TechTalk

December 15, 2022

Optimizing the Experience in Dynamics 365 Finance & SCM

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Dynamics 365
Design Manager

Jason Green
Power Apps (F&O)
Program Manager

Objectives

- Understand the importance of optimizing user experiences
- Review the personalization capabilities available for F&O apps
- Learn how to approach optimizing for your organization

LESS
I$
MORE

Accountant
Customer Service
Auditor
Customer Service
Inventory Accountant
Recruiter
Chief Financial Officer
Accountant
Waterspider
Budget Clerk
Inventory Accountant
Chief Financial Officer
Financial Controller
Benefits
Cost Accountant
Project Manager
Recruiter
Resource Manager
Receiving Clerk
Accounts Payable
Shipping Clerk
Accounts Payable
Lease Manager
Accountant
Human Resources
Collections Manager
Credit Manager
Logistics
System Administrator
Product Designer
Production Planner
Auditor
Accounts Receivable
Auditor
Collections Agent
Resource Manager
Compensation
Human Resources
Quality Control
Machine Operator
Shipping Clerk
Accounting Manager
Logistics
Buying Agent
Collections Agent
Cost Accountant
Project Manager
Machine Operator
Credit Manager
Receiving Clerk
Production Planner
Benefits
System Administrator
Lease Accountant
Accounts Receivable
Purchasing Agent
Purchasing Agent
Kit Manager
Financial Controller
Budget Clerk
Compensation

Dynamics 365 Finance and Operations was designed to show all content by default.

The user experience should be tailored to each user through

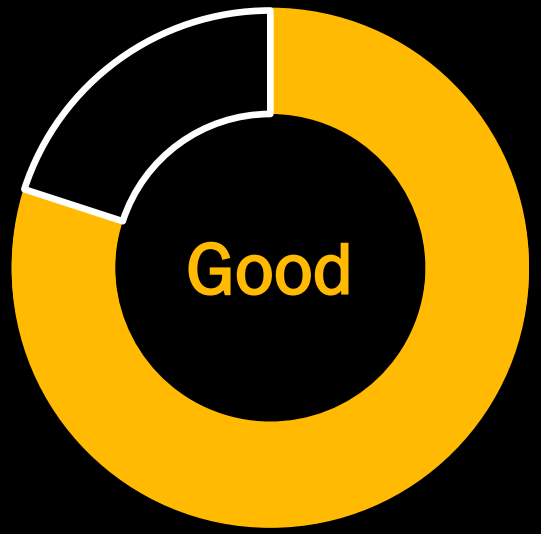
- Role-based security
- Configuration keys
- Personalization

Although, some of our users tell us

- their experience is overwhelming or complex
- they use less than 50% of the UI they see
- it takes too many steps to do their work

We need your help to optimize the user experience through personalization

Designed experience



Optimized experience

We would love your feedback

Go to Menti.com 2637 1394

End User Expectations

It just works for me

Designed for me

Helps me be efficient

It just works

Consumergrade experiences

8 in 10 people are connoisseurs of great user experience and consciously pass on products that don’t meet their standards

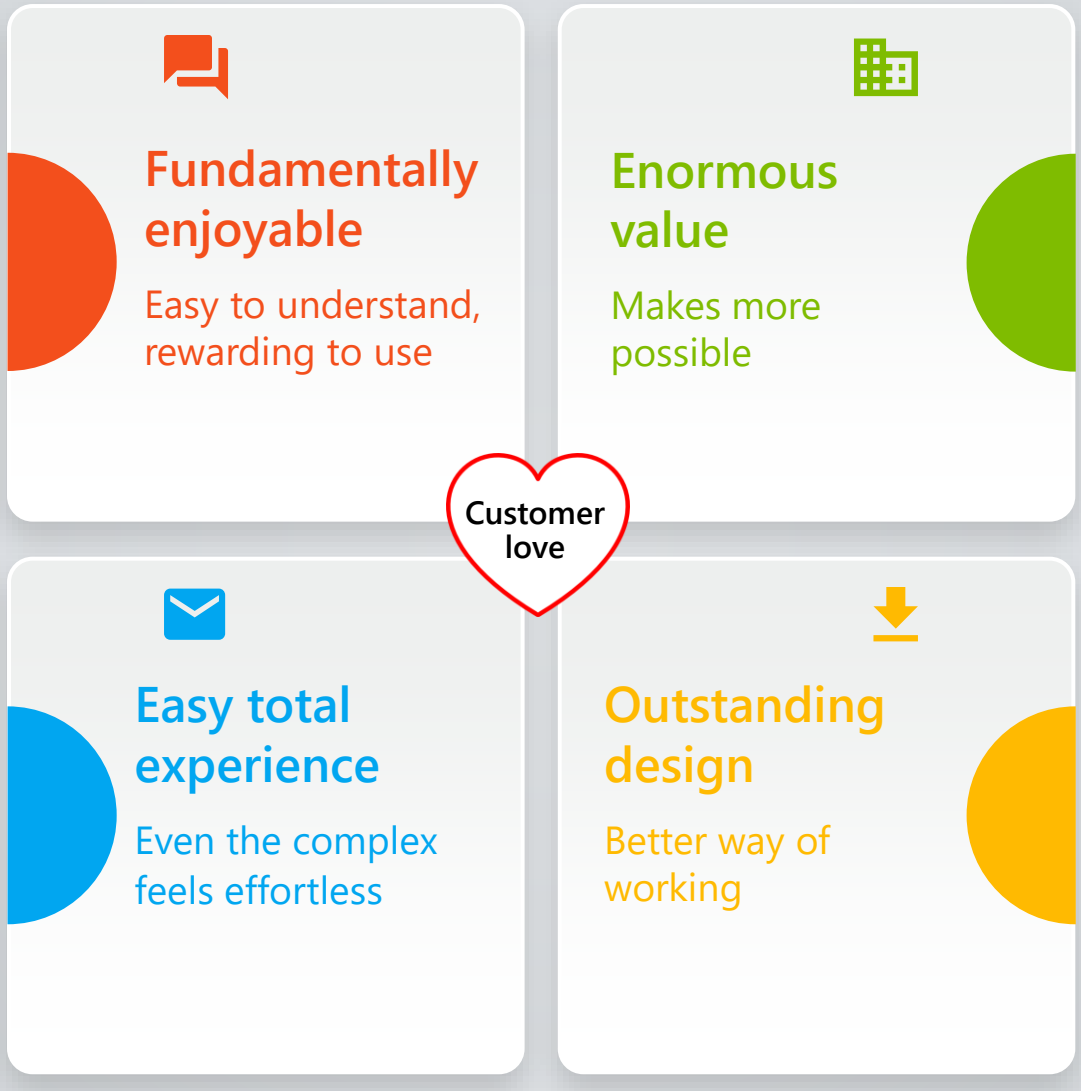
Forrester
2022

ERP products have a reputation for having overly complicated experiences

Dynamics 365 users expect
consumergrade experiences

CONSUMERGRADE PRODUCT EXPERIENCE FRAMEWORK

A decision-making tool for building successful human centered products



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Designed for me

Less is more

Help me be efficient

I’m trying to get my work done

Desire Paths

Examples of users being efficient in Dynamics 365

- Creating favorite menu items
- Memorizing keyboard shortcuts, so they don’t have to go between the keyboard and the mouse for data entry
- Editing data in Excel because it is faster to do mass updates than in a Dynamics 365 grid
- Spinning up a new instance of Dynamics 365 in another browser tab to continue working after taking an action that will take some time
- Searching for the forms using navigation search
- Creating Views and Tiles of popular queries they perform so they don’t have to filter every time

We need to optimize the experience for each person using Dynamics 365, so they feel ...

- It just works for them
- Designed for them
- Helps them be efficient

Personalization demo

Jason Green

Optimizing for your company

Creating corporate views that tailor the experience to your organization

Optimizing for your company

Creating corporate views

1. **Identify your frequently used forms for your organization**

Typical Frequently used forms

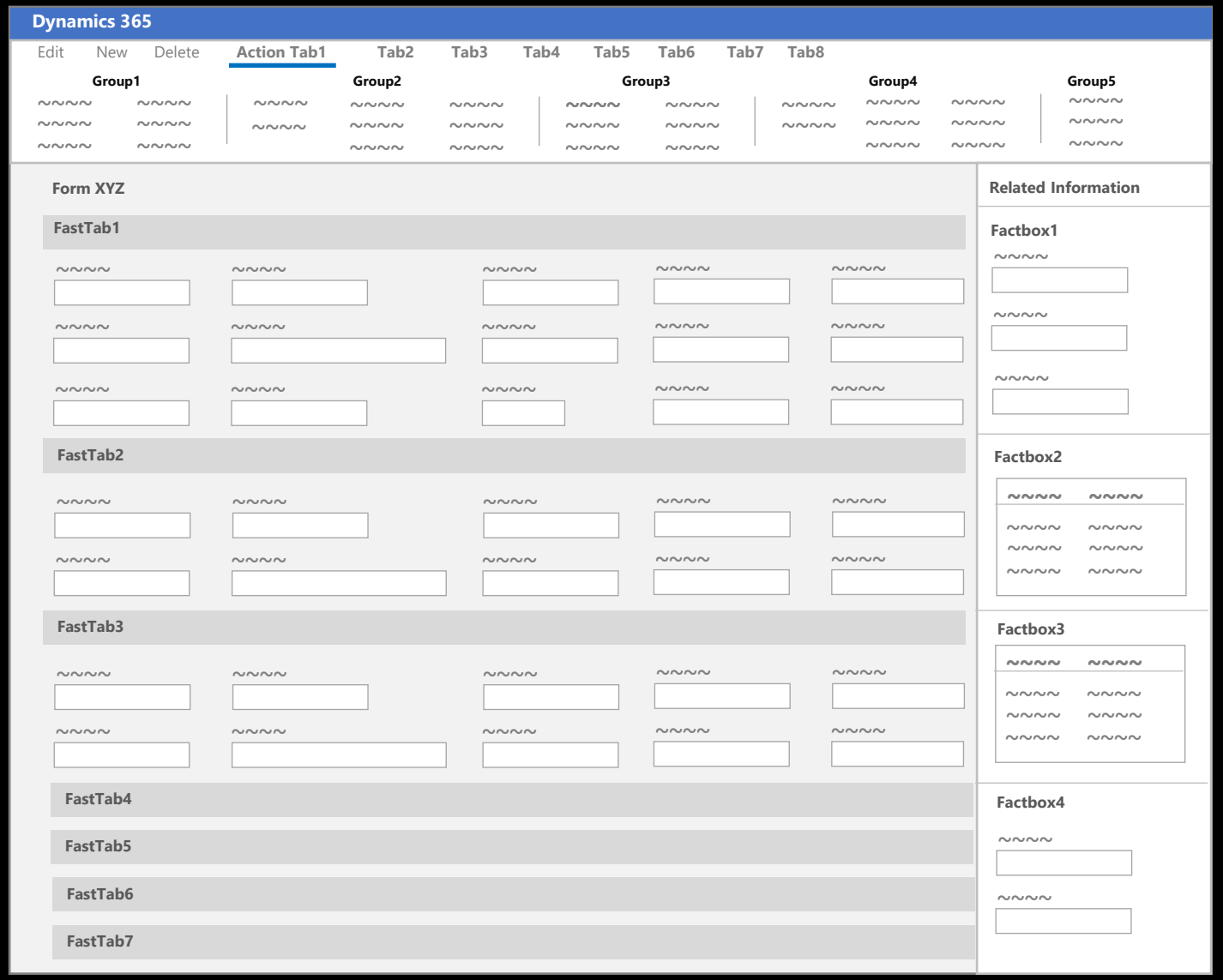
- Sales Orders List & Details
- Purchase Order List & Details
- General Journal
- Inventory on hand
- Inventory Transactions
- Product List & Details
- Worker List & Details
- Customer List & Details
- Customer Transactions
- Vendor List & Details
- Vendor Transactions
- Vendor Invoice
- Free Text Invoice
- Project List & Details

