

# CRM connect

CRM Super User Masterclass



THURSDAY 15<sup>th</sup> MAY 2025



Can you hear me?



Is everything clear?



~ 45 mins

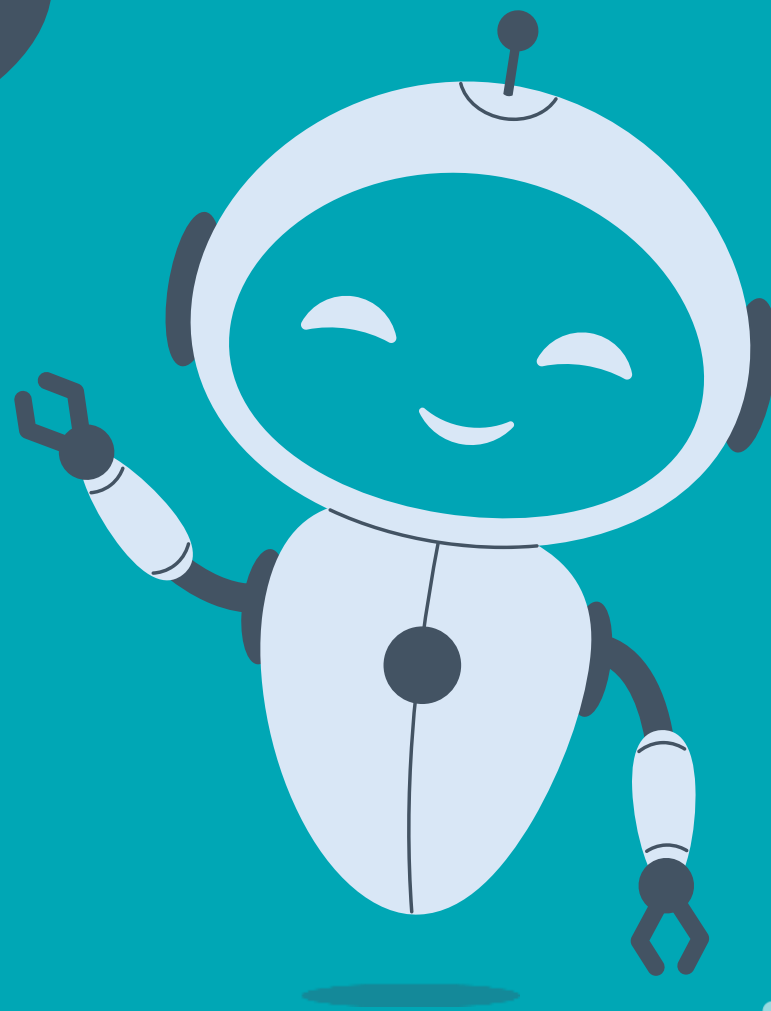


Q & A



Hi!

