



# CRM Health Check: Boosting Dynamics 365 Performance

August 20, 2024

Microsoft  
Partner

**forvs**  
**mazars**

# Global Presence

**Top 10**

Global Network\*

**\$5bn**

Combined Revenue (2023)

**100+**

Combined Countries & Territories

**400+**

Combined Offices & Locations

**1,800+**

Combined Partners

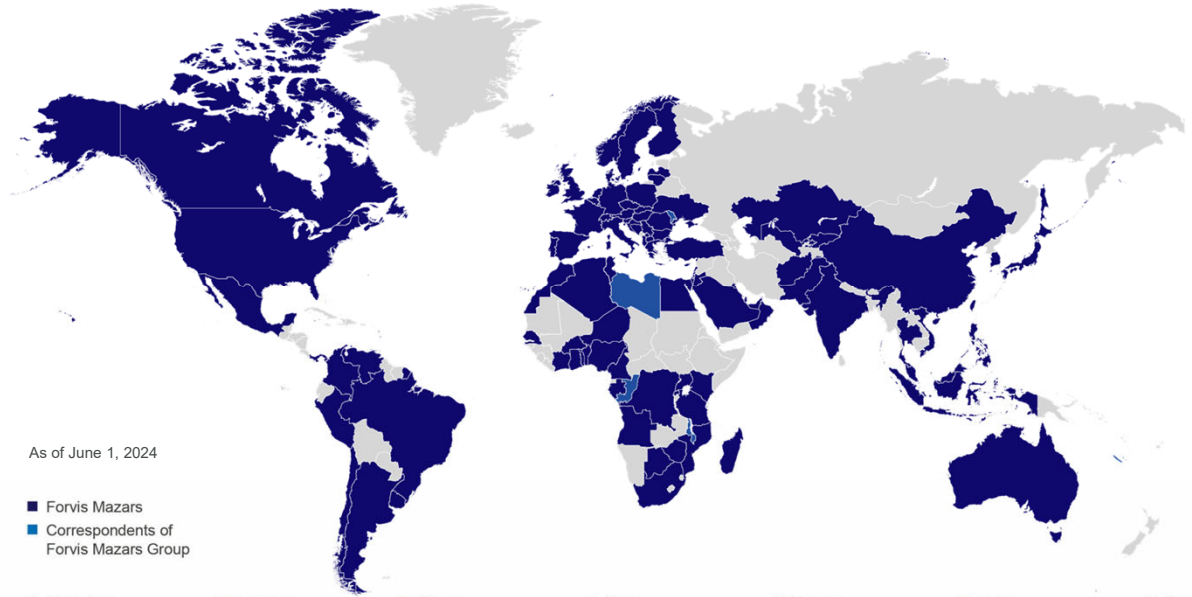
**40,000+**

Combined Employees

\* Source: IAB World Network rankings, based on most recent rankings

2023 revenues: FORVIS \$1.7bn (€1.6bn), Mazars (expected) \$3bn (€2.8bn)

Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars, LLP in the United States and Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories.



