-time marketing. The recommended number varies greatly by brand and vertical. [Learn more](#)

Channel ⓘ	Daily	Weekly	Monthly
Email	2	5	---
Push notification	2	5	---
Text message	---	4	---

# Dynamics 365 Marketing

Moments - based

Easily create modern forms using the new intuitive form experience

- Effortlessly create smart forms to place on your websites and capture your customers' attention while allowing them to input their details
- New Drag and drop editor will allow advanced forms to be created without development expertise.

GA April 2023

The screenshot displays the Dynamics 365 Marketing 'Marketing Form 2' editor. The interface includes a top navigation bar with 'Save', 'Test send', 'Check content', and 'Ready to send' buttons. Below this is a 'Design' tab and a 'Preview and test' tab. The main canvas shows a 'Lead Generation Form' with a header 'Hello, we're excited to host you. Do fill up this form and help us get to know you better.' and two input fields: 'What is your name?' and 'What is your company name?'. A right-hand sidebar titled 'Elements' provides a 'Standard' palette of form components such as Short text, Multi choice, Long text, Yes / No, Statement, Dropdown, Number, Title, Paragraph, Divider, Media, and Date. A vertical toolbar on the left contains various editing tools.



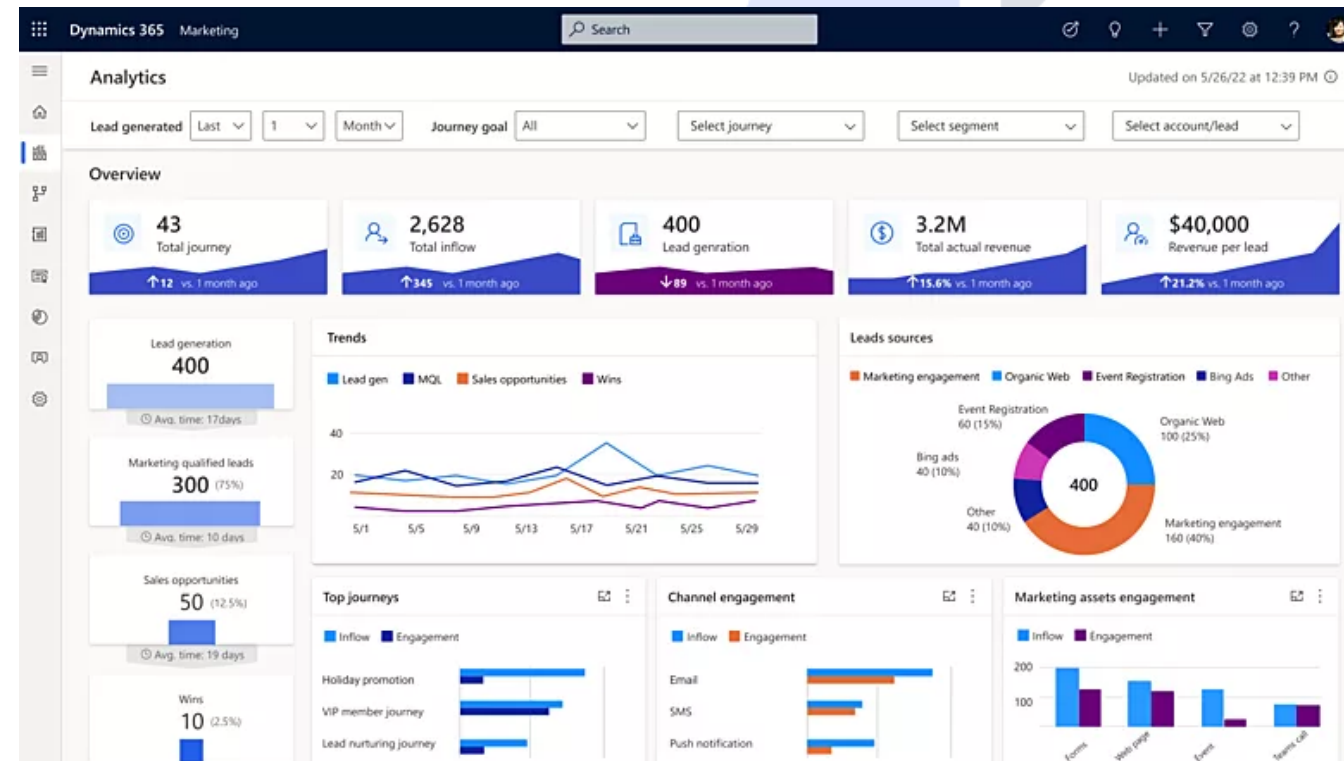
# Dynamics 365 Marketing

Data and AI

Optimize B2B marketing and accelerate your pipeline with OOB dashboards

- Native integration with D365 sales will help marketing leaders to assess the top sources of leads that drive conversion.
- New dashboards tracking pipeline development and analysing the contribution of journeys, content and marketing messages across business processes

Public preview from July 2023



# Demo – Customer engagement

- Customer service
- **Enhancements to simplify case management**-[Case: Case for Interactive experience: Average order shipment time - Dynamics 365](#)
- **Create email templates**-[Email Template: Template: Release wave template - Dynamics 365](#)
- **Multitask efficiently with enhanced**

## Sales

- **Improved opportunity form**-[Opportunity: Opportunity: 10 orders of Product SKU JJ202 \(sample\) - Dynamics 365](#)
- **Up next widget** -[Dynamics 365](#)
- **Sales accelerator**-[Sales Insights settings - Sequences - Microsoft Dynamics 365](#)

# QR Codes



Feedback Form

[https://www.d365ppug.com/uk/  
feedback](https://www.d365ppug.com/uk/feedback)



Agenda

[https://www.d365ppug.com/uk/  
schedule](https://www.d365ppug.com/uk/schedule)

# THANK YOU

Looking forward to connecting!

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