Jon & Jordan





# Storage



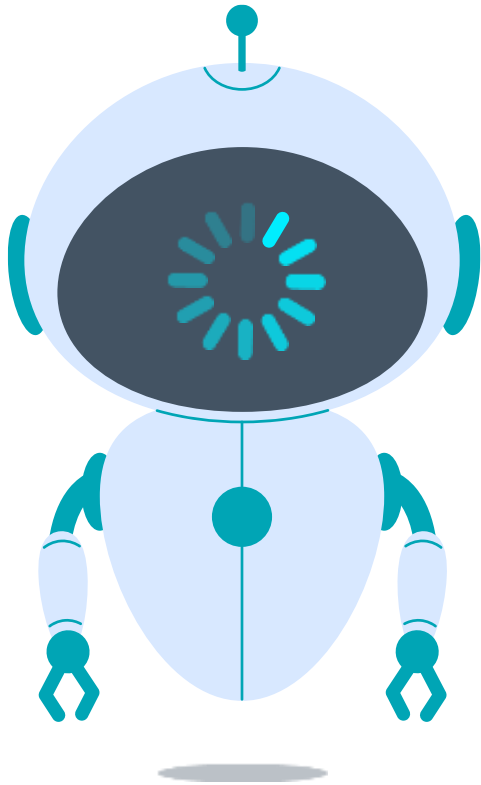
# Permissions





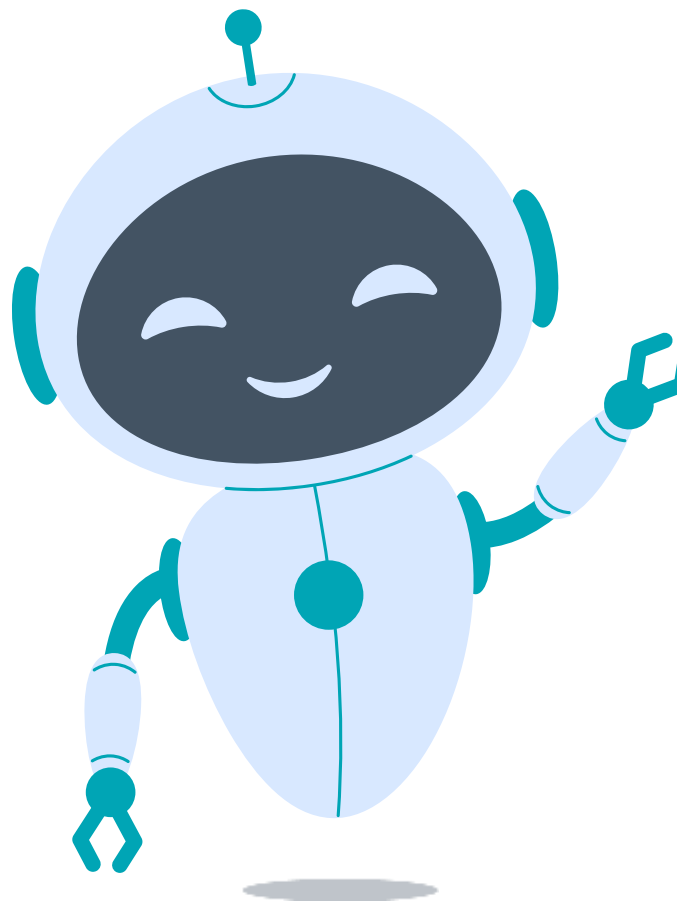
# Views

# View



- changing columns, new filtering element (grid enhancements) - seems to just be in dev
- advanced find – related
- also in make.powerapps.com
- personal views
- saving views
- sharing views (and options here)
- hiding system views
- views in apps
- adding charts - Power BI and embedding



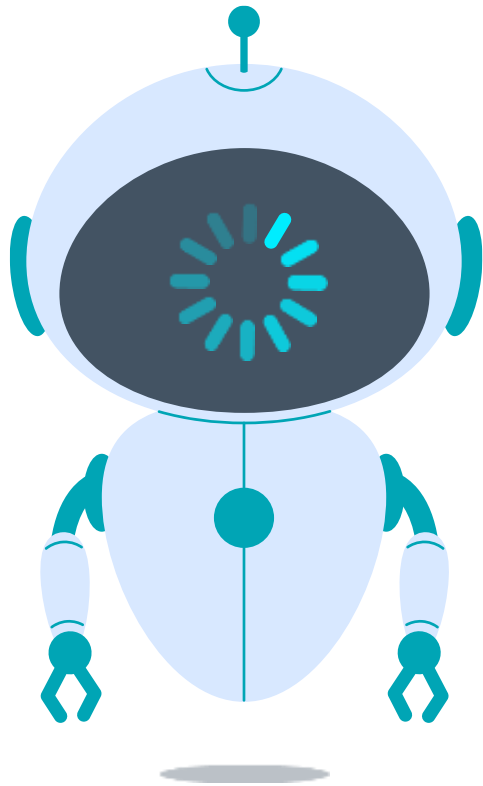


# Demonstration



# General Administration

# Personal Settings



- Regions,
- Languages
- Formats
- Records per page
- Default pane

# Personal Settings

**Dynamics 365 Sales Hub**

**Search**

**My work list**

Activities will appear here  
Create sequences to populate the work items.  
[Create sequences](#)

**Set Personal Options**  
Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

**General** | Synchronization | Activities | Formats | Email Templates | Email Signatures | Email | Privacy | **Languages**

**Select** | Import | Track | Config | Auton | Unifie | View y

**Select the language you prefer to see Microsoft Dynamics 365 displayed in**  
You can change the display language used for items such as menus and dialog boxes.

