

TechTalk

December 15, 2022

Optimizing the Experience in Dynamics 365 Finance & SCM

Kevin Honeyman

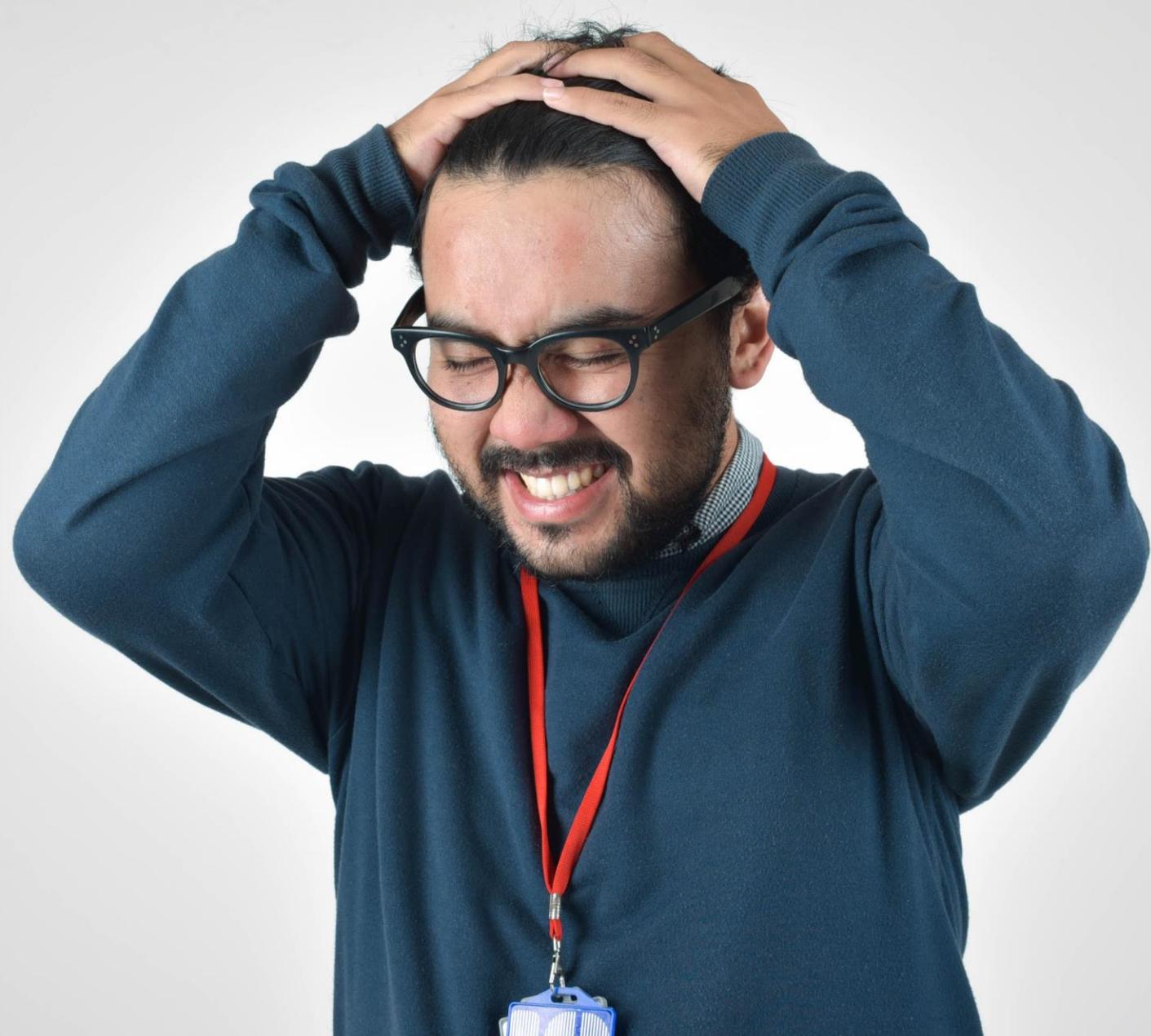
Dynamics 365
Design Manager

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

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

The user experience should be tailored to each user through

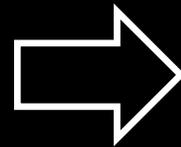
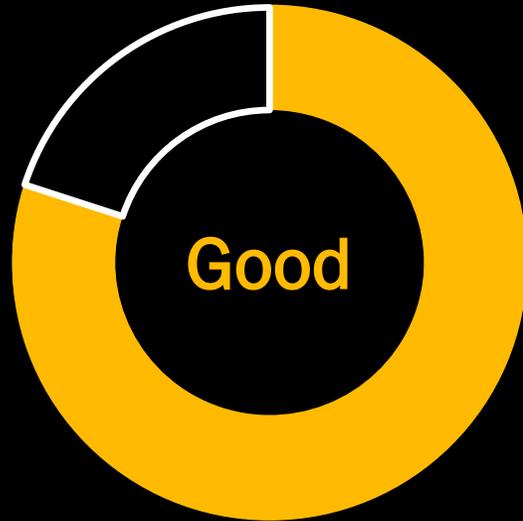
- Role-based security
- Configuration keys
- Personalization

