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CRM connect

CRM Super User Masterclass

THURSDAY 15th MAY 2025

Can you hear me?

Is everything clear?

~ 45 mins

Q & A

Jon & Jordan

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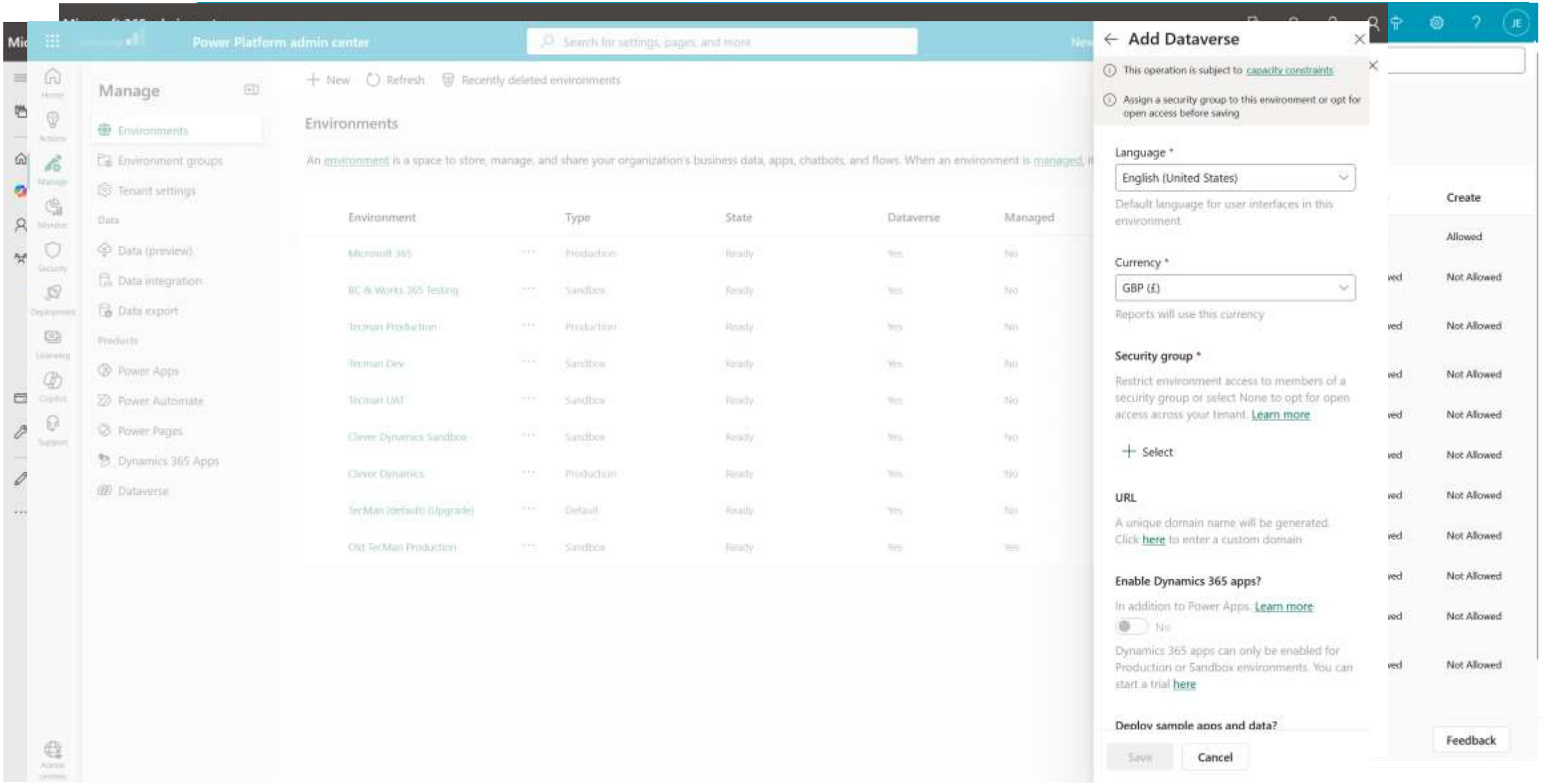
Storage

Permissions


Power Platform admin center
Search for settings, pages, and more
Manage
Environments
Environment groups
Tenant settings
Data
Data (preview)
Data integration
Data export
Products
Power Apps
Power Automate
Power Pages
Dynamics 365 Apps
Dataverse
New
Refresh
Recently deleted environments
Environments
An environment is a space to store, manage, and share your organization's business data, apps, chatbots, and flows. When an environment is managed, it
Environment
Type
State
Dataverse
Managed
Add Dataverse
This operation is subject to capacity constraints
Assign a security group to this environment or opt for open access before saving
Language *
English (United States)
Default language for user interfaces in this environment
Currency *
GBP (£)
Reports will use this currency
Security group *
Restrict environment access to members of a security group or select None to opt for open access across your tenant. Learn more
Select
URL
A unique domain name will be generated. Click here to enter a custom domain
Enable Dynamics 365 apps?
In addition to Power Apps. Learn more
No
Dynamics 365 apps can only be enabled for Production or Sandbox environments. You can start a trial here
Deploy sample apps and data?
Save
Cancel
Create
Allowed
Not Allowed
Feedback