Base Language	English
User Interface Language	English
Help Language	English

[OK](#) [Cancel](#)

Home

Actions

Manage

Security

Copilot

Monitor

Deploy...

Licensing

Support

Admin centers

Manage

Environments

Environment groups

Tenant settings

Data

Data (preview)

Data integration

Data export

Products

Power Apps

Power Automate

Power Pages

Dynamics 365 Apps

Dataverse

Power Platform admin center

Search for settings, pages, and more

New admin center

JE

Environments > Tecman Dev > Settings > Features

Learn more about [Features](#)

Copilot

Preview

Enable new AI-powered Copilot features for people who make apps. [Learn more](#)

On

Allow users to analyze data using an AI-powered chat experience in [canvas apps](#) and [model-driven apps](#). [Learn more](#) [Requires Copilot licensing](#)

Default

Allow canvas editors to insert the Copilot answer component, which allows users to receive an AI-powered answer to a predefined data query.

On

Copilot Studio agents

Accessing transcripts from conversations in Copilot Studio agents

Transcripts gathered from conversations with agents made in Copilot Studio may include sensitive or personally identifiable information (PII), and exposing them to everyone with access to the data may open security risks. [Learn more](#)

☒ Allow agent owners and editors to see session transcripts from conversation interactions in their agents.

☒ Allow conversation transcripts and their associated metadata to be saved in Dataverse (required for enhanced reporting).

AI Builder

Enable the usage of AI Builder model types that are in preview. [Learn more](#)

Off

Search

Manage how search works in this environment. [Learn more](#)

Dataverse search

On (recommended)

When on, searches in supported product areas will use Dataverse search. Model-driven apps will also receive search improvements. [Learn how to configure](#)

Share search analytics with Microsoft

Requires agreement to the [terms of service](#)

Off

Single table search option

Off

When on, Dataverse search will provide a shortcut to restrict the search to a single table on view pages of search-enabled tables. Dataverse search must be turned on. [Learn how and where to configure search](#)

Prevent slow keyword filter for quick find terms on view pages

Off

When Dataverse search is off, slow queries are allowed but will show a warning

Quick Find record limits

On

Use quick find view of an entity for searching on grids and sub-grids

On

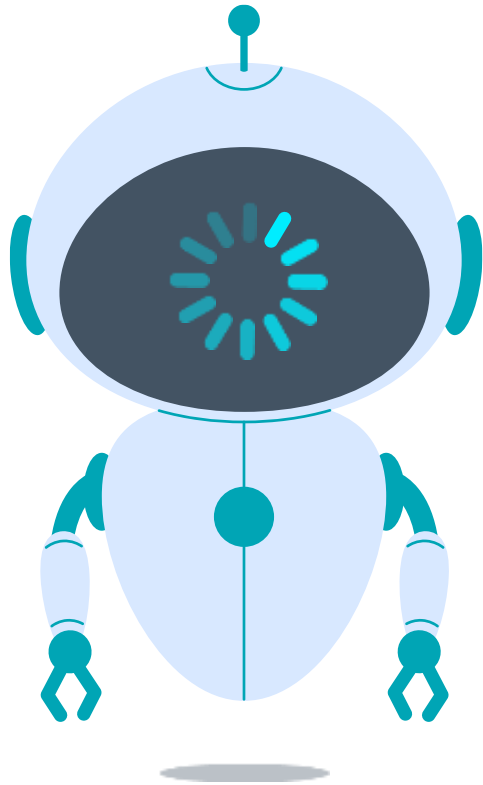
Search for records in Microsoft 365 apps