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

It just works

Consumergrade experiences

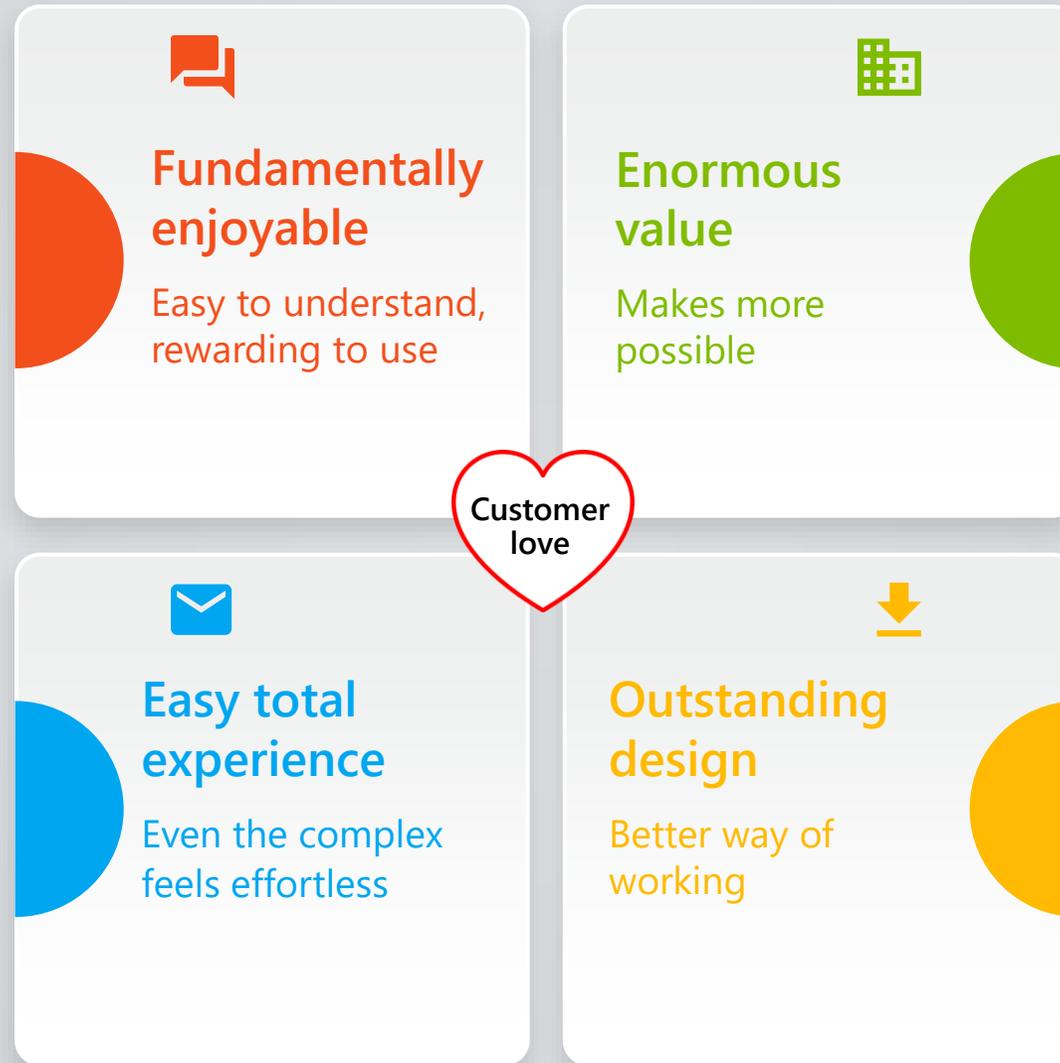
8 in 10 people are connoisseurs of great user experience and consciously pass on products that don't meet their standards

**Forrester
2022**

**ERP products have a reputation for
having overly complicated experiences**

**Dynamics 365 users expect
consumergrade experiences**

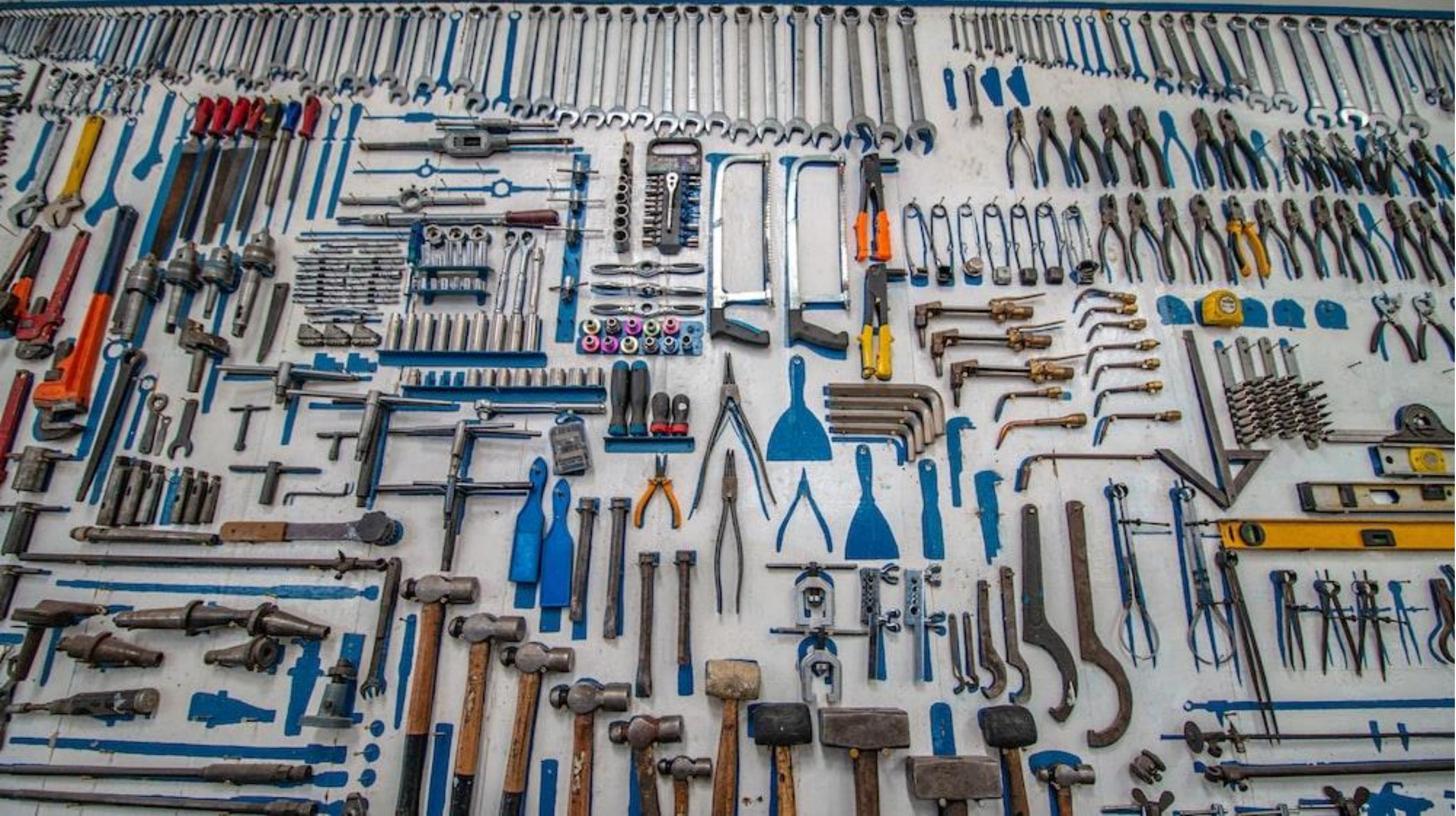
CONSUMERGRADE PRODUCT EXPERIENCE FRAMEWORK



A decision-making tool for building successful human centered products

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

Dynamics 365

Edit New Delete Action Tab1 Tab2 Tab3 Tab4 Tab5 Tab6 Tab7 Tab8

Group1		Group2		Group3		Group4		Group5	
~~~~	~~~~	~~~~	~~~~	~~~~	~~~~	~~~~	~~~~	~~~~	~~~~
~~~~	~~~~	~~~~	~~~~	~~~~	~~~~	~~~~	~~~~	~~~~	~~~~
~~~~	~~~~	~~~~	~~~~	~~~~	~~~~	~~~~	~~~~	~~~~	~~~~

Form XYZ

FastTab1

