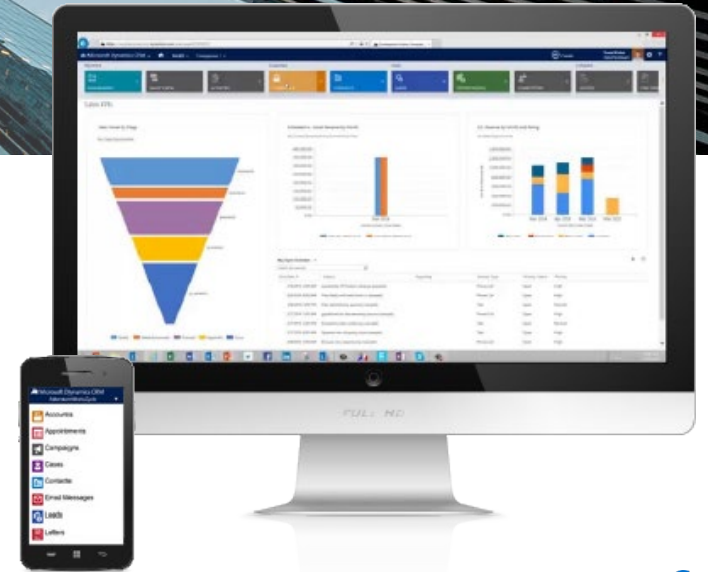




Spring Cleaning Microsoft Dynamics CRM

Best Practices

Microsoft Partner



forv/s
mazars

U.S. Presence

Top 10

U.S. Public
Accounting Firm*

\$2.2bn

Revenue
(FY2024)

76

Markets

29

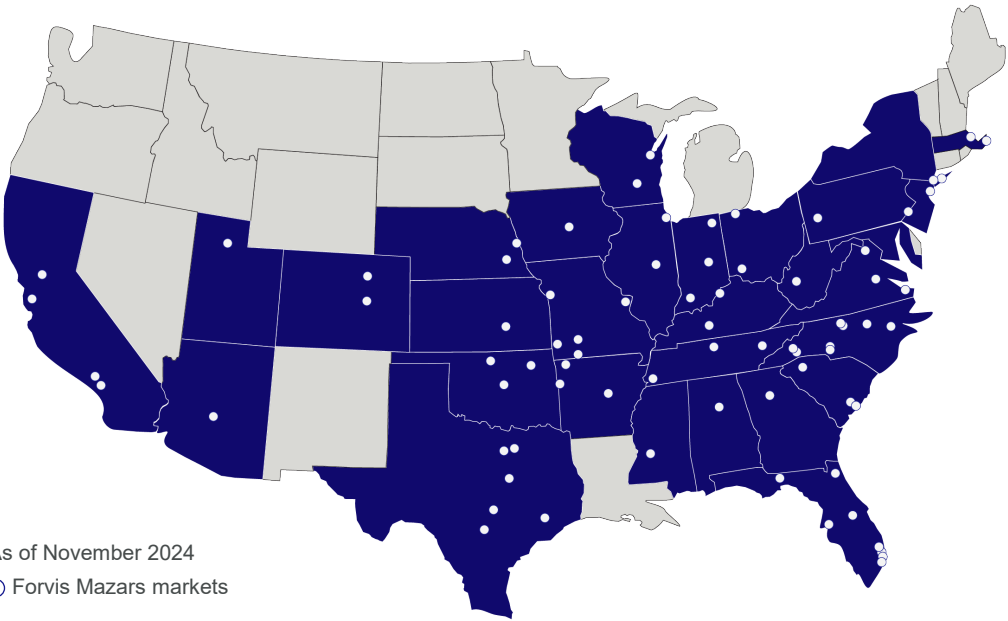
States

600+

Partners &
Principals

7,000+

Employees



Alabama
Birmingham

Arizona
Phoenix

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Jose

Colorado
Colorado Springs
Denver

Florida
Boca Raton
Fort Lauderdale
Jacksonville
Miami
Orlando
Tallahassee
Tampa Bay
West Palm Beach