Off

Save

Cancel

# General Settings



- TDS endpoint (not into too much depth)
- Delete disabled users (don't do this)
- Power BI utilisation
- Map
- Recycle bin
- Turn off Co-Pilot natural language search
- Turn off suggestions

# General Settings

## Environments > CRM Connect > Settings > Features

### no generation

Enable the AI prompts feature in Power Platform and Copilot Studio. [Learn more](#)

☒ On

#### AI form fill assistance

Allow AI to generate form field suggestions for model-driven apps. [Learn more](#)

##### Automatic suggestions

Default

##### Smart paste and file suggestions (Production Ready Preview)

Default

##### Form fill assist toolbar

Default

#### AI suggestions for formula columns

[Preview](#)

Allow users to get AI suggestions when creating formula columns. Currently in preview. [Learn more](#)

☒ On

#### Natural language grid and view search

[Preview](#)

Find your data in model-driven app views with the help of Copilot. [Learn more](#)

##### Enable this feature for:

Users as the feature becomes available

### Map and address services

[Learn more](#)

#### Limited

Allow map display, latitude and longitude pins, and shapes

☒ On

#### Full

In addition to the above, allow map routing, address input control, and pins loaded from addresses. Requires agreement to the [terms of service](#)

☐ Off

### Help features

Custom help for customizable entities

☐ Off

Global custom help URL

☐ Agreed parameters by URL

Enable Custom Help Pages

☐ Off

### Power Apps component framework for canvas apps

Enables Power Apps component framework feature that allows the execution of code that may not be generated by Microsoft when a maker adds code components to an app. Make sure that the code component solution is from a trusted source. [Learn more](#)

Allow publishing of canvas apps with code components

☐ Off

Enable this feature for:

Users as the feature becomes available

Allow AI to generate charts to visualize the data in a view (production-ready preview). [Learn more](#)

Auto

#### AI insight cards

[Preview](#)

Recent summaries and other Copilot insights will appear on main forms

☒ On

### Power Automate Process Mining

Enable production ready preview features for Power Automate Process Mining. [Learn more](#)

☒ On

### Embedded content

Power BI visualization embedding

☐ Off

Ring Maps

☐ Off

Prevent social data in Dynamics

☐ Off

### Communications

Country/region code prefixing for numbers

☒ On

[Learn more](#)

Enable sharing of default VM image(s) to users

☒ On

When on, all users in the environment can access default VM image(s) provided by Microsoft. [Learn more](#)

### Power Automate Automation center

Enable production ready preview features for Power Automate Automation center. [Learn more](#)

☒ On

### Enhanced desktop flow schema

Enhanced schema has been enabled on your organization by Microsoft. To disable it, please contact the Support.

Enable storage of desktop flow files into x2 schema. [Learn more](#)

☒ On

Opt-out of desktop flow schema v2 enabled by default. [Learn more](#)

☐ Off

### Desktop flow run action logs configuration

Activation status of run action logs. [Learn more](#)

Enabled (Default)

Action logs version. [Learn more](#)

V1 - Stored in the AdditionalContent file.

Flowlogs entity time to live in minutes

40000

Set default time expiration in the Flowlogs entity (only supported with V3). The default value is 40000 minutes (666 days). Set the value to 0 to never expire them. [Learn more](#)

Create new records and activities using Unified Interface forms instead of quick view forms

☐ Off

Disable the option to quick create new records and activities in the Mobile application

☐ Off

Edit and view records and activities using Unified Interface forms instead of quick view forms

☐ Off

### Power Apps Ideas for Canvas Apps

Show ideas query data to help improve ideas results. Requires agreement to the [terms of service](#)

☐ Off

### Environment settings behavior

Advanced Settings redirection. [Learn more](#)

☒ On

When enabled, the Advanced settings toolbar links within product experiences will be redirected to a new Environment Settings URL.