~~~~	~~~~	~~~~	~~~~	~~~~
<input type="text"/>				
~~~~	~~~~	~~~~	~~~~	~~~~
<input type="text"/>				
~~~~	~~~~	~~~~	~~~~	~~~~
<input type="text"/>				

FastTab2

~~~~	~~~~	~~~~	~~~~	~~~~
<input type="text"/>				
~~~~	~~~~	~~~~	~~~~	~~~~
<input type="text"/>				

FastTab3

~~~~	~~~~	~~~~	~~~~	~~~~
<input type="text"/>				
~~~~	~~~~	~~~~	~~~~	~~~~
<input type="text"/>				

FastTab4

FastTab5

FastTab6

FastTab7

Related Information

Factbox1

~~~~

~~~~

~~~~

Factbox2

|      |      |
|------|------|
| ~~~~ | ~~~~ |
| ~~~~ | ~~~~ |
| ~~~~ | ~~~~ |

Factbox3

|      |      |
|------|------|
| ~~~~ | ~~~~ |
| ~~~~ | ~~~~ |
| ~~~~ | ~~~~ |

Factbox4

~~~~

~~~~

# 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

- Actions

Dynamics 365

| Edit | New  | Delete | Action Tab1   | Tab2          | Tab3          | Tab4 | Tab5 | Tab6          | Tab7 | Tab8          |
|------|------|--------|---------------|---------------|---------------|------|------|---------------|------|---------------|
|      |      |        | <b>Group1</b> | <b>Group2</b> | <b>Group3</b> |      |      | <b>Group4</b> |      | <b>Group5</b> |
| ~~~~ | ~~~~ | ~~~~   | ~~~~          | ~~~~          | ~~~~          | ~~~~ | ~~~~ | ~~~~          | ~~~~ | ~~~~          |
| ~~~~ | ~~~~ | ~~~~   | ~~~~          | ~~~~          | ~~~~          | ~~~~ | ~~~~ | ~~~~          | ~~~~ | ~~~~          |
| ~~~~ | ~~~~ | ~~~~   | ~~~~          | ~~~~          | ~~~~          | ~~~~ | ~~~~ | ~~~~          | ~~~~ | ~~~~          |

Form XYZ

FastTab1

|                      |                      |                      |                      |                      |
|----------------------|----------------------|----------------------|----------------------|----------------------|
| ~~~~                 | ~~~~                 | ~~~~                 | ~~~~                 | ~~~~                 |
| <input type="text"/> |
| ~~~~                 | ~~~~                 | ~~~~                 | ~~~~                 | ~~~~                 |
| <input type="text"/> |
| ~~~~                 | ~~~~                 | ~~~~                 | ~~~~                 | ~~~~                 |
| <input type="text"/> |

FastTab2

|                      |                      |                      |                      |                      |
|----------------------|----------------------|----------------------|----------------------|----------------------|
| ~~~~                 | ~~~~                 | ~~~~                 | ~~~~                 | ~~~~                 |
| <input type="text"/> |
| ~~~~                 | ~~~~                 | ~~~~                 | ~~~~                 | ~~~~                 |
| <input type="text"/> |

FastTab3

|                      |                      |                      |                      |                      |
|----------------------|----------------------|----------------------|----------------------|----------------------|
| ~~~~                 | ~~~~                 | ~~~~                 | ~~~~                 | ~~~~                 |
| <input type="text"/> |
| ~~~~                 | ~~~~                 | ~~~~                 | ~~~~                 | ~~~~                 |
| <input type="text"/> |

FastTab4

FastTab5

FastTab6

FastTab7

Related Information

Factbox1

|                      |
|----------------------|
| ~~~~                 |
| <input type="text"/> |
| ~~~~                 |
| <input type="text"/> |
| ~~~~                 |
| <input type="text"/> |

Factbox2

|      |      |
|------|------|
| ~~~~ | ~~~~ |
| ~~~~ | ~~~~ |
| ~~~~ | ~~~~ |
| ~~~~ | ~~~~ |

Factbox3

|      |      |
|------|------|
| ~~~~ | ~~~~ |
| ~~~~ | ~~~~ |
| ~~~~ | ~~~~ |
| ~~~~ | ~~~~ |

Factbox4

|                      |
|----------------------|
| ~~~~                 |
| <input type="text"/> |
| ~~~~                 |
| <input type="text"/> |

# 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

- **Actions**
- **Fields**

Dynamics 365

Edit New Delete Action Tab1 Tab2 Tab3

Group1 Group2

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

Form XYZ

Related Information

FastTab1

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

FastTab2

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

FastTab3

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

FastTab4

FastTab5

FastTab6

FastTab7

Factbox1

~~~~

~~~~

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Factbox2

~~~~ ~~~~

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~~~~ ~~~~

Factbox3

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Factbox4

~~~~

~~~~

# Optimizing for your company

Creating corporate views

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

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- **Actions**
- **Fields**

Dynamics 365

Edit New Delete Action Tab1 Tab2 Tab3

Group1 Group2

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~

Form XYZ

FastTab1

~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~

FastTab2

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

FastTab3

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

FastTab4

FastTab5

FastTab6

FastTab7

Related Information

Factbox1

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Factbox2

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Factbox3

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Factbox4

~~~~

~~~~

A screenshot of a Dynamics 365 form interface. The top navigation bar includes 'Edit', 'New', 'Delete', and three tabs: 'Action Tab1' (which is selected and underlined), 'Tab2', and 'Tab3'. Below the navigation bar, there are two groups of fields: 'Group1' and 'Group2', each containing two rows of placeholder text '~~~~'. The main body of the form is titled 'Form XYZ' and contains seven 'FastTab' sections, labeled 'FastTab1' through 'FastTab7'. 'FastTab1' through 'FastTab3' contain various input fields and placeholder text. 'FastTab4' through 'FastTab7' are currently empty. On the right side of the form, there is a 'Related Information' section containing four 'Factbox' sections, labeled 'Factbox1' through 'Factbox4', each with its own set of placeholder text and input fields. A red rectangular box highlights the main content area of the form, encompassing the 'Form XYZ' section and the 'FastTab' sections.

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

- **Actions**
- **Fields**

The screenshot shows a Dynamics 365 form interface. At the top, there is a blue header bar with the text "Dynamics 365". Below the header, there is a navigation bar with buttons for "Edit", "New", "Delete", "Action Tab1", "Tab2", and "Tab3". The "Action Tab1" button is highlighted with a blue underline. Below the navigation bar, there are two groups of fields: "Group1" and "Group2". Each group contains two rows of fields, represented by wavy lines. The main content area of the form is titled "Form XYZ" and is highlighted with a red border. It contains seven fast tabs: "FastTab1", "FastTab2", "FastTab3", "FastTab4", "FastTab5", "FastTab6", and "FastTab7". Each fast tab contains a grid of fields, represented by wavy lines. To the right of the main content area, there is a "Related Information" section containing four factboxes: "Factbox1", "Factbox2", "Factbox3", and "Factbox4". Each factbox contains a grid of fields, represented by wavy lines.

