

*EmpiRed*



Dynamics 365  
– *'making it real'*

Guy Riddle  
Scott Wingett

# Microsoft Dynamics 365

Evolution from current offerings

Before  Now

## Dynamics CRM

- Sales, Service, Marketing
- Field Service
- Project Service Automation
- Social Engagement
- Portals
- Gamification
- Voice of the Customer
- Unified Service Desk

Dynamics 365 for Sales

Dynamics 365 for Customer Service

Dynamics 365 for Marketing

Dynamics 365 for Field Service

Dynamics 365 for Project Service Automation

## Dynamics AX

Dynamics 365 for Operations (Enterprise Edition)

## 'Project Madeira'

Dynamics 365 for Financials (Business Edition)

Dynamics GP

Dynamics NAV

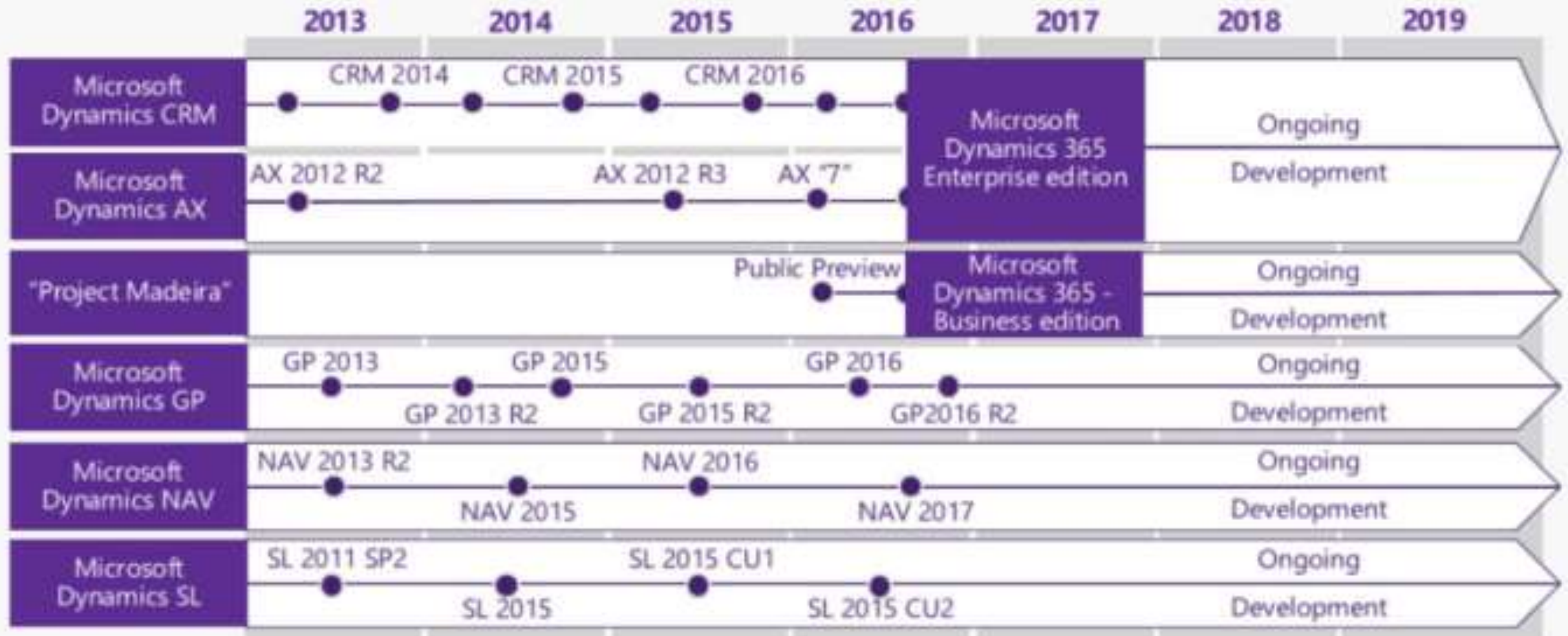
Dynamics SL

Dynamics GP

Dynamics NAV

Dynamics SL

# The Microsoft Dynamics Portfolio Roadmap





# Sales

Configurable end-to-end business processes for Dynamics 365 Sales

| Features                |
|-------------------------|
| Opportunity Management  |
| Social Selling          |
| Office 365 Productivity |
| Mobility                |
| Account Management      |
| Activity Management     |
| Intelligence            |

| Scenarios                      |
|--------------------------------|
| B2B or B2C pipeline management |
| Stakeholder Management         |
| Membership Management          |
| Wealth Management              |
| Donations and Fundraising      |
| Grants Management              |
| Loyalty Management             |

# Marketing



Configurable end-to-end business processes for Dynamics 365 Marketing

| Features  |
|---|
| Lead Management   |
| Campaign Planning   |
| Marketing Lists   |
| Social Engagement   |
| Intelligence  |
| Enterprise Marketing*  |
| Business Marketing*   |

| Scenarios                  |
|----------------------------|
| Nurture marketing          |
| Contextual personalisation |
| Omni-channel marketing     |
| Progressive profiling      |
| Event management           |
| Web analytics              |

\* Empired support Marketo and ClickDimensions as strategic marketing platform providers partners. There are other Marketing platforms that integrate with Dynamics 365 additionally.

# Field Service



Configurable end-to-end business processes for Dynamics 365 Field Service

| Features                      |
|-------------------------------|
| Scheduling & Dispatch         |
| Asset and Warranty Management |
| Service Agreements            |
| Inventory Management          |
| Resource Management           |
| Customer billing              |
| Dedicated Mobile App          |

| Scenarios                                     |
|---|
| Connected Field Service (IoT)                 |
| Traditional asset break/fix                   |
| Healthcare client management                  |
| Financial services on-the-road                |
| Home services (car service, home maintenance) |
| Facilities booking                            |



# Project Service Automation



Configurable end-to-end business processes for Dynamics 365 Project Service

| Features            |
|---------------------|
| Scheduling          |
| Resource Management |
| Time & Expenses     |
| Project Planning    |
| Team Collaboration  |
| Customer Billing    |
| Intelligence        |

| Scenarios                                    |
|--|
| Business / Professional Services             |
| Construction                                 |
| Engineering                                  |
| Legal  |
| Accounting                                   |
| Information Technology (internal & external) |



# Customer Service



Configurable end-to-end business processes for Dynamics 365 Customer Service

| Features                                |
|---|
| Case Management                         |
| Self Service Portal                     |
| Agent Enablement (Unified Service Desk) |
| Integrated Social Engagement            |
| Knowledge Base Management               |
| Omni-Channel Communication              |
| Intelligence                            |

| Scenarios                              |
|--|
| Employee Self Service (HR / Help Desk) |
| Customer / Partner Self Service        |
| Complaints and Issues Management       |
| Call Centre                            |
| Public sector citizen services         |
| Claims management                      |
| Client care                            |

# Operations




Configurable end-to-end business processes for Dynamics 365 Operations

| Features                        |                           |
|---------------------------------|---------------------------|
| Retail                          | Budget Control            |
| Procurement & Sourcing          | Warehouse Management      |
| Supply Chain Management         | Transportation Management |
| Project Accounting              | Inventory Management      |
| Human Capital Management        | Order fulfillment         |
| Manufacturing                   | Mobility                  |
| Financial Management (AR/AP/GL) | Analytics and Reporting   |

# Purpose-built end-to-end business process

Empower people to delight customers through an end-to-end view

## PROCESS

Prospect  Cash



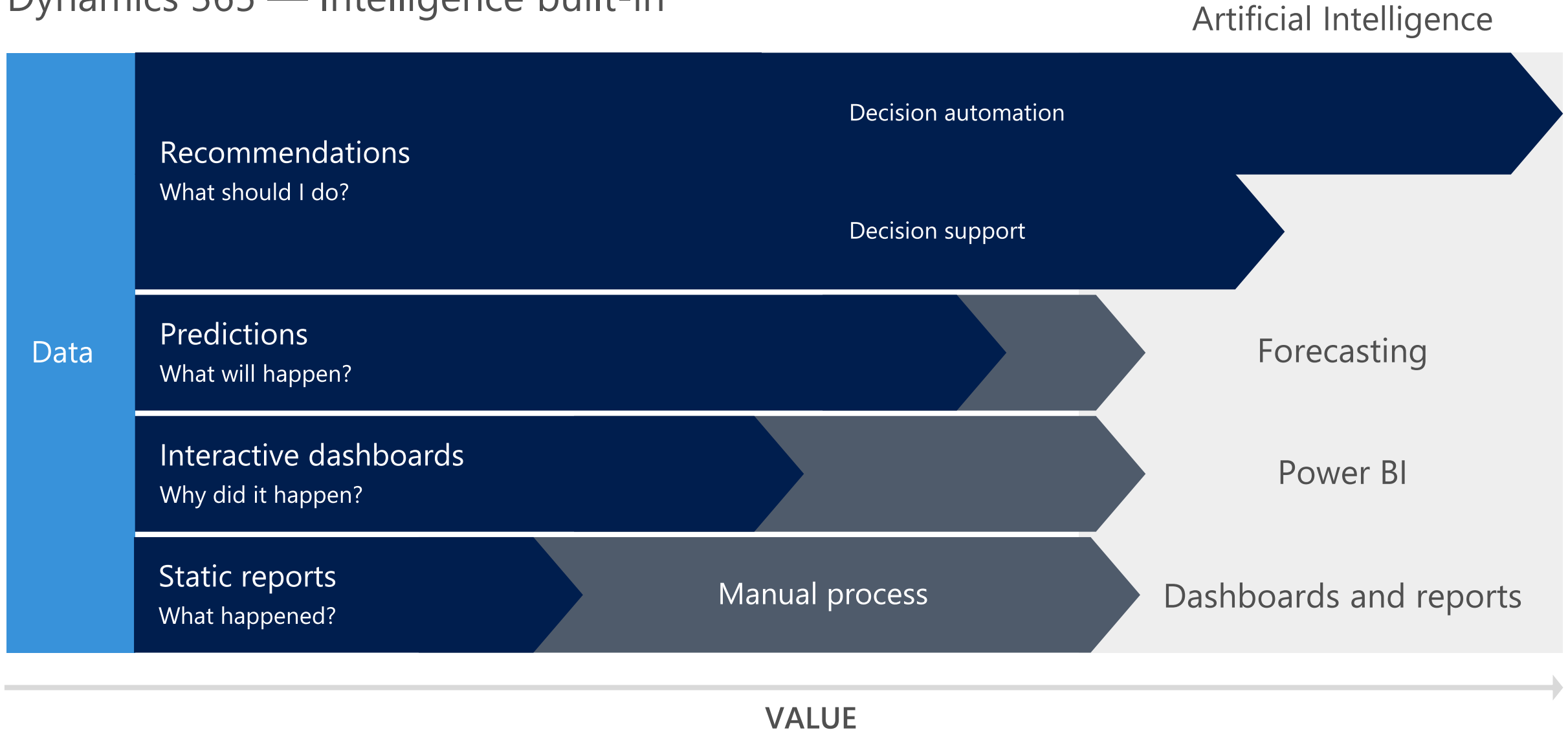
## PERSONAS



How are my people supported  
in their decision making?