Georgia
Atlanta

Illinois
Chicago
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston Brewster
Boston-Chestnut Hill

Mississippi
Jackson

Missouri
Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska
Lincoln
Omaha

New Jersey
Iselin

New York
Long Island
New York City

North Carolina
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro
Greenville
Hendersonville
Raleigh
Winston-Salem

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Fort Washington
Pittsburgh

South Carolina
Charleston
Greenville
Summerville

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah
Salt Lake City

Virginia
Norfolk
Richmond
Tysons

West Virginia
Charleston

Wisconsin
Appleton
Madison

* Source: Inside Public Accounting, based on most recent rankings

FY2025 combined revenues: FORVIS & Mazars USA

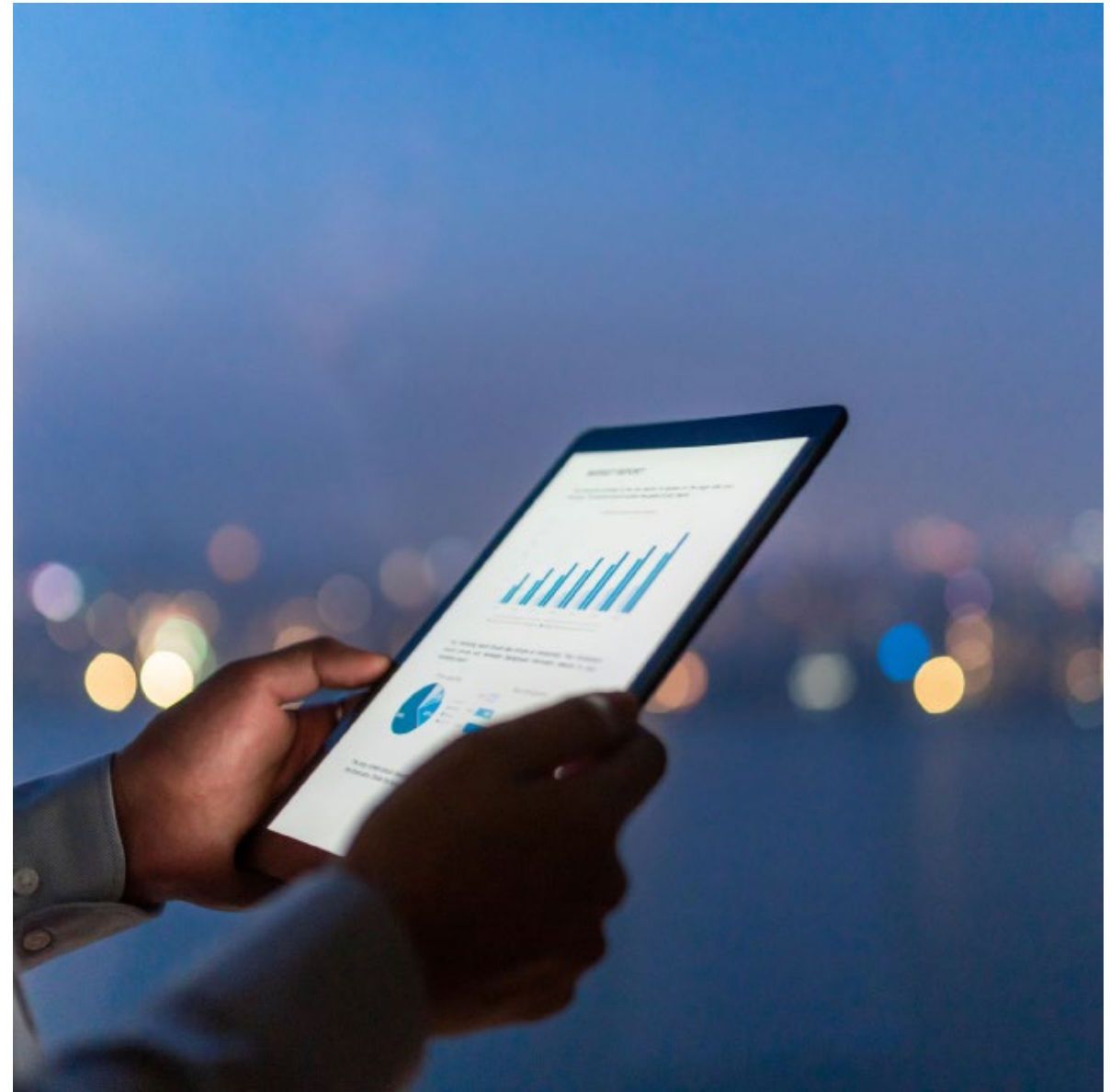
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Business Technology Services