### Advanced mobile offline settings for model-driven apps

When there is a mismatch of data between client and server, conflict errors occur. By default, changes that are made by a user in offline mode are automatically synced to the server when the user is back online. When enabled, the server wins over the client and the conflict errors must be resolved manually. [Learn more](#)

Enable conflict detection for mobile offline synchronization

☐ Off

### Recycle Bin (Preview)

Admins can view and recover any deleted records within a configurable time period up to 30 days. [Learn more](#)

Enable Recycle bin for Dynamics tables.

☐ Off

# Environment Settings

- Backup and restore
- Bulk delete
- Advanced settings - other routes in
- Multiple forms and orders - opening last used form - how this works
- audit summary view & filtering



# Environment

The screenshot shows the Power Platform admin center interface. The left sidebar contains navigation links: Home, Environments, Environment groups, Advisor, Security, Analytics, Billing, Settings, Copilot, Resources, and Help > support. The main content area is titled 'Environments > CRM Connect'. It features a 'Details' section with the following information:

Field	Value
Environment URL	crmconnect.crm11.dynamics.com
State	Ready
Region	United Kingdom
Refresh cadence	Frequent
Type	Sandbox
Security group	Not assigned
Organization ID	d91f59ca-4f11-4011-9aed-0005bdf183a4
Environment ID	852d819a-c938-e6f8-bf12-7b2bd9c6da3
Created by	Not specified

To the right of the details is an 'Access' section with links to 'Security roles', 'Teams', 'Users', 'S2S apps', and 'Business units', each with a 'See all' link.

The screenshot shows the 'Bulk Record Deletion' tool interface. A 'Define Search Criteria' dialog box is open, allowing users to select search criteria to identify records to delete. The dialog includes a 'Select search criteria to identify records to delete' section with a 'Link list' dropdown set to 'Accounts' and a 'Use Saved View' dropdown set to 'Inactive Accounts'. Below this, there are checkboxes for 'Case', 'Group AND', and 'Group OR'. The 'Group AND' section is expanded, showing a list of criteria: 'Status' (set to 'Inactive'), 'Modified On' (set to 'On or after 1/1/2025'), and 'Deleted' (set to 'No'). A 'Search' button is at the bottom of the dialog. The background shows a table of records with columns for 'Status Reason', 'Deleted', and 'Released'.

Environments > CRM PP Workshops > Settings > Audit settings

## Auditing

Manage logging for Dataverse data

☐ Start Auditing

☐ Log access ⓘ

☐ Read logs ⓘ

## Retain these logs for

Set the retention policy for these logs, after which they'll be deleted.

