

*Empiored*

 DYNAMICS DAY  
**2016**



Guy Riddle  
Rowan Miller

Dynamics 365  
Sales and Service Roadmap Update

# 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



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# Relationship Insights

**Dynamics 365** Sales Opportunities

SEND SAVE SAVE & CLOSE INSERT TEMPLATE INSERT ARTICLE FORM

**New Email**

From: Katie Jordan

To: Summary

Cc: Topic: 6 orders of Product SKU JJ202 (sample)

Bcc: Contact: Maria Campbell (sample)

Subject: Potential Customer: Fabrikam, Inc. (sample)

Purchase Timeframe: This Year

Currency: US Dollar

Budget Amount: \$30,000.00

Purchase Process: --

Description: --

Regarding: Needs to restock their supply of Product SKU AX305; will purchase at least 25-50 (sample)

Duration: 30 minutes

**Activities**

YAMMER SYSTEM POSTS ACTIVITIES NOTES

All | Add Phone Call Add Task ...

dfdgfd

Priority: Normal

Completed by: Katie Jordan 4/6/2016 1:42 PM

Katie Jordan

hello world CRM:0001002

4/28/2016 9:45 AM - Private email not yet tracked.

Katie Jordan

RE: CRM:0004005

3/1/2016 4:54 PM

**TRACK**

**Attachment**

**STAKEHOLDERS**

Name ↑ Role

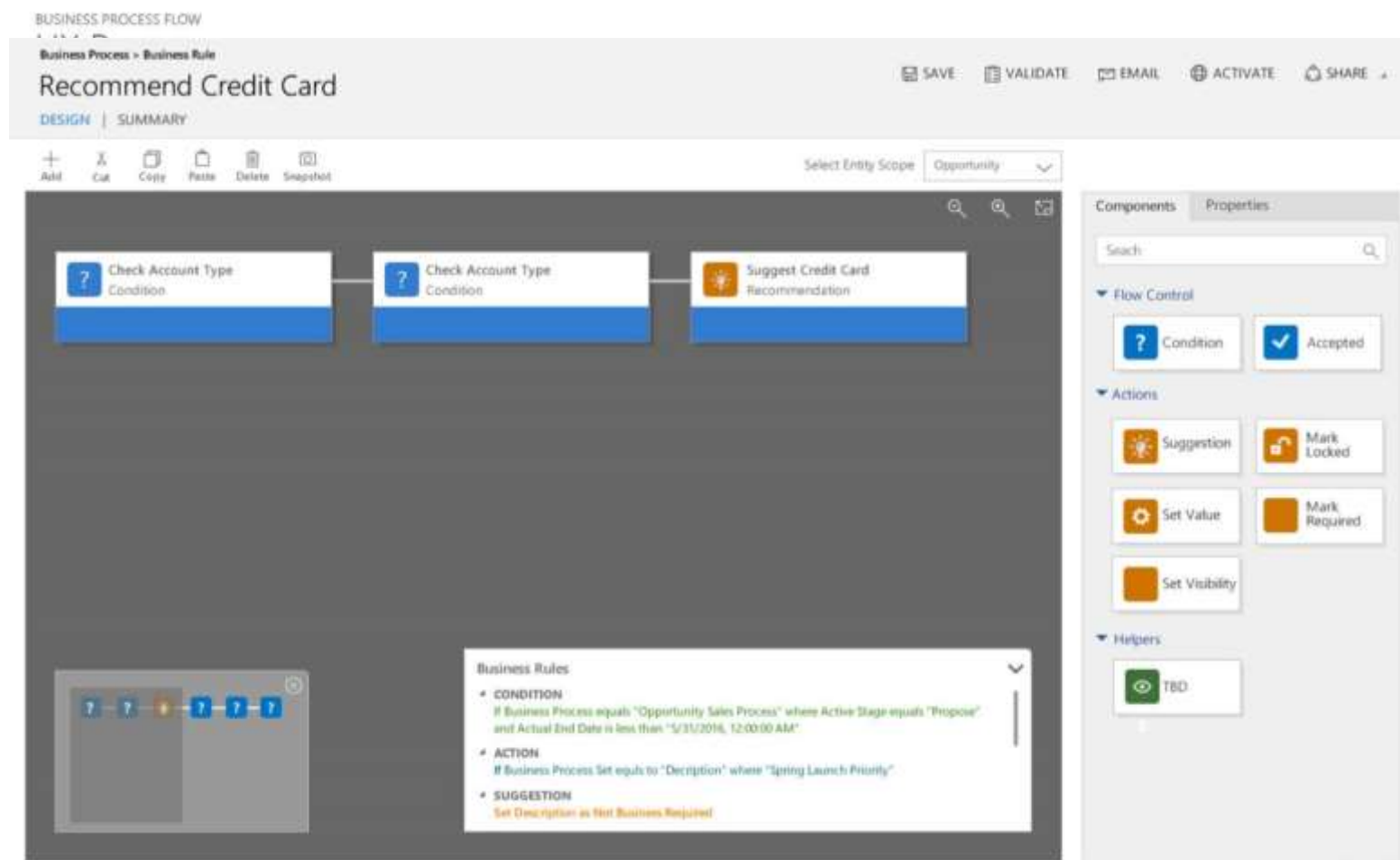
No stakeholders found.