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

Finance	Supply Chain
Commerce	Project Operations
Business Central	Dynamics GP

NetSuite

Sage & Sage Intacct

Trimble Construction One


 **CRM**

Microsoft Dynamics 365

Sales	Customer Service
Customer Insights	Field Service

Salesforce

Marketing Automation

 **Advanced Technology**

Insights

Microsoft Power BI

Solver Planning & Analysis

Automation

Microsoft Power Platform

Robotic Process Automation (RPA)

App Development

 **Managed Services** for business applications, IT, & cybersecurity support.

Microsoft Partner

ORACLE
NetSuite
Solution Provider Partner

Sage Partner

salesforce **PARTNER**


solver

Trimble
Construction One™

forv/s
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Today's Presenters



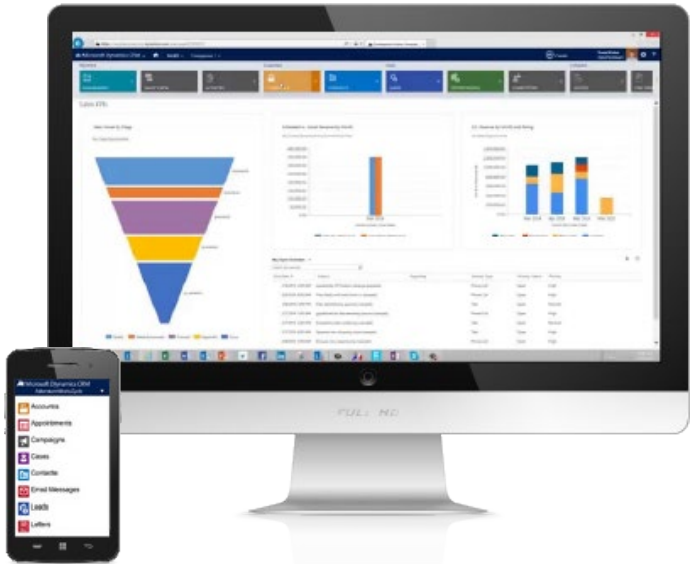
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Chad Collett

Senior Marketing Leader
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Chad.Collett@us.forvismazars.com



Microsoft Partner

Learning Objectives



Data Cleanup



System Customization & Security



Ongoing efforts throughout the year

Agenda

1. Introduction
2. Data Cleanup & Management
3. Field, View, & Dashboard Relevance
4. Marketing Lists & Campaigns
5. Process Overview
6. System Performance Optimization
7. Security, Compliance, & Integration Checks
8. Educational Resources
9. Q&A



Importance of Spring Cleaning

- Organize & Declutter Dynamics
- Ensure Data Is Easy to Access & Analyze
- Increased User Adoption



Data Cleanup & Management

- **Record Cleanup**
 - Closing Old Leads
 - Records Last Modified or Last Activity Date Older Than 6 months
 - Overdue Activities
 - Records Owned by Inactive Users
 - Notes versus Activities
- **Duplicate Detection**
 - Enable Out of the Box Duplicate Detection Rules or Create Custom Rules
 - Search for Duplicates
- **Record Details**
 - Updating Text Fields to Option Sets or Lookups
 - Updating Manually Populated Fields to Be Auto-Populated
 - Removing Fields That Are No Longer Needed