# Journey from data to action...

Dynamics 365 — Intelligence built-in



# Dynamics 365 intelligence

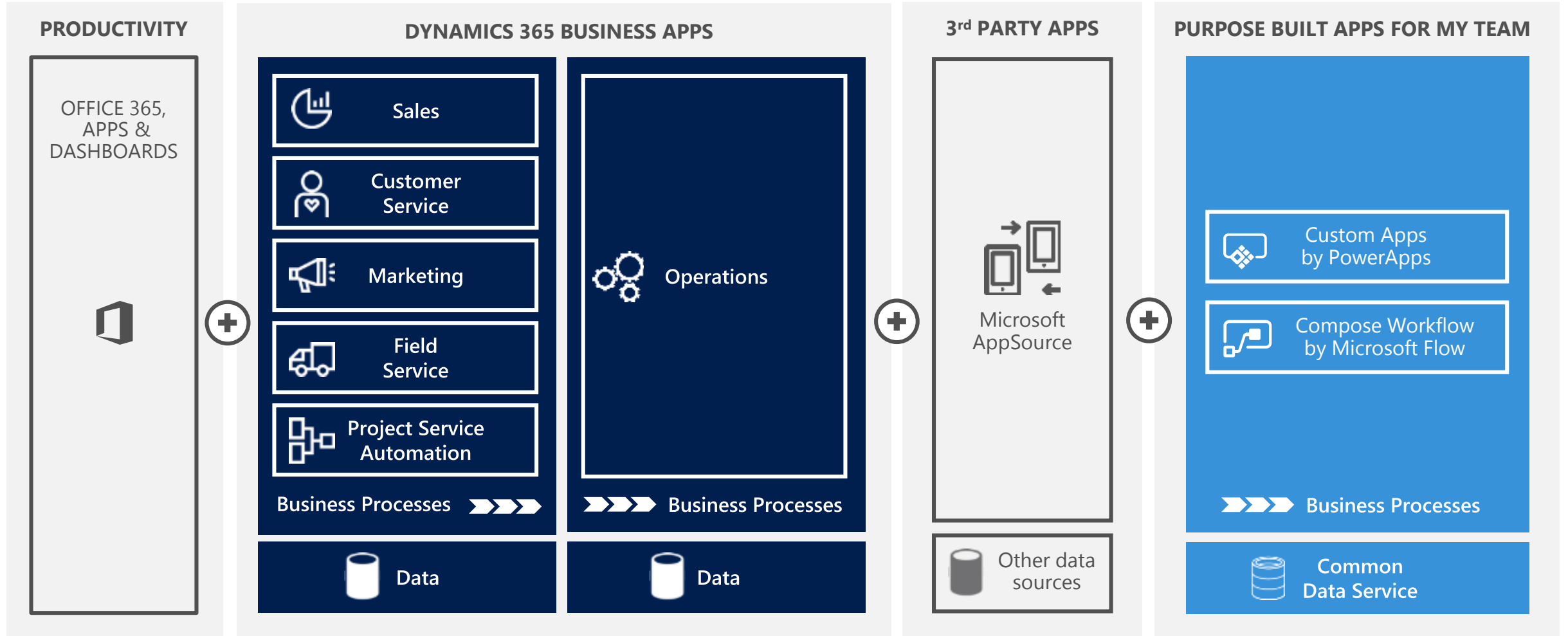
Intelligence built-in today

|  |                         |                               |   |
|--|-------------------------|-------------------------------|---|
|  Sales                        | Relationship Insights   | Cross-sell / Up-sell          | Product Recommendations                 |
|  Customer Service             | Knowledge Base Insights | Previous Case recommendations | Customer Insights                       |
|  Marketing                    | Lead Scoring            | Intent Analysis               | Sentiment Analysis                      |
|  Field Service                | Preemptive Service      | Resource Optimisation         |   |
|  Project Service Automation | Resource Optimisation   |                               |   |
|  Operations                 | Demand Forecasting      | Cash Flow Forecast            | Predictive Sales and Inventory Forecast |

How do I adapt and extend the standard business processes provided by the services?



# Adaptability of business processes



# AppSource

## Products

- ☒ Dynamics 365
  - ☒ Operations
  - ☒ Sales
  - ☒ Financials
  - ☒ Customer Services
  - ☒ Field Services
  - ☒ Project Services Automation

- ☐ Power BI
- ☐ Office 365
- ☐ Azure
- ☐ Dynamics NAV

## Categories

- ☐ Analytics
- ☐ Collaboration
- ☐ Customer service
- ☐ Finance
- ☐ Human resources
- ☐ IT + administration
- ☐ Marketing
- ☐ Operations + supply chain
- ☐ Productivity
- ☐ Sales

## Industries

Operations X

Sales X

Financials X

Customer Services X

Field Services X

Project Services Automation X

## App results (170)

[View partner results \(33\)](#)**ADEACA ONE**

By Adeaca Corp  
Dynamics 365 for Operations

ADEACA ONE is a powerful alternative to generic ERP for enterprise class project-based organizations

[Request trial](#)**Annata Dynamics IDMS**

By Annata  
Dynamics 365 for Operations

The all-in-one Management Solution for the Automotive, Equipment, Rental and Fleet Industries

[Request trial](#)**Apttus X-Author**

By Apttus  
Dynamics 365

X-Author is a bi-directional Excel interface for Dynamics CRM using unlimited objects simultaneously

[Request trial](#)**Apttus Contract Lifecycle Management**

By Apttus  
Dynamics 365

Apttus Contract Lifecycle Management helps companies of all sizes close deals faster & reduce risk

[Request trial](#)**Arbela One Step Consolidation (OSC)**

By Arbela Technologies Corp.  
Dynamics 365 for Operations

Automate your Dynamics AX Consolidations with ease and

**Armanino's Revenue Recognition**

By Armanino LLP  
Dynamics 365 for Operations

Simplify your accounting and manage revenue recognition,

**Arquiconsult Portuguese Localization Pack**

By Arquiconsult AX Portugal LOC  
Dynamics 365 for Operations

The Localization pack allows your organization to fulfill the

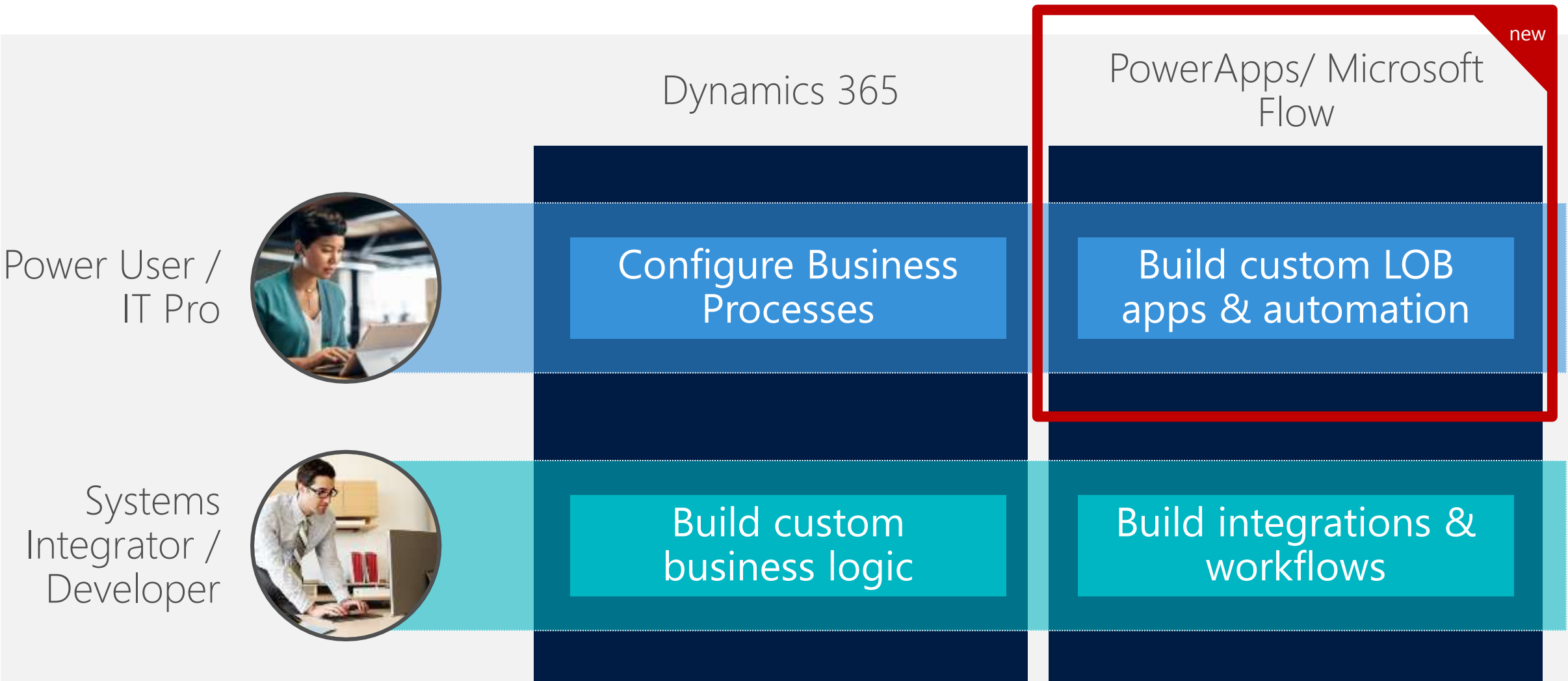
**Avanade Advanced Store Replenishment**