**ACTIVITY ANALYSIS**

Time Spent by Team 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

Quality	25,000.00
Develop	55,000.00
Propose	55,000.00
	\$105,000
	\$75,000
	\$48,000
	\$16,000
	1,000

My Open Leads

- Yvonne McKay  
New Store Opened this year  
New
- Susanna Hubberd  
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

Reebok Fall Update  
Opportunity

Develop Propose

Summary

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Contact: Maria Simpson  
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Last Synced...

Reebok Fall Update  
Opportunity

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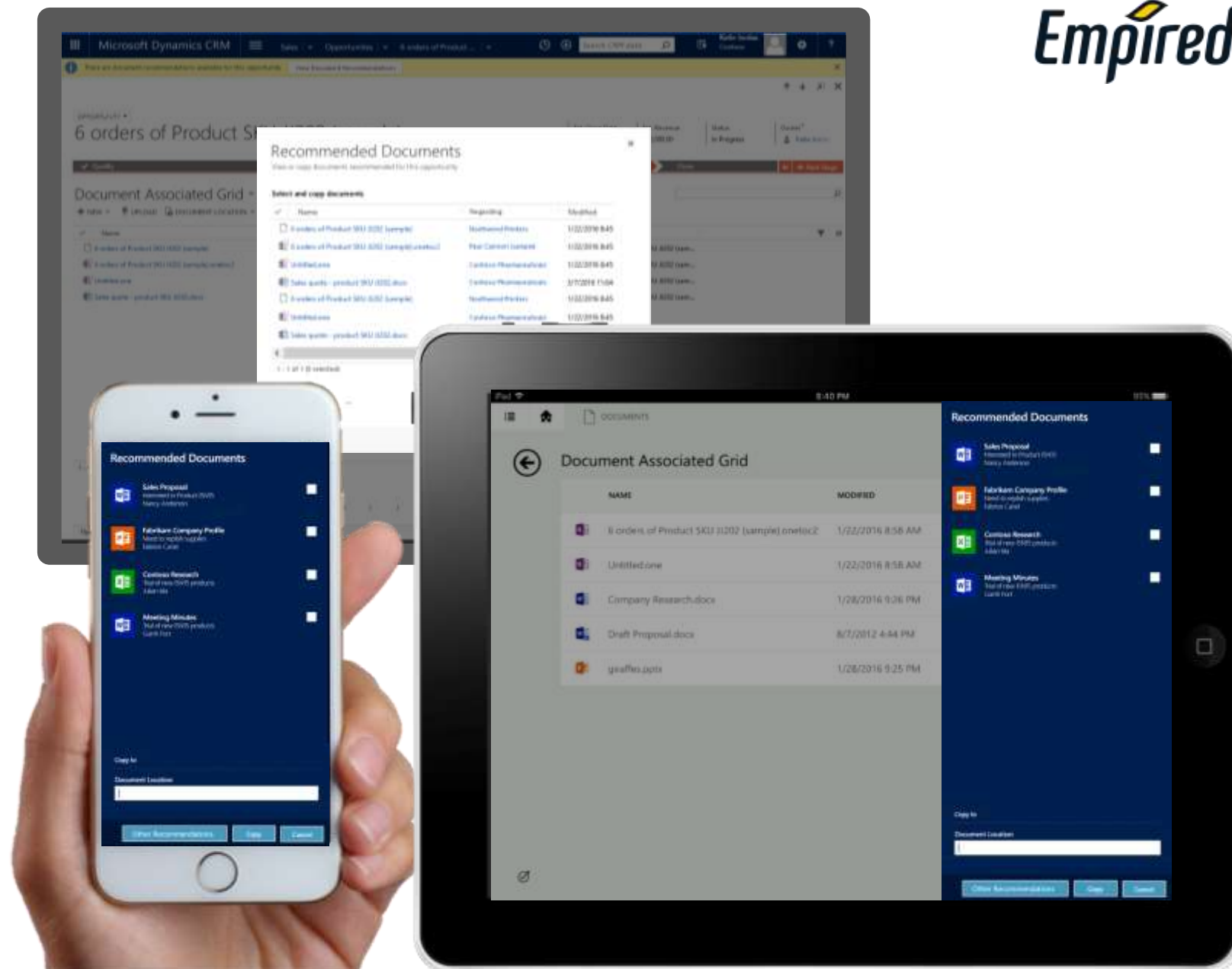
Related:

- Maria Simpson  
Contoso  
IT Manager
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- Activities
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Last Synced...