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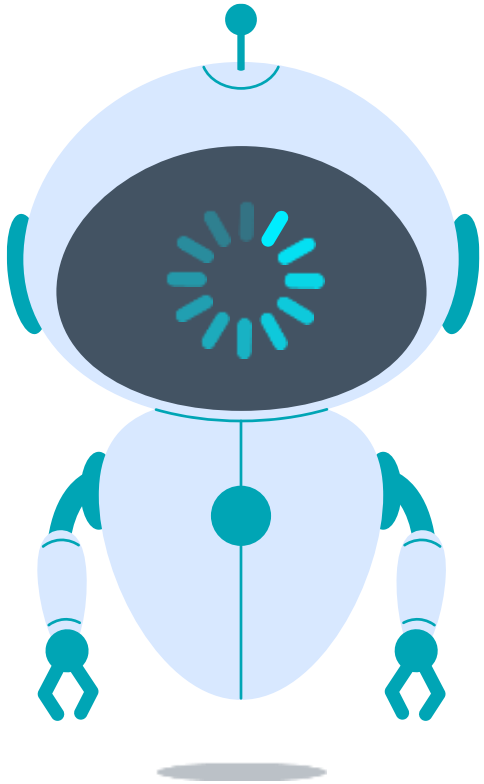
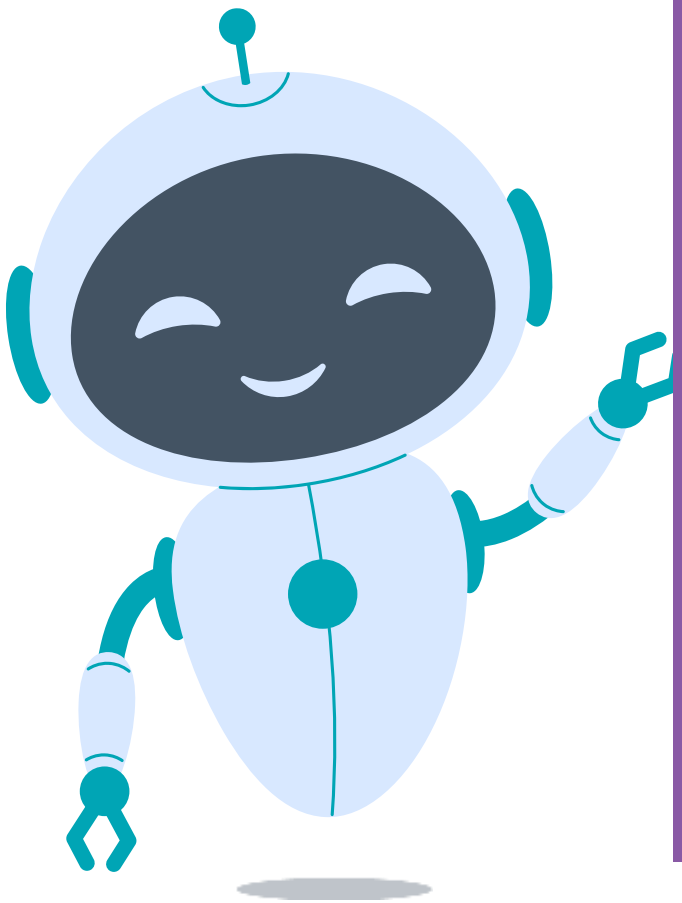
Views

View



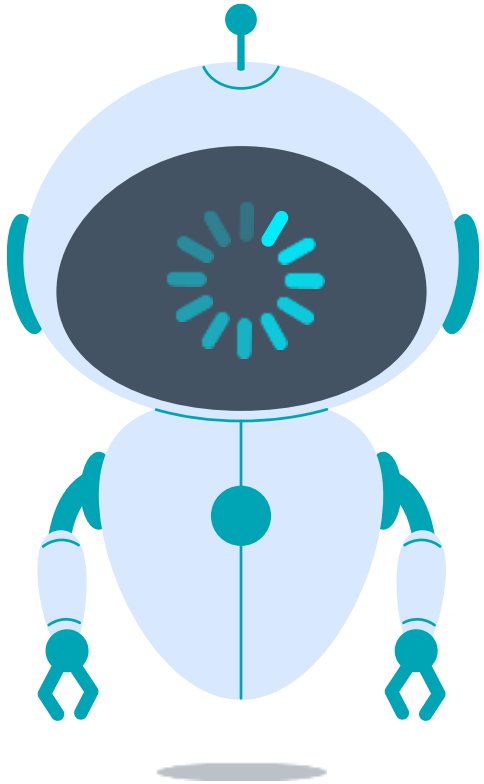
- changing columns, new filtering element (grid enhancements) - seems to just be in dev
- advanced find – related
- also in make.powerapps.com
- personal views
- saving views
- sharing views (and options here)
- hiding system views
- views in apps
- adding charts - Power BI and embedding