As of June 1, 2024

■ Forvis Mazars  
■ Correspondents of Forvis Mazars Group

- |                          |  |              |              |                   |                |                        |
|--------------------------|--|--------------|--------------|-------------------|----------------|------------------------|
| ■ Afghanistan            | ■ Cameroon                               | ■ France     | ■ Korea      | ■ Morocco         | ■ Qatar        | ■ Togo                 |
| ■ Albania                | ■ Canada                                 | ■ Gabon      | ■ Kosovo     | ■ Mozambique      | ■ Romania      | ■ Tunisia              |
| ■ Algeria                | ■ Cayman Islands                         | ■ Germany    | ■ Kuwait     | ■ Netherlands     | ■ Rwanda       | ■ Türkiye              |
| ■ Angola                 | ■ Chile                                  | ■ Ghana      | ■ Kyrgyzstan | ■ New Caledonia   | ■ Saudi Arabia | ■ Uganda               |
| ■ Argentina              | ■ China                                  | ■ Greece     | ■ Latvia     | ■ Niger           | ■ Senegal      | ■ Ukraine              |
| ■ Australia              | ■ Colombia                               | ■ Hong Kong  | ■ Lebanon    | ■ Nigeria         | ■ Serbia       | ■ United Arab Emirates |
| ■ Austria                | ■ Congo                                  | ■ Hungary    | ■ Libya      | ■ North Macedonia | ■ Singapore    | ■ United Kingdom       |
| ■ Bahrain                | ■ Côte d'Ivoire                          | ■ India      | ■ Lithuania  | ■ Norway          | ■ Slovakia     | ■ United States        |
| ■ Belgium                | ■ Croatia                                | ■ Indonesia  | ■ Luxembourg | ■ Oman            | ■ Slovenia     | ■ Uruguay              |
| ■ Benin                  | ■ Cyprus                                 | ■ Ireland    | ■ Madagascar | ■ Pakistan        | ■ South Africa | ■ Uzbekistan           |
| ■ Bermuda                | ■ Czech Republic                         | ■ Israel     | ■ Malawi     | ■ Palestine       | ■ Spain        | ■ Venezuela            |
| ■ Bosnia and Herzegovina | ■ Democratic Republic of the Congo (DRC) | ■ Italy      | ■ Malaysia   | ■ Panama          | ■ Sweden       | ■ Vietnam              |
| ■ Botswana               | ■ Denmark                                | ■ Japan      | ■ Malta      | ■ Peru            | ■ Switzerland  | ■ Zimbabwe             |
| ■ Brazil                 | ■ Egypt                                  | ■ Jordan     | ■ Mauritius  | ■ Philippines     | ■ Taiwan       |                        |
| ■ Bulgaria               | ■ Finland                                | ■ Kazakhstan | ■ Mexico     | ■ Poland          | ■ Tanzania     |                        |
| ■ Burkina Faso           |  | ■ Kenya      | ■ Moldova    | ■ Portugal        | ■ Thailand     |                        |

© 2024 Forvis Mazars, LLP. All rights reserved.

**forvis  
mazars**

# Business Technology Services

Forvis Mazars provides enterprise resource planning (ERP) & customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, & support services.

Our end-to-end solutions help clients achieve their digital transformation goals by:

- Creating effective processes & strategies for future operations
- Designing & implementing modern operational systems
- Reviewing new business-facing technologies
- Leveraging existing investments in legacy technologies
- Integrating data solutions



# Business Technology Services

## ERP

Microsoft Dynamics 365	
Enterprise	Finance
	Supply Chain
	Commerce
SMB	Business Central
	Dynamics GP
NetSuite	
Sage Intacct	

## CRM

Microsoft Dynamics 365
Sales
Service
Marketing
Salesforce
Marketing Automation

## Advanced Technology

Insights
Microsoft Power BI
Solver CPM
Automation
Microsoft Power Platform
Robotic Process Automation (RPA)
App Development

↻ **Managed Services** for business applications, IT, & cyber support.

Microsoft Partner

ORACLE NETSUITE  
Solution Provider

Sage Partner

salesforce PARTNER

solver

forv/s  
mazars

© 2024 Forvis Mazars, LLP. All rights reserved.

# Today's Presenters

CRM Practice

**“Our team is focused on delivering an Unmatched Client Experience<sup>®</sup> on every engagement.”**

– Chad Back, Partner



**Lauren Poad**

Senior Consultant

[lauren.poad@us.forvismazars.com](mailto:lauren.poad@us.forvismazars.com)



**Tom Gioielli**

Senior Managing Consultant

[tom.gioielli@us.forvismazars.com](mailto:tom.gioielli@us.forvismazars.com)

Microsoft  
Partner

© 2024 Forvis Mazars, LLP. All rights reserved.