← | ↗ | Save | Save & Close | + New | Open org ch

AW Adventure Works (sample)
Account

Summary | Profile | Relationship Analytics | Details | Related

ACCOUNT INFORMATION

Account Name * Adventure Works (sample)

Account Number ABC28UU7

Account Type Targeted ▾

Relationship Type Customer ▾

Fax ---

Website http://www.adventure-works.c... 🌐

Parent Account --- 🔍

Open Deals 📅 1
Last updated: 3/4/2025 8:01 AM
Recalculate

Open Revenue 📅 \$15,000.00
Last updated: 3/4/2025 8:00 AM

Field, View, & Dashboard Relevance

- **Field Review**

- Reviewing & Updating Fields to Ensure They Collect Relevant Data
- Key Data Points
- Audit Dashboards

- **Views & Dashboards**

- Cleanup Personal Views & Dashboards by Deleting or Unsharing With Yourself
- Update Filters, Columns, & Sorting on Existing Personal or System Views
- Update Components on Existing Personal or System Dashboards

Edit filters: Accounts

Reset to default Download FetchXML Delete all filters

Showing live data [Change to retained data](#)

AND	Field	Operator	Value
<input type="checkbox"/>	Status	Equals	Active
<input type="checkbox"/>	Account Type	Equals	Targeted

+ Add

Group By:	(no grouping)	
Account Name	Account Type	Relationship Type
01 Sample Member	Targeted	Customer
3G Home Exteriors	Targeted	Customer
515 Brewing Company	Targeted	Customer
A+ Screens LLC	Targeted	Customer
Adventure Works (sample)	Targeted	Customer

Marketing Lists & Campaigns

- Marketing List Cleanup
 - Static vs. Dynamic Lists
 - Consolidation Opportunities
 - Integration Between Dynamics & 3rd Party Marketing Automation Service
- Campaigns
 - Reviewing Results of Recent Campaigns
 - Deactivate Outdated Campaigns to Clean Up Source Campaign List

←

↻

Save

Fall Tradeshow

Marketing List · Mar

Summary

Members

Information

Name

List Type

Purpose

Targeted At

Source

Currency

Modified On

Cost

Last Used On

Manage Dynamic List Members

✓

Name

Topic

Owner

Status Reas...

Created On

Company

Val Lingen	Request samples	Valerie Lingen..	New	9/5/2024 11:0...	---
Alex Baker	5 Café A-100 Automatic	Pete Hoffman..	New	4/30/2024 3:2...	---
Josiah Love	10 Airpot Duo Coffee Ma...	Pete Hoffman..	New	4/30/2024 3:2...	---
Jermaine Berrett	5 Café Lite Espresso Mac...	Pete Hoffman..	New	4/30/2024 3:2...	---
Harriet Parrish	15 Airpot Duo Coffee Ma...	Pete Hoffman..	New	4/30/2024 3:2...	---
Rachel Michael	20 Airpot XL Coffee Make...	Pete Hoffman..	New	4/30/2024 3:2...	---
Lilly Pyles	3 Café Duo Espresso Mac...	Pete Hoffman..	New	4/30/2024 3:2...	---
Jabez Parker	5 Café Lite Espresso Mac...	Pete Hoffman..	New	4/30/2024 3:2...	---
Harrison Curtis	5 Café Duo Espresso Mac...	Pete Hoffman..	New	4/30/2024 3:2...	---
Halle Griffiths	20 Airpot XL Coffee Make...	Pete Hoffman..	New	4/30/2024 3:2...	---
Reuben Kidd	10 Airpot Duo Coffee Ma...	Pete Hoffman..	New	4/30/2024 3:2...	---
Gabriela Christiansen	5 Café Grande Espresso ...	Pete Hoffman..	New	4/30/2024 3:2...	---
Ivan Cashin	15 Airpot XL Coffee Make...	Pete Hoffman..	New	4/30/2024 3:2...	---

1 - 23 of 23

Back to query

Use query

Process Overview

○ Business Process Flow Review

- Refining the Process to Align With Current Sales Strategies
- Sales Process & Marketing Alignment