Demonstration

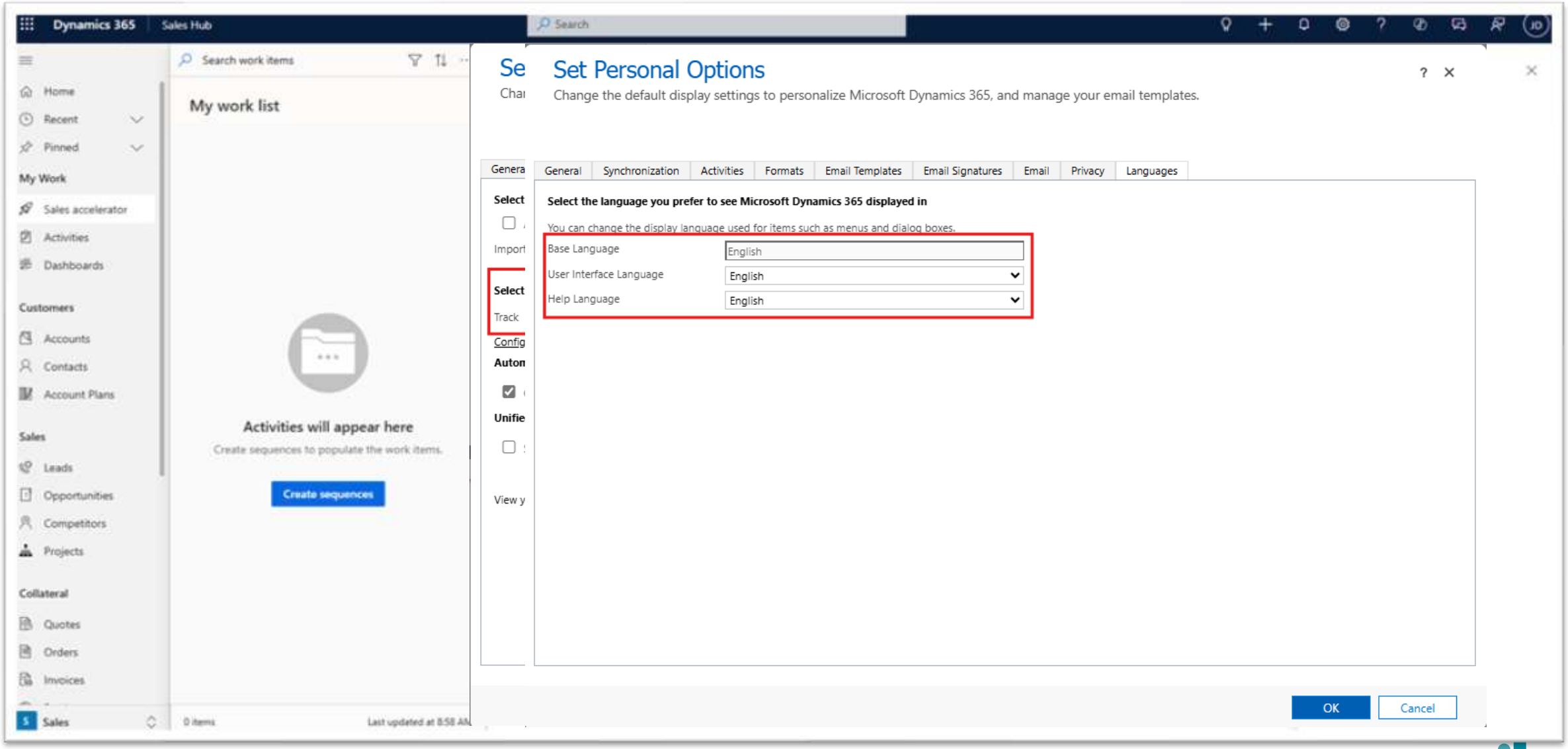
General Administration

Personal Settings



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

Personal Settings



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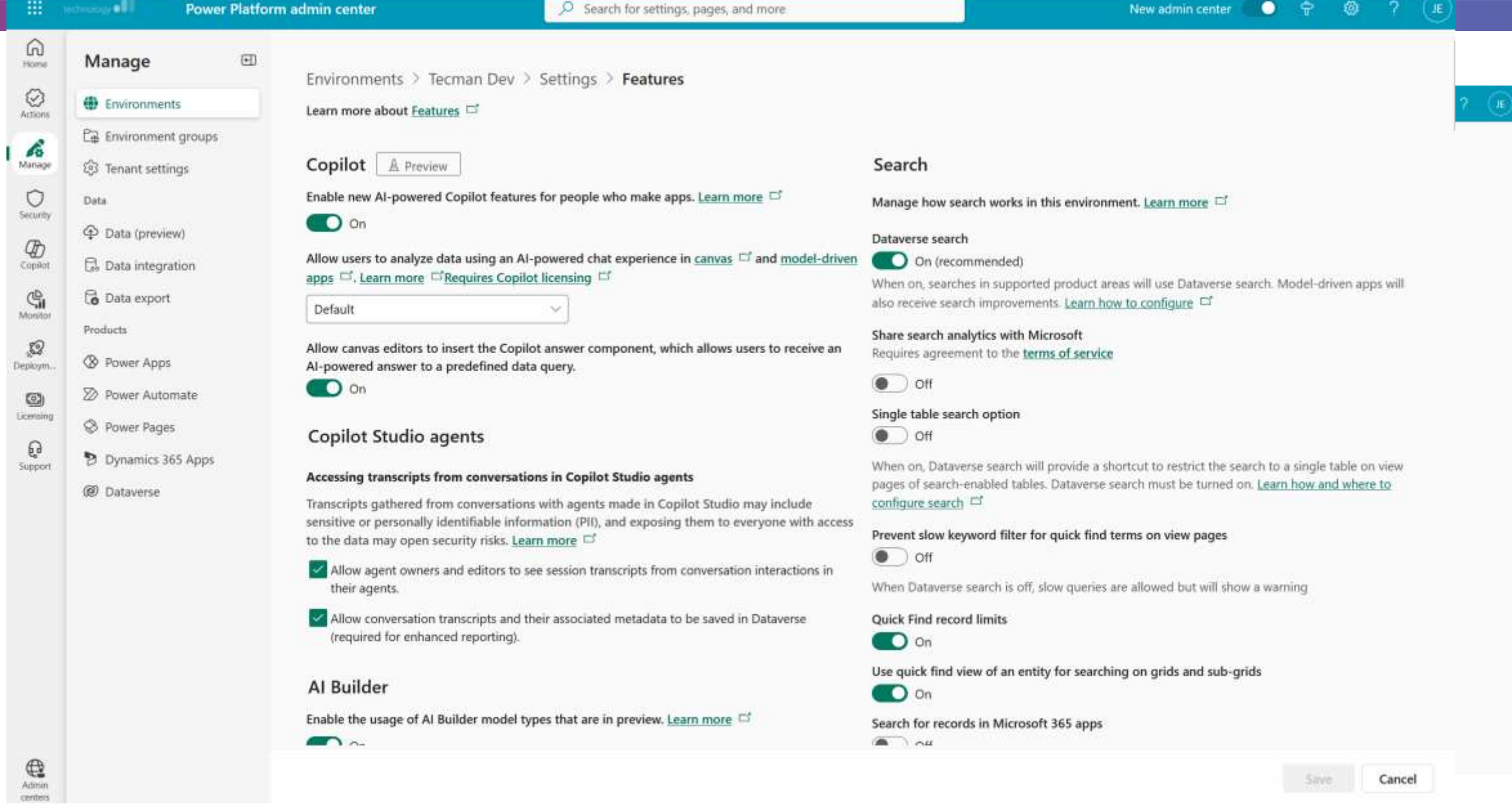
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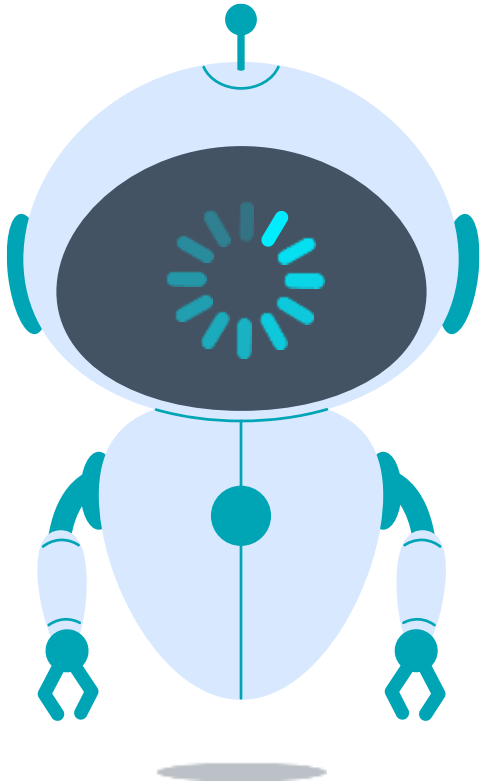
Products
Power Apps
Power Automate
Power Pages
Dynamics 365 Apps
Dataverse
Environments > Tecman Dev > Settings > Features
Learn more about Features
Copilot
Preview
Enable new AI-powered Copilot features for people who make apps. Learn more
On
Allow users to analyze data using an AI-powered chat experience in canvas 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
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
Save
Cancel