By Avanade, Inc.  
Dynamics 365 for Operations

Avanade Advanced Store Replenishment for Microsoft

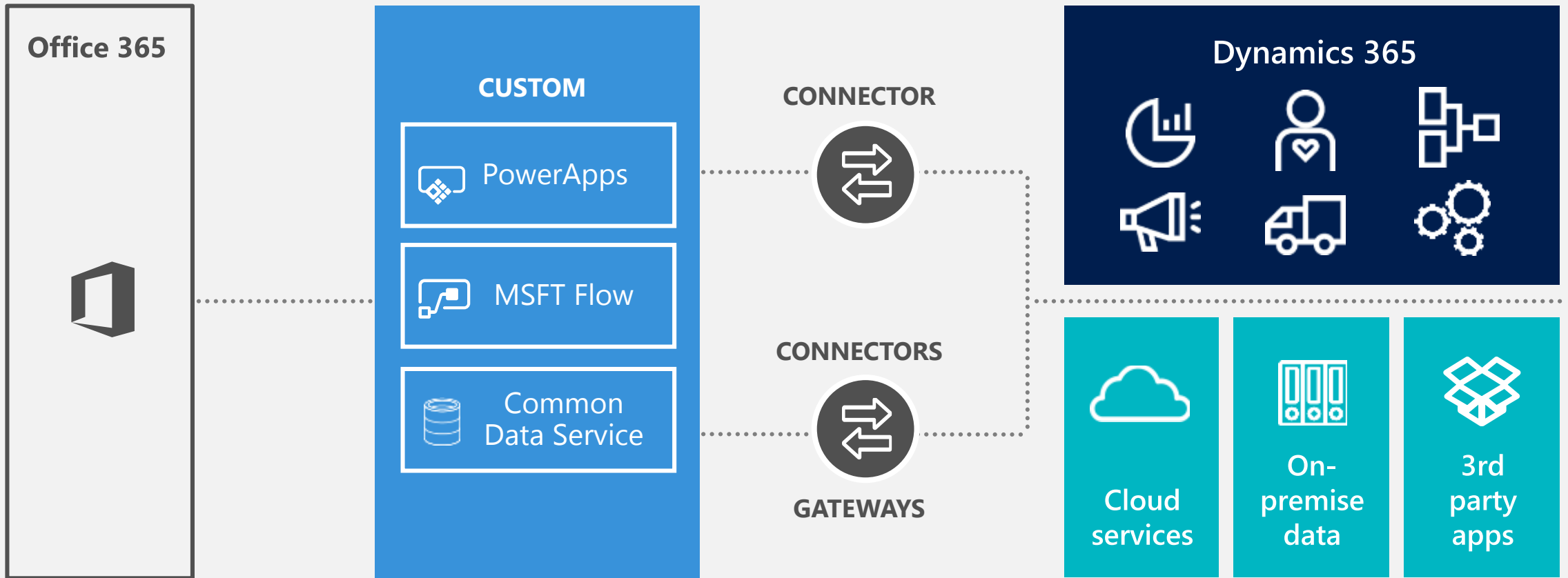
# PowerApps

# Extensibility



# Extensibility

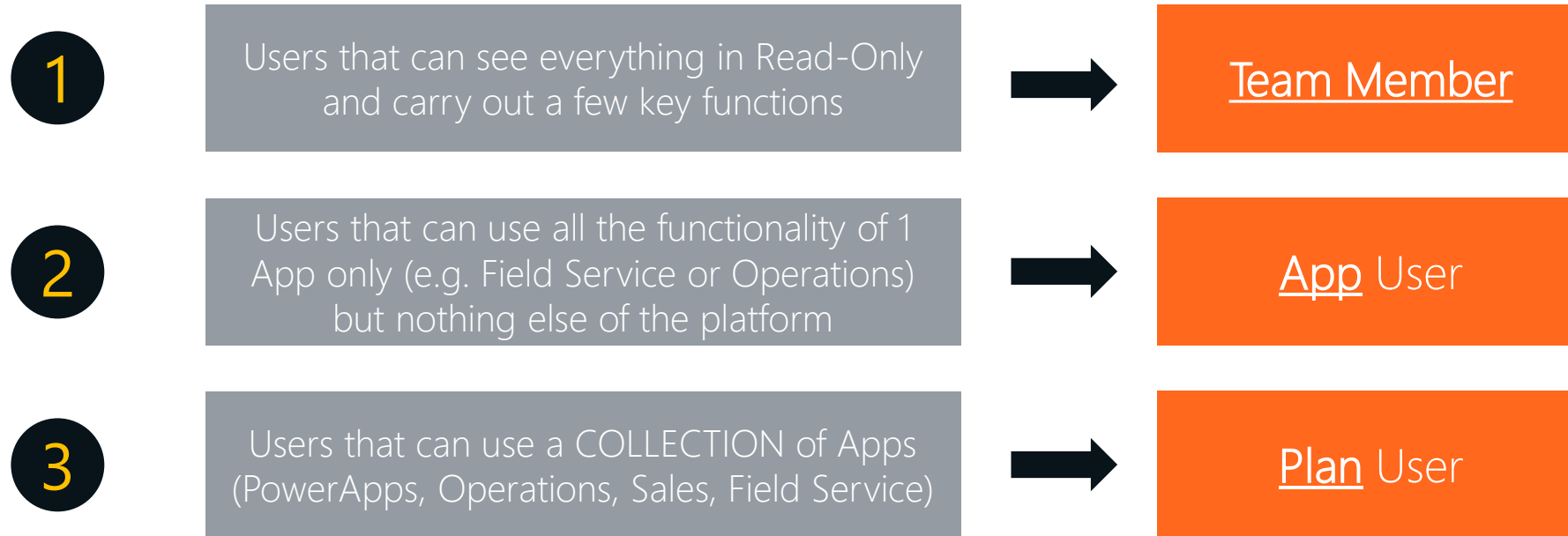
Build custom LOB apps & automation



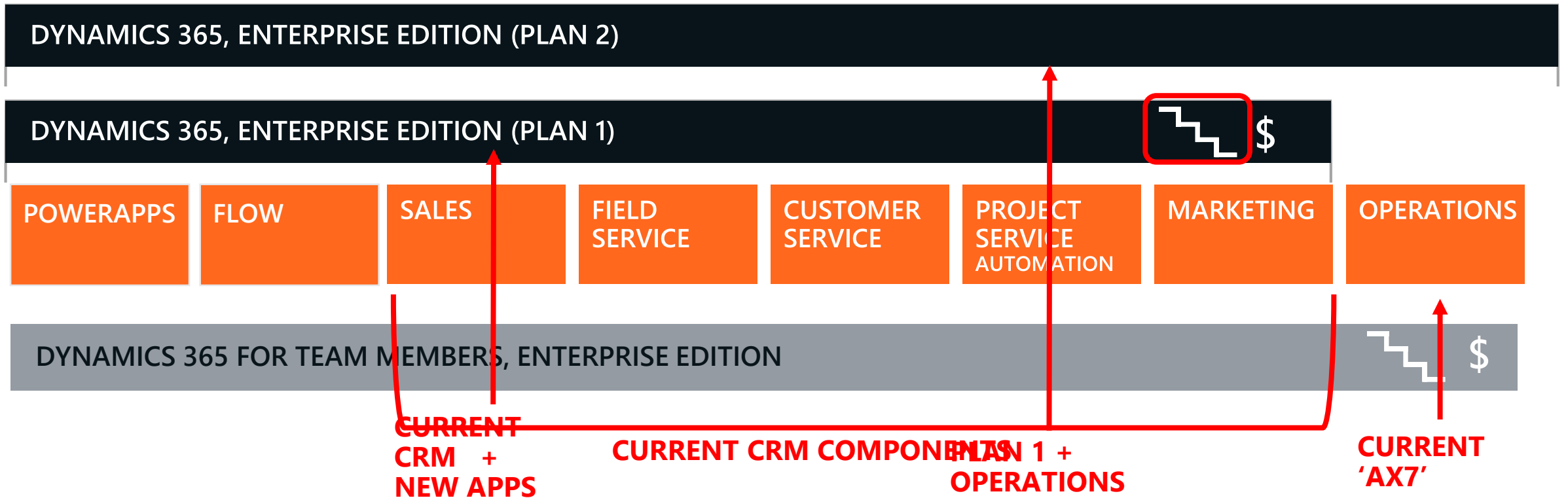
# Licensing



# Licensing – Teams, Apps, Plans



# Enterprise Edition – Apps & Plans



# Enterprise Plan 1 value 'example'




| Dynamics 365 Enterprise Plan 1               |                                      |  |
|--|--------------------------------------|--|
| Sales & Customer Service Functionality       | CRM OL Professional                  | <div>All included in Dynamics 365 Plan 1</div> <div>40% – 80% additional value</div> |
| Mobile Offline                               |                                      |  |
| Social Engagement Professional               |                                      |  |
|  | +                                    |  |
| Field Service Functionality                  | CRM OL Enterprise                    |  |
| Project Service Functionality                |                                      |  |
| Social Engagement Enterprise                 |                                      |  |
| Voice of Customer                            |                                      |  |
| Gamification                                 | Additional cost purchased separately |  |
| AX Task User                                 |                                      |  |
| PowerApps and Flow                           |                                      |  |
|  | +                                    |  |
| 10 GB storage + 5GB / 20 Full users (no cap) | Additional minimum per tenant in CRM |  |
| Included non-production instance (no min)    |                                      |  |
| Included Portal                              |                                      |  |

# *Dynamics 365 'CRM'*

- New Features (18 features in 15 minutes)

# Dynamics 365 – Sales and Service

## Roadmap Update

|  Sales    | Relationship Insights | Unified business process     | Gamification       | Mobile sales            | Document suggestions    | Social                     |
|--|-----------------------|------------------------------|--------------------|-------------------------|-------------------------|----------------------------|
|  Service  | Portal                | Customer Insights            | Machine Learning   | Connected Field Service | Scheduling Optimisation | Project Service Automation |
|  Platform | Editable Grids        | Dynamics 365 App for Outlook | Backup and Restore | Data Warehouse          | Office 365 Integration  | Cloud migration            |