Optimizing for your company

Creating corporate views

1. **Identify your frequently used forms for your organization**

2. **Hide all content on these forms that you don't use**



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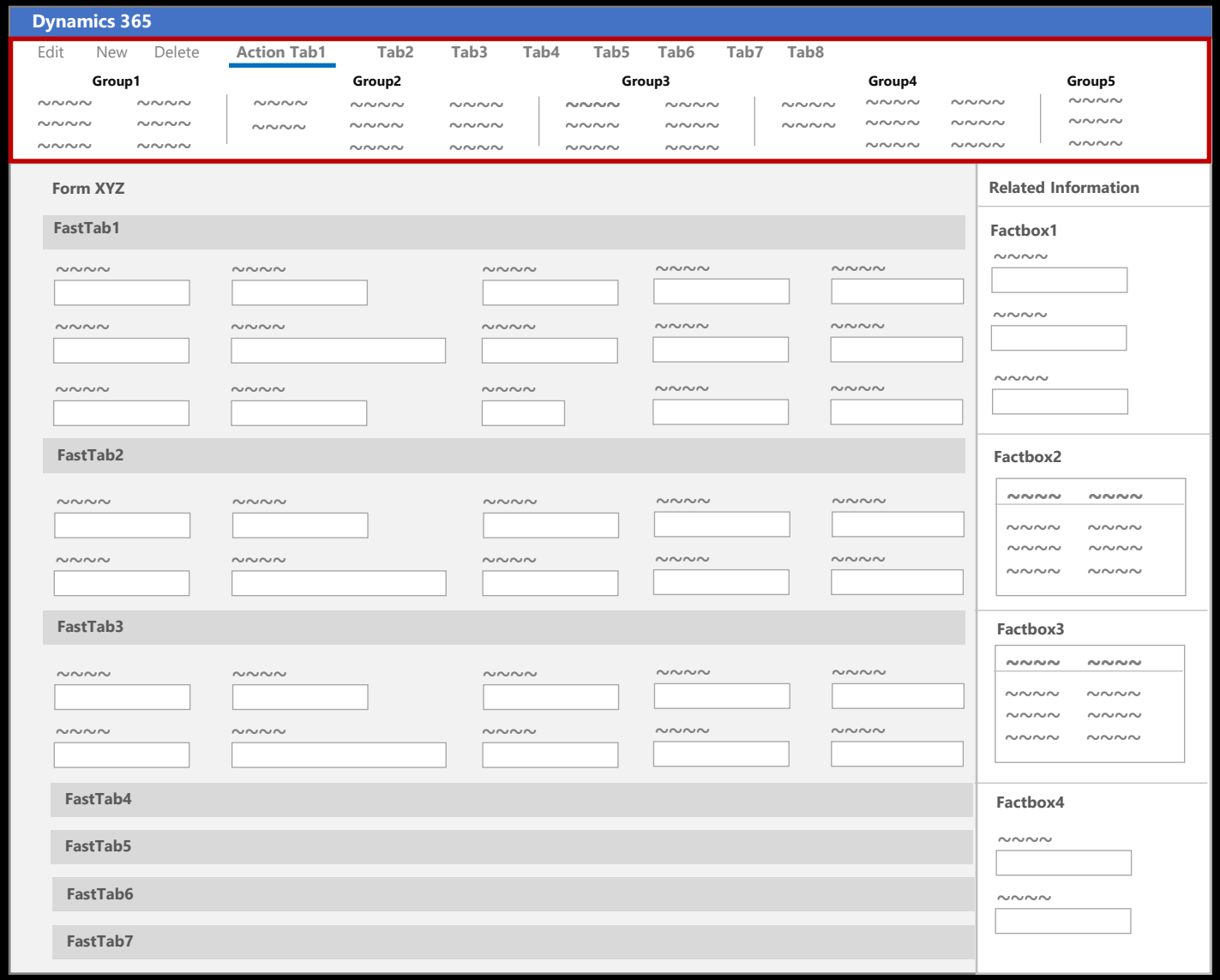

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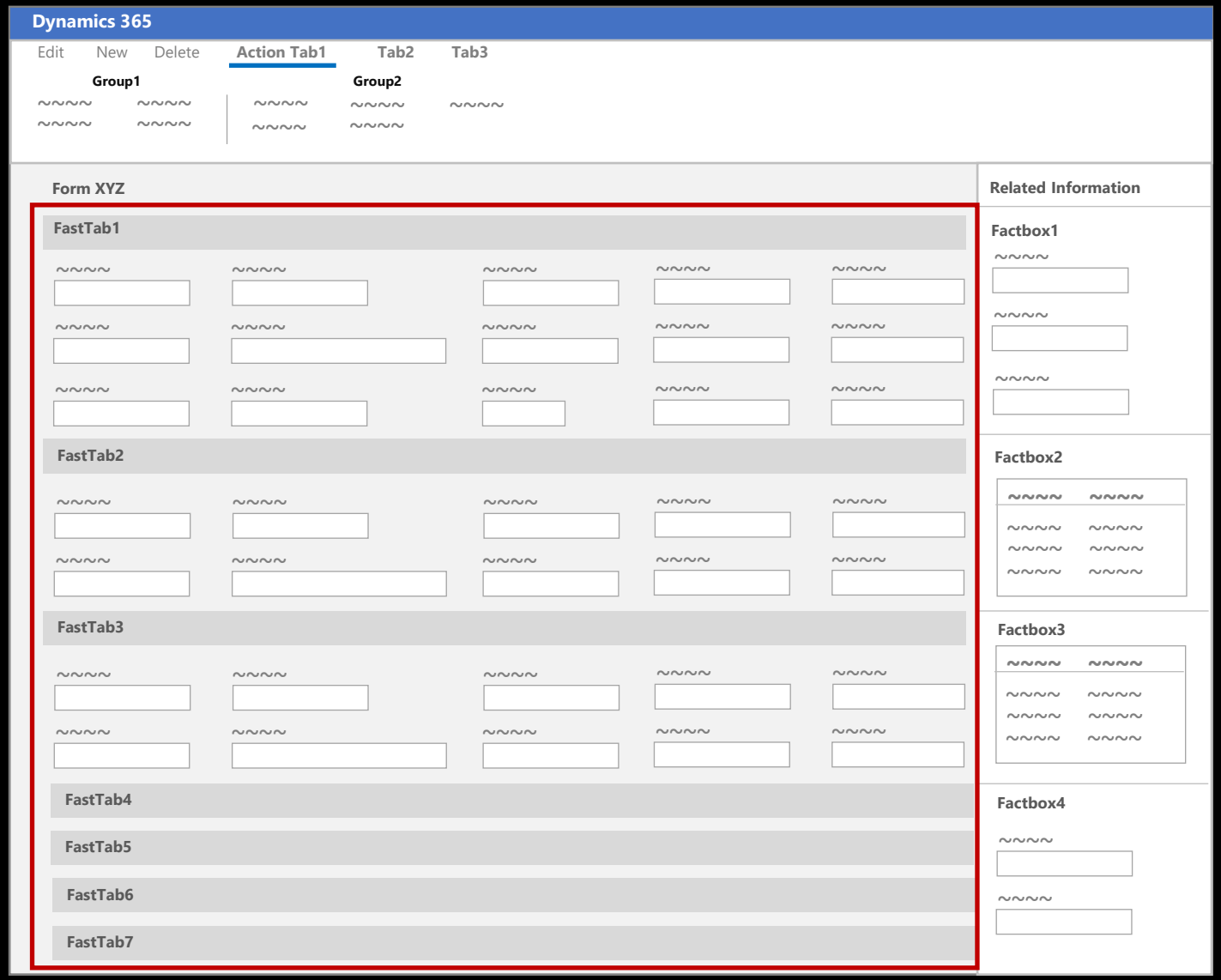

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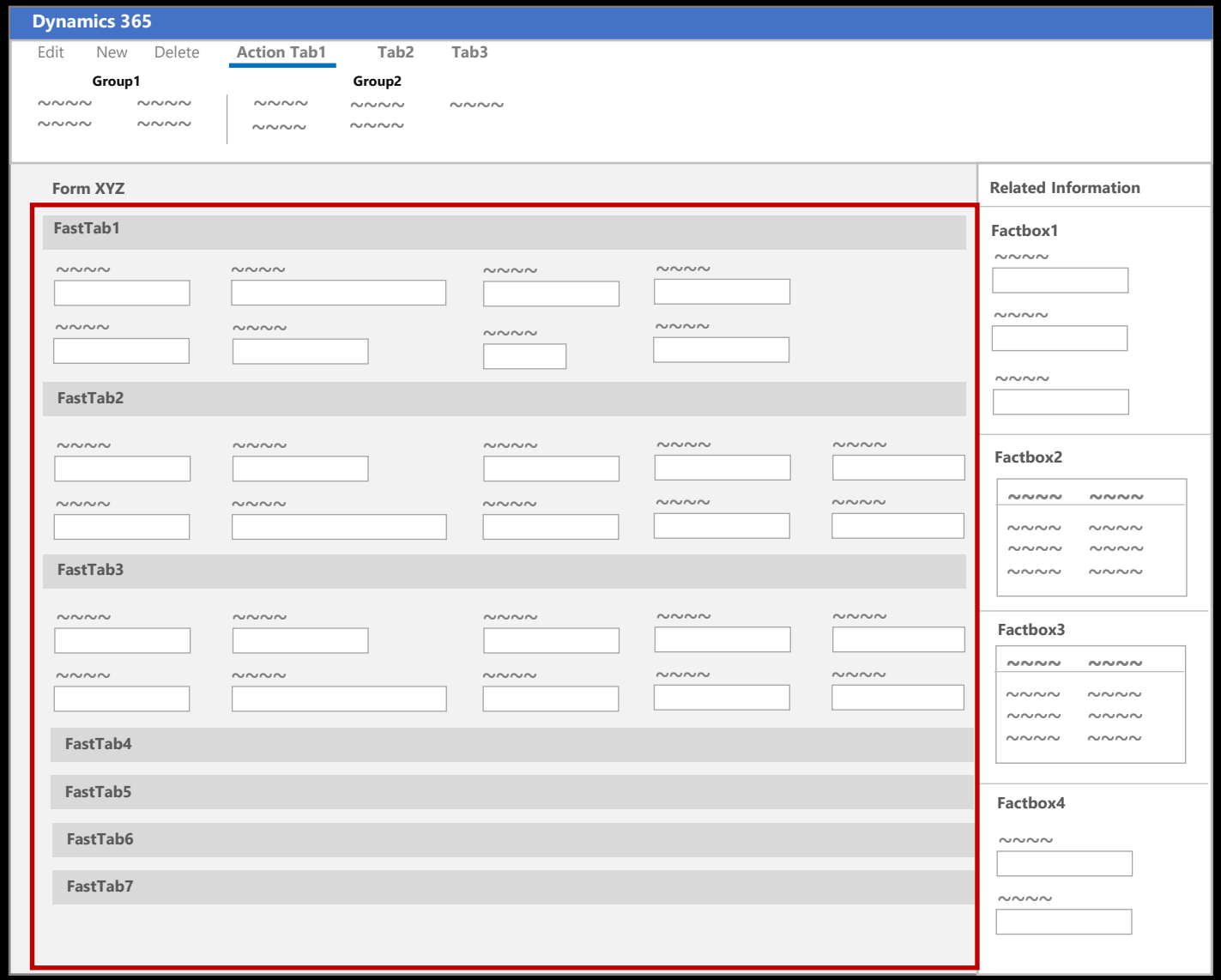