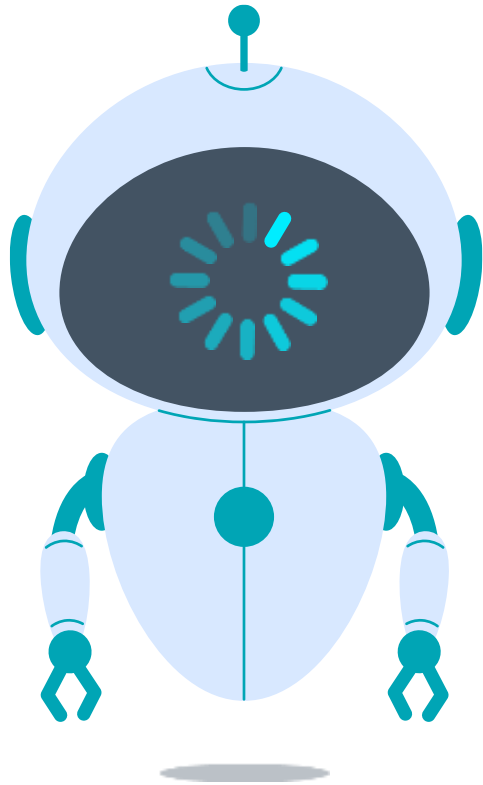
Forever

Global Audit Settings ⓘ

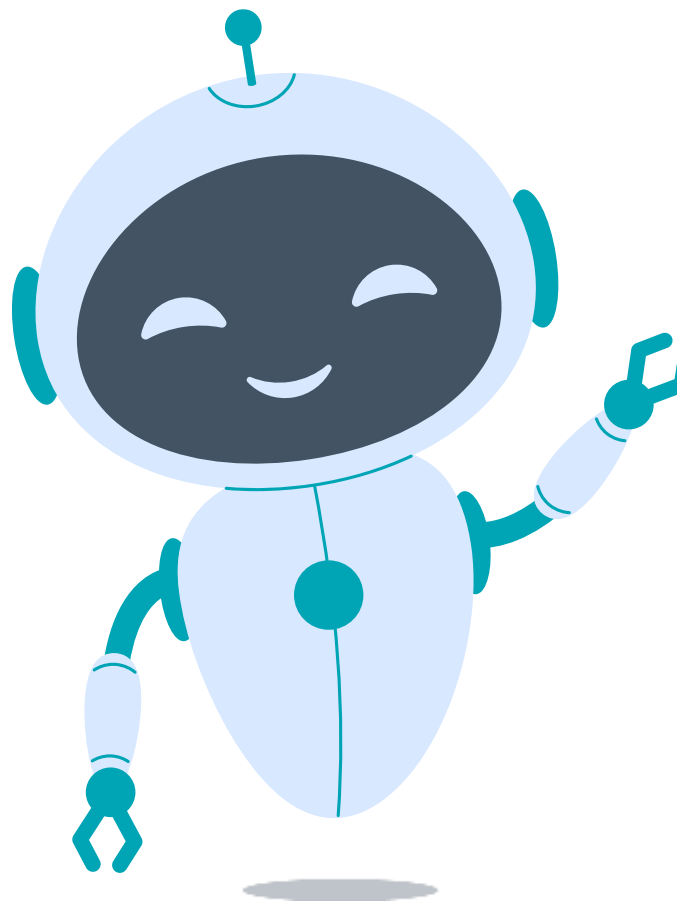


# Power Automate Flow Management

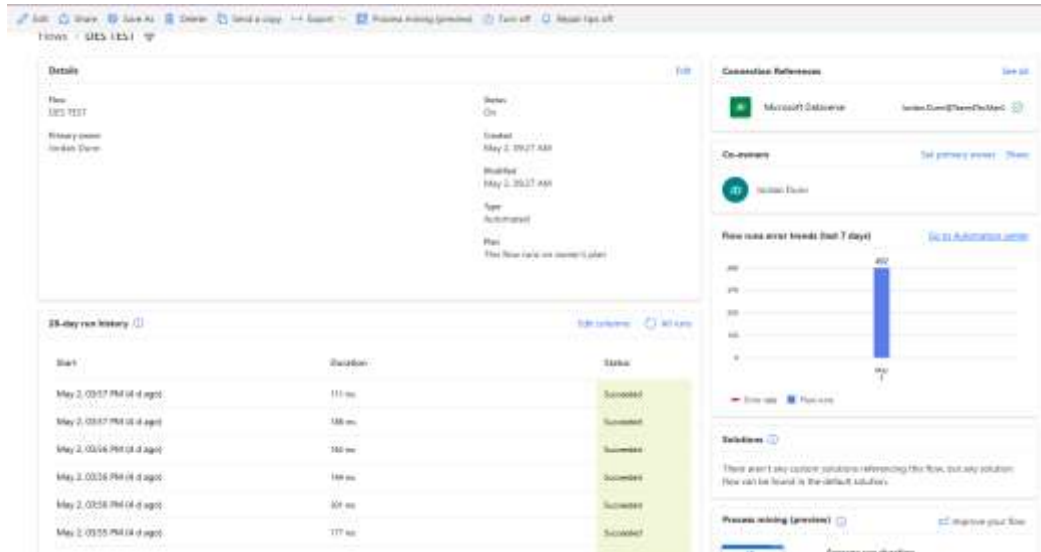
# Power Automate Management Flow Management