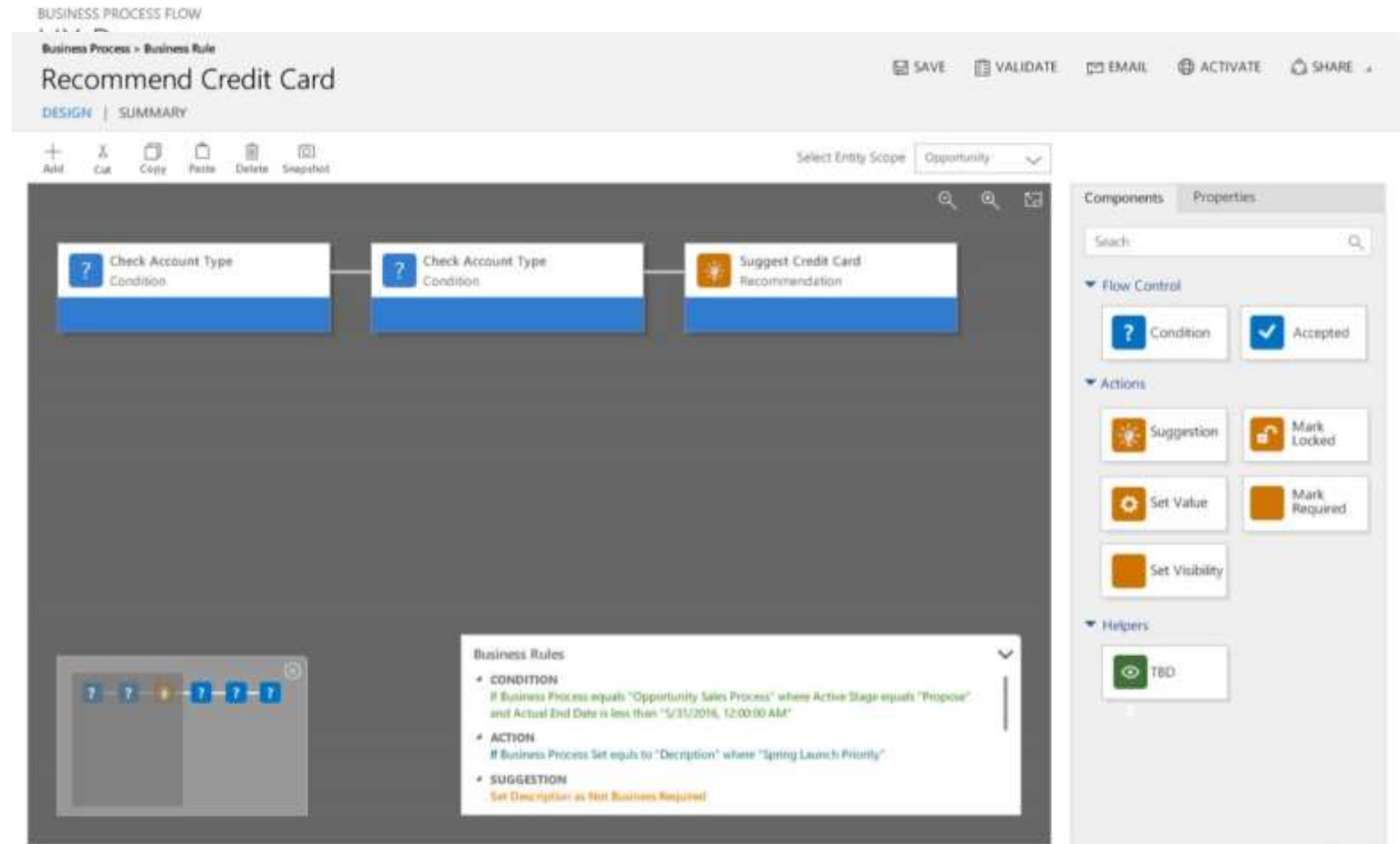


# Relationship Insights

The screenshot displays the Microsoft Dynamics 365 Sales interface. The top navigation bar shows 'Dynamics 365', 'Sales', and 'Opportunities'. The main area is titled 'New Email' and contains a form for creating a new email. The form includes fields for 'From' (Katie Jordan), 'To' (Maria Campbell (sample)), 'Cc' (Fabrikam, Inc. (sample)), 'Subject' (6 orders of Product SKU JJ202 (sample)), 'Topic' (This Year), 'Purchase Timeframe' (US Dollar), 'Currency' (\$30,000.00), 'Budget Amount' (--), 'Purchase Process' (--), and 'Description' (--). A 'TRACK' button is highlighted in the bottom right corner of the form. The right sidebar shows 'Attachment', 'STAKEHOLDERS', and 'ACTIVITY ANALYSIS' sections. The 'STAKEHOLDERS' section shows 'No stakeholders found.' and the 'ACTIVITY ANALYSIS' section shows 'Time Spent by Team' for 'Jun 24, 2016'.

# Unified Process Designer

- ✓ Visual designer for Business Analysts
- ✓ Business process flows
- ✓ Task flows
- ✓ Portable business logic
- ✓ Actionable rule-based recommendations
- ✓ Portable business logic collaboration across teams.





# Gamification

- ✓ Participate in individual and team-based games
- ✓ Updated user interface
- ✓ Increased productivity, engagement, and performance as well as user adoption of business applications



# Mobility

**Reebok Fall Update**  
Opportunity

Est. Close Date: 4/6/2016  
Est. Revenue: \$10,000.00  
Status: In Progress  
Owner: Richard Dickinson

Related:

- Maria Simpson  
Contoso  
IT Manager
- Katie Jordan  
My...
- Activities  
My...
- Blue Yonder  
My...

Summary

Topic: Reebok Fall Update SKU JJ202  
Contact: Maria Simpson  
Account: Contoso  
Purchase TimeFrame: This Year  
Budget Amount: \$30,000.00  
Probability: 90%

Purchase Process: ---  
Description: ---  
Currency: US Dollar  
Current Situation: Sales Dropping among younger customers.  
Customer Need: Needs rare offering at an affordable price  
Proposed Solution: Suggest SKU JJ202 or

Notes

Type Here

Quick Reference

The ZStrike Elite se  
proident, sunt in d  
molit anim id est

6/8/2016

Top Detail

The ZStrike Elite se  
proident, sunt in d  
molit anim id est

Welcome back Nancy!

RECOMMENDATION

Kevin just opened your email, call now!

Kevin just opened your email, "quick question" 2 minutes ago. It's the perfect time to call!

Acme Inc.  
Acme is looking for 10 orders of BL-101

Call Kevin

RECOMMENDATION

You may want to call Maria today.

It's been 2 months since your last contact and the opportunity is set to close in two weeks.

Contoso Ltd.  
Contoso need 200 bikes

Call Maria

AGENDA

Discuss Proposal  
11:30 AM Skype Online Meeting

**Reebok Fall Update**  
Opportunity

Develop Propose

Summary

Topic: Reebok Fall Update SKU JJ202  
Contact: Maria Simpson  
Account: Contoso  
Purchase TimeFrame: This Year  
Budget Amount: \$30,000.00  
Probability: 90%

Last Synced...

My Open Leads

- Yvonne McKay  
New Store Opened this year  
New
- Susanna Hubberod  
Mailed an interest card back  
Contacted
- Nancy Anderson  
New Store Opened this year  
Contacted
- Maria Campbell  
Interested in only only store  
New
- Peter Houseton  
Good Prospect  
New

Quality: 25,000.00  
Develop: 55,000.00  
Propose: 55,000.00

\$106,000  
\$75,000  
\$48,000  
\$16,000

1,000

**Reebok Fall Update**  
Opportunity

Develop Propose

Est. Close Date: 4/6/2016  
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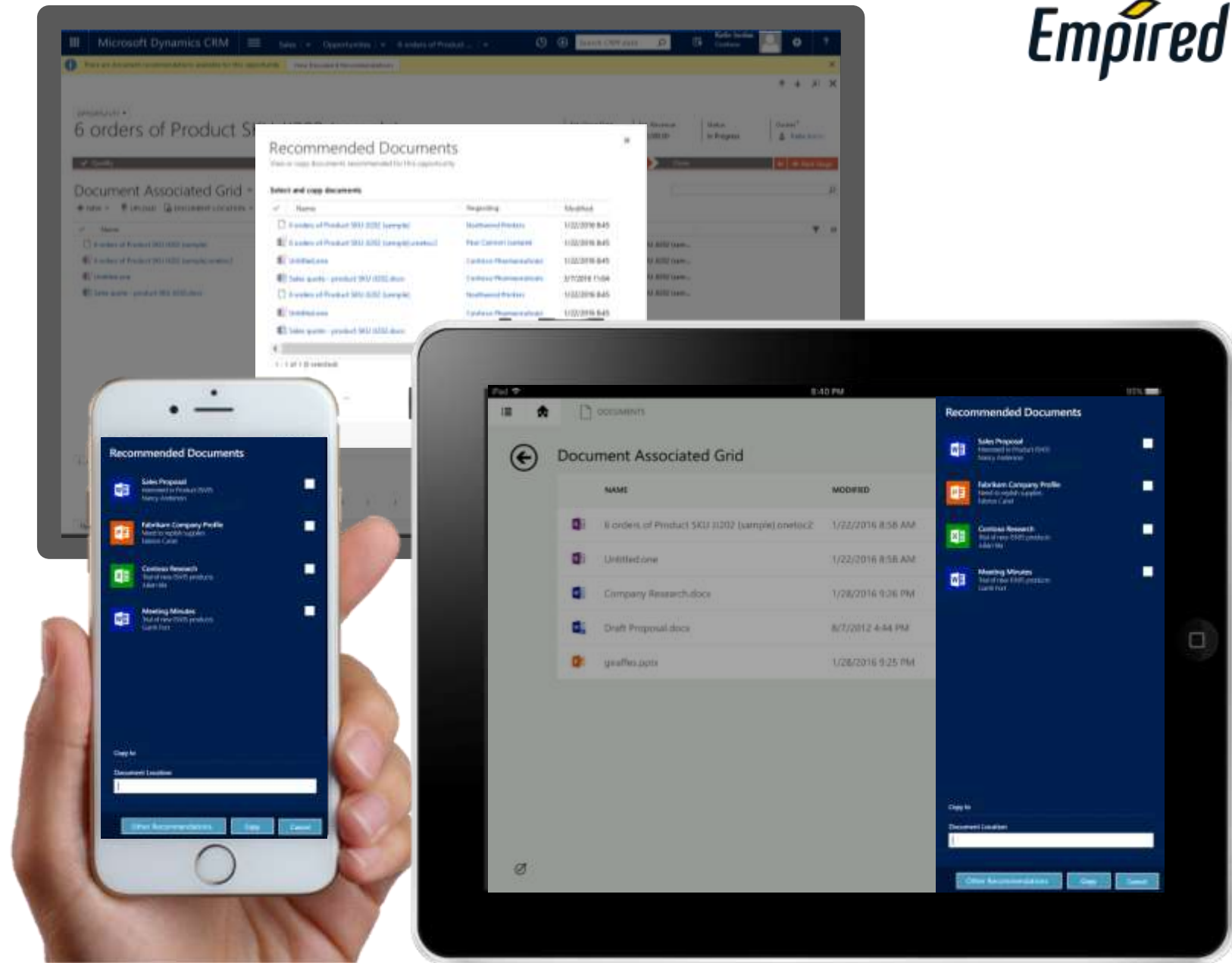
Related:

- Maria Simpson  
Contoso  
IT Manager
- Katie Jordan
- Activities
- Blue Yonder

Last Synced...