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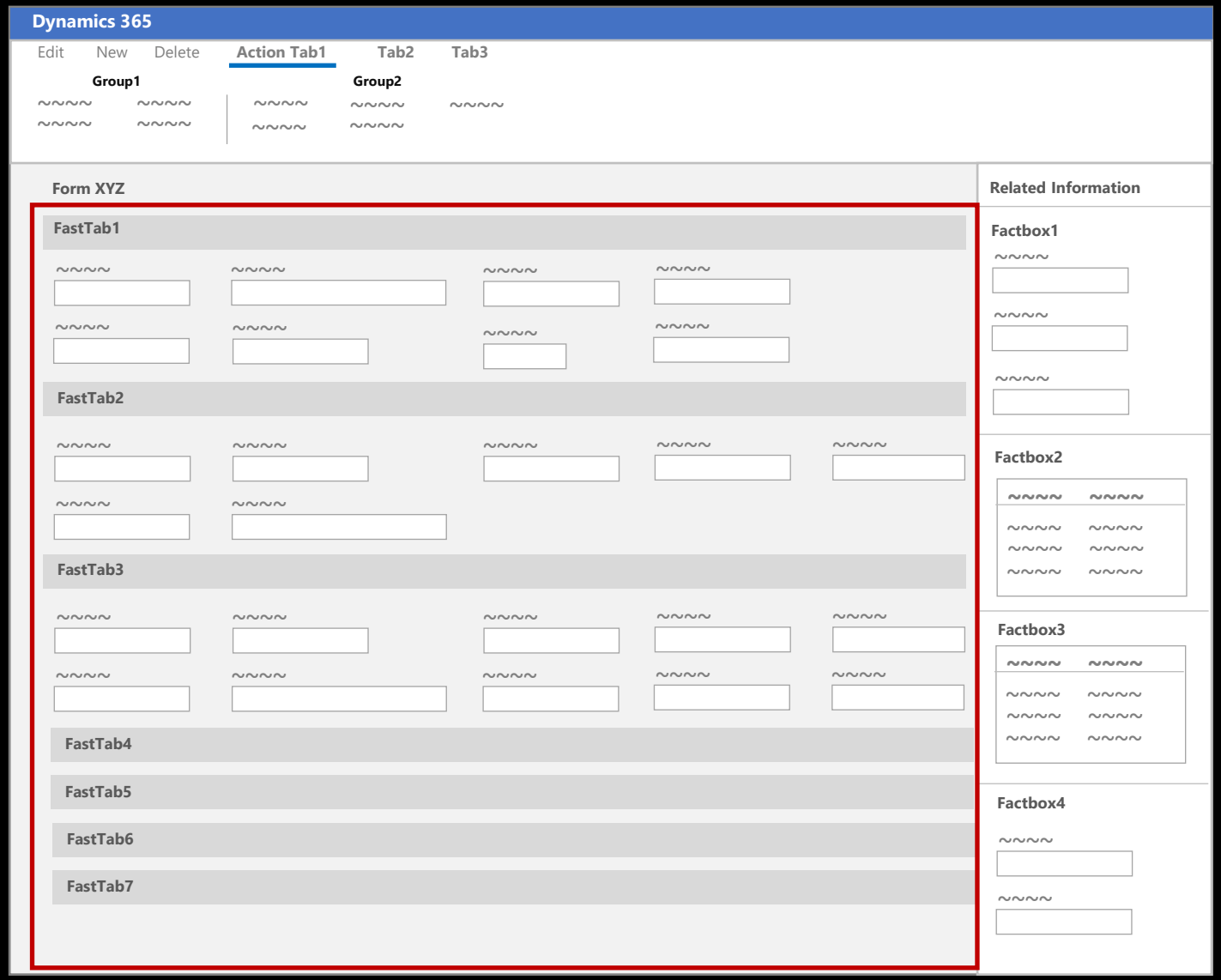

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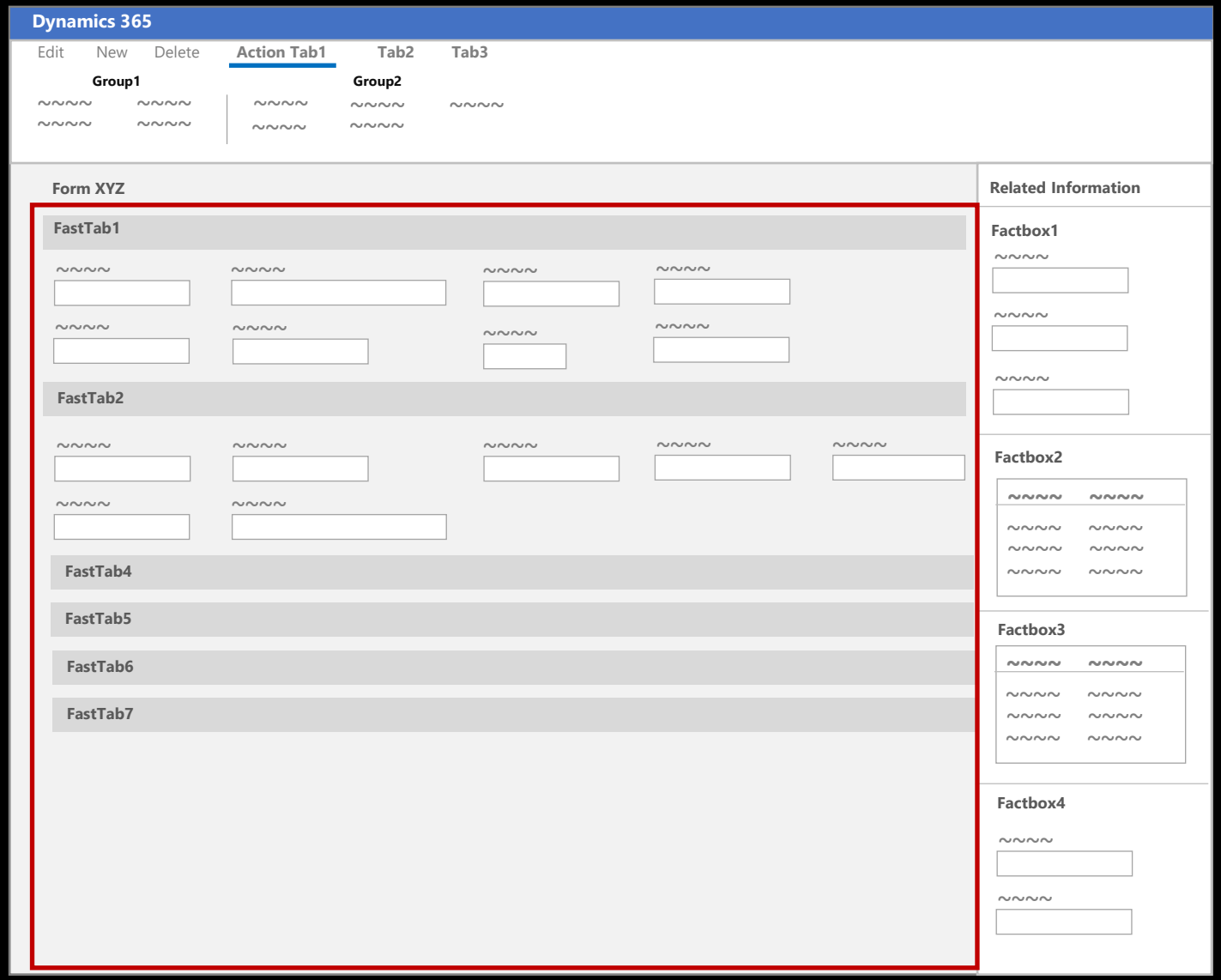