**forvis  
mazars**



# CRM Health Check: Boosting Dynamics 365 Performance

August 20, 2024

Microsoft  
Partner

**forvs**  
**mazars**

# Objectives

1. Define how to set key performance indicators related to data quality, modifications, customization, & integrations
2. Identify how to review your CRM system's configuration, including what's "core" & what's customized
3. Discuss how to perform a data audit, assessing data quality, duplicate records, missing information, & inconsistencies



# 01

## KPIs

Define how to set key performance indicators related to data quality, modifications, customization, & integrations.





# Data Quality Customization

## Columns & Form Layout

- Custom fields
- Required columns (fields) to ensure data entry consistency
- Column naming & location on form contributing to positive user experience
- Lookups & Options Sets as opposed to Open Text Fields
- Segment accounts & use views to track which records should be deactivated

City	Los Angeles
State	California
ZIP/Postal Code	90210
Country	United States

JS James Smith - Saved  
Contact · Contact

Summary Details Scheduling Files Related

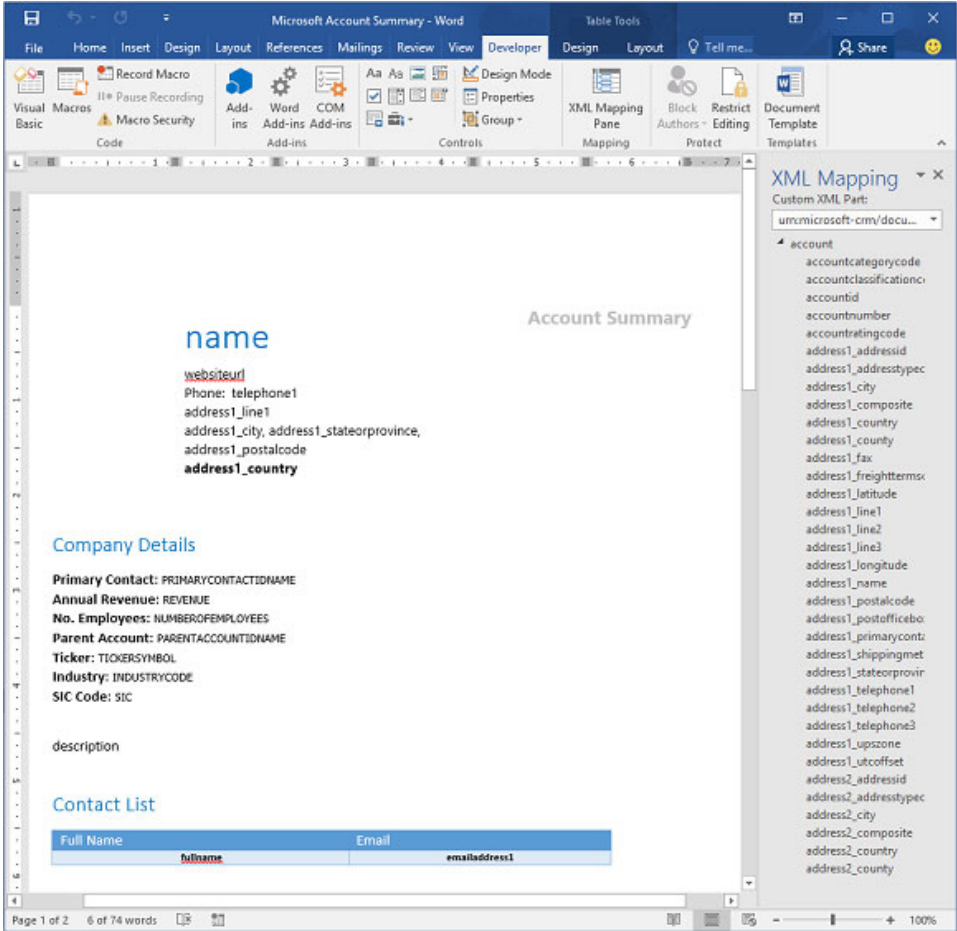
CONTACT INFORMATION

First Name	James
Last Name	Smith
Job Title	Doctor
Email	jamesmith@drtest.com
Business Phone	999-995-5559
Fax	---
Mobile Phone	919-955-9689
Primary Time Zone	(GMT-08:00) Pacific Time (US & Canada)