○ Workflows

- Currently Active Workflow/Flow Review
- Opportunities for New Workflows/Flows
- Email Notifications versus Dynamics Activities
- Specific Users Referenced in Workflows

The screenshot displays a Microsoft Dynamics CRM record for a contact named Rachel Michael. The record is in the 'Qualify (10 Mo)' stage of a workflow. A dropdown menu is open for the 'Existing Account?' field, showing options like 'Alpin...'. The record includes fields for 'Topic', 'Order Type', 'First Name', 'Last Name', 'Job Title', and 'Business Phone'. The 'Who Knows Whom' section shows no connections found. The 'Stakeholders' section lists April McGuire as a stakeholder. The 'Competitors' section lists Fourth Coffee. The 'Highlights' section contains two bullet points about phone calls.

Record Details:

- Contact:** Rachel Michael
- Lead Source:** External Referral
- Warm Rating:** Warm
- New Status:** New
- Owner:** Pete Hoffman
- Stage:** Qualify (10 Mo)
- Active for:** 10 months
- Topic:** 20 Airpot XL Coffee Makers for Alpine S
- Order Type:** Item based
- First Name:** Rachel
- Last Name:** Michael
- Job Title:** Purchasing Director
- Business Phone:** 281-555-0164

Existing Account? Dropdown Options:

- Existing Contact? ---
- Existing Account? ☒ Alpin... x
- Purchase Timeframe ☒ Unknown
- Estimated Budget ---
- Purchase Process ---
- Identify Decision Maker ☒ completed
- Capture Summary ---

Who Knows Whom: No connections found. Start by creating a manual activity with Rachel Michael. [Learn More.](#)

Stakeholders: AM April McGuire Stakeholder

Competitors: FC Fourth Coffee <http://www.fourthcoffee.com/>

Highlights:

- A follow-up phone call was made to check in with a contact regarding previous discussions.
- A phone call was conducted to share details about XL coffee machines with a contact.

System Performance Optimization

- Power Platform Admin Center

- Major System Settings
- Analytics
- Microsoft Support
- Billing & Licenses
- Capacity Usage & Environment Health

- Processes

- Connections to Dataverse always have an authenticated user (PowerBI, 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**



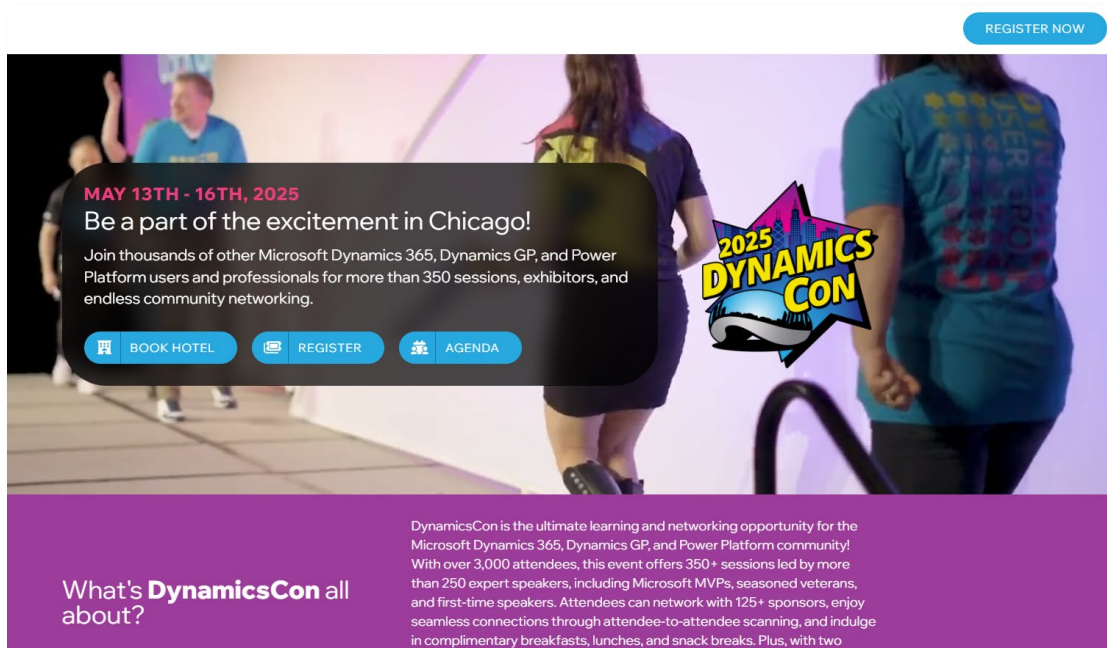
Security, Compliance, & Integration Checks