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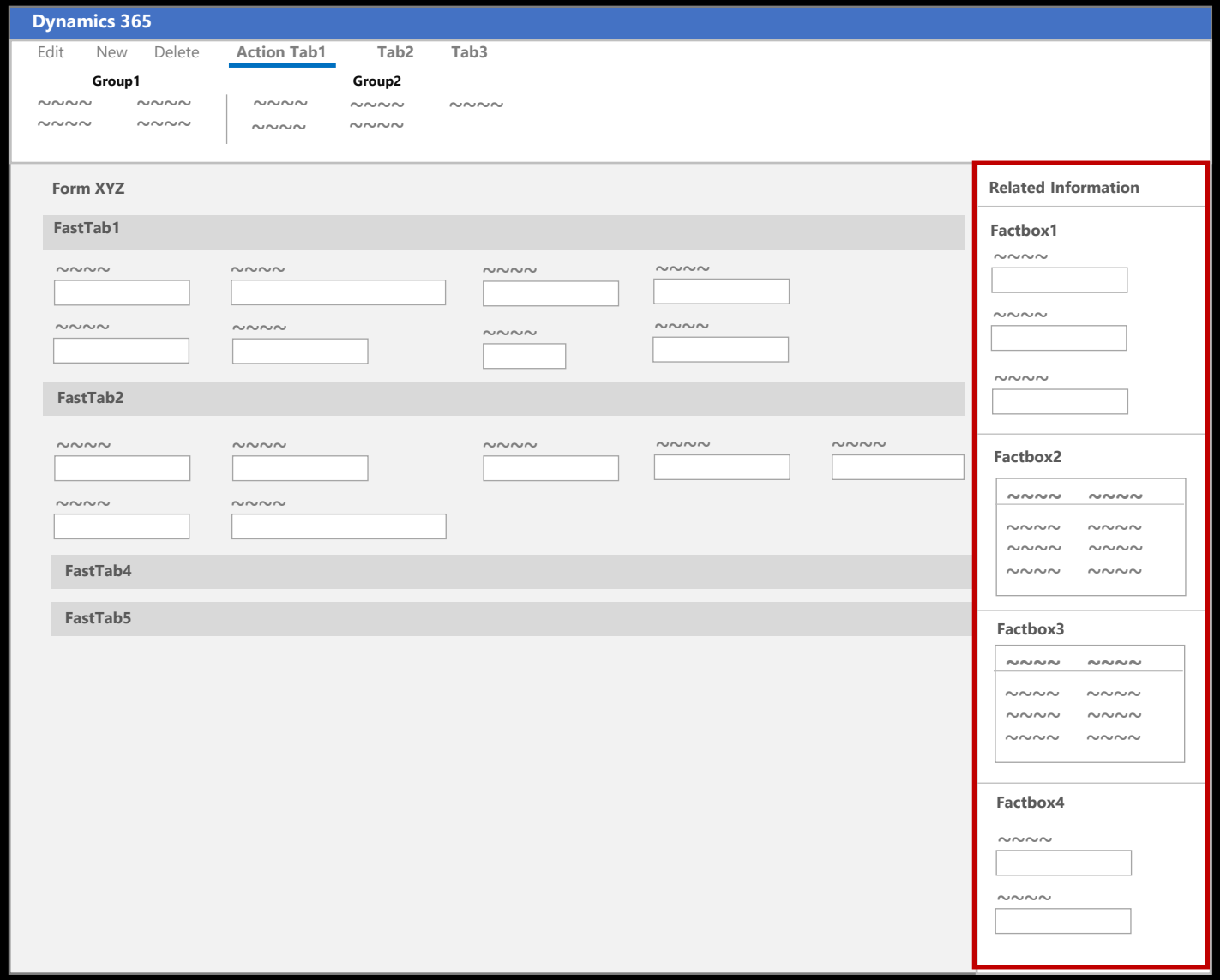
   - **Factboxes**



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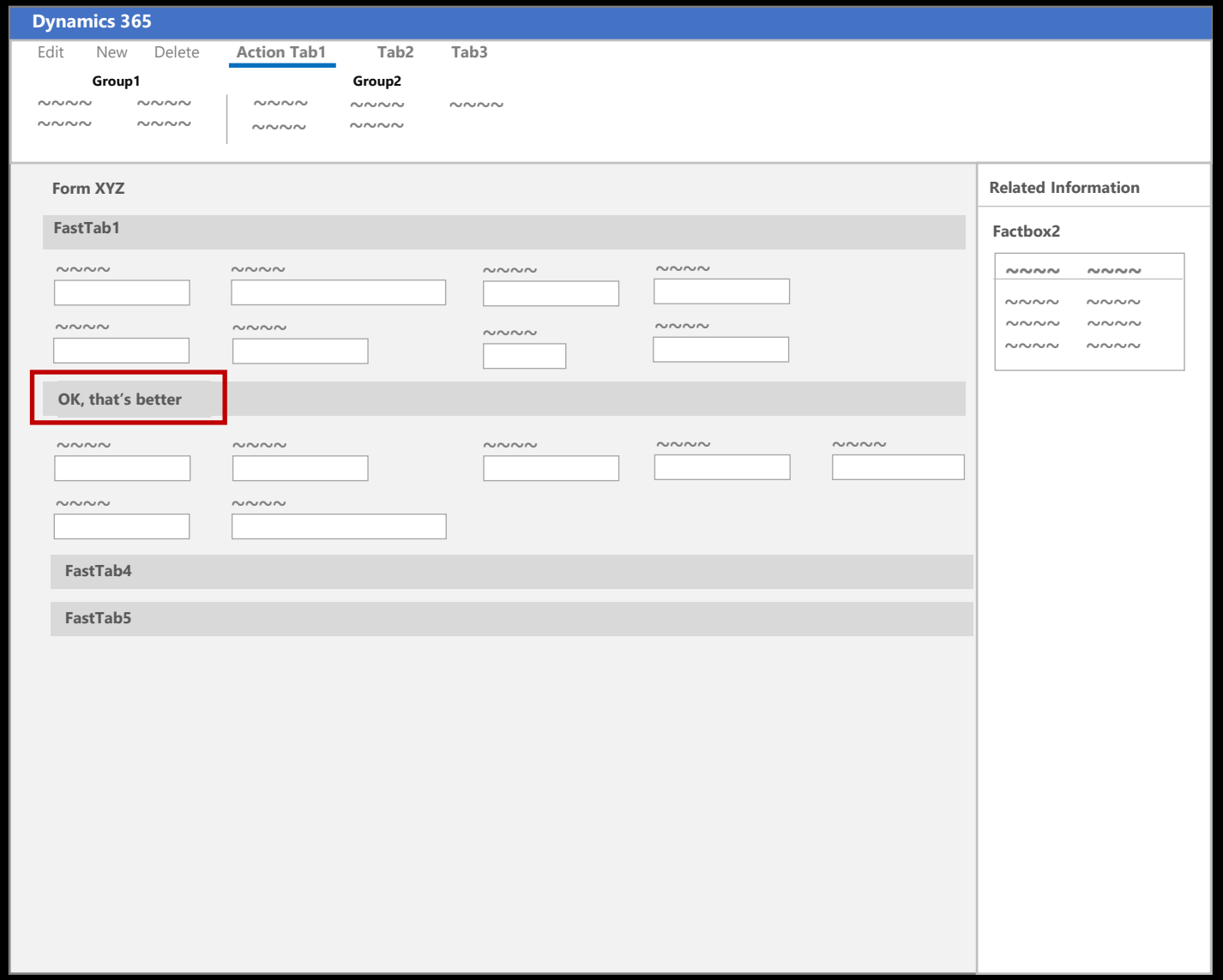

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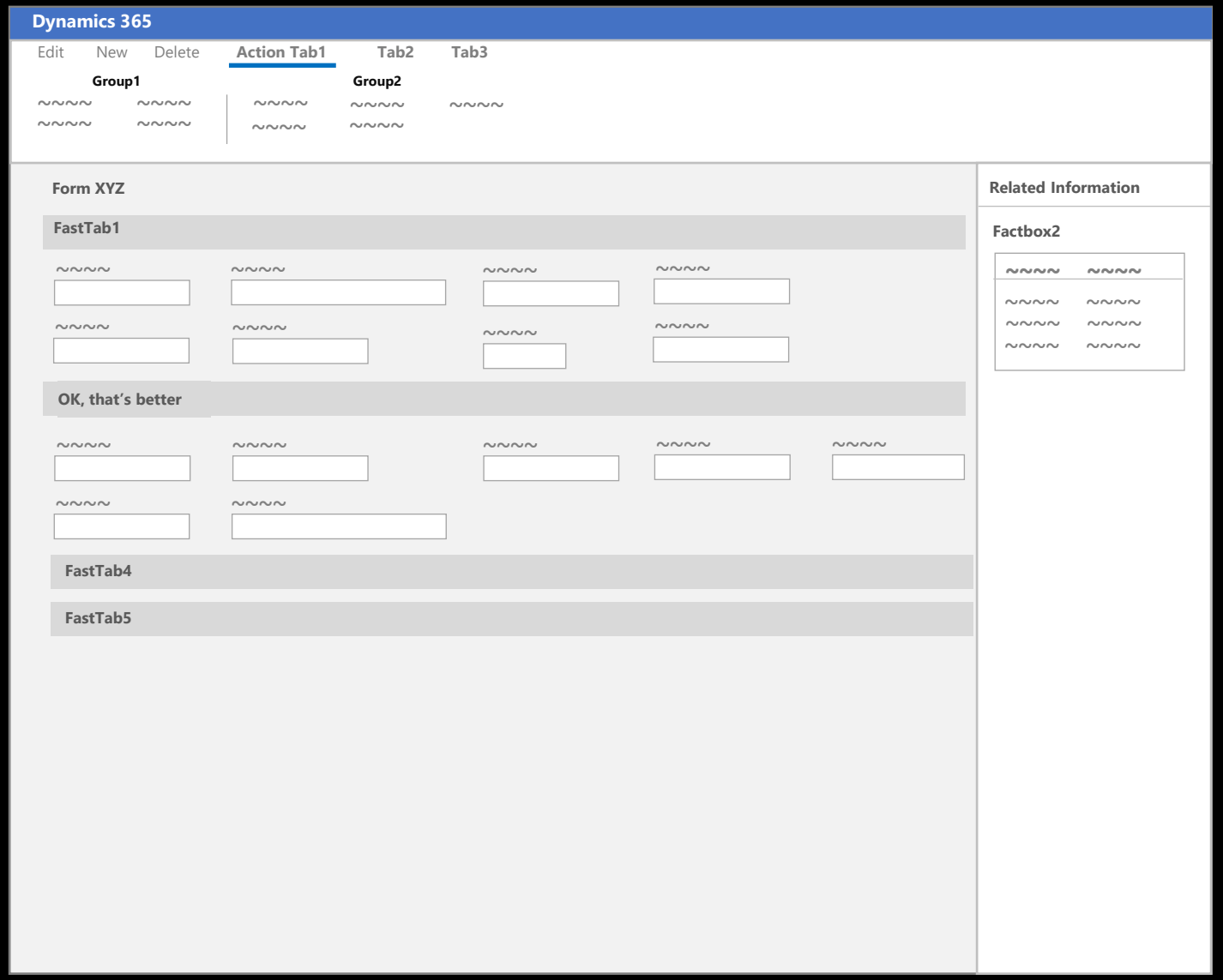