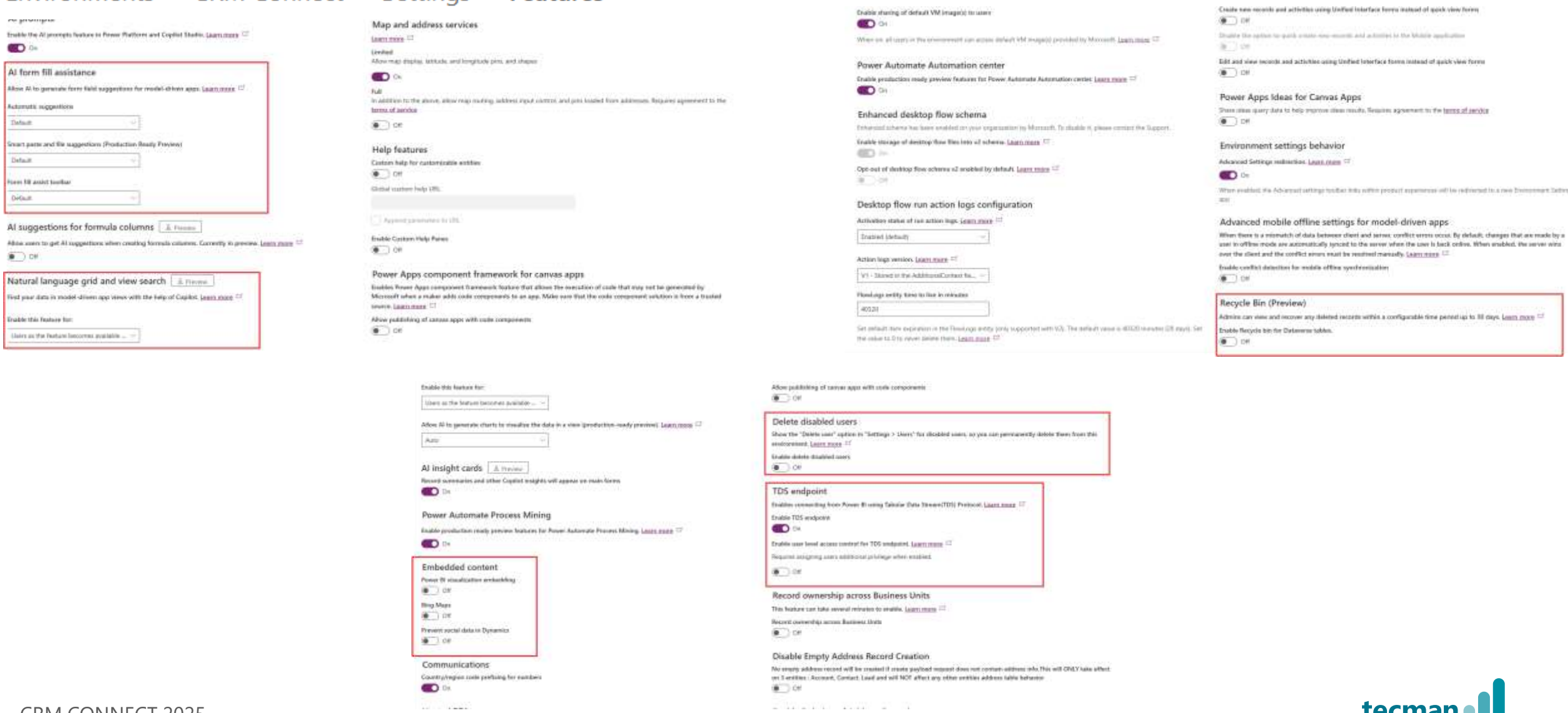
General Settings



- 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**



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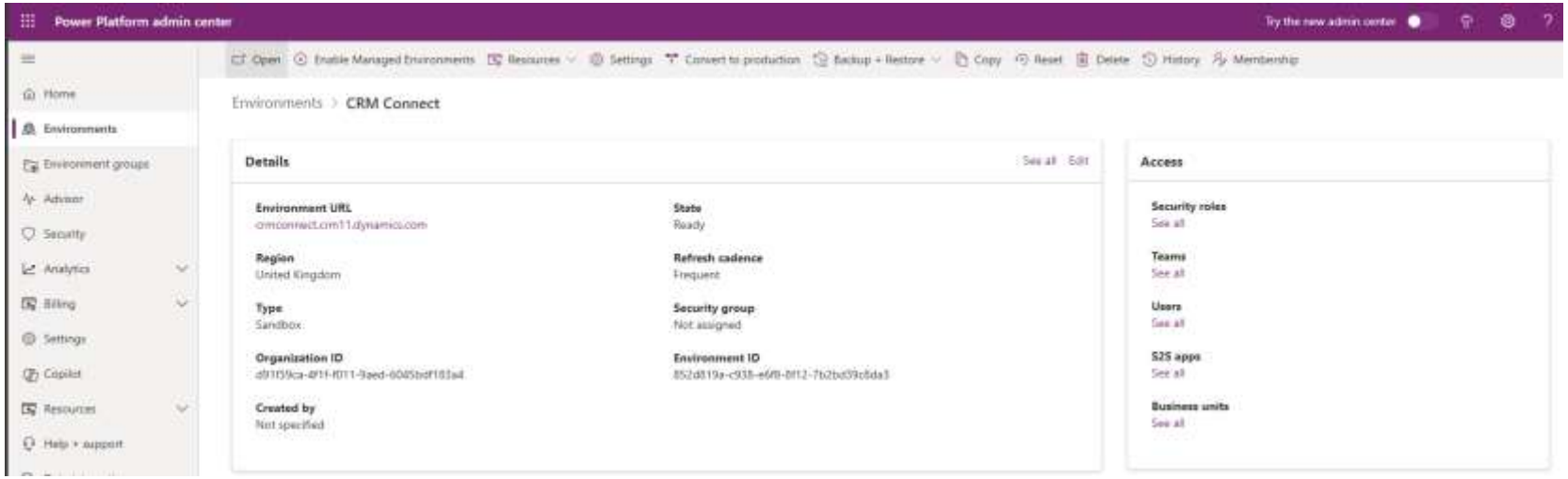
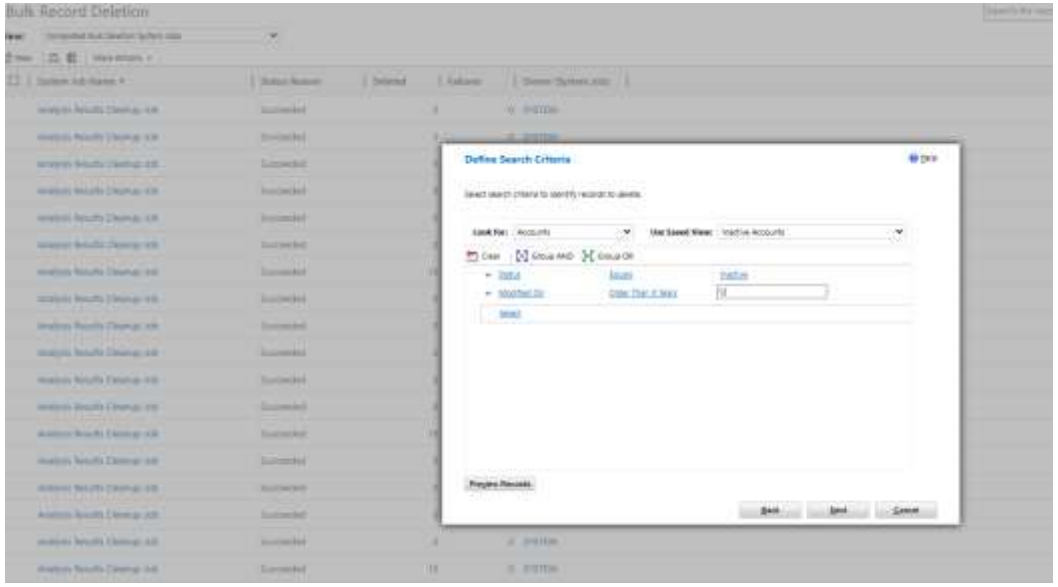
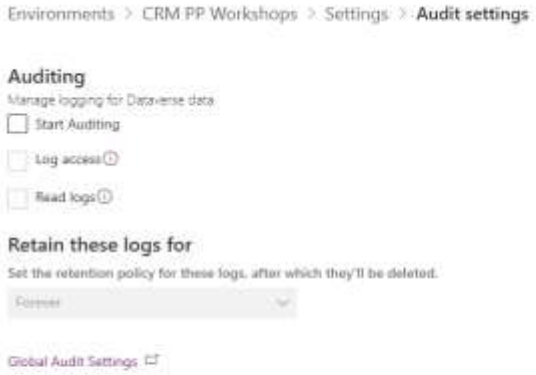
Environment Settings