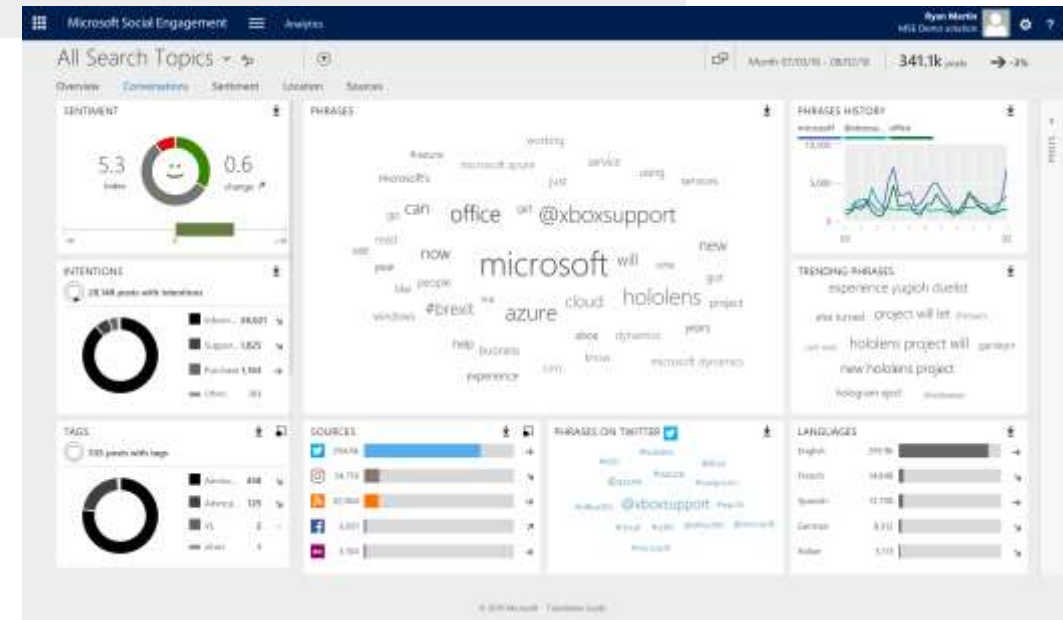
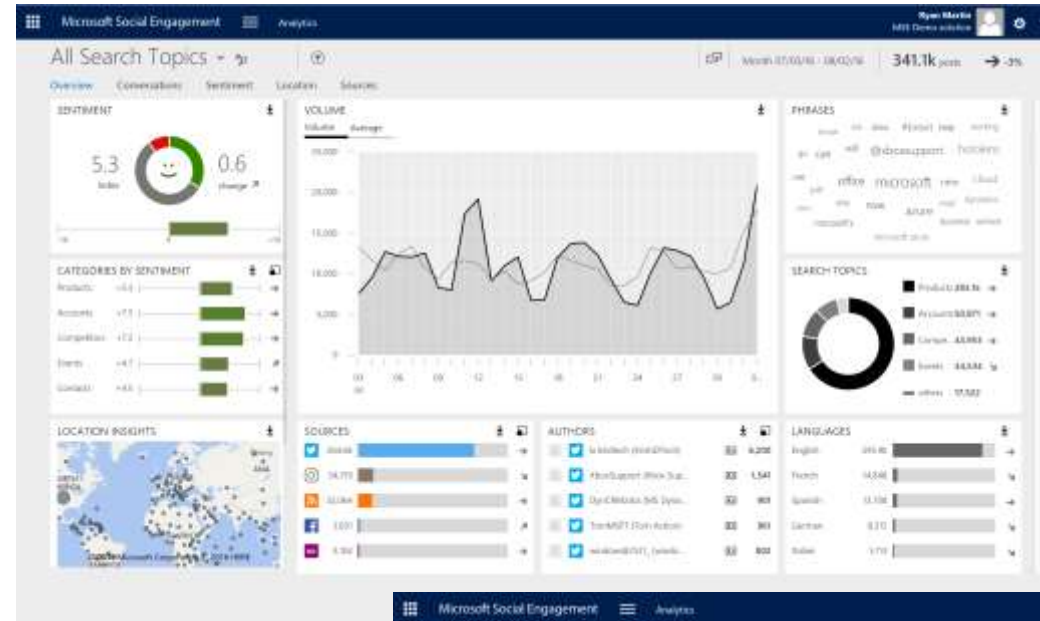
# Document Suggestions

- ✓ Discover documents that are relevant to your current work
- ✓ Based on record similarity rules
- ✓ Copy the most helpful documents to your record repository






# Social Engagement

- ✓ Auto tags and adaptive learning on tags
- ✓ Chinese and Japanese sentiment analysis
- ✓ Smart data sets
- ✓ Instagram as a new source
- ✓ Automatically assign posts



# Dynamics 365 – Sales and Service

## Roadmap Update

|  |                       |                              |                    |                         |                         |                            |
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# Portal

- ✓ Created via Admin Portal
- ✓ Choice of Portal 'Types'
  - ✓ Customer
  - ✓ Partner
  - ✓ Employee
- ✓ Managed via Admin Portal



Manage your solutions

Select a preferred solution to manage on selected instance: DynDay2017

| SOLUTION NAME                 | VERSION  | AVAILABLE UNTIL | STATUS        |
|-------------------------------|----------|-----------------|---------------|
| Community Portal              | 8.2.1.71 | 1/1/2050        | Not installed |
| Company News Timeline         | 1.0.0.0  | 12/31/2050      | Not installed |
| Custom portal                 | 8.2.1.71 | 1/1/2050        | Not installed |
| Customer Self-Service Portal  | 8.2.1.71 | 1/1/2050        | Not installed |
| Dynamics 365 Customer Se...   | 1.0.0.1  | 1/1/2050        | Installed     |
| Dynamics 365 Sales Applic...  | 1.0.0.1  | 1/1/2050        | Installed     |
| Employee Self-Service Port... | 8.2.1.71 | 1/1/2050        | Not installed |
| Fantasy Sales Team            | 1.4.8    | 1/1/2050        | Not installed |
| Field Service                 | 6.1.2.90 | 1/1/2050        | Not installed |
| Gamification                  | 2017.2.0 | 1/1/2050        | Not installed |
| Office 365 Groups             | 2.7.0.0  | 1/1/2050        | Not installed |
| Partner Field Service         | 8.2.1.71 | 1/1/2050        | Not installed |
| Partner Portal                | 8.2.1.71 | 1/1/2050        | Not installed |

Custom portal

(INSTALL) Customer portal service is in progress of the...

Created by: MI

[Learn more](#)

Microsoft Dynamics 365

### Portal Details

#### General Settings

\*Name

\*Type

Portal URL

Base Portal URL  
<https://dynday2017.microsoftcrmportals.com>

Portal Audience

\*Portal Audience

Update Portal Binding

\*Select Website Record

Change Portal State

\*Portal State

- PORTAL DETAILS
- PORTAL ACTIONS
- SET UP CUSTOM DOMAINS AND SSL
- MANAGE SSL CERTIFICATES
- MANAGE DYNAMICS 365 INSTANCE

# Customer Insights

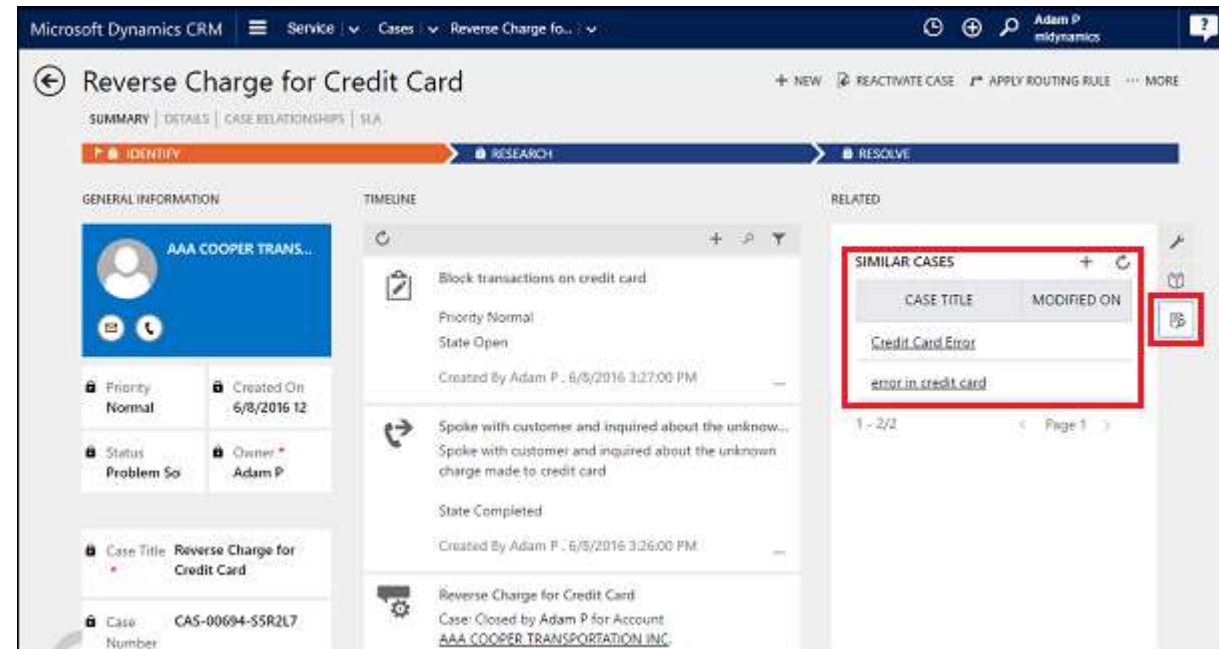
- ✓ Customer 360°
- ✓ Customer knowledge & interactions
- ✓ Pre-built integrations
- ✓ Bring your own data
- ✓ Build your own applications
- ✓ Insights for each business role





# Machine Learning

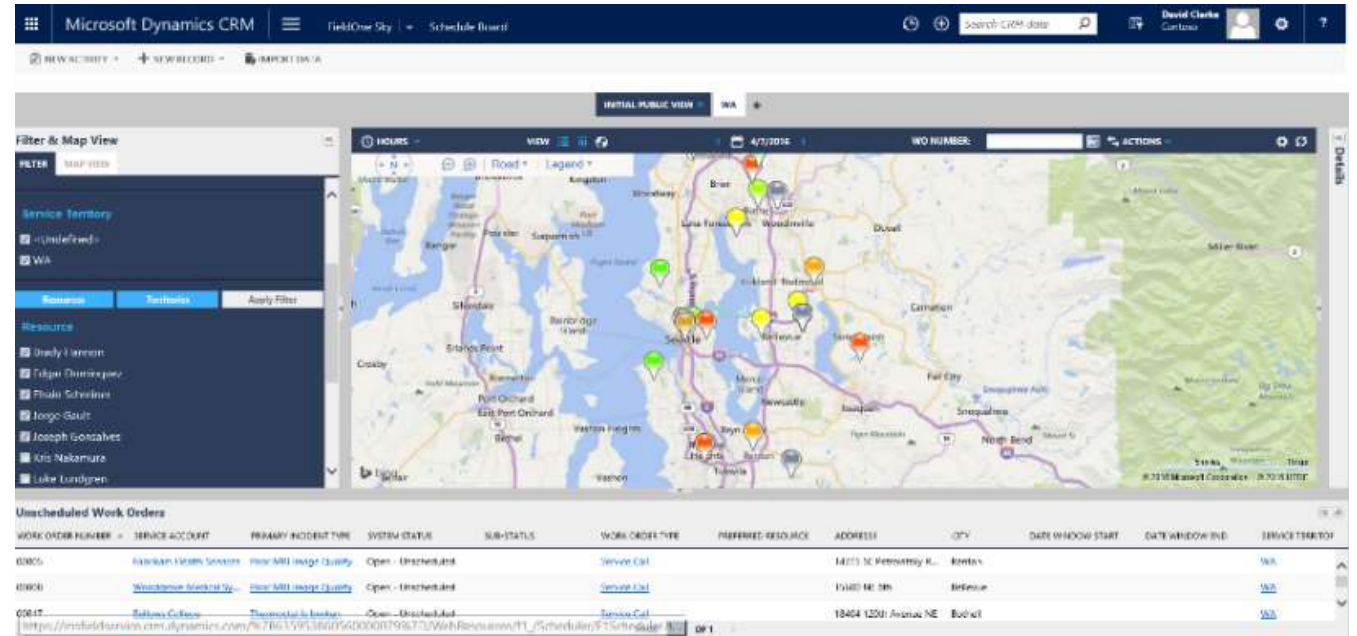
- ✓ Auto-suggest of relevant knowledge articles
- ✓ Case topic analysis
- ✓ Cross-sell / up-sell recommendations
- ✓ First element of democratising AI



The screenshot displays the Microsoft Dynamics CRM interface for a case titled "Reverse Charge for Credit Card". The interface is divided into several sections: "GENERAL INFORMATION", "TIMELINE", and "RELATED". The "GENERAL INFORMATION" section shows the case details, including the account "AAA COOPER TRANS...", priority "Normal", status "Problem Sol", and owner "Adam P". The "TIMELINE" section shows a sequence of events, including "Block transactions on credit card" and "Spoke with customer and inquired about the unknown...". The "RELATED" section shows a list of "SIMILAR CASES" with columns for "CASE TITLE" and "MODIFIED ON". The "SIMILAR CASES" section is highlighted by a red box, and a red square highlights the "SIMILAR CASES" header. The "SIMILAR CASES" list includes two entries: "Credit Card Error" and "error in credit card".