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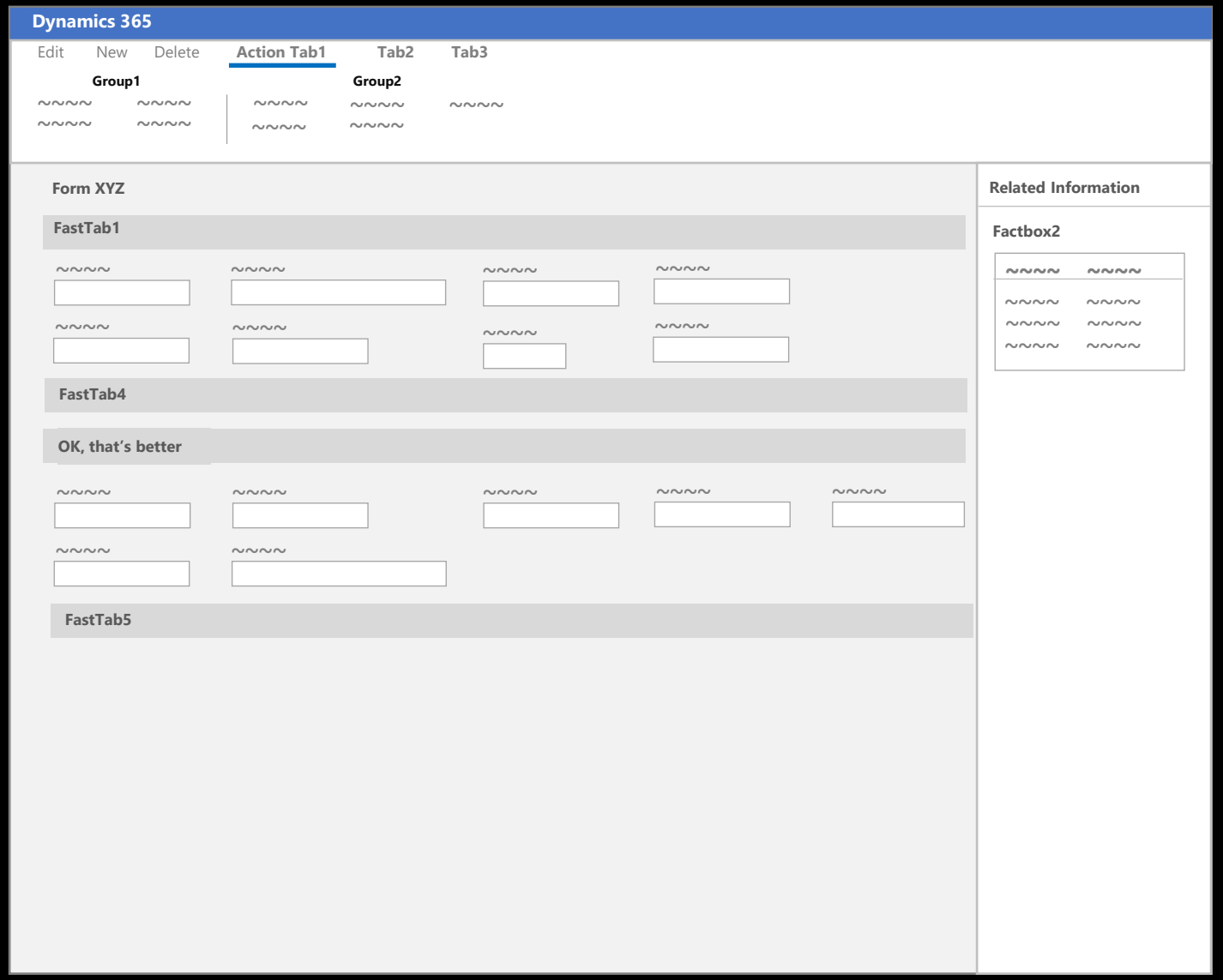

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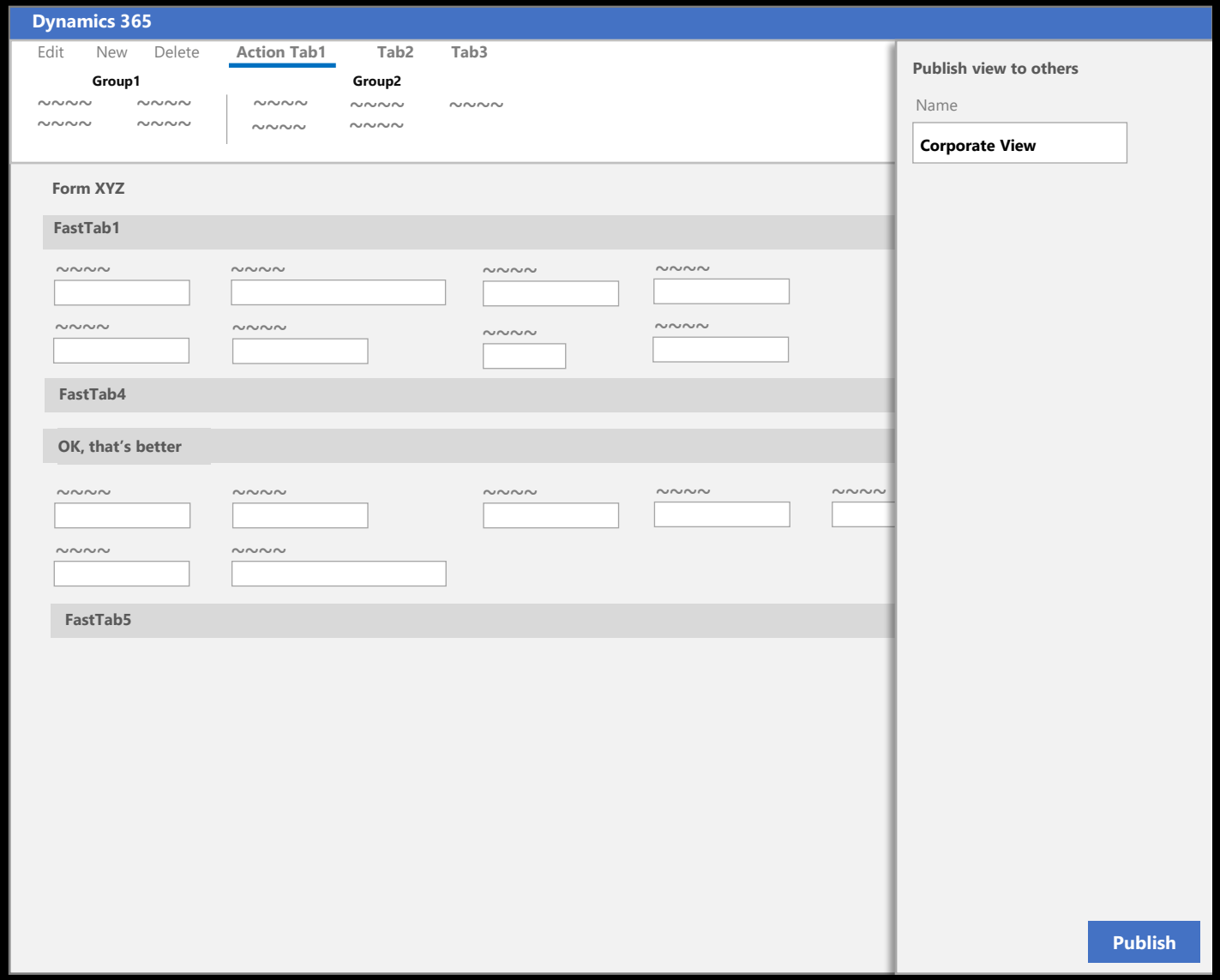

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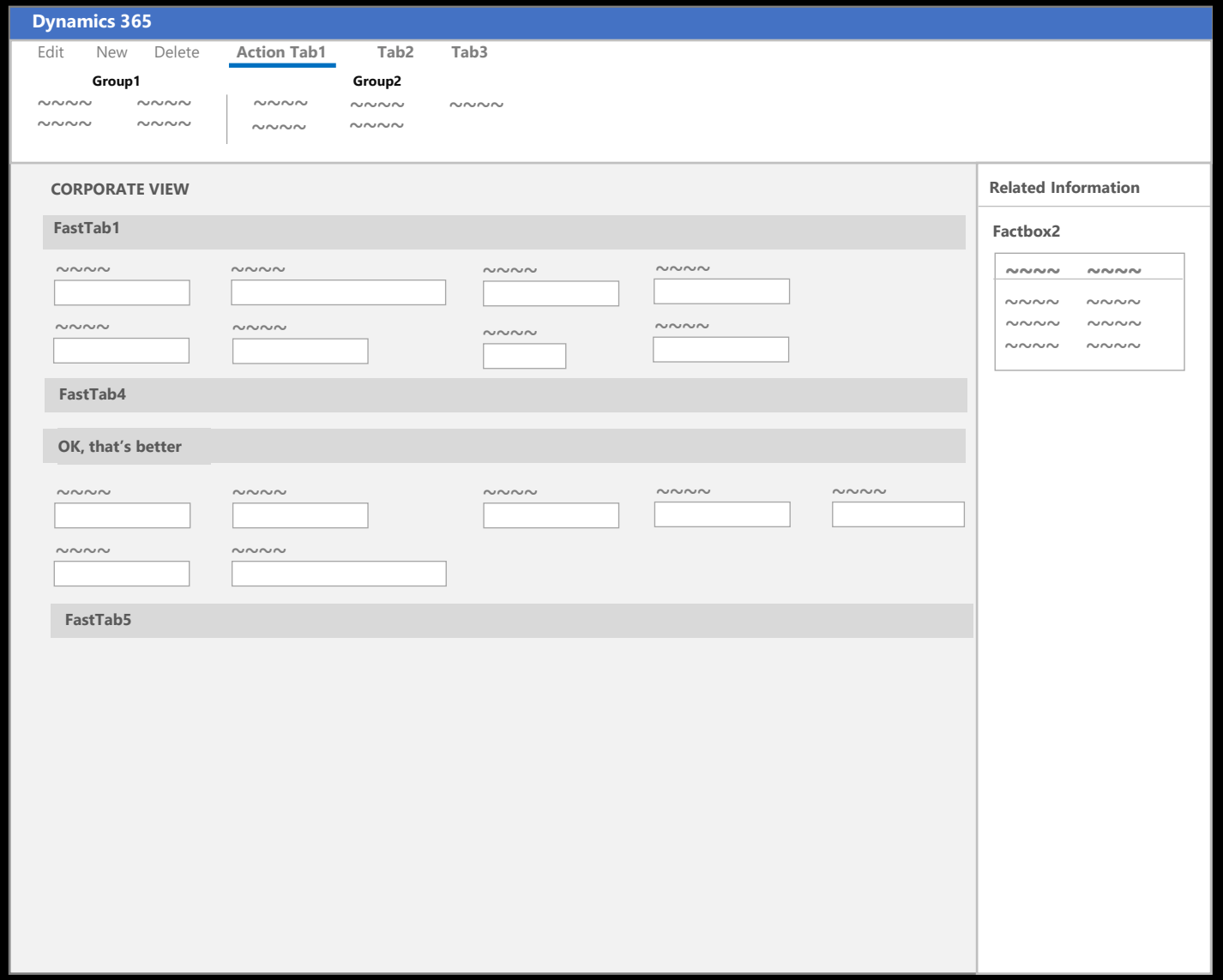
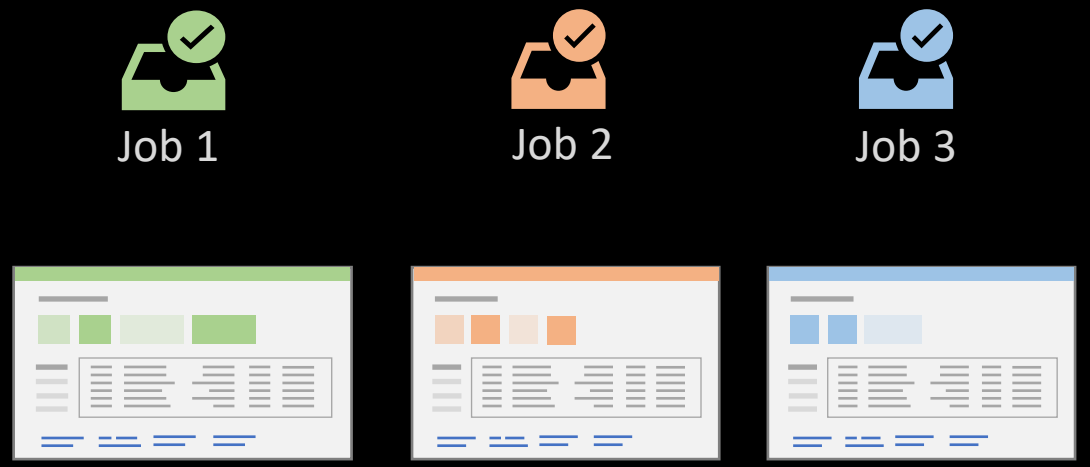