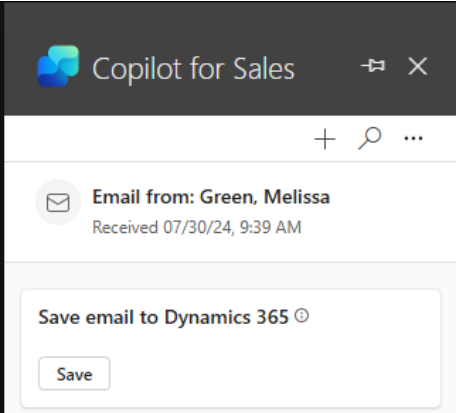
# Data Quality Customization

## Dynamics Templates

- Templates help to reduce data entry & reduce user error
- Word templates for creating standardized documents using Dynamics data from a specific record
- Email templates to save time & provide consistent feedback to clients



# Data Quality Integrations



# 02

## Configuration

Identify how to review your CRM system's configuration, including what's "core" & what's customized.



# Discovering What Is Custom in Your CRM Admin & Configuration Centers

## Power Platform Maker Portal (<https://make.powerapps.com>)

- Primary site to make updates or changes to your Dataverse environments
- Home for all installed solutions
- Holds information on all tables & related components, such as columns, forms, business rules, etc.
- Allows you to build out Model Driven apps, cloud flows, or other customizations
- Best place to review specific customizations made to your CE environment

Name	Modified	Owner	Type
Project	2 weeks ago	Provision User	Model-driven
Power Pages Management	10 months ago	SYSTEM	Model-driven
Resource Scheduling	3 years ago	Provision User	Model-driven
Solution Health Hub	4 years ago	SYSTEM	Model-driven
Kevin Test	4 years ago	Kevin Jicha	Model-driven

# Column & Option Set Schema More Than Meets the Eye

## Column Prefix Values

- Out-of-box fields will typically have no prefix, or a Microsoft specific one
- Custom & tables use a prefix from the publisher before all values

Account	:	ParentAccountId	🔍 Lookup
Account Type	:	fv_AccountType	☑ Choice
Actual Close Date	:	ActualCloseDate	📅 Date only
Actual Revenue	:	ActualValue	💰 Currency
Actual Revenue (Base)	:	ActualValue_Base	💰 Currency

## Option Set Values

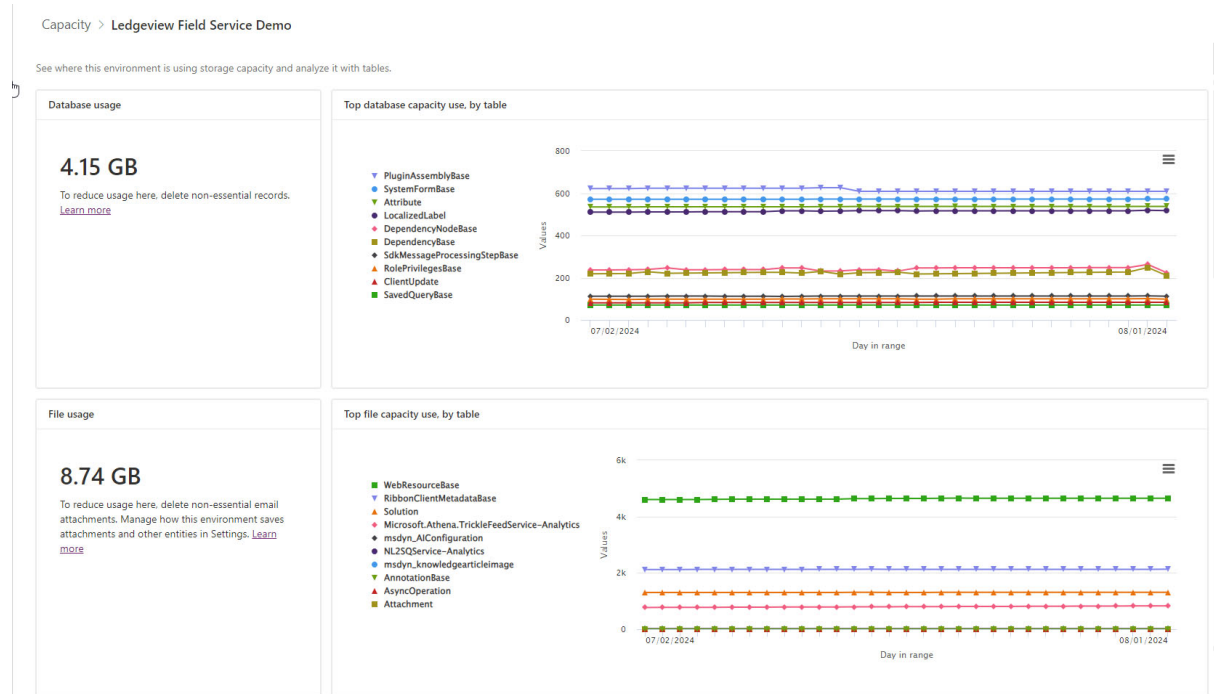
- Out-of-box option set values will usually have single digit values
- Custom Option Set Values are determined by publisher
  - Ex: 918320000 for the publisher below