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

- **Actions**
- **Fields**

Dynamics 365

Edit New Delete Action Tab1 Tab2 Tab3

Group1 Group2

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~

Form XYZ

FastTab1

~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~

FastTab2

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~

FastTab4

FastTab5

FastTab6

FastTab7

Related Information

Factbox1

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Factbox2

~~~~ ~~~~

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~~~~ ~~~~

~~~~ ~~~~

Factbox3

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~~~~ ~~~~

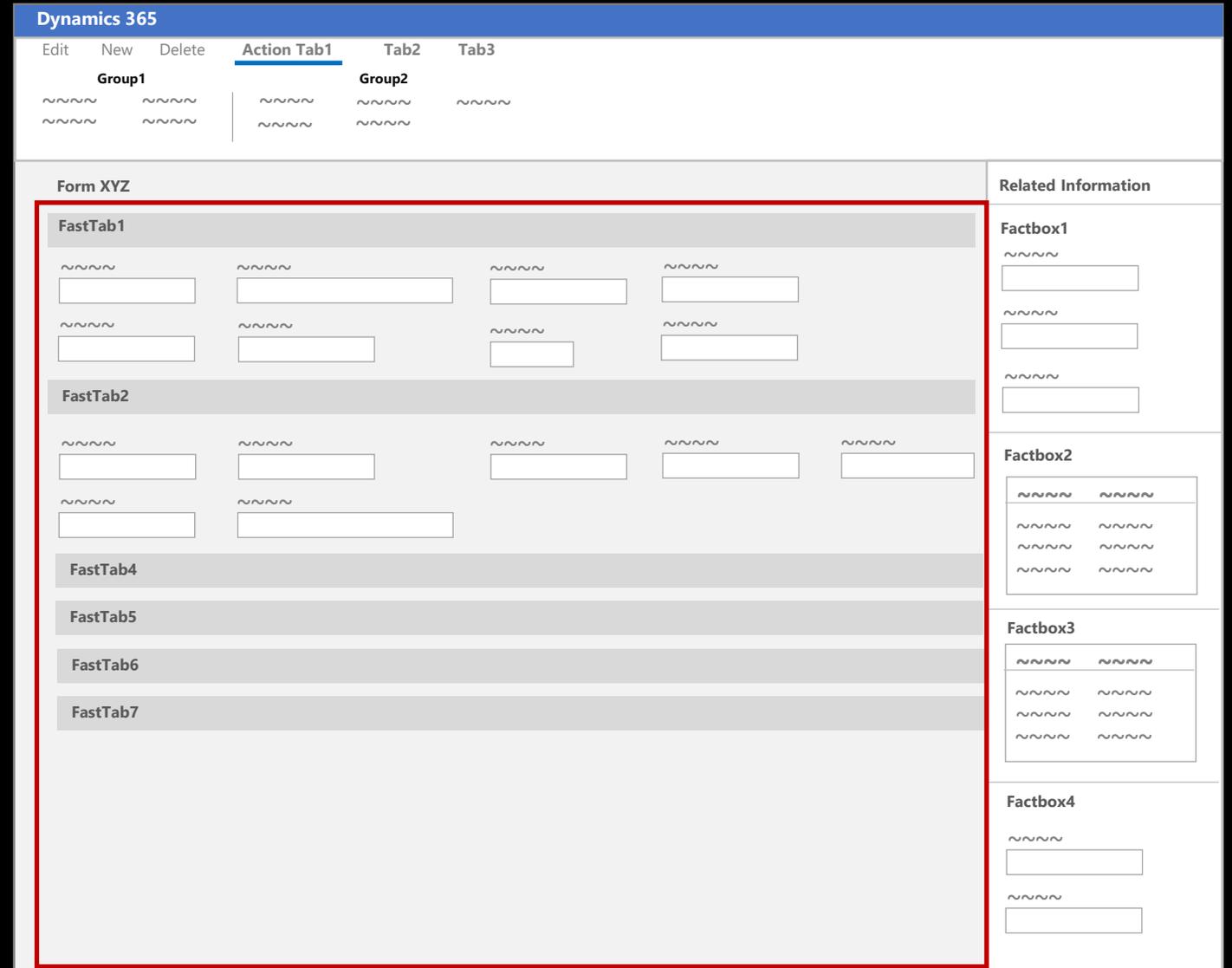
~~~~ ~~~~

Factbox4

~~~~

~~~~

~~~~

The image shows a screenshot of a Dynamics 365 form interface. At the top, there is a blue header bar with the text 'Dynamics 365'. Below this is a navigation bar with buttons for 'Edit', 'New', 'Delete', and three tabs: 'Action Tab1' (which is selected and underlined), 'Tab2', and 'Tab3'. The main content area is divided into two sections. The left section is titled 'Form XYZ' and contains several 'FastTab' components: 'FastTab1', 'FastTab2', 'FastTab4', 'FastTab5', 'FastTab6', and 'FastTab7'. 'FastTab1' and 'FastTab2' contain placeholder text '~~~~' and input fields. The right section is titled 'Related Information' and contains four 'Factbox' components: 'Factbox1', 'Factbox2', 'Factbox3', and 'Factbox4'. 'Factbox1' and 'Factbox4' contain placeholder text and input fields. 'Factbox2' and 'Factbox3' contain placeholder text in a grid layout. A red rectangular box highlights the 'Form XYZ' section, indicating the area where content should be hidden according to the instructions.

# 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

- **Actions**
- **Fields**
- **Factboxes**

The screenshot displays a Dynamics 365 form interface. At the top, there is a navigation bar with 'Dynamics 365' and several tabs: 'Edit', 'New', 'Delete', 'Action Tab1', 'Tab2', and 'Tab3'. Below the navigation bar, there are two groups of fields: 'Group1' and 'Group2'. The main body of the form is divided into several sections: 'Form XYZ', 'FastTab1', 'FastTab2', 'FastTab4', and 'FastTab5'. Each section contains various input fields and text labels. On the right side, there is a 'Related Information' section, which is highlighted with a red border. This section contains four factboxes: 'Factbox1', 'Factbox2', 'Factbox3', and 'Factbox4'. Each factbox contains a grid of data or a list of items. The 'Factbox1' and 'Factbox4' sections each have a single input field below them. The 'Factbox2' and 'Factbox3' sections each have a grid of data.