- General Flows
- Cloud flow run history in Dataverse (in settings)
- Ownership
- General management - duplication and removal
- Limitations (5000 limit - 28 day history)
- Automation centre (and per Flow)



# Demonstration



## Create new canvas apps and cloud flows in Dataverse solutions

New canvas apps and cloud flows will be created inside a Dataverse solution. This makes applications portable between environments. Note: With this setting on, your team will likely need security roles updated for this environment. [Learn more](#)

☐ Canvas apps (CRM)

☐ Cloud flows (CRM)

## Cloud flow run history in Dataverse

With cloud flow run history in Dataverse, you can leverage the extensibility of Dataverse to track the results of your cloud flow executions at scale. [Learn more](#)

**FlowRun entity time to live**

Enabled - 28 days retention (default)

When enabled, every new cloud flow execution will have an entry in the "FlowRun" table to store the cloud flow run metadata. You can adjust the duration of how long the execution records are stored depending on your storage capacity needs.

## Block unmanaged customizations

Dataverse will block unmanaged customizations in the environment. Select [Learn more](#) to review known limitations. [Learn more](#)

☐ CRM

## Data Validation

Enable email address validation in model-driven apps (preview). [Learn more](#)

☐ CRM

## Attachment Security

Enable security on Attachment entity

☐ CRM

Name	Limit	Notes
Concurrent runs	Unlimited for flows with Concurrency Control turned off 1 to 100 when Concurrency Control is turned on (defaults to 25)	This is the limit for how many runs a flow can have at the same time. Note: Concurrency Control is set in the flow's trigger settings and is off by default. Turning on Concurrency Control can't be undone without deleting and re-adding the trigger.
Waiting runs	Not applicable when Concurrency Control is off 10 plus the degree of parallelism (1-100) when Concurrency Control is on	This limit describes the highest number of flow runs that can be queued when the flow is at its maximum number of concurrent runs. Note: Additional triggers that arrive while the waiting runs limit is met might be re-tried by the connector. However, the retry attempts might not succeed if the maximum waiting limit continues to be met for an extended period of time. To ensure all triggers result in flow runs, leave the Concurrency Control setting off in the flow's trigger.
Apply to each array item	5,000 for Low, 100,000 for all others	This limit describes the highest number of array items that an "apply to each" loop can process. To filter larger arrays, you can use the query action.
Apply to each concurrency	1 is the default limit. You can change the default to a value between 1 and 50 inclusively.	This limit is the highest number of "apply to each" loop iterations that can run at the same time, or in parallel.
Split on item	5,000 for Low without trigger concurrency 100,000 for all others without trigger concurrency 100 with trigger concurrency	For triggers that return an array, you can specify an expression that uses a "SplitOn" property that splits or detaches array items into multiple workflow instances for processing, rather than use a "foreach" loop. This expression references the array to use for creating and running a workflow instance for each array item. Note: When concurrency is turned on, the Split on limit is reduced to 100 items.
Unit iterations	Default: 50 Maximum: 5,000	
Paginated items	5,000 for Low, 100,000 for all others	To process more items, trigger multiple flow runs over your data.

**Co-owners**

Adding an owner gives them full control of the flow, so make sure you only share with people you trust. They'll be able to add or remove other users as owners, access the run history, and can update, edit or delete this flow. [Learn more](#)

**Add a system user or team as an owner**

Enter names to email addresses:

Jordan Dunn  
Jordan.Dunn@TeamDevMec.com

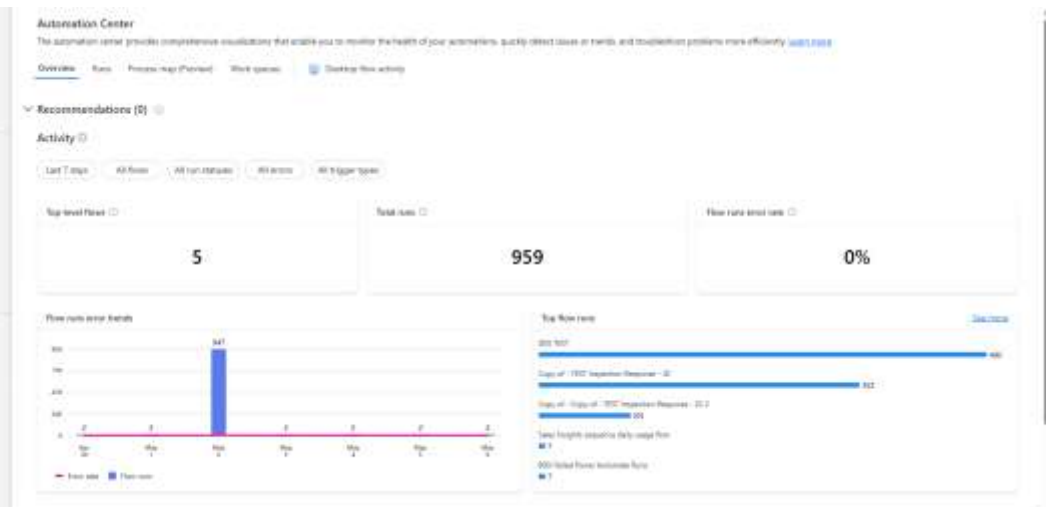
**Embedded connection references**

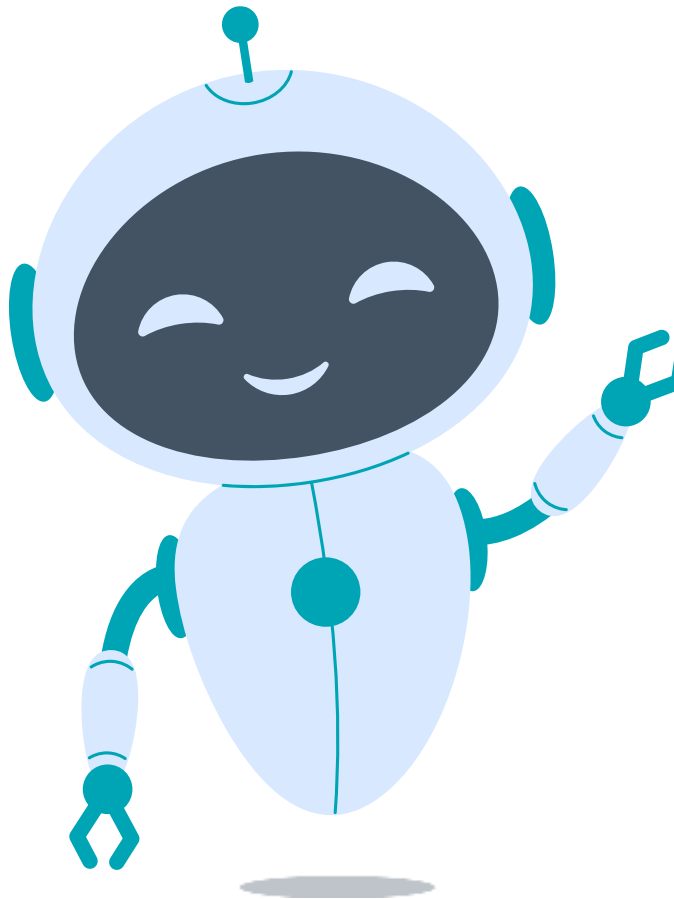
Everyone listed as an owner will have access to all these connection references and will only be able to use them in this flow.

**Connection references in use**

Connection references listed are actively being used in this flow.

Microsoft Database





Need more Guidance?  
Speak to your  
Account Manager!

*Thank you!*



CRM

**connect**

THURSDAY 15<sup>th</sup> MAY 2025