☑	Under Minimum Seat Count	918,320,009	🗑
☑	Unresponsive - never responded	918,320,004	🗑
☑	Unresponsive - stopped responding	918,320,005	🗑
☑	Canceled	4	🗑
☒	Out-Sold	5	🗑

# Discovering What Is Custom in Your CRM Admin & Configuration Centers

## Power Platform Maker Portal (<https://make.powerapps.com>)

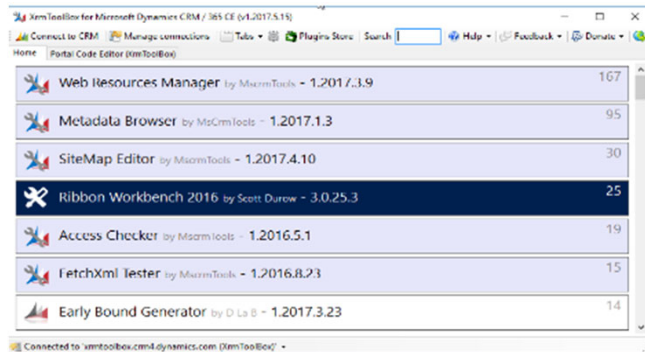
- Major system settings
- Analytics
- Microsoft support
- Billing & licenses
- Capacity usage & environment health



# Third-Party Administrator Tools Making the Most of Your Privileges

## XRM Toolbox

- Free application that houses tools by developers to perform actions not typically available in CE
- Adheres to Dataverse security model & access
- Sample tools
  - Attribute Usage Inspector
  - Bulk Workflow Execution
  - View Layout Replicator



## Level Up for Dynamics 365

- Browser extension for all chromium-based browsers (Edge, Chrome, etc.)
- Show logical names or hidden fields on a form
- Enable ability to make changes to locked fields
- Show all Option Set values for a table (including schema values)
- Impersonate other users in the application
- Show all business rules or workflows on the table





# Third-Party Administrator Tools

## XRM Toolbox – Attribute Usage Inspector

Data

You can filter attributes displayed by enabling attributes filtering in settings, then selecting an entity.