- 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







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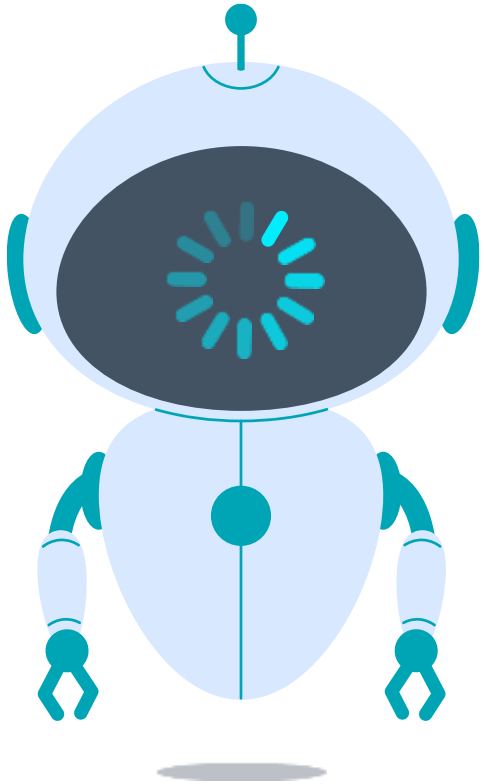
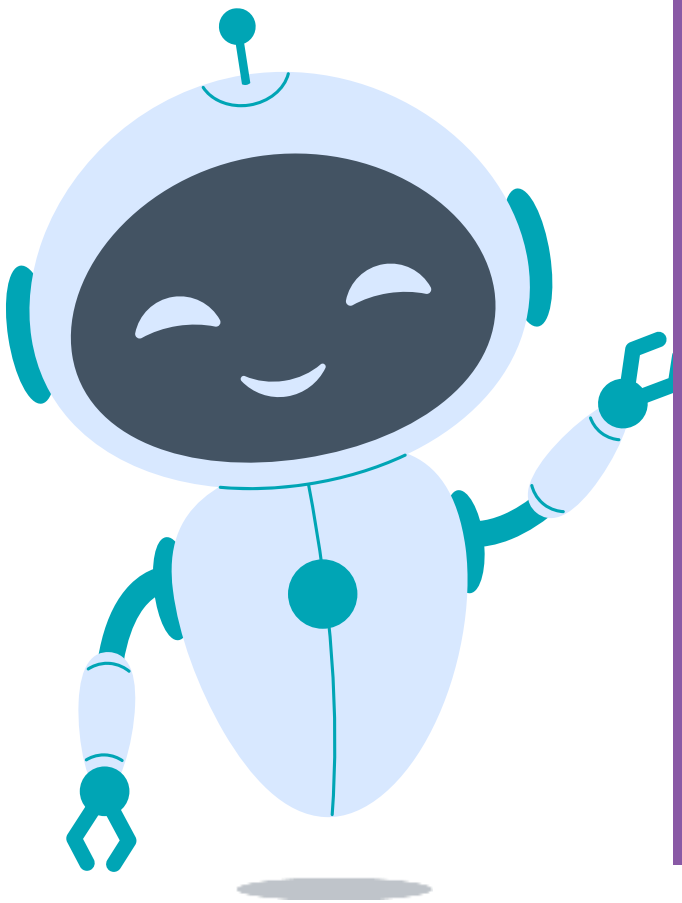
Power Automate Flow Management