# 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

- Actions
- Fields
- Factboxes

**3** Rename fields & actions to fit your company's terminology

Dynamics 365

Edit New Delete Action Tab1 Tab2 Tab3

Group1 Group2

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~

Form XYZ

FastTab1

~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~

OK, that's better

~~~~ ~~~~ ~~~~ ~~~~ ~~~~

~~~~ ~~~~ ~~~~ ~~~~

FastTab4

FastTab5

Related Information

Factbox2

~~~~ ~~~~

~~~~ ~~~~

~~~~ ~~~~

~~~~ ~~~~

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

- Actions
- Fields
- Factboxes

3 Rename fields & actions to fit your company's terminology

4 Rearrange fields & actions for efficiency

The screenshot displays a Dynamics 365 form titled "Form XYZ" with a blue header bar. The form is organized into several sections:

- Header:** Includes "Edit", "New", "Delete", and three tabs: "Action Tab1" (selected), "Tab2", and "Tab3".
- Groups:** Two groups are visible: "Group1" and "Group2", each containing two rows of placeholder text "~~~~".
- Main Content Area:**
 - FastTab1:** Contains two rows of four input fields each, with placeholder text "~~~~" above each field.
 - Section:** A grey bar with the text "OK, that's better".
 - FastTab4:** Contains two rows of input fields with placeholder text "~~~~" above each field.
 - FastTab5:** A single row of input fields.
- Related Information Pane:** Located on the right side, titled "Related Information", it contains a "Factbox2" with a table of placeholder text "~~~~".

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

- Actions
- Fields
- Factboxes

3 Rename fields & actions to fit your company's terminology

4 Rearrange fields & actions for efficiency

The screenshot displays a Dynamics 365 form interface. At the top, a blue header bar contains the text "Dynamics 365". Below the header, a navigation bar includes "Edit", "New", "Delete", and three tabs: "Action Tab1" (which is selected and underlined), "Tab2", and "Tab3". The main content area is divided into several sections: "Group1" and "Group2" at the top, each containing two rows of placeholder text "~~~~". Below this is a section titled "Form XYZ" which contains five tabs: "FastTab1", "FastTab4", "OK, that's better", "FastTab5", and "FastTab5". The "OK, that's better" section contains two rows of placeholder text "~~~~" and five input fields. To the right of the main form area is a "Related Information" sidebar containing a "Factbox2" with two columns of placeholder text "~~~~".

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

- Actions
- Fields
- Factboxes

3 Rename fields & actions to fit your company's terminology

4 Rearrange fields & actions for efficiency

5 Save and Publish this view to all users as the default view

The screenshot displays the Dynamics 365 form editor interface. At the top, there's a blue header with 'Dynamics 365' and a navigation bar with 'Edit', 'New', 'Delete', and three tabs: 'Action Tab1', 'Tab2', and 'Tab3'. Below the navigation bar, there are two groups of fields: 'Group1' and 'Group2', each containing two placeholder fields represented by wavy lines. The main form area is titled 'Form XYZ' and contains several sections: 'FastTab1' with four placeholder fields, 'FastTab4' with one placeholder field, 'OK, that's better' with five placeholder fields, and 'FastTab5' with one placeholder field. On the right side, there's a 'Publish view to others' panel with a 'Name' field containing the text 'Corporate View' and a 'Publish' button at the bottom right.

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

- Actions
- Fields
- Factboxes

3 Rename fields & actions to fit your company's terminology

4 Rearrange fields & actions for efficiency

5 Save and Publish this view to all users as the default view

The screenshot displays a Dynamics 365 interface for a corporate view. At the top, the header reads "Dynamics 365" and includes navigation options: "Edit", "New", "Delete", "Action Tab1", "Tab2", and "Tab3". Below the header, there are two groups: "Group1" and "Group2", each containing two rows of placeholder text "~~~~".

The main content area is titled "CORPORATE VIEW" and contains several sections:

- FastTab1:** A section with two rows of placeholder text "~~~~" and four input fields.
- FastTab4:** A section with two rows of placeholder text "~~~~" and four input fields.
- OK, that's better:** A section with two rows of placeholder text "~~~~" and five input fields.
- FastTab5:** A section with two rows of placeholder text "~~~~" and two input fields.

On the right side, there is a "Related Information" panel containing a "Factbox2" with two columns of placeholder text "~~~~".