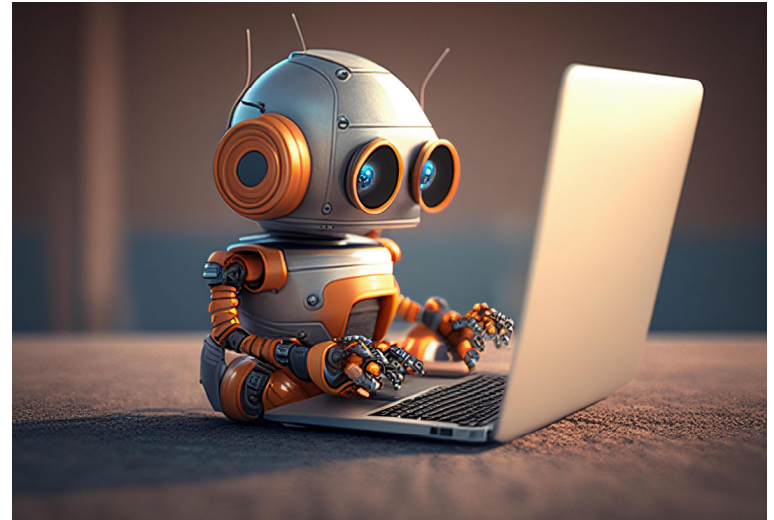
	Display Name	Logical Name	Attribute Type	On Form(s)	Data Usage
▶	Autoclose in Progress	fv_autocloseinprogress	Boolean	False	35.77%
	Equipment ROI Agreement	fv_equipmentagreement	Lookup	True	1.62%
	Equipment Job Type	fv_equipmentjobtype	Picklist	True	1.70%
	Equipment Origin Location	fv_equipmentoriginlocation	Lookup	True	1.03%
	Estimated Subtotal Amount	fv_estimatedsubtotalamount	Money	True	43.88%
	Estimated Subtotal Amount (Base)	fv_estimatedsubtotalamount_base	Money	False	43.88%
	Flat Rate	fv_flatrate	Boolean	True	2.43%
	Is Carson Awesome	fv_iscarsonawesome	Boolean	False	44.76%
	Subtotal Amount	fv_subtotalamount	Money	True	44.76%
	Subtotal Amount (Base)	fv_subtotalamount_base	Money	False	44.76%
	Total Amount with Tax	fv_totalamount	Money	True	44.76%
	Total Amount (Base)	fv_totalamount_base	Money	False	44.76%
	Total Tax	fv_totaltax	Money	True	45.21%
	Total Tax (Base)	fv_totaltax_base	Money	False	45.21%
	Allow Notification Email	lvp_allownotificationemail	Boolean	True	99.85%
	Allow Notification Text	lvp_allownotificationtext	Boolean	True	99.85%
	Amount Paid	lvp_amountpaid	Money	True	0.74%

# Service Accounts Save Systems Who Owns Your Processes?

## Why You Should Pay Attention to Process Owners

- Connections to Dataverse always have an authenticated user (Power BI, Power Automate, etc.)
- All processes in CE (Cloud Flows, Workflows, Actions, & Dialogs) are owned by a user record
- When creating a custom process, the default owner is the user who created it

When a user is disabled in your organization, all processes or connections owned by that user are **disabled** automatically.



# 03

## Data Audit

Discuss how to perform a data audit, assessing data quality, duplicate records, missing information, & inconsistencies.



# Data Auditing Duplicate Detection & Merging

## Data Integrity

- Create & publish duplicate detection rules
- Merge to deactivate duplicate records

**Duplicate records found** ×

Merge to an existing record by choosing a record from matched list and clicking merge. To proceed without merging, click Ignore and save. [Learn more](#)

**Current record**

Full Name	Email	First Name	Last Name	Business Phone
James Smith	jamesmith@dr...	James	Smith	999-995-5559

Duplicates found: **Contact (1)**

Full Name	First Name	Last Name	Modified On
James Smith	James	Smith	7/24/2024 10:30 AM

**Merge Contacts** ×

Choose data from the fields to combine the records into a single primary record. ⓘ