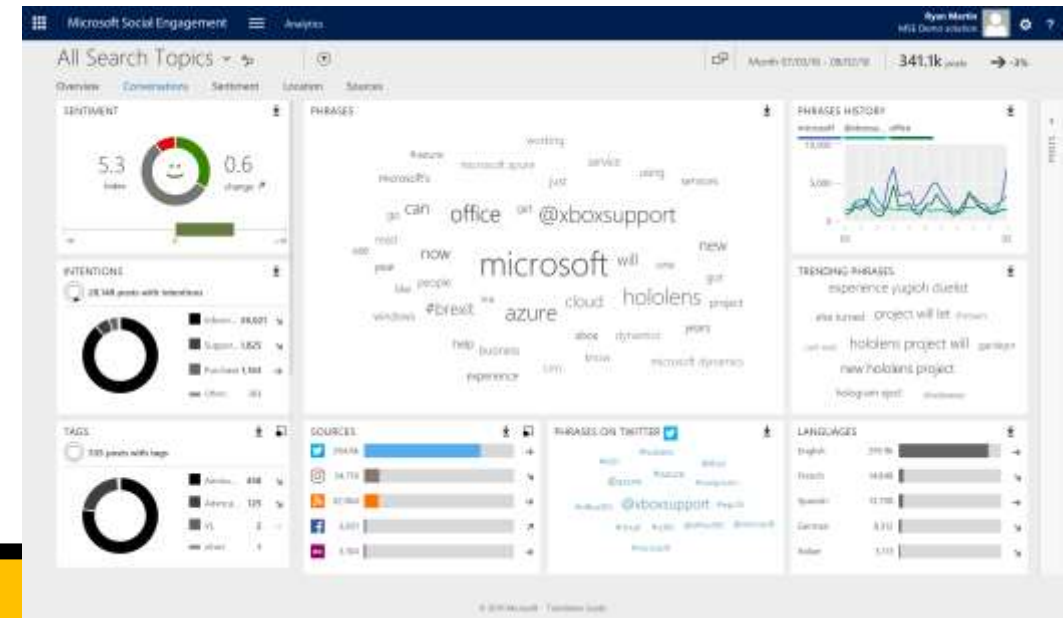
# Document Suggestions

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








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



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# 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".

**GENERAL INFORMATION:**

- Account:** AAA COOPER TRANS...
- Priority:** Normal
- Created On:** 6/8/2016 12
- Status:** Problem Sol
- Owner:** Adam P
- Case Title:** Reverse Charge for Credit Card
- Case Number:** CAS-00694-55R2L7

**TIMELINE:**

- Block transactions on credit card** (Priority Normal, State Open, Created By Adam P - 6/8/2016 3:27:00 PM)
- Spoke with customer and inquired about the unknown...** (Spoke with customer and inquired about the unknown charge made to credit card, State Completed, Created By Adam P - 6/8/2016 3:26:00 PM)
- Reverse Charge for Credit Card** (Case Closed by Adam P for Account AAA COOPER TRANSPORTATION INC.)

**RELATED:**

A red box highlights the "SIMILAR CASES" section, which contains a table with the following data:

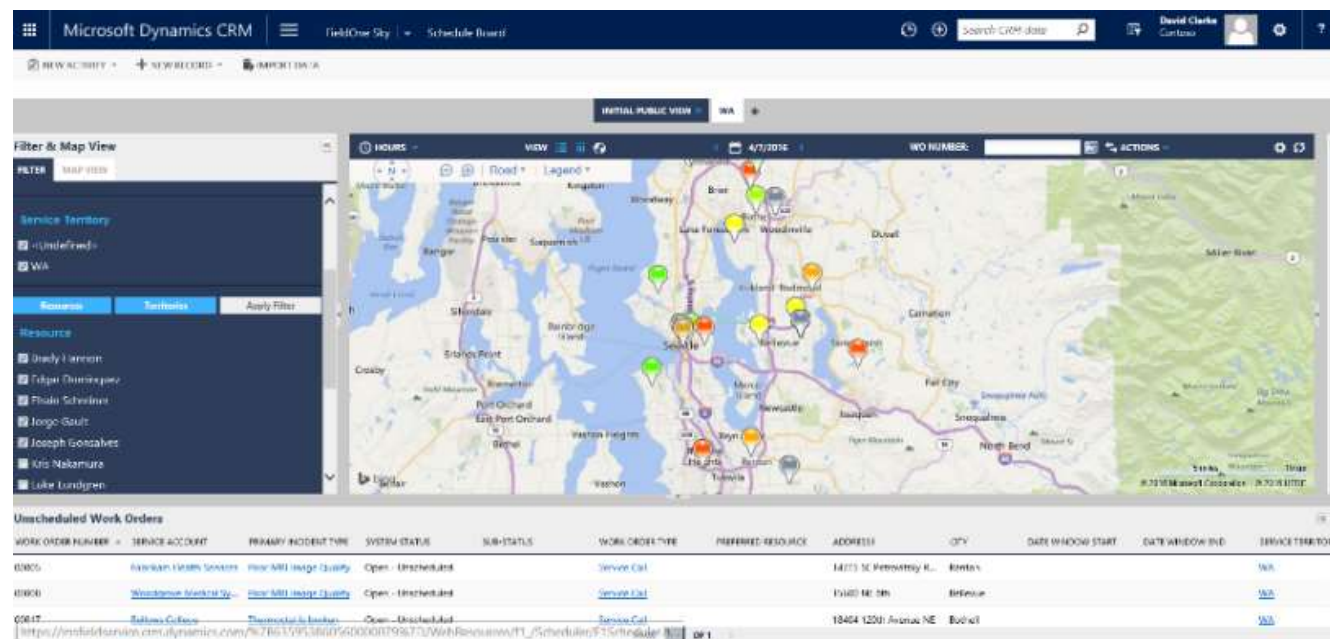
CASE TITLE	MODIFIED ON
Credit Card Error	
error in credit card	

The "SIMILAR CASES" section also includes a pagination indicator "1 - 2/2" and a "Page 1" link.