- Security & Compliance
 - Security Role Review
 - Data Compliance in Dynamics
- Integration Checks
 - Ensuring Integrations With Other Systems Are Functioning Correctly
 - Updating Connectors or APIs



Resources & Events

Learn from your peers



The screenshot shows a banner for the 2025 DynamicsCon event. It features a background image of people at a conference. A dark overlay contains the text: "MAY 13TH - 16TH, 2025", "Be a part of the excitement in Chicago!", and "Join thousands of other Microsoft Dynamics 365, Dynamics GP, and Power Platform users and professionals for more than 350 sessions, exhibitors, and endless community networking." Below this text are three buttons: "BOOK HOTEL", "REGISTER", and "AGENDA". A "REGISTER NOW" button is in the top right corner. A "2025 DYNAMICS CON" logo is on the right. At the bottom, a purple bar contains the text "What's DynamicsCon all about?" and a paragraph describing the event.

MAY 13TH - 16TH, 2025
Be a part of the excitement in Chicago!

Join thousands of other Microsoft Dynamics 365, Dynamics GP, and Power Platform users and professionals for more than 350 sessions, exhibitors, and endless community networking.

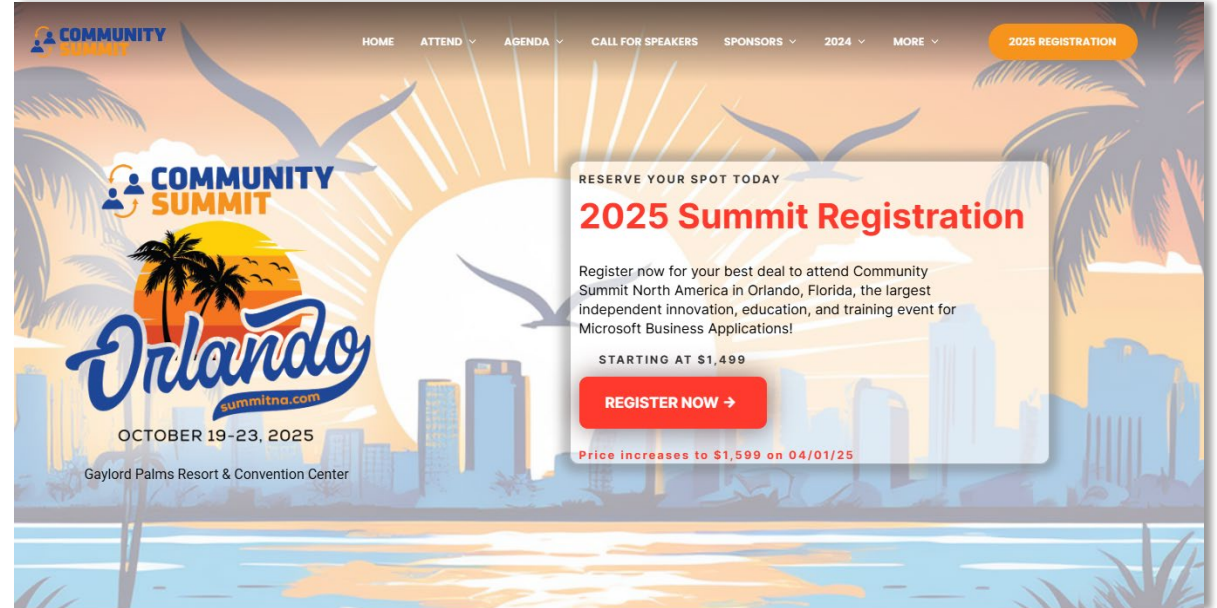
[BOOK HOTEL](#) [REGISTER](#) [AGENDA](#)

2025 DYNAMICS CON

What's **DynamicsCon** all about?