Merge records by choosing fields with data ⓘ  View fields with conflicting data

Enable parent check ⓘ

	Matched record	Current record
	<input checked="" type="radio"/> James Smith	<input type="radio"/>
<b>CONTACT INFORMATION</b>	<input type="radio"/> Select all fields in this section	<input checked="" type="radio"/> Select all fields in this section
Job Title	<input type="radio"/> Physician	<input checked="" type="radio"/> Doctor
Email	<input type="radio"/>	<input checked="" type="radio"/> jamesmith@drtest.com
Business Phone	<input type="radio"/>	<input checked="" type="radio"/> 999-995-5559
Mobile Phone	<input type="radio"/>	<input checked="" type="radio"/> 919-955-9689
Primary Time Zone	<input type="radio"/> (GMT-05:00) Eastern Time (US & Canada)	<input checked="" type="radio"/> (GMT-08:00) Pacific Time (US & Canada)
<b>ADDRESS</b>	<input checked="" type="radio"/> Select all fields in this section	<input type="radio"/> Select all fields in this section
Address	<input checked="" type="radio"/>	<input type="radio"/> 123 Ficus Street

# Data Quality Table Keys

## Unique Data

- Unable to Ignore & Save
- Must be unique (such as a Serial Number or SSN)

**Duplicate records found** ×

Merge to an existing record by choosing a record from matched list and clicking merge. To proceed without merging, click Ignore and save. [Learn more](#)

**Current record**

Full Name	Email	First Name	Last Name	Business Phone
James Smith	jamesmith@dr...	James	Smith	999-995-5559

Duplicates found: **Contact (1)**

Full Name	First Name	Last Name	Modified On
James Smith	James	Smith	7/24/2024 10:30 AM

**Merge Contacts** ×

Choose data from the fields to combine the records into a single primary record. ⓘ

Merge records by choosing fields with data ⓘ  View fields with conflicting data

Enable parent check ⓘ

	Matched record	Current record
	<input checked="" type="radio"/> James Smith	<input type="radio"/>
<b>CONTACT INFORMATION</b>	<input type="radio"/> Select all fields in this section	<input checked="" type="radio"/> Select all fields in this section
Job Title	<input type="radio"/> Physician	<input checked="" type="radio"/> Doctor
Email	<input type="radio"/>	<input checked="" type="radio"/> jamesmith@drtest.com
Business Phone	<input type="radio"/>	<input checked="" type="radio"/> 999-995-5559
Mobile Phone	<input type="radio"/>	<input checked="" type="radio"/> 919-955-9689
Primary Time Zone	<input type="radio"/> (GMT-05:00) Eastern Time (US & Canada)	<input checked="" type="radio"/> (GMT-08:00) Pacific Time (US & Canada)
<b>ADDRESS</b>	<input checked="" type="radio"/> Select all fields in this section	<input type="radio"/> Select all fields in this section
Address	<input checked="" type="radio"/>	<input type="radio"/> 123 Ficus Street

# Data Quality Bulk Delete

## Data Cleanup

- Bulk Delete use cases

**Duplicate records found** ×

Merge to an existing record by choosing a record from matched list and clicking merge. To proceed without merging, click Ignore and save. [Learn more](#)

**Current record**

Full Name	Email	First Name	Last Name	Business Phone
James Smith	jamesmith@dr...	James	Smith	999-995-5559

Duplicates found: **Contact (1)**

Full Name	First Name	Last Name	Modified On
James Smith	James	Smith	7/24/2024 10:30 AM

**Merge Contacts** ×

Choose data from the fields to combine the records into a single primary record. ⓘ