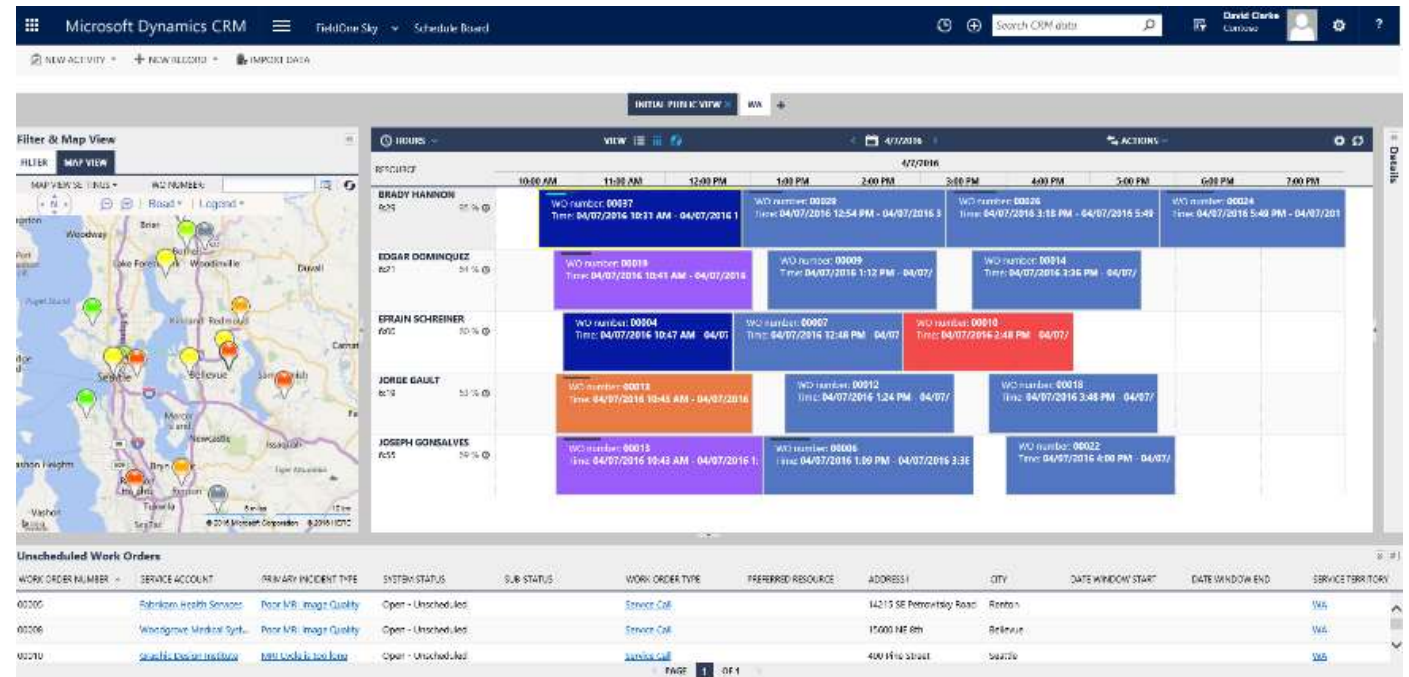
# Connected Field Service

- ✓ Enabling any CRM entity to be IOT enabled
- ✓ Diagnosing and fixing issues remotely
- ✓ Automating the process of responding to service alerts
- ✓ Proactive service experience for customer



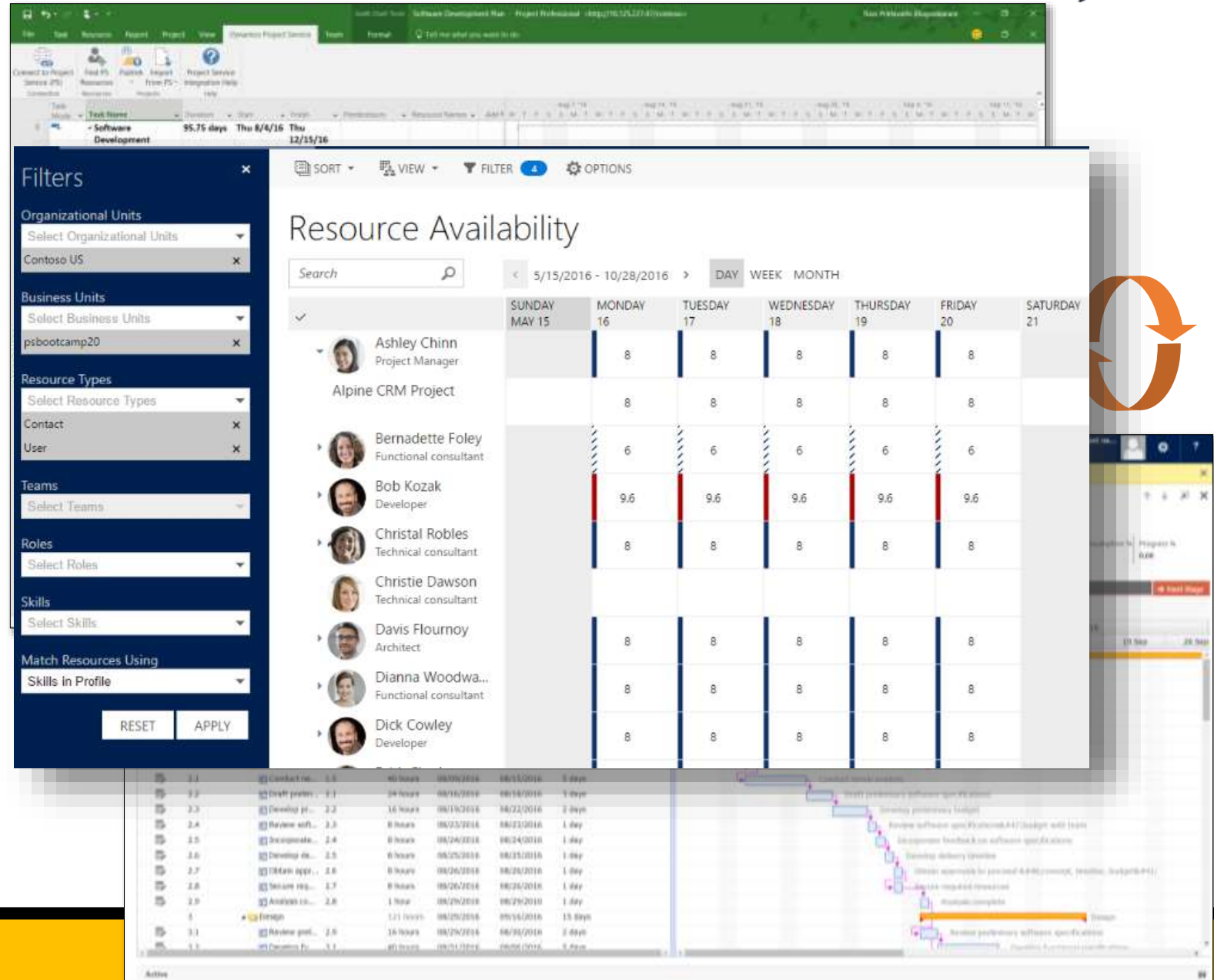
# Scheduling Optimisation

- ✓ Automatically Schedule work to the most appropriate resources while optimizing to fit in the most appointments per day.
- ✓ Automatically scheduled for things like time travel, distance, or even service level agreement with a customer
- ✓ Schedule gets re-optimized in real time to ensure the field service is efficient






# Project Service Automation

- ✓ MS Project integration
- ✓ Actuals integration with Dynamics 365 Operations
- ✓ Exchange booking integration



# Dynamics 365 – Sales and Service

## Roadmap Update

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# Editable Grids

- ✓ In-Grid editing of records
- ✓ Web client and Mobile
- ✓ Home-grid or sub-grid level
- ✓ Navigate using keyboard or mouse
- ✓ Configurable business logic

Dynamics 365 | Sales | Accounts

See how the interactive service hub can make you more productive. Experience it now

NEW EDIT ACTIVATE DEACTIVATE DELETE MERGE SHOW AS SEND DIRECT EMAIL ADD TO MARKETING LIST

Active Accounts

Search for records

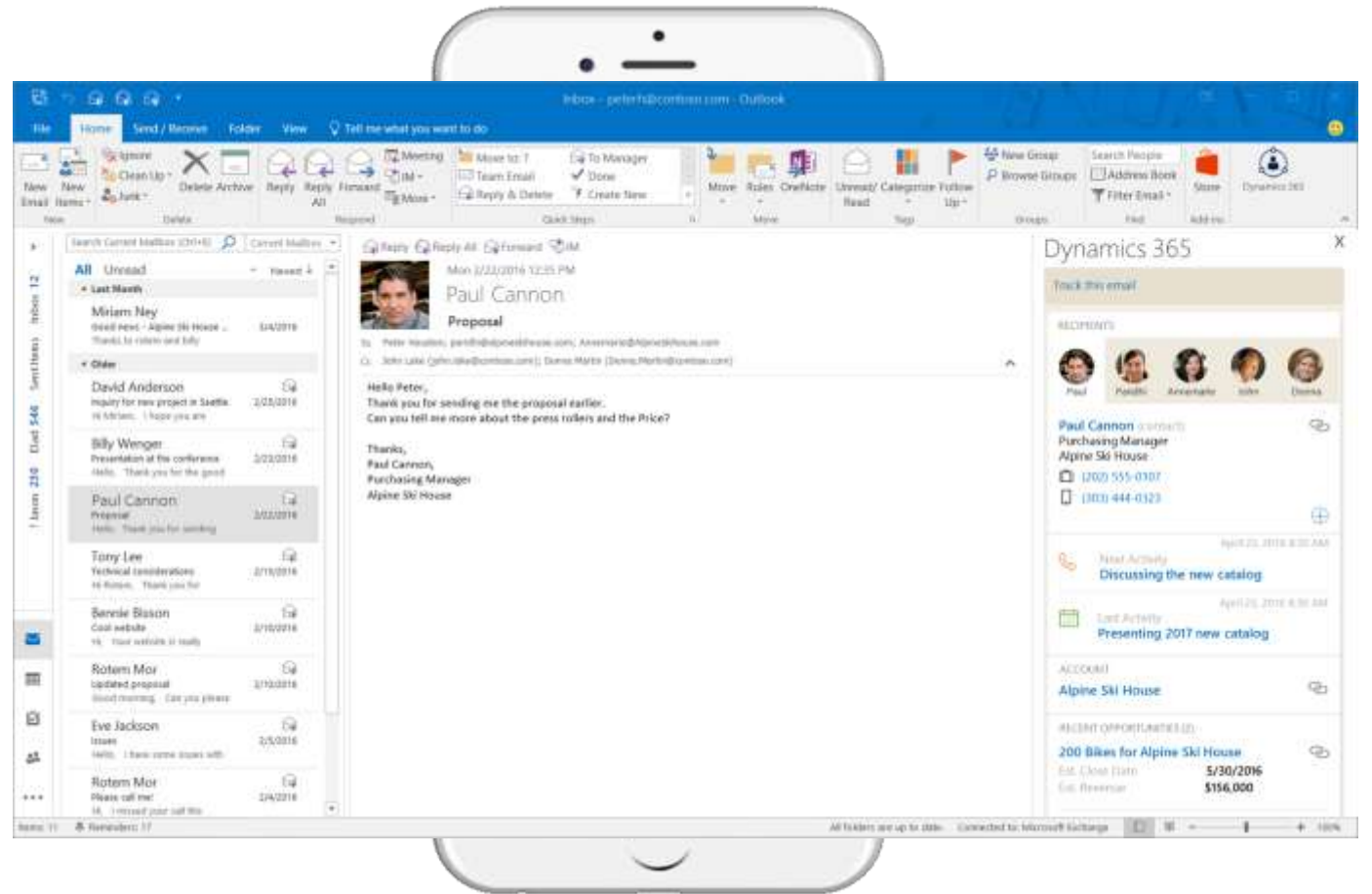
Group By: (no grouping)

