

DYNAMICS 365 TEN BEST PRACTICES

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**DYN 365
SUPPORT**

About enCloudg

- Dynamics 365 Cloud Customer Relationship Management – Silver 2014 - present
- 15 years experience working with small to mid sized businesses to modernize sales, marketing customer service
- Work with companies throughout the US and Canada
- Primary focus is on Cloud-based Dynamics 365 Customer Engagement Platform

About Dynamics365Support.com

- Premier provider of low cost fixed fee support services for Dynamics 365, PowerApps and Flow

Microsoft
Partner

Silver Cloud Customer Relationship Management
Silver Small and Midmarket Cloud Solutions

10 BEST PRACTICES FOR DYNAMICS 365

1. Set a Profile Picture
2. Update your Personal Settings
3. Use Relevance Search
4. Timeline Search for activities in records
5. Create Custom Personal Views
6. Create Custom Charts and Dashboards
7. Update data using Excel
8. Build Word Templates and send as PDFs
9. View Activities on a calendar
10. Collaborate with Teams

Personal Settings

Best Practice #1 – Set your profile picture

Personal Settings/View your user Information/Click on Circle in upper left corner and upload an image



Best Practice #2 – Update Personal Settings

- Default Pane and Tab
- Records per page – set to 250
- Advanced Find – Details
- Default Search Experience – Relevance Search
- Time Zone
- Currency
- Personal email Templates
- Email signatures
- Track email
- Create Contacts/Leads for unknown tracked emails
- Turn off error notifications

Search Options

Best Practice #3 – Use Relevance Search



Better search results than Categorized Search across all entities – wildcards not needed!

Filter across different entities, time periods and users

Admins should optimize Search – remove entities not used –ie Fax and add in custom entities

<https://docs.microsoft.com/en-us/power-platform/admin/configure-relevance-search-organization>

Best Practice #4 – Timeline Search

Search activities and notes withing a record for keywords

Find old emails and other activities and notes

Filter by user and time period

Create Custom Views and Dashboards

Best Practice #5 – Create Custom Views



<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/save-advanced-find-search>

Best Practice #6 - Create Custom Charts and Dashboards

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/start-your-day-dashboard-chart#:~:text=for%20the%20calculations.-,Create%20a%20personal%20dashboard,Dashboard%2C%20and%20then%20select%20Create.>

Update Data and use Word Templates

Best Practice #7 – Update data in Excel



Best Practice #8 – Build Word Templates and email as pdfs in one step

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/start-your-day-dashboard-chart#:~:text=for%20the%20calculations.-,Create%20a%20personal%20dashboard,Dashboard%2C%20and%20then%20select%20Create.>

View Activities on a Calendar and Collaborate with Teams

Best Practice #9 – View activities on a calendar



<https://community.dynamics.com/365/b/omarzaarour-transform365/posts/using-the-calendar-control-view-in-the-unified-interface>

Best Practice #10 – Collaborate with Teams

<https://docs.microsoft.com/en-us/dynamics365/teams-integration/teams-collaboration-enhanced-experience>