Merge records by choosing fields with data ⓘ  View fields with conflicting data

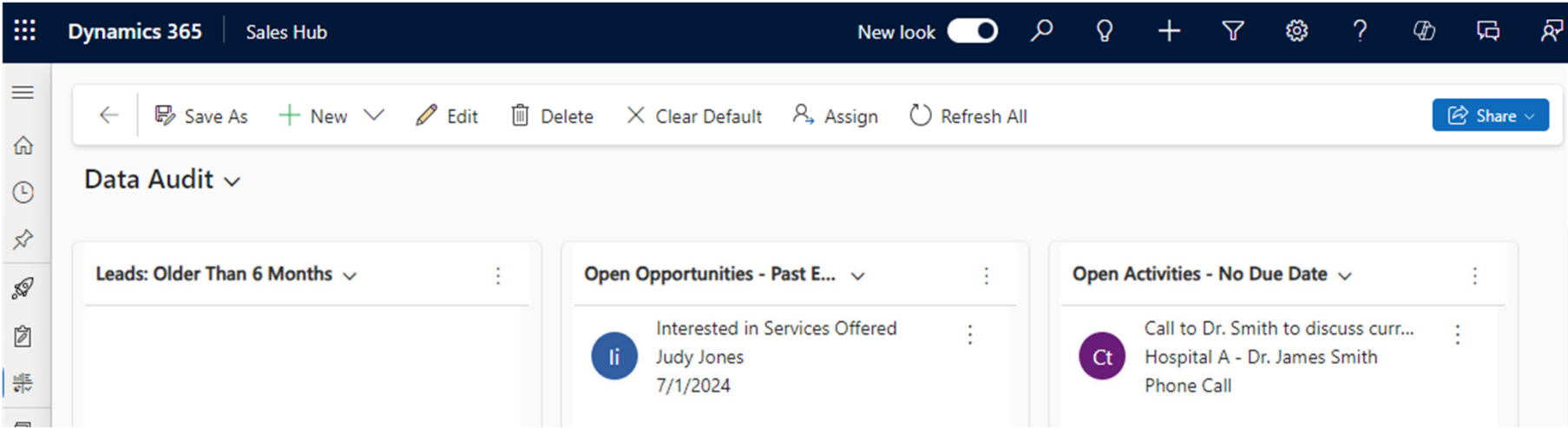
Enable parent check ⓘ

	Matched record	Current record
	<input checked="" type="radio"/> James Smith	<input type="radio"/>
<b>CONTACT INFORMATION</b>	<input type="radio"/> Select all fields in this section	<input checked="" type="radio"/> Select all fields in this section
Job Title	<input type="radio"/> Physician	<input checked="" type="radio"/> Doctor
Email	<input type="radio"/>	<input checked="" type="radio"/> jamesmith@drtest.com
Business Phone	<input type="radio"/>	<input checked="" type="radio"/> 999-995-5559
Mobile Phone	<input type="radio"/>	<input checked="" type="radio"/> 919-955-9689
Primary Time Zone	<input type="radio"/> (GMT-05:00) Eastern Time (US & Canada)	<input checked="" type="radio"/> (GMT-08:00) Pacific Time (US & Canada)
<b>ADDRESS</b>	<input checked="" type="radio"/> Select all fields in this section	<input type="radio"/> Select all fields in this section
Address	<input checked="" type="radio"/>	<input type="radio"/> 123 Ficus Street

# Data Quality Views & Dashboards

## Data Auditing Using Views & Dashboards

- Build views to audit records that have blank required or recommended fields or records that have not been modified recently and may require follow-up
- Utilize dashboards to aggregate a series of views auditing a variety of record types



# Data Quality Data Management

## Data Management Checklist



- Data governance & architecture
- Data modeling
- Configuration data & data migration
- Data integration
- Data quality



# Q&A



Business  
Technology  
Services

## Questions?

# Contact

## Forvis Mazars



**Lauren Poad**

Senior Consultant

[lauren.poad@us.forvismazars.com](mailto:lauren.poad@us.forvismazars.com)



**Tom Gioielli**

Senior Managing Consultant

[tom.gioielli@us.forvismazars.com](mailto:tom.gioielli@us.forvismazars.com)

The information set forth in this presentation contains the analysis and conclusions of the author(s) based upon his/her/their research and analysis of industry information and legal authorities. Such analysis and conclusions should not be deemed opinions or conclusions by Forvis Mazars or the author(s) as to any individual situation as situations are fact-specific. The reader should perform their own analysis and form their own conclusions regarding any specific situation. Further, the author(s)' conclusions may be revised without notice with or without changes in industry information and legal authorities.

© 2024 Forvis Mazars, LLP. All rights reserved.

Microsoft  
Partner