| Account Name                     | Industry             | Open Revenue | Open Deals | Main Phone | Address      | Primary Contact           | Email (Primary)  | Status | Address 1                   |
|----------------------------------|----------------------|--------------|------------|------------|--------------|---------------------------|------------------|--------|-----------------------------|
| A. Datum Corporation (sample)    | Accounting           | \$0.00       | 0          | 555-0158   | Redmond      |                           | someone_j@ex...  | Active | 2137 Birchwood Dr Re...     |
| Adventure Works (sample)         | Accounting           | \$0.00       | 0          | 555-0152   | Santa Cruz   | ew                        | ine_c@exa...     | Active | 4405 Balboa Court Santa ... |
| Alpine Ski House (sample)        | Consumer Services    | \$30,000.00  | 1          | 555-0157   | Missoula     | Jim Glynn (sample)        | ine_h@exa...     | Active | 2313 B Southampton Rd ...   |
| Blue Yonder Airlines (sample)    | Accounting           | \$25,000.00  | 1          | 555-0154   | Los Angel... | Maria Campbell (sample)   | ine_e@exa...     | Active | 9068 Muir Road Los Ange...  |
| City Power & Light (sample)      | Financial            | \$0.00       | 0          | 555-0155   | Redmond      | Nancy Anderson (sample)   | ine_f@exa...     | Active | 3397 Rancho View Drive ...  |
| Coho Winery (sample)             | Consulting           | \$25,000.00  | 1          | 555-0159   | Phoenix      | Patrick Sands (sample)    | ine_j@exa...     | Active | 137 Lancelot Dr Phoenix...  |
| Contoso Pharmaceuticals (sample) | Financial            | \$26,000.00  | 1          | 555-0156   | Redmond      | Paul Cannon (sample)      | ine_g@exa...     | Active | 9906 Oak Grove Road Re...   |
| Demo Account                     | Consumer Services    | \$0.00       | 0          | 555-7655   | ---          | Rene Valdes (sample)      | ine_d@exa...     | Active | ---                         |
| Fabrikam, Inc. (sample)          | Building Supply R... | \$10,000.00  | 1          | 555-0153   | Lynnwood     | Robert Lyon (sample)      | ine_a@exa...     | Active | 7995 Edwards Ave. Lynn...   |
| Fourth Coffee (sample)           | Consulting           | \$0.00       | 0          | 555-0150   | Renton       | Scott Konersmann (sample) | ine_b@exa...     | Active | 5009 Orange Street Rento... |
| Litware, Inc. (sample)           | Financial            | \$0.00       | 0          | 555-0151   | Dallas       | Sidney Higa (sample)      | someone_b@exa... | Active | 100 Red Oak Lane Dallas...  |

Charts

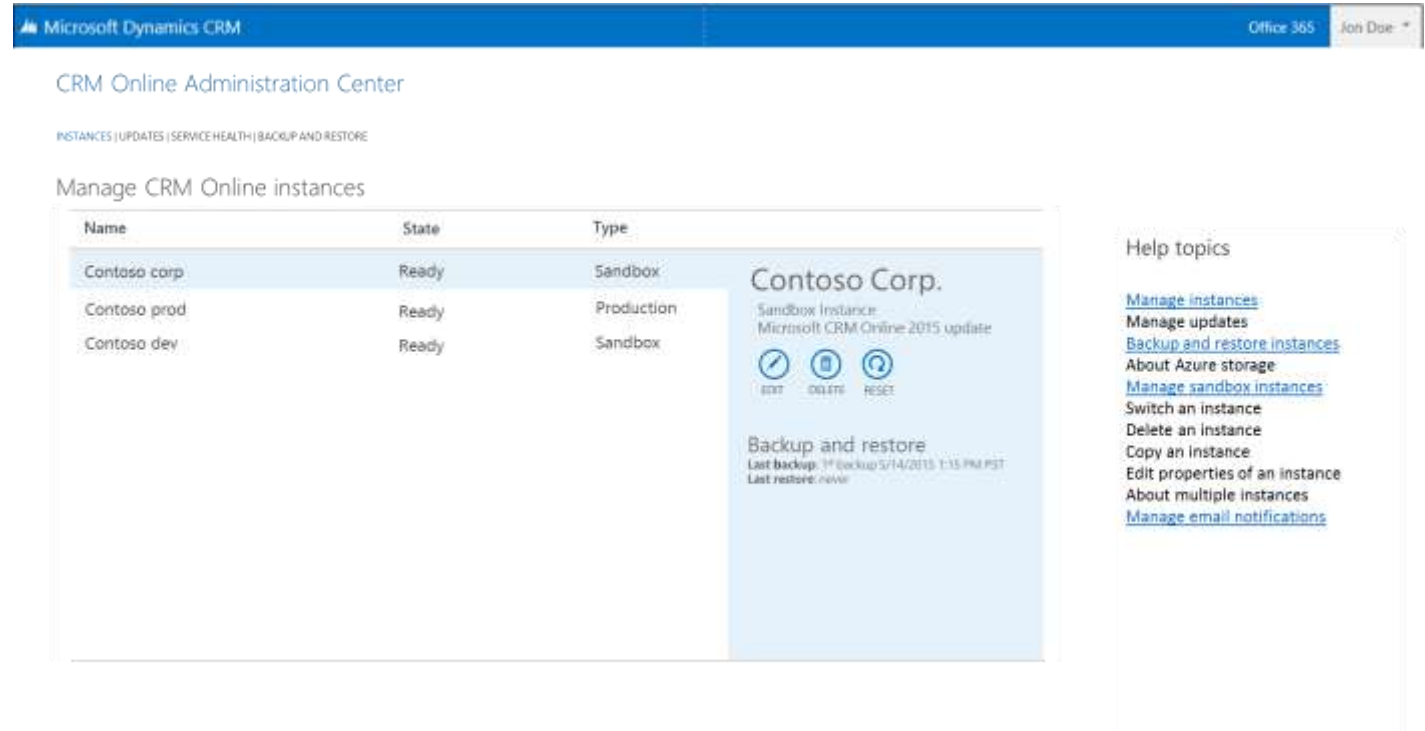
# Dynamics 365 App for Outlook

- ✓ Enhanced user interface
- ✓ One-click Track and Set Regarding
- ✓ Display Dynamics 365 data when composing e-mails
- ✓ Outlook App for Mobile\*



# Backup and Restore

- ✓ Daily System Backups
- ✓ On-Demand Backups
- ✓ Restore from Backup
- ✓ Delete Backups



Microsoft Dynamics CRM

Office 365 | Jon Doe

CRM Online Administration Center

INSTANCES | UPDATES | SERVICE HEALTH | BACKUP AND RESTORE

Manage CRM Online instances

| Name         | State | Type       |
|--------------|-------|------------|
| Contoso corp | Ready | Sandbox    |
| Contoso prod | Ready | Production |
| Contoso dev  | Ready | Sandbox    |

**Contoso Corp.**

Sandbox Instance  
Microsoft CRM Online 2015 update

EDIT DELETE RESET

**Backup and restore**  
Last backup: 11 backup 5/14/2015 1:15 PM PST  
Last restore: never

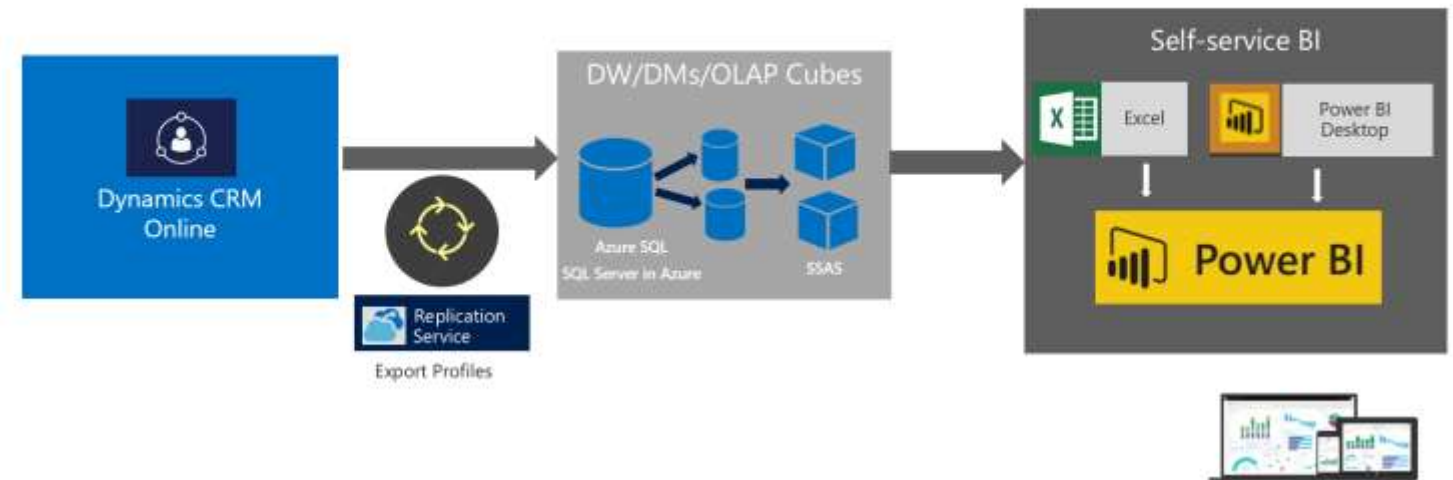
Help topics

- [Manage instances](#)
- [Manage updates](#)
- [Backup and restore instances](#)
- [About Azure storage](#)
- [Manage sandbox instances](#)
- [Switch an instance](#)
- [Delete an instance](#)
- [Copy an instance](#)
- [Edit properties of an instance](#)
- [About multiple instances](#)
- [Manage email notifications](#)