Optimizing for a role

1 Identify jobs to be done



Job 1



Job 2



Job 3

Optimizing for a role

1 Identify jobs to be done



Job 1



Job 2



Job 3

2 Design a workspace for each job



Optimizing for a role

1 Identify jobs to be done

2 Design a workspace for each job



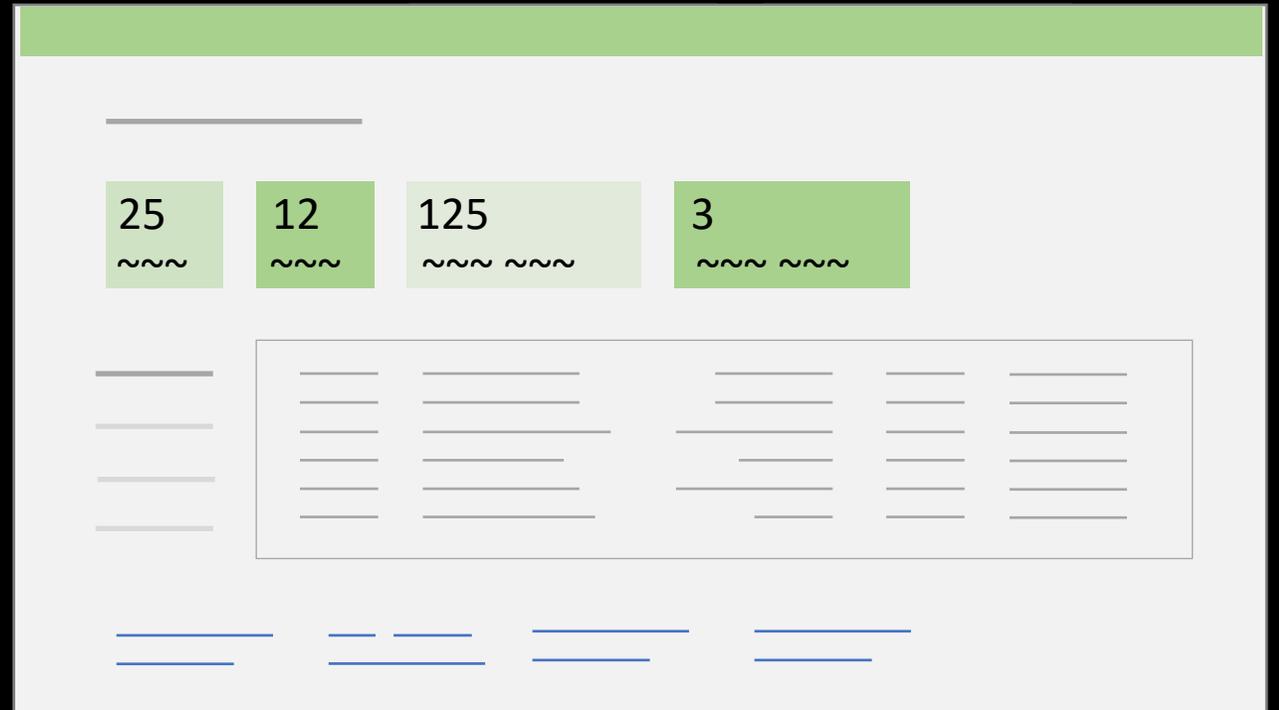
Job 1



Job 2



Job 3



Optimizing for a role

1 Identify jobs to be done



Job 1



Job 2



Job 3

2 Design a workspace for each job



Optimizing for a role

1 Identify jobs to be done

2 Design a workspace for each job

3 Create filtered views for each list



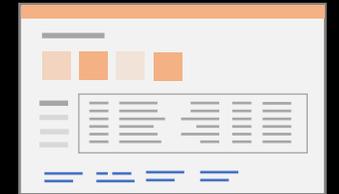
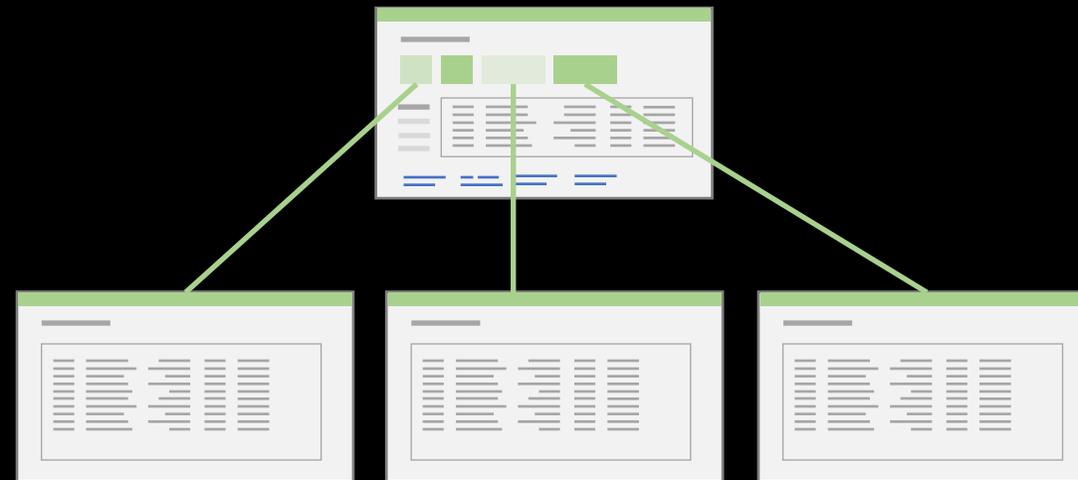
Job 1



Job 2



Job 3



Optimizing for a role

1 Identify jobs to be done



Job 1



Job 2

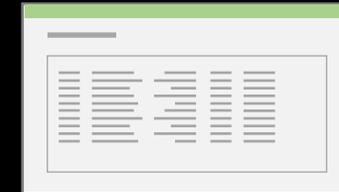
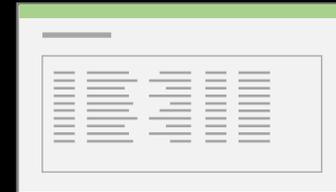
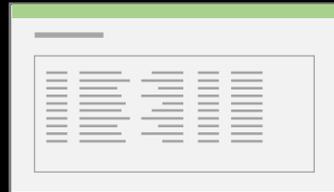