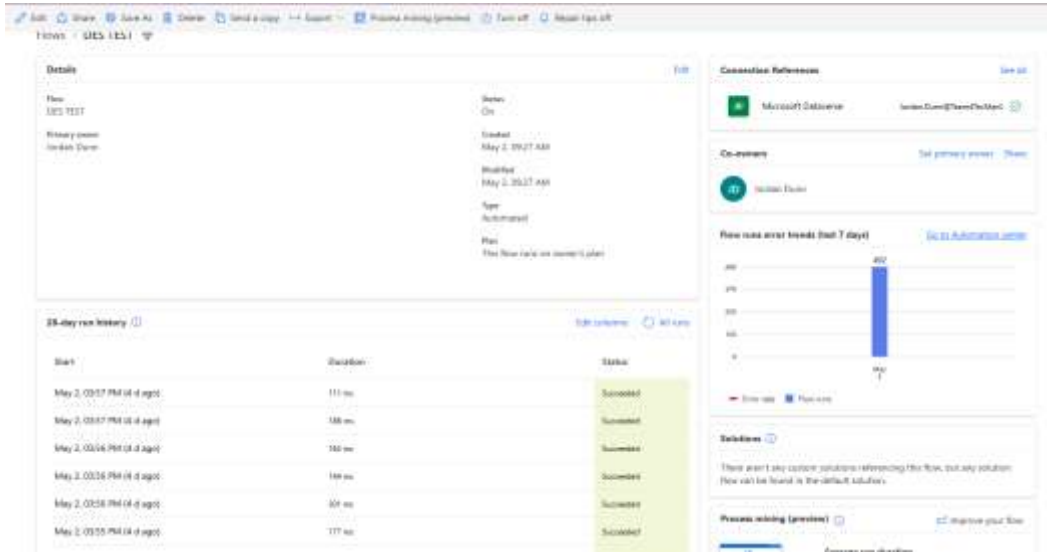
Power Automate Management Flow Management

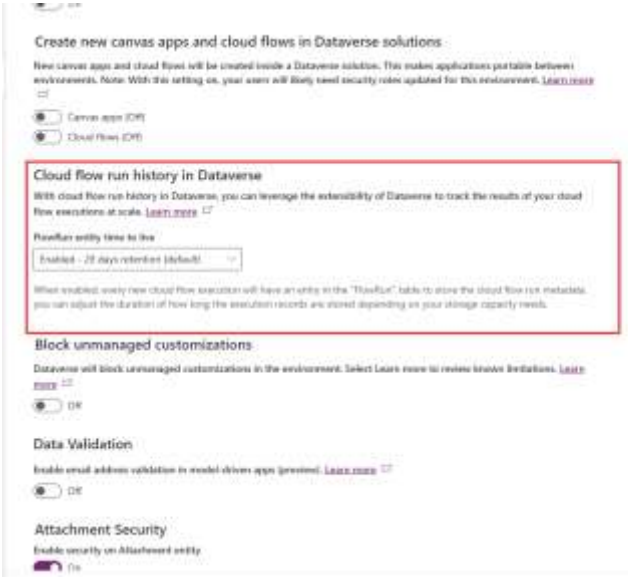


- General Flows
- Cloud flow run history in Dataverse (in settings)
- Ownership
- General management - duplication and removal
- Limitations (5000 limit - 28 day history)
- Automation centre (and per Flow)