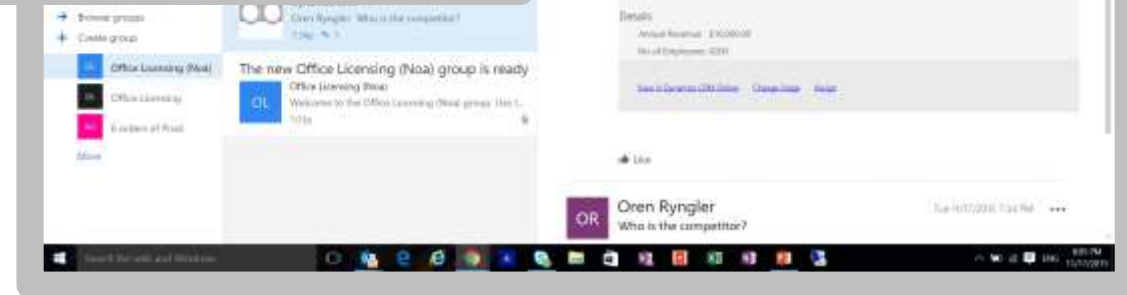
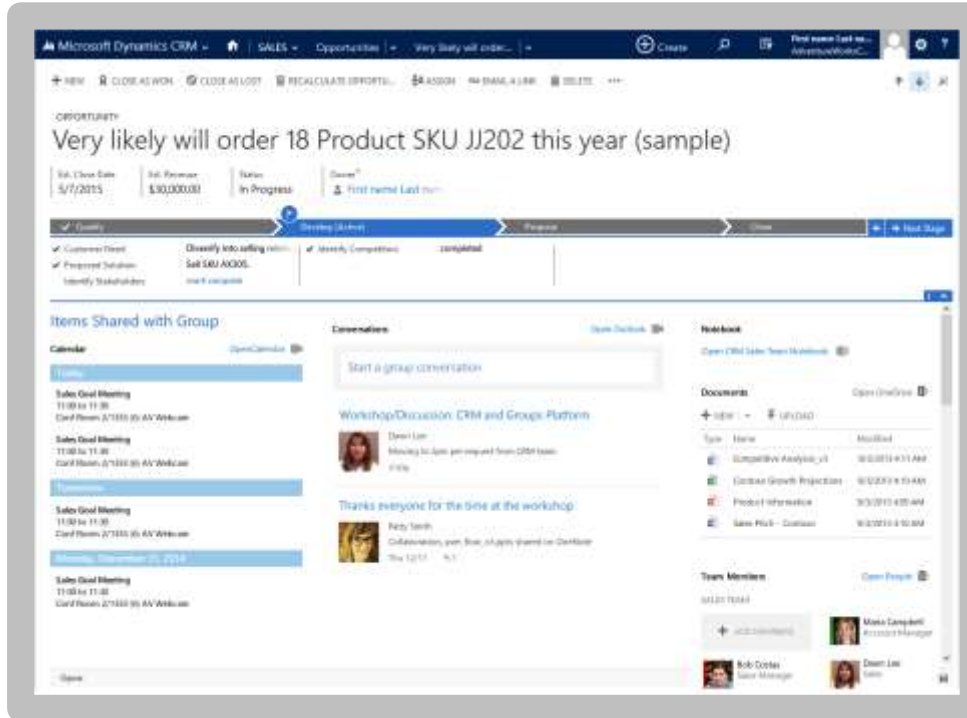
# Data Warehouse

- ✓ Replication of data to customer owned stores
- ✓ Supports variety of data stores
- ✓ Full fidelity replication
- ✓ Visibility & diagnostics
- ✓ Data recovery, reset & rebuild



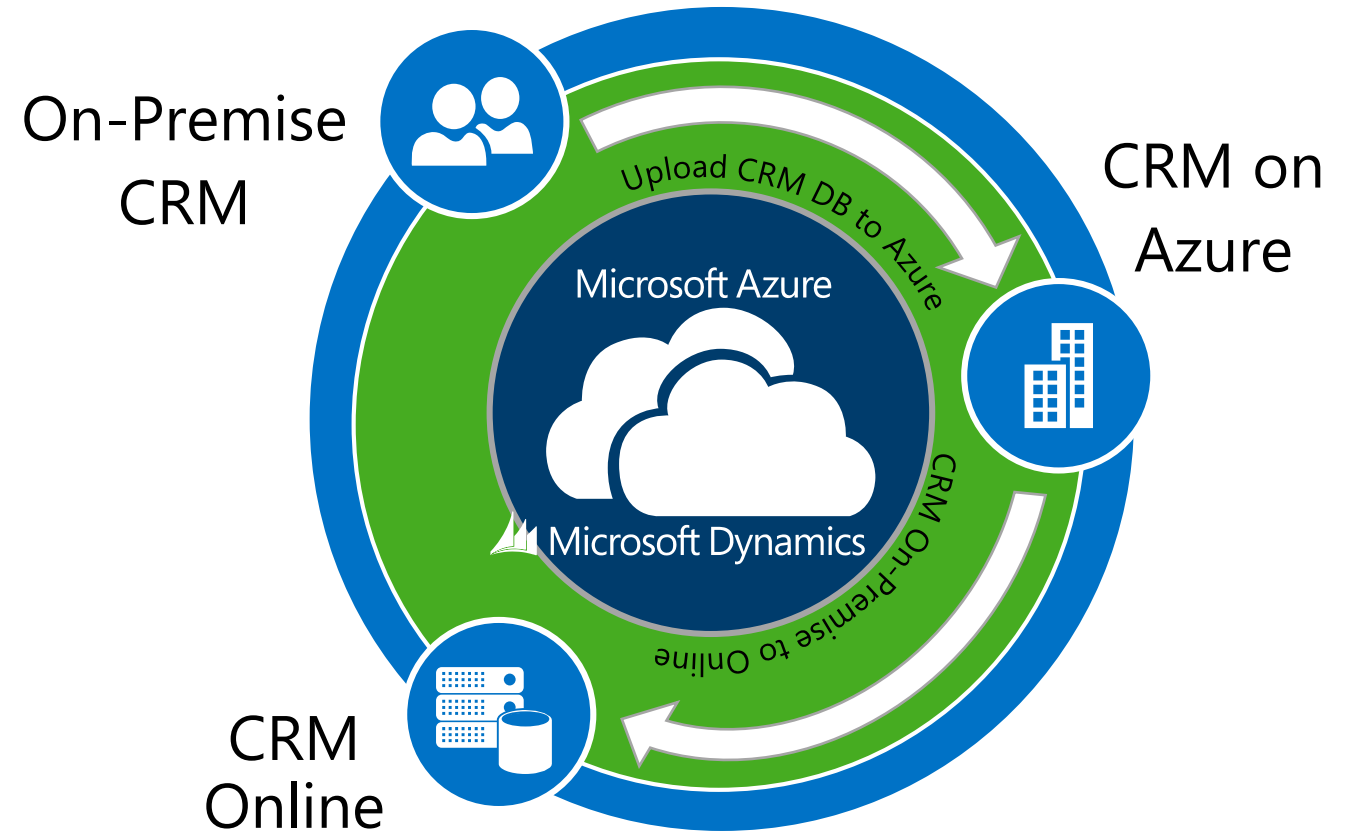
# Office 365

- ✓ Associate to existing group
- ✓ Auto-update group membership
- ✓ Guest-access scenarios



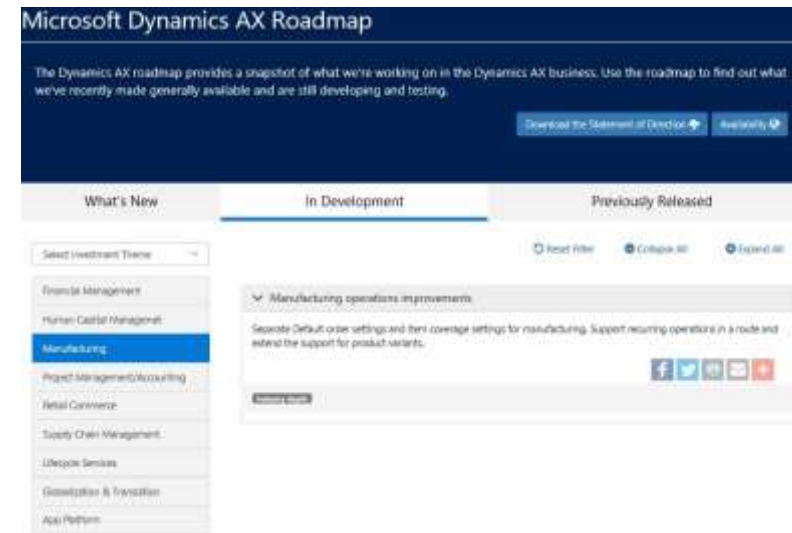
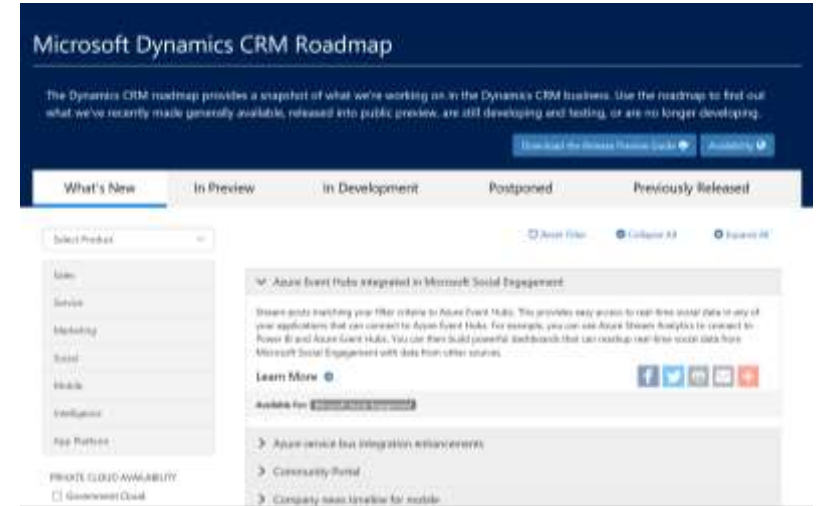
## On-premises to Cloud migration

- ✓ Guided Process to move to CRM Online
- ✓ Mechanism to bring CRM on-premises database to Azure as a staging area



# Future Roadmap

- ✓ <http://crmroadmap.dynamics.com/>
- ✓ New Dynamics 365 Roadmap site in Q2 FY17 to incorporate both Dynamics CRM and Dynamics AX







Thank you.