DynamicsCon is the ultimate learning and networking opportunity for the Microsoft Dynamics 365, Dynamics GP, and Power Platform community! With over 3,000 attendees, this event offers 350+ sessions led by more than 250 expert speakers, including Microsoft MVPs, seasoned veterans, and first-time speakers. Attendees can network with 125+ sponsors, enjoy seamless connections through attendee-to-attendee scanning, and indulge in complimentary breakfasts, lunches, and snack breaks. Plus, with two

DynamicsCon
May 13–16, 2025
Chicago, IL
<https://dynamicscon.com/>



The screenshot shows a banner for the 2025 Community Summit. It features a background image of a sunset over a city skyline with palm trees. A white overlay contains the text: "RESERVE YOUR SPOT TODAY", "2025 Summit Registration", "Register now for your best deal to attend Community Summit North America in Orlando, Florida, the largest independent innovation, education, and training event for Microsoft Business Applications!", "STARTING AT \$1,499", and a "REGISTER NOW" button. Below the button, it says "Price increases to \$1,599 on 04/01/25". The "COMMUNITY SUMMIT" logo is in the top left, and a navigation menu is in the top right. The "2025 Summit Registration" logo is in the center, with "Orlando" in a large script font. Below it, the dates "OCTOBER 19-23, 2025" and the location "Gaylord Palms Resort & Convention Center" are listed.

COMMUNITY SUMMIT

HOME ATTEND AGENDA CALL FOR SPEAKERS SPONSORS 2024 MORE [2025 REGISTRATION](#)

RESERVE YOUR SPOT TODAY

2025 Summit Registration

Register now for your best deal to attend Community Summit North America in Orlando, Florida, the largest independent innovation, education, and training event for Microsoft Business Applications!

STARTING AT \$1,499

[REGISTER NOW](#)

Price increases to \$1,599 on 04/01/25

Orlando
summitna.com

OCTOBER 19-23, 2025
Gaylord Palms Resort & Convention Center

Summit NA*
October 19–23, 2025
Orlando, FL
<https://www.summitna.com/>

*use code "ForvisMazars10" to save 10% on registration

Q&A



Business
Technology
Services

Questions?

Contact

Forvis Mazars



Chad Collett

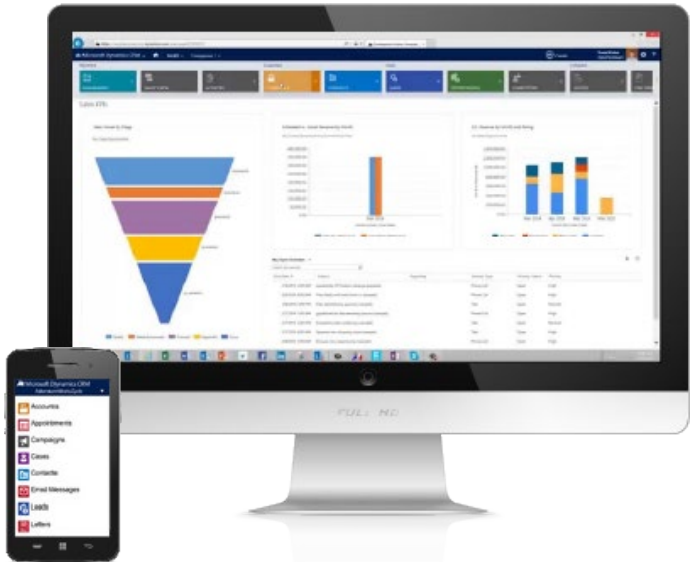
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