Optimizing for a role

1. **Identify jobs to be done**

Optimizing for a role

1. Identify jobs to be done
2. Design a workspace for each job



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Optimizing for a role

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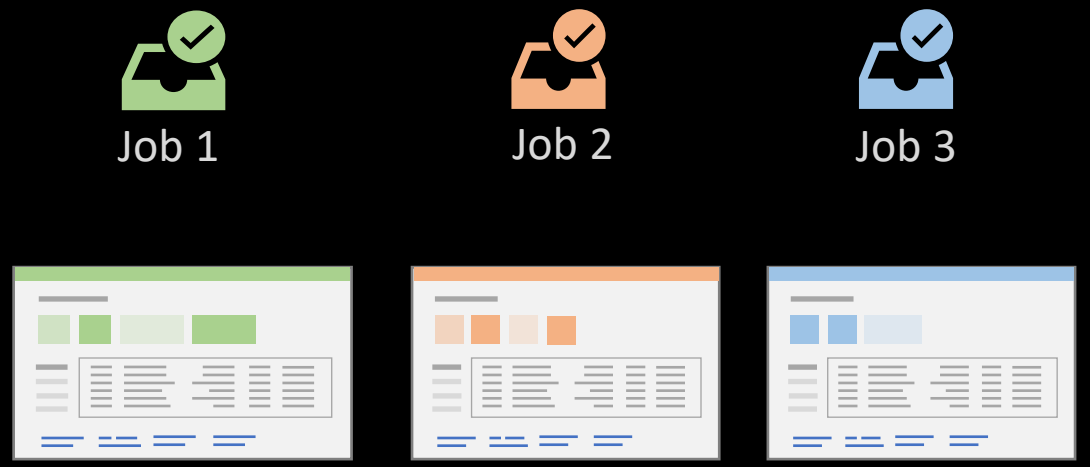


Optimizing for a role

1. Identify jobs to be done
2. Design a workspace for each job
3. Create filtered views for each list

Optimizing for a role

1. Identify jobs to be done
2. Design a workspace for each job
3. Create filtered views for each list
4. Create optimized task views for each form

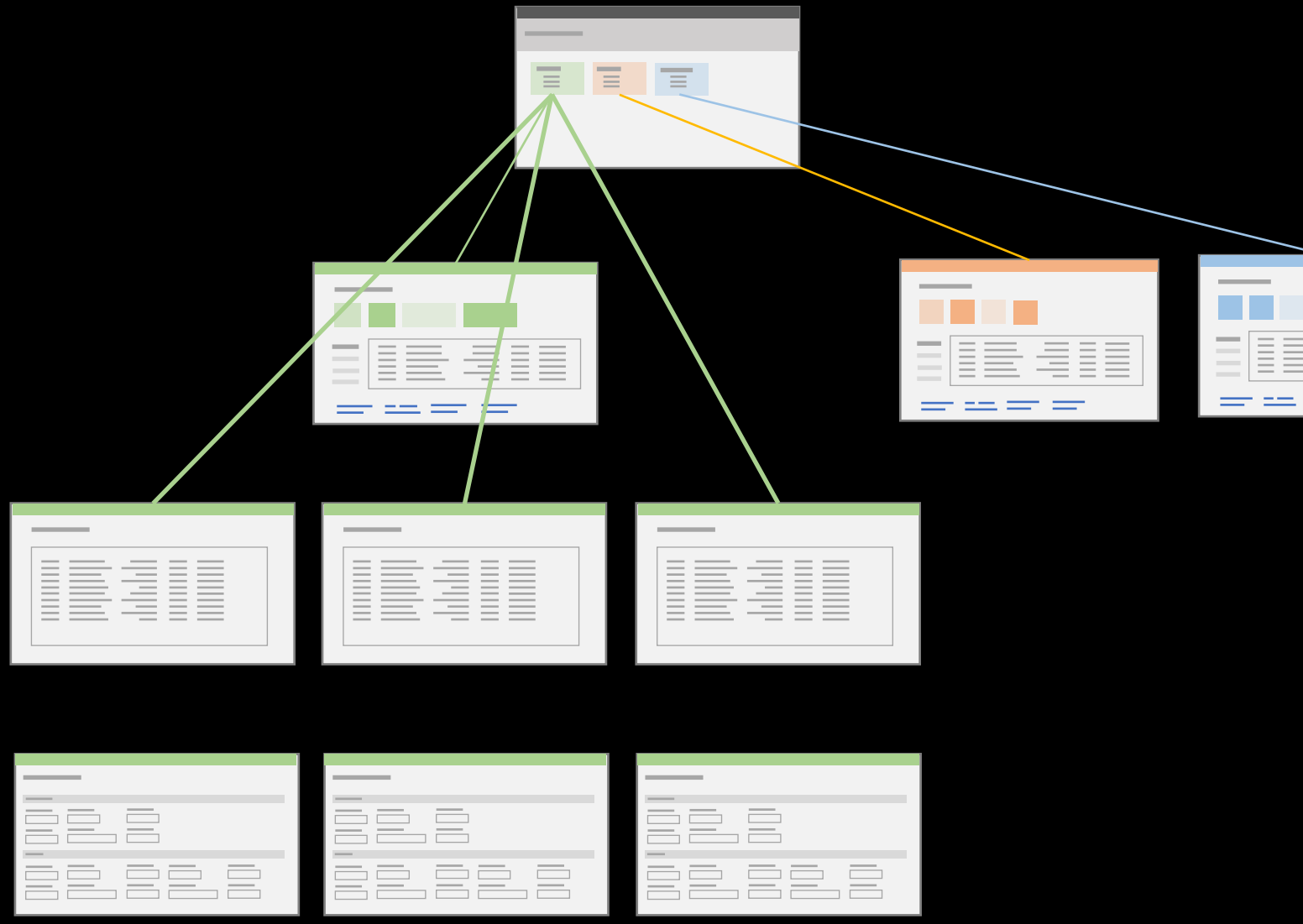
Job 1

Job 2

Job

Optimizing for a role

5 Optimize Dashboard



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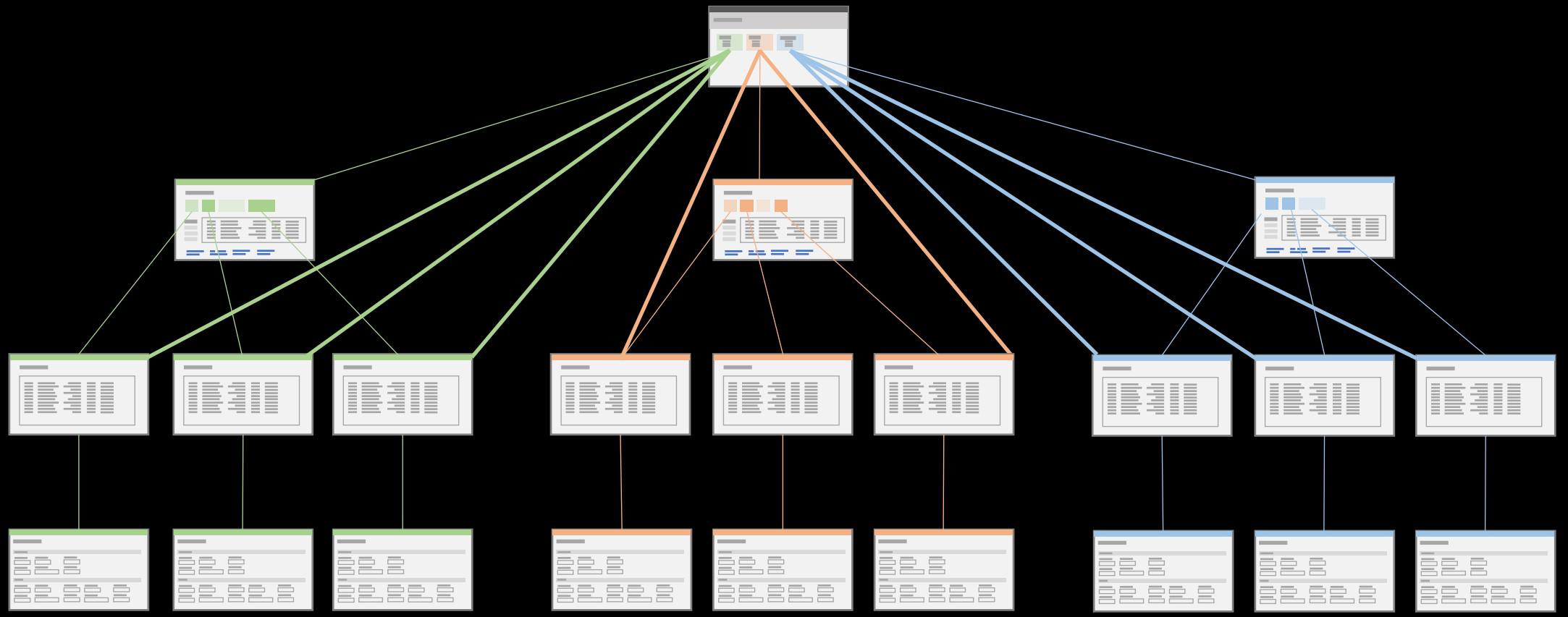


Personalization opportunities

Some examples

Opportunity

Search people ...