Job 3

2 Design a workspace for each job



3 Create filtered views for each list

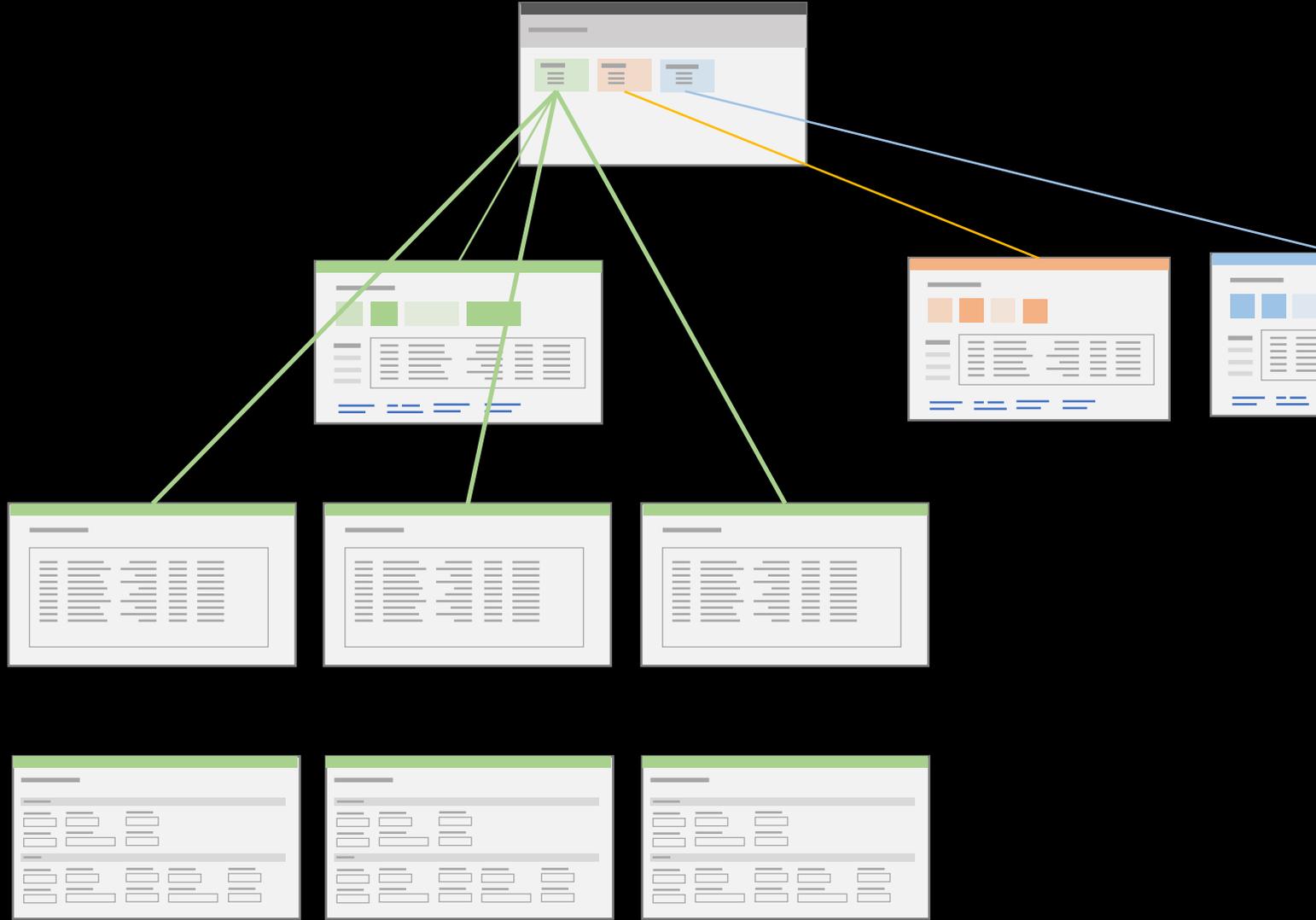


4 Create optimized task views for each form

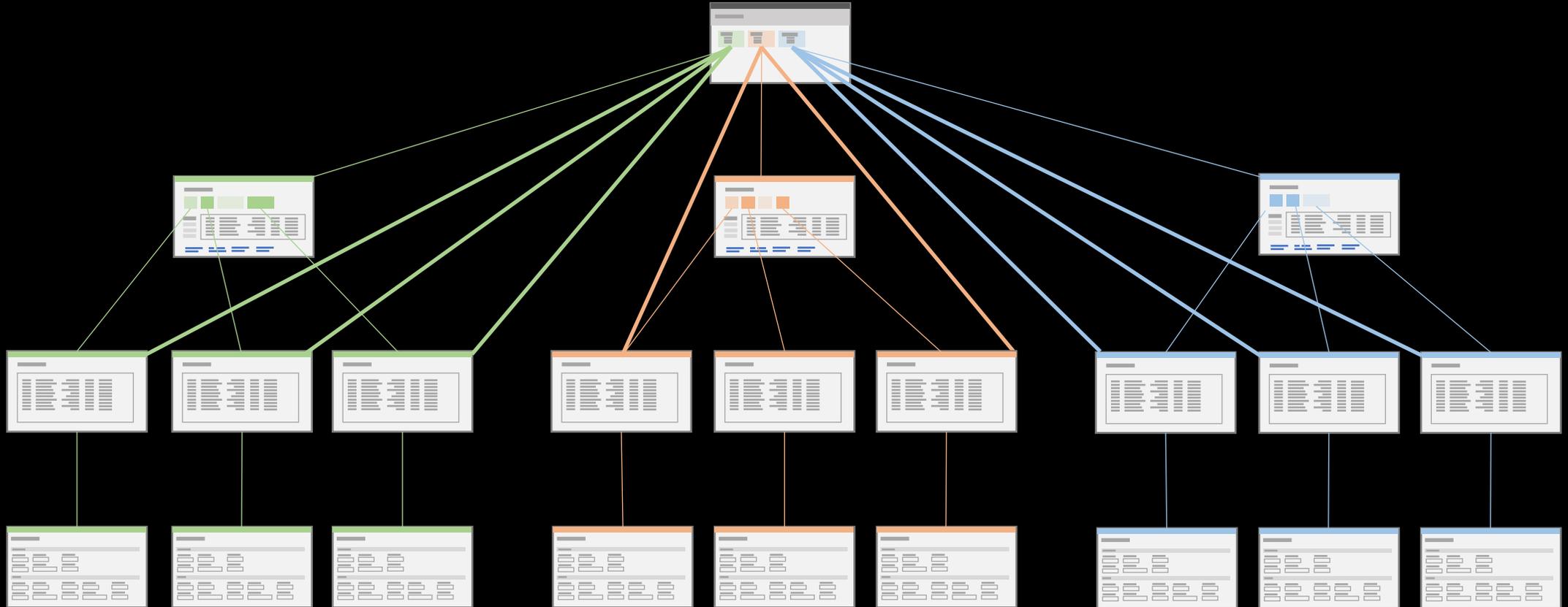


Optimizing for a role

5 Optimize Dashboard



Optimizing for a role



Personalization opportunities

Some examples

Welcome to Finance and Operations



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 |



Contoso Entertainment System USA

 **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**



Contoso Entertainment System USA



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 |
|-----------------------------|----------|



Customer invoicing

Summary

3
Shipped but not invoiced sales orders

1
Sales orders on hold

0
Free text invoices assigned to me

4
Unposted free text invoices

0
Unposted recurring invoice groups

Opportunity

Orders and invoices

- 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

Opportunity

| Invoice | 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 | |

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: Date: Hide currency revaluations

- [List](#)
[General](#)
[Payment](#)
[Promissory note](#)
[Settlement](#)
[Remittance](#)
[History](#)
[1099](#)
[Financial dimensions](#)



| 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 |
|---------------|-----------|---------|-------------|--------------------------------|---------------------------------|----------|-----------|------------|------------------------------|-------------------------------|---------|
| 14000640 | 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 | |
| 14000648 | 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 | |
| 14000650 | 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 | |
| 14000655 | 7/1/2017 | | | 2.89 | 0.00 | USD | 2.89 | 0.00 | 2.89 | 0.00 | |
| 14000656 | 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 | |

Vendor transactions | 1001 : ACME OFFICE SUPPLIES

Company View

[List](#)
[General](#)
[Payment](#)
[Promissory note](#)
[Settlement](#)
[Remittance](#)
[History](#)
[1099](#)
[Financial dimensions](#)

| <input type="radio"/> | Voucher | Date |  Invoice | Status | Amount | Balance |
|-----------------------|-------------------------------|-----------|---|----------|-------------------|--------------------|
| <input type="radio"/> | PIV-110000544 | 2/28/2017 | ACM222 | Invoiced | 7,000.00 | 0.00 |
| <input type="radio"/> | 140000640 | 3/7/2017 | | None | 35.00 | 0.00 |
| <input type="radio"/> | APPM001199 | 3/7/2017 | | Invoiced | 6,965.00 | 0.00 |
| <input type="radio"/> | PIV-110000546 | 4/6/2017 | ACM333 | Invoiced | 7,000.00 | 0.00 |
| <input type="radio"/> | 140000648 | 5/1/2017 | | None | 35.00 | 0.00 |
| <input type="radio"/> | APPM001205 | 5/1/2017 | | Invoiced | 6,965.00 | 0.00 |
| <input type="radio"/> | PIV-110000981 | 5/17/2017 | 1001 | Invoiced | 2,117.85 | 0.00 |
| <input type="radio"/> | 140000650 | 5/23/2017 | | None | 2.00 | 0.00 |
| <input type="radio"/> | APPM001206 | 5/23/2017 | | Invoiced | 397.50 | 0.00 |
| <input type="radio"/> | PIV-110000986 | 5/23/2017 | 1347987 | Invoiced | 399.50 | 0.00 |
| <input type="radio"/> | APPM001204 | 6/1/2017 | | Invoiced | 2,117.85 | 0.00 |
| <input type="radio"/> | APIN000021 | 6/5/2017 | 80193 | Invoiced | 4,589.10 | -4,589.10 |
| <input type="radio"/> | APIN000024 | 6/8/2017 | 09310 | Invoiced | 782.09 | -782.09 |
| <input type="radio"/> | APPM001203 | 6/12/2017 | | Invoiced | 892.57 | 892.57 |
| <input type="radio"/> | APIN000013 | 6/20/2017 | 309 | Invoiced | 309.03 | -309.03 |
| <input type="radio"/> | APIN000011 | 6/22/2017 | 7093 | Invoiced | 5,603.00 | -5,603.00 |
| <input type="radio"/> | APIN000009 | 6/24/2017 | 100189 | Invoiced | 7,209.98 | -7,209.98 |
| <input type="radio"/> | APIN000004 | 6/29/2017 | 10012 | Invoiced | 23,109.90 | -23,109.90 |
| <input type="radio"/> | 140000655 | 7/1/2017 | | None | 2.89 | 0.00 |
| <input type="radio"/> | 140000656 | 7/1/2017 | | None | 2.89 | 0.00 |
| <input type="radio"/> | APIN000002 | 7/1/2017 | 10017 | Invoiced | 578.09 | -578.09 |
| <input type="radio"/> | APIN000027 | 7/11/2017 | 678911 | Invoiced | 3,400.11 | -3,400.11 |
| <input type="radio"/> | APIN000033 | 7/17/2017 | 109 | Invoiced | 45.88 | -45.88 |
| <input type="radio"/> | APIN000038 | 7/23/2017 | 698183 | Invoiced | 205.80 | -205.80 |
| <input type="radio"/> | APIN000044 | 7/29/2017 | 0779183 | Invoiced | 109.10 | -109.10 |
| <input type="radio"/> | APIN000045 | 7/30/2017 | T28 | Invoiced | 80.99 | -80.99 |
| <input type="radio"/> | APIN000046 | 7/31/2017 | 729 | Invoiced | 44.70 | -44.70 |
| <input type="radio"/> | PIV-110000983 | 8/16/2017 | 46981 | Invoiced | 2,400.00 | -2,400.00 |
| <input type="radio"/> | APIN000048 | 9/13/2017 | 09810 | Invoiced | 1,098.99 | -1,098.99 |
| <input type="radio"/> | PIV-110000992 | 12/2/2022 | Test001 | Invoiced | 72,050.00 | -72,050.00 |
| Total | | | | | 120,724.19 | -120,724.19 |
| 41 rows | | | | | | |