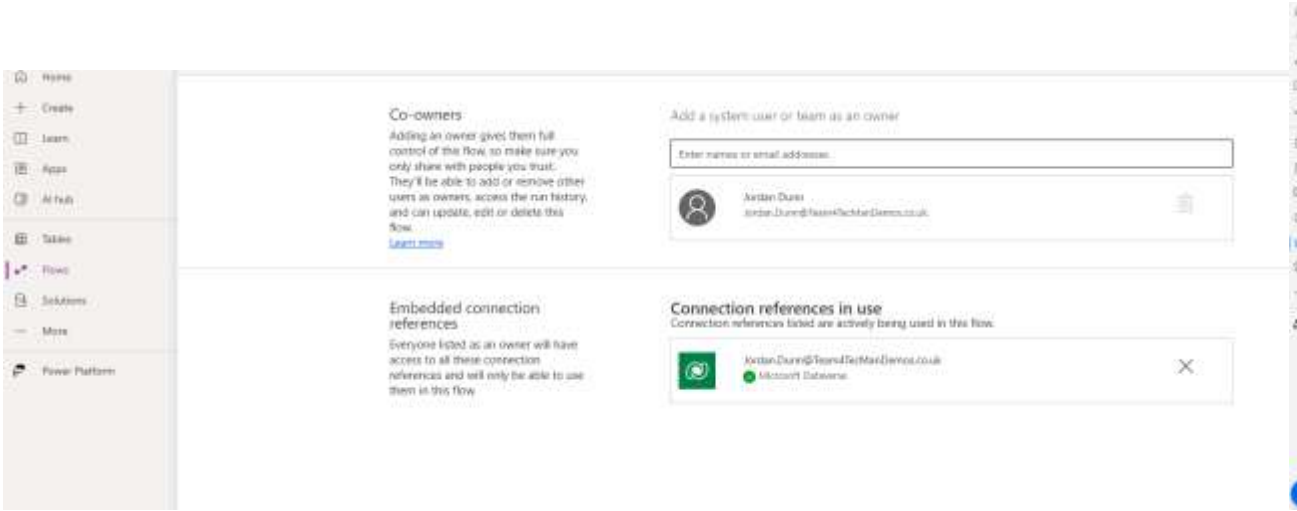


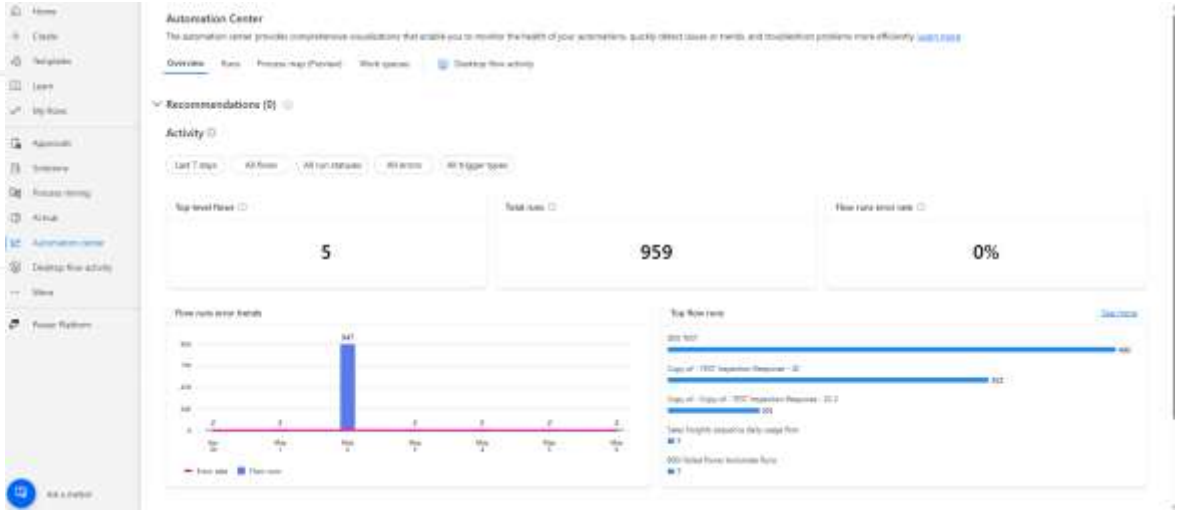
Demonstration





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 highest number of "apply to each" loop iterations that can run at the same time, or in parallel.
Split on items	- 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 debatches 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.
Until iterations	- Default: 60 - 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.





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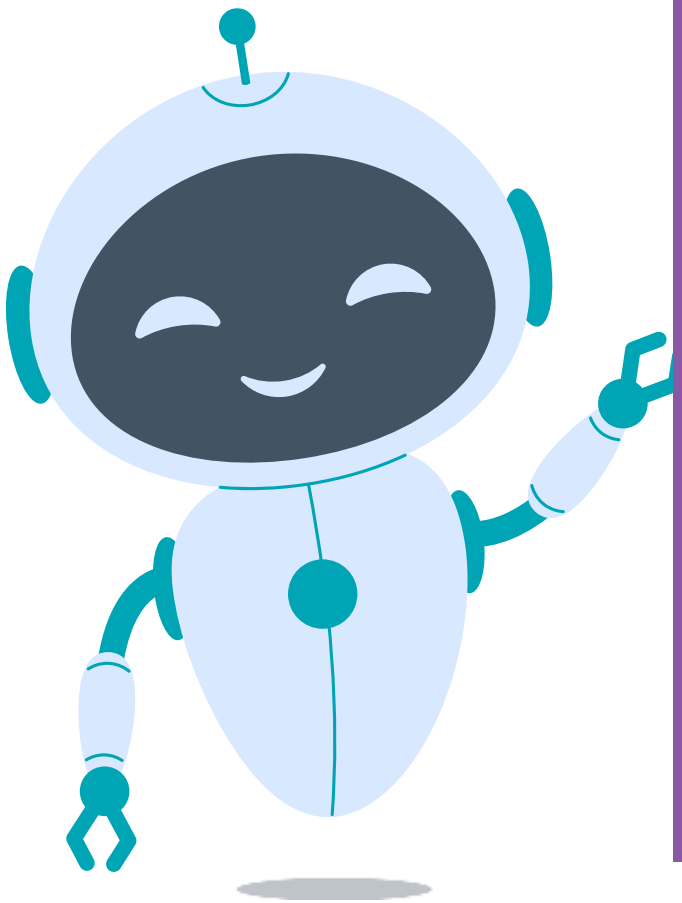
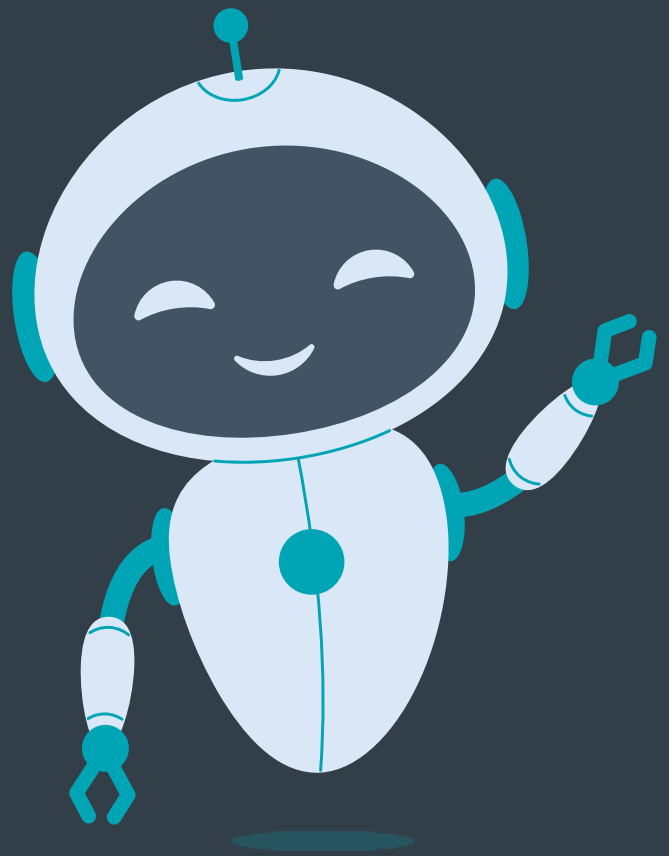


Need more Guidance?

Speak to your Account Manager!



Thank you!

CRM

connect

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