November 2022

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Work items assigned to me

- Cash advance request : Record ret...
- Expense reports : Record returned
- Catalog : catalog approval
- Expense reports : Expense report a...
- Cash advance request : Cash advan...
- Approve travel requisition
- Catalog : catalog approval

- Bank management
- Cost analysis
- Financial analysis - current company
- Payroll management
- Resource lifecycle management
- Benefits
- Cost control
- Financial period close
- People
- Retail and Commerce IT
- Budget planning
- Customer credit and collections
- Fixed asset management
- Personnel management
- Sales order processing and inquiry
- Business document management
- Customer invoicing
- General journal processing
- Pricing and discount management
- Sales return processing
- Business processes for human resources
- Customer payments
- Invoicing
- Product readiness for discrete manufacturing
- Store financials
- Business processes for payroll
- Data management
- Learning
- Product readiness for process manufacturing
- Store management
- Cash overview - all companies
- Data validation checklist
- Leave and absence
- Product variant model definition
- System administration
- Cash overview - current company
- Distributed order management
- Ledger budgets and forecasts
- Production floor management
- Task management

Financial period close

Past due tasks	131
Today's remaining tasks	0

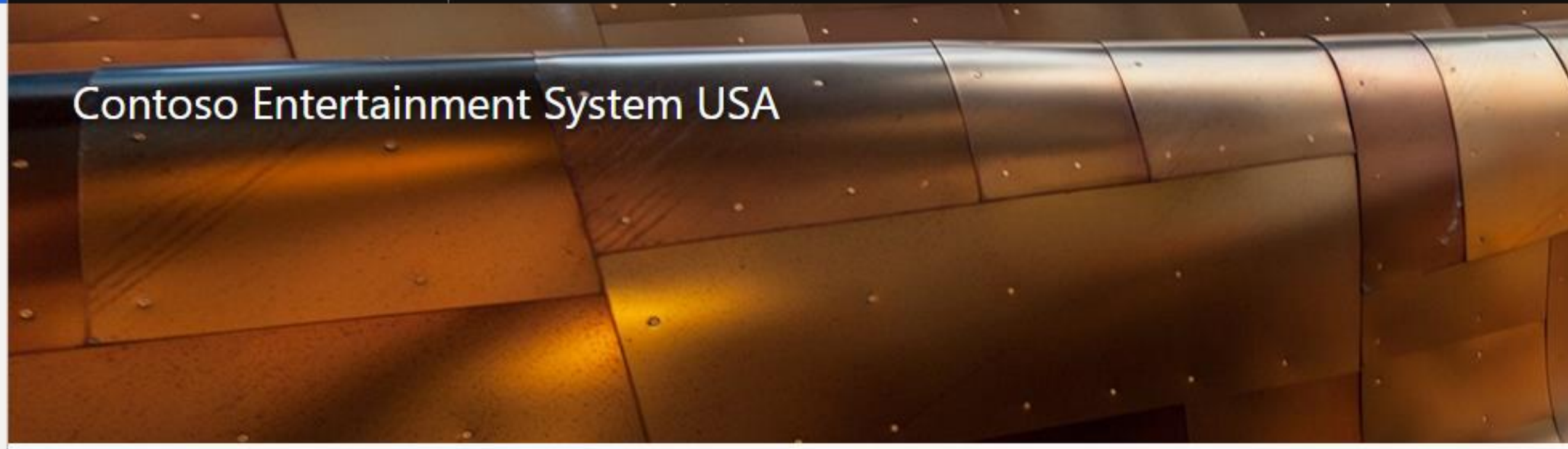
Vendor invoice entry

Journals Not Posted	5
Pending vendor invoices	54

Vendor payments

Vendor pay run - not posted	2

Vendor invoice automation



Financial period close

Past due tasks	131
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Vendor invoice entry

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Vendor payments

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Customer invoicing

Opportunity

Summary

3	1	0	4	0
Shipped but not invoiced sales orders	Sales orders on hold	Free text invoices assigned to me	Unposted free text invoices	Unposted recurring invoice groups

Orders and invoices

Opportunity

- Shipped but not invoiced sales orders
- Sales orders on hold
- Unposted free text invoices
- Open customer invoices
- Sales orders posting history
- Free text invoice posting history
- Find customer
- Find sales order

Filter | Invoice

Sales	Customer account	Customer name	Date	H...
	US-016	Whale Wholesales	12/7/2016	
	US-017	Turtle Wholesales	12/7/2016	
	US-001	Contoso Retail San Diego	1/18/2017	

See more

Opportunity

Links

INVOICE
Sales order batch
Free text invoice batch
Open customer invoices
Free text invoices
Invoice journal
Recurring invoices
My batch jobs

REPORTS
Shipped not invoiced report
Customer account statement

Vendor transactions | 1001 : ACME OFFICE SUPPLIES

Standard view

Show: All

Date: 12/2/2022

Hide currency revaluations

List | General | Payment | Promissory note | Settlement | Remittance | History | 1099 | Financial dimensions

Opportunity

Voucher	Date	Invoice	Description	Amount in transaction curre...	Balance in transaction currency	Currency	Amount	Balance	Amount in reporting currency	Balance in reporting currency	Note ID
140000640	3/7/2017			35.00	0.00	USD	35.00	0.00	35.00	0.00	
APPM001199	3/7/2017			6,965.00	0.00	USD	6,965.00	0.00	6,965.00	0.00	
PIV-110000546	4/6/2017	ACM333		7,000.00	0.00	USD	7,000.00	0.00	-7,000.00	0.00	
140000648	5/1/2017			35.00	0.00	USD	35.00	0.00	35.00	0.00	
APPM001205	5/1/2017			6,965.00	0.00	USD	6,965.00	0.00	6,965.00	0.00	
PIV-110000981	5/17/2017	1001		2,117.85	0.00	USD	2,117.85	0.00	-2,117.85	0.00	
140000650	5/23/2017			2.00	0.00	USD	2.00	0.00	2.00	0.00	
APPM001206	5/23/2017			397.50	0.00	USD	397.50	0.00	397.50	0.00	
PIV-110000986	5/23/2017	1347987		399.50	0.00	USD	399.50	0.00	-399.50	0.00	
APPM001204	6/1/2017			2,117.85	0.00	USD	2,117.85	0.00	2,117.85	0.00	
APIN000021	6/5/2017	80193		4,589.10	-4,589.10	USD	4,589.10	-4,589.10	-4,589.10	-4,589.10	
APIN000024	6/8/2017	09310		782.09	-782.09	USD	782.09	-782.09	-782.09	-782.09	
APPM001203	6/12/2017			892.57	892.57	USD	892.57	892.57	892.57	892.57	
APIN000013	6/20/2017	309		309.03	-309.03	USD	309.03	-309.03	-309.03	-309.03	
APIN000011	6/22/2017	7093		5,603.00	-5,603.00	USD	5,603.00	-5,603.00	-5,603.00	-5,603.00	
APIN000009	6/24/2017	100189		7,209.98	-7,209.98	USD	7,209.98	-7,209.98	-7,209.98	-7,209.98	
APIN000004	6/29/2017	10012		23,109.90	-23,109.90	USD	23,109.90	-23,109.90	-23,109.90	-23,109.90	
140000655	7/1/2017			2.89	0.00	USD	2.89	0.00	2.89	0.00	
140000656	7/1/2017		Reverse:	2.89	0.00	USD	2.89	0.00	-2.89	0.00	
APIN000002	7/1/2017	10017		578.09	-578.09	USD	578.09	-578.09	-578.09	-578.09	
APIN000027	7/11/2017	678911		3,400.11	-3,400.11	USD	3,400.11	-3,400.11	-3,400.11	-3,400.11	
APIN000033	7/17/2017	109		45.88	-45.88	USD	45.88	-45.88	-45.88	-45.88	
APIN000038	7/23/2017	698183		205.80	-205.80	USD	205.80	-205.80	-205.80	-205.80	
APIN000044	7/29/2017	0779183		109.10	-109.10	USD	109.10	-109.10	-109.10	-109.10	
APIN000045	7/30/2017	T28		80.99	-80.99	USD	80.99	-80.99	-80.99	-80.99	
APIN000046	7/31/2017	729		44.70	-44.70	USD	44.70	-44.70	-44.70	-44.70	
PIV-110000983	8/16/2017	46981		2,400.00	-2,400.00	USD	2,400.00	-2,400.00	-2,400.00	-2,400.00	
APIN000048	9/13/2017	09810		1,098.99	-1,098.99	USD	1,098.99	-1,098.99	-1,098.99	-1,098.99	
PIV-110000992	12/2/2022	Test001		72,050.00	-72,050.00	USD	72,050.00	-72,050.00	-72,050.00	-72,050.00	

Company View

Voucher	Date	Invoice	Status	Amount	Balance
PIV-110000544	2/28/2017	ACM222	Invoiced	7,000.00	0.00
140000640	3/7/2017		None	35.00	0.00
APPM001199	3/7/2017		Invoiced	6,965.00	0.00
PIV-110000546	4/6/2017	ACM333	Invoiced	7,000.00	0.00
140000648	5/1/2017		None	35.00	0.00
APPM001205	5/1/2017		Invoiced	6,965.00	0.00
PIV-110000981	5/17/2017	1001	Invoiced	2,117.85	0.00
140000650	5/23/2017		None	2.00	0.00
APPM001206	5/23/2017		Invoiced	397.50	0.00
PIV-110000986	5/23/2017	1347987	Invoiced	399.50	0.00
APPM001204	6/1/2017		Invoiced	2,117.85	0.00
APIN000021	6/5/2017	80193	Invoiced	4,589.10	-4,589.10
APIN000024	6/8/2017	09310	Invoiced	782.09	-782.09
APPM001203	6/12/2017		Invoiced	892.57	892.57
APIN000013	6/20/2017	309	Invoiced	309.03	-309.03
APIN000011	6/22/2017	7093	Invoiced	5,603.00	-5,603.00
APIN000009	6/24/2017	100189	Invoiced	7,209.98	-7,209.98
APIN000004	6/29/2017	10012	Invoiced	23,109.90	-23,109.90
140000655	7/1/2017		None	2.89	0.00
140000656	7/1/2017		None	2.89	0.00
APIN000002	7/1/2017	10017	Invoiced	578.09	-578.09
APIN000027	7/11/2017	678911	Invoiced	3,400.11	-3,400.11
APIN000033	7/17/2017	109	Invoiced	45.88	-45.88
APIN000038	7/23/2017	698183	Invoiced	205.80	-205.80
APIN000044	7/29/2017	0779183	Invoiced	109.10	-109.10
APIN000045	7/30/2017	T28	Invoiced	80.99	-80.99
APIN000046	7/31/2017	729	Invoiced	44.70	-44.70
PIV-110000983	8/16/2017	46981	Invoiced	2,400.00	-2,400.00
APIN000048	9/13/2017	09810	Invoiced	1,098.99	-1,098.99
PIV-110000992	12/2/2022	Test001	Invoiced	72,050.00	-72,050.00
Total				**120,724.19**	**-120,724.19**

41 rows

000733 : Contoso Retail New York

Sales order header

DELIVERY ADDRESS
Name: Contoso Retail New York

Delivery address: Contoso Retail New York
Address:
678 Orange Street
New York, NY 10006
USA

DELIVERY DATE
Requested ship date: 1/8/2017
Requested receipt date: 1/8/2017

Simulate delivery dates
Confirmed ship date: 1/8/2017
Confirmed receipt date: 1/8/2017

REFERENCES
Customer reference:
Customer requisition:

DISCOUNTS
Total discount %: 0.00

WAREHOUSE
Release status: Open

TRANSPORTATION
Routes:
Carrier customer account number:

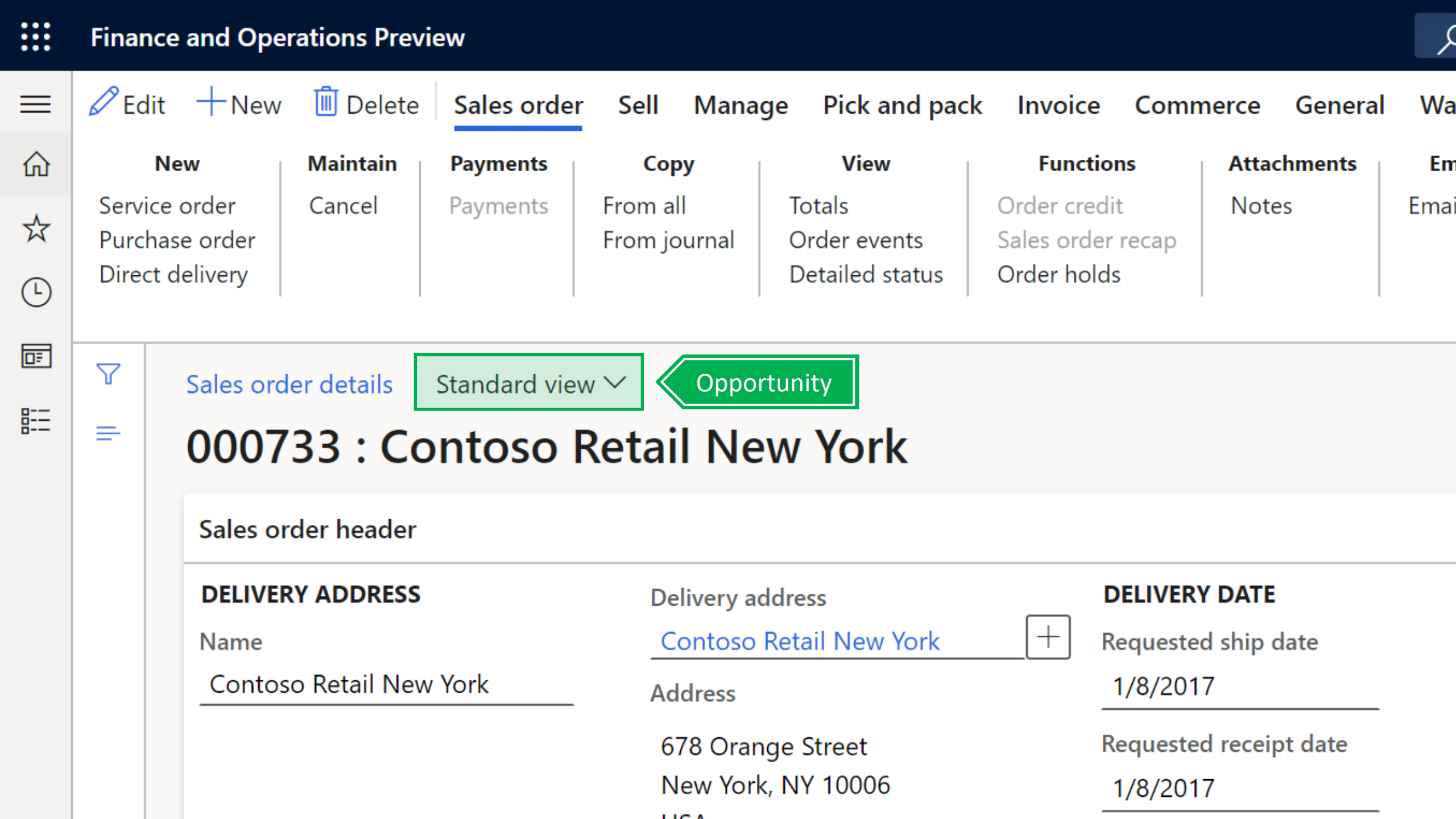
DISTRIBUTED ORDER MANAGEMENT
DOM Status: Not processed

Sales order lines

Add line | Add lines | Add products | Remove | Sales order line | Financials | Inventory | Product and supply | Update line | Warehouse | Retail

T...	Variant number	Item number	Product name	Sales category	CW quantity	CW unit	Quantity	Unit	Delivery type	CW deliver...	Adjusted u...	Site	Warehouse	Unit price
		D0001	MidRangeSpeaker	Speakers			16.00	ea	Stock		0.00000	1	13	480.00
		L0001	MidRangeSpeaker2	Speakers			37.00	ea	Stock		0.00000	1	13	500.00
		P0001	AcousticFoamPanel				123.00	ea	Stock		0.00000	3	32	37.00
		D0003	StandardSpeaker	Speakers			17.00	ea	Stock		0.00000	1	13	220.00
		T0001	SpeakerCable / Speaker c...	Accessories			49.00	ea	Stock		0.00000	2	21	500.00
		D0004	HighEndSpeaker / High E...	Speakers			18.00	ea	Stock		0.00000	1	13	2,000.00
		T0004	TelevisionM12037" / Telev...	Television			49.00	ea	Stock		0.00000	2	21	350.00
		T0002	ProjectorTelevision	Television			37.00	ea	Stock		0.00000	2	21	3,750.00
		T0005	TelevisionHDTVX59052 / T...	Television			25.00	ea	Stock		0.00000	2	21	2,890.00
		T0003	SurroundSoundReceive	Receivers			37.00	ea	Stock		0.00000	2	21	450.00

Line details


Finance and Operations Preview
Edit
New
Delete
Sales order
Sell
Manage
Pick and pack
Invoice
Commerce
General
New
Service order
Purchase order
Direct delivery
Maintain
Cancel
Payments
Payments
Copy
From all
From journal
View
Totals
Order events
Detailed status
Functions
Order credit
Sales order recap
Order holds
Attachments
Notes
Sales order details
Standard view
Opportunity
000733 : Contoso Retail New York
Sales order header
DELIVERY ADDRESS
Name
Contoso Retail New York
Delivery address
Contoso Retail New York
Address
678 Orange Street
New York, NY 10006
DELIVERY DATE
Requested ship date
1/8/2017
Requested receipt date
1/8/2017

Edit | New | Delete | Sales order | Sell | Manage | Pick and pack | Invoice | Commerce | General | Warehouse | Transportation | Credit management

New
Service order
Purchase order
Direct delivery

Maintain
Cancel

Payments
Payments

Copy
From all
From journal

View
Totals
Order events
Detailed status

Functions
Order credit
Sales order recap
Order holds

Attachments
Notes

Email notification
Email notification log

Clean up
Clean up sales update history

Opportunity

Sales order details | Standard view

000733 : Contoso Retail New York

Lines | Header | Open order

Opportunity

Sales order header

DELIVERY ADDRESS
Name: Contoso Retail New York

Delivery address: Contoso Retail New York
Address:
678 Orange Street
New York, NY 10006
USA

DELIVERY DATE
Requested ship date: 1/8/2017
Requested receipt date: 1/8/2017

Simulate delivery dates
Confirmed ship date: 1/8/2017
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REFERENCES
Customer reference:
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DISCOUNTS
Total discount %: 0.00

WAREHOUSE
Release status: Open

TRANSPORTATION
Routes:
Carrier customer account number:

DISTRIBUTED ORDER MANAGEMENT
DOM Status: Not processed

Opportunity

Sales order lines

Add line | Add lines | Add products | Remove | Sales order line | Financials | Inventory | Product and supply | Upda... | Retail

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		T0003	SurroundSoundReceive	Receivers			37.00	ea	Stock		0.00000	2	21	450.00

Opportunity

Line details

All vendors | My view

1001 : Acme Office Supplies

General — 40 | Active (PO is not auto-confirmed)

Addresses

Contact information

Miscellaneous details — -- | 0.00 | No

Vendor profile — --

Purchasing demographics — USD | -- | -- | -- | --

Invoice and delivery — -- | -- | -- | -- | -- | 10pct

Purchase order defaults — -- | -- | -- | -- | -- | --

Payment — Net30 | CHECK | -- | -- | 0.5%D10 | --

Tax 1099

TAX 1099 OPTIONS

Report 1099: No

W-9 received: No

Check for W-9: No

FATCA filing requirement: No

Federal tax ID:

Tax ID type: Unknown

1099 box:

Foreign entity indicator: No

Second TIN: No

Name to use on the 1099: Vendor name

DBA:

Name control:

OID

CUSIP: No

CUSIP ID:

CUSIP details:

Nominee details:

Investor type: None

Retail

Financial dimensions

Related information

Miscellaneous details

Vendor profile

Purchasing demographics

Invoice and delivery

Purchase order defaults

Payment

Opportunity

Tax 1099

TAX 1099 OPTIONS

Report 1099
No

W-9 received
No

Check for W-9
No

FATCA filing requirement
No

Federal tax ID

Tax ID type
Unknown

1099 box

Foreign entity indicator
No

Second TIN
No

Name to use on the 1099
Vendor name

DBA

Name control

OID

CUSIP
No

CUSIP ID

CUSIP details

Retail

Financial dimensions

Who should be personalizing the experience?

The people training users should be optimizing experiences before training others

- Partner

  or

- System Admin

  or

- Power User within a department *(Ideal)*

- Encourage end users to further personalize their experience

Personalization concerns

What is a myth and what is a reality?

Personalizations will break on updates

Difficult to provide tech support for highly personalized experiences

Personalization can cause performance issues

- No longer an issue
- Some customers have over 100,000 views that are having no issues on updates
- If you are having issues, let us know

Personalization concerns

What is a myth and what is a reality?

Personalizations will break on updates

Difficult to provide tech support for highly personalized experiences

Personalization can cause performance issues

Some customers are creating Corporate views that everyone in the organization has including the people providing support.

- They encourage people to extend the corporate views as needed
- Internal support people can ask user to go back to corporate view to debug issues

Microsoft support team can ask users to go back to the *Standard view* to debug issues

Personalization concerns

What is a myth and what is a reality?

Personalizations will break on updates

Difficult to provide tech support for highly personalized experiences

Personalization can cause performance issues

Most personalizations have negligible impact on performance

- Specifically, changes that don't impact the query like hiding, reordering, etc.

Changes to the query can impact performance

- Filtering/sorting on nonindexed fields
- "Contains" or "is one of" operators
- Joining on additional data sources through Advanced filter or sort or adding certain fields

Recommendations

- Enable the "Saved views performance enhancement" feature
- Avoid filtering/sorting in base corporate views
- Be cautious with defaulting or distributing views with slow queries

“Views drive efficiency that allows you to tailor specific screens to your own organization without any development effort and ensure consistency among your users. Without views, users will have to consistently apply specific personalization & filters they want to answer various business questions.

PCL users use saved views to drive repeatability in business process. Saved views ensure users are being shown the right information based on what they are looking for, without having to perform multiple keystrokes to get at the information they are looking for.”

Drew Forward
Technical Solution Analyst
at PCL Construction

Recap / Call to action

1. Create and publish corporative views of your most used forms
2. Optimize experiences for your most common roles

Higher User Satisfaction

Thank you

Additional resources

- TechTalk Series: Using the Power Platform to Extend Finance and Operations Apps - Microsoft Dynamics Blog
- Personalize the user experience - Finance & Operations | Dynamics 365 | Microsoft Learn
- Saved views - Finance & Operations | Dynamics 365 | Microsoft Learn
- Embed canvas apps from Power Apps - Finance & Operations | Dynamics 365 | Microsoft Learn
- Embed third-party apps - Finance & Operations | Dynamics 365 | Microsoft Learn