[Edit](#) [+ New](#) [Delete](#) **Sales order** | [Sell](#) [Manage](#) [Pick and pack](#) [Invoice](#) [Commerce](#) [General](#) [Warehouse](#) [Transportation](#) [Credit management](#) [Options](#)

| | | | | | | | | |
|--|---------------------------|-----------------------------|---|--|--|-----------------------------|---|--|
| 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 |
|--|---------------------------|-----------------------------|---|--|--|-----------------------------|---|--|

Sales order details | Standard view ▼

000733 : Contoso Retail New York

[Lines](#) | [Header](#) | [Open order](#)

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 |
|-----------------------|----------------|-------------|------------------------------|----------------|-------------|---------|----------|------|---------------|---------------|---------------|------|-----------|------------|
| <input type="radio"/> | | 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



Edit + New Delete Sales order Sell Manage Pick and pack Invoice Commerce General Wa

| New | Maintain | Payments | Copy | View | Functions | Attachments | Em |
|-----------------|----------|----------|--------------|-----------------|-------------------|-------------|-------|
| Service order | Cancel | Payments | From all | Totals | Order credit | Notes | Email |
| Purchase order | | | From journal | Order events | Sales order recap | | |
| Direct delivery | | | | Detailed status | Order holds | | |



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
USA



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 | Maintain | Payments | Copy | View | Functions | Attachments | Email notification | Clean up |
| Service order
Purchase order
Direct delivery | Cancel | Payments | From all
From journal | Totals
Order events
Detailed status | Order credit
Sales order recap
Order holds | Notes | Email notification log | Clean up sales update history |

Opportunity

Sales order details | Standard view

000733 : Contoso Retail New York

Lines | Header | Open order

Sales order header

| | | | | | | |
|-------------------------|--|------------------------|---|----------------------|------------------|-------------------------------------|
| DELIVERY ADDRESS | Delivery address | DELIVERY DATE | Simulate delivery dates | REFERENCES | DISCOUNTS | TRANSPORTATION |
| Name | <u>Contoso Retail New York</u> + | Requested ship date | Confirmed ship date | Customer reference | Total discount % | Routes |
| Contoso Retail New York | Address | 1/8/2017 | 1/8/2017 | Customer requisition | 0.00 | Carrier customer account number |
| | 678 Orange Street
New York, NY 10006
USA | Requested receipt date | Confirmed receipt date | | WAREHOUSE | DISTRIBUTED ORDER MANAGEMENT |
| | | 1/8/2017 | 1/8/2017 | | Release status | DOM Status |
| | | | | | Open | Not processed |

Opportunity

Sales order lines

[+ Add line](#) [+ Add lines](#) [Add products](#) [Remove](#) [Sales order line](#) [Financials](#) [Inventory](#) [Product and supply](#) [Update](#) [Retail](#)

| T... | Variant number | Item number | Product name | Sales category | CW quantity | CW unit | 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 |

Opportunity

Line details

| | | | | |
|---|---------------------------------------|---|--|---|
| New | Related information | Agreements | Quality | Set up |
| Purchase order
Request for quotation
Purchase requisition | Planned purchase orders
Agreements | Purchase orders
Product receipt
Request for quotation journal
Approved vendor list by vendor | Trade agreements
Purchase agreements
Purchase prices
Discounts
Supplementary purchase item | Non conformances
External item description
External codes
Forecast
Configure vendor for catalog import
Default item status |

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
<input type="radio"/> No
W-9 received
<input checked="" type="radio"/> No
Check for W-9
<input checked="" type="radio"/> No | FATCA filing requirement
<input checked="" type="radio"/> No
Federal tax ID

Tax ID type
Unknown | 1099 box

Foreign entity indicator
<input checked="" type="radio"/> No
Second TIN
<input checked="" type="radio"/> No | Name to use on the 1099
Vendor name

DBA

Name control
_____ | OID
CUSIP
<input checked="" type="radio"/> No
CUSIP ID

CUSIP details
_____ | Nominee details

Investor type
None |
| Retail | ▾ | | | | |
| Financial dimensions | ▾ | | | | |

Related information

Miscellaneous details

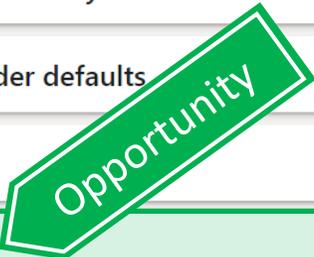
Vendor profile

Purchasing demographics

Invoice and delivery

Purchase order defaults

Payment



Tax 1099

TAX 1099 OPTIONS

Report 1099

No

FATCA filing requirement

No

1099 box

Name to use on the 1099

Vendor name

OID

CUSIP

No

W-9 received

No

Federal tax ID

Foreign entity indicator

No

DBA

CUSIP ID

Check for W-9

No

Tax ID type

Unknown

Second TIN

No

Name control

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

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](#)