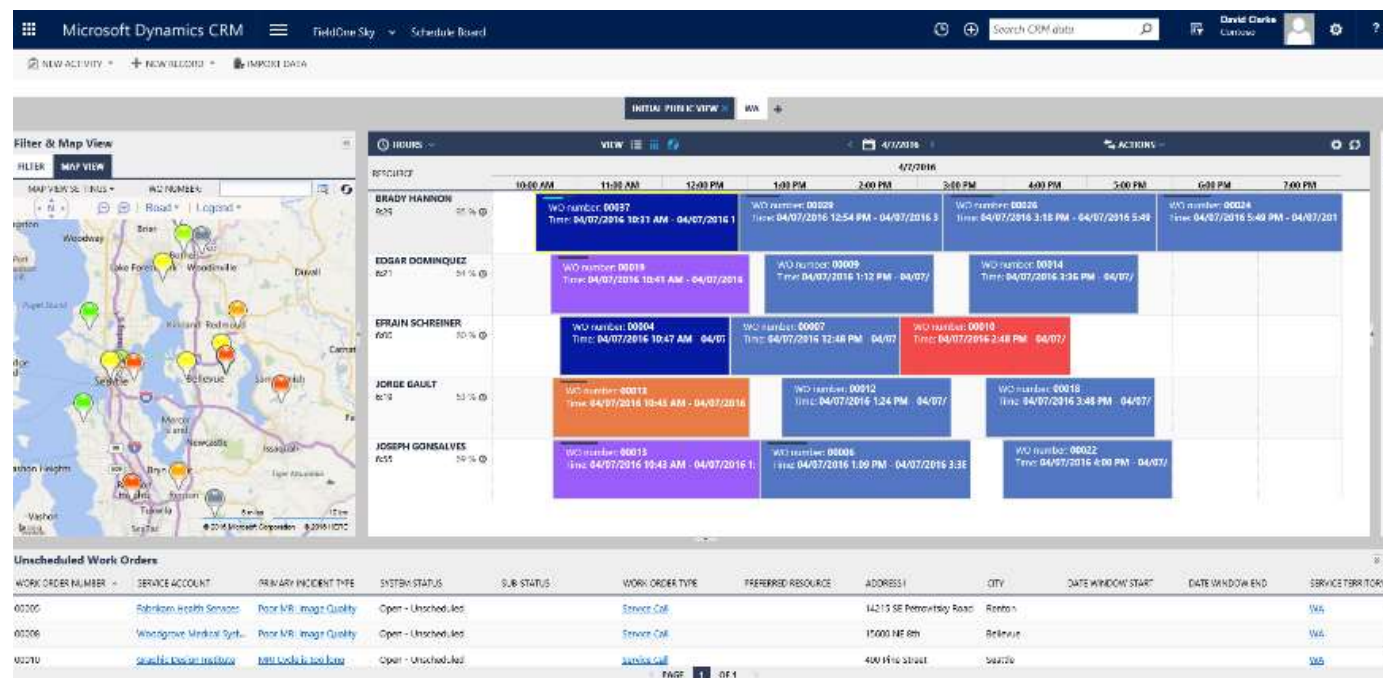
# Connected Field Service

- ✓ 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



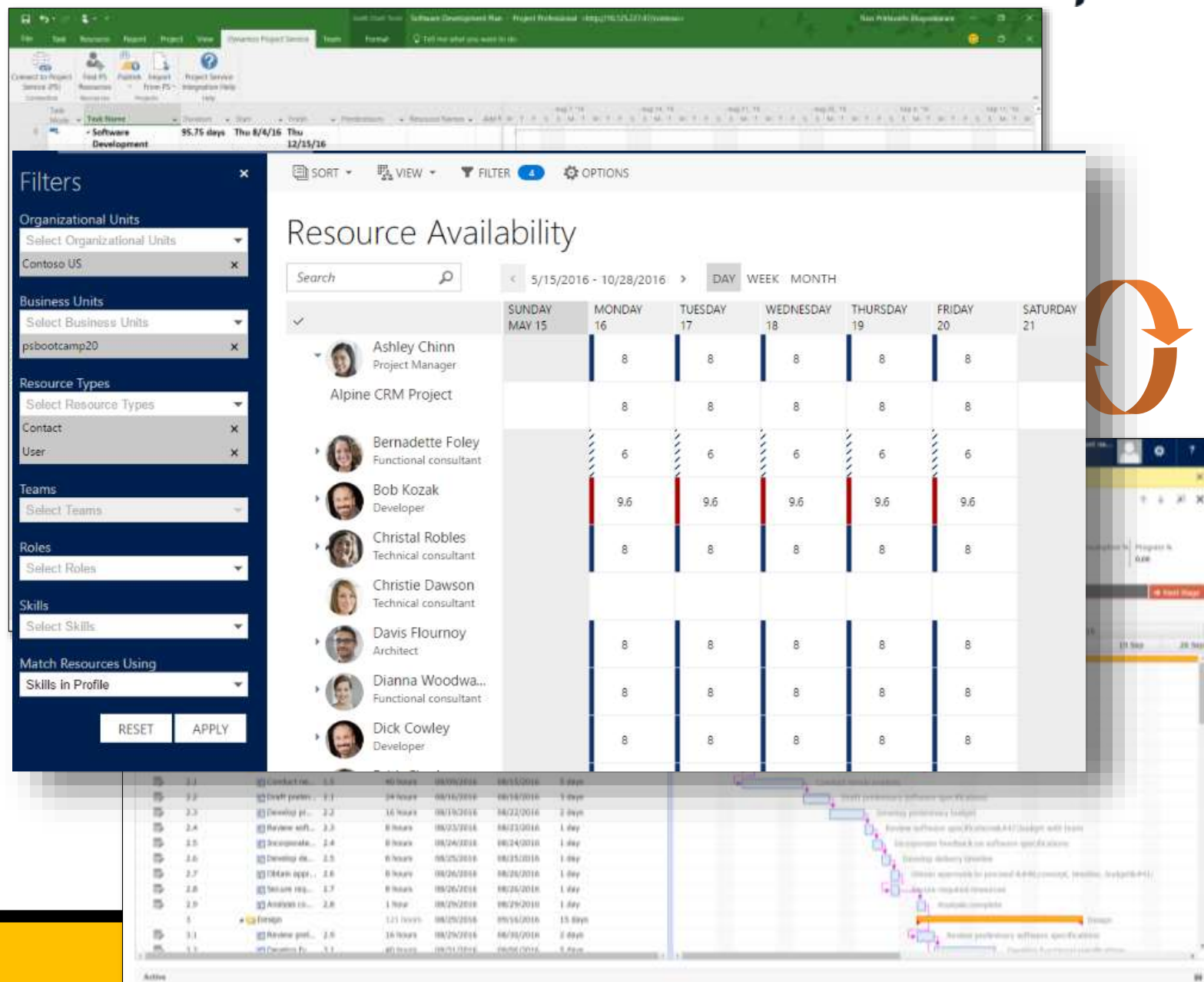
# Scheduling Optimisation

- ✓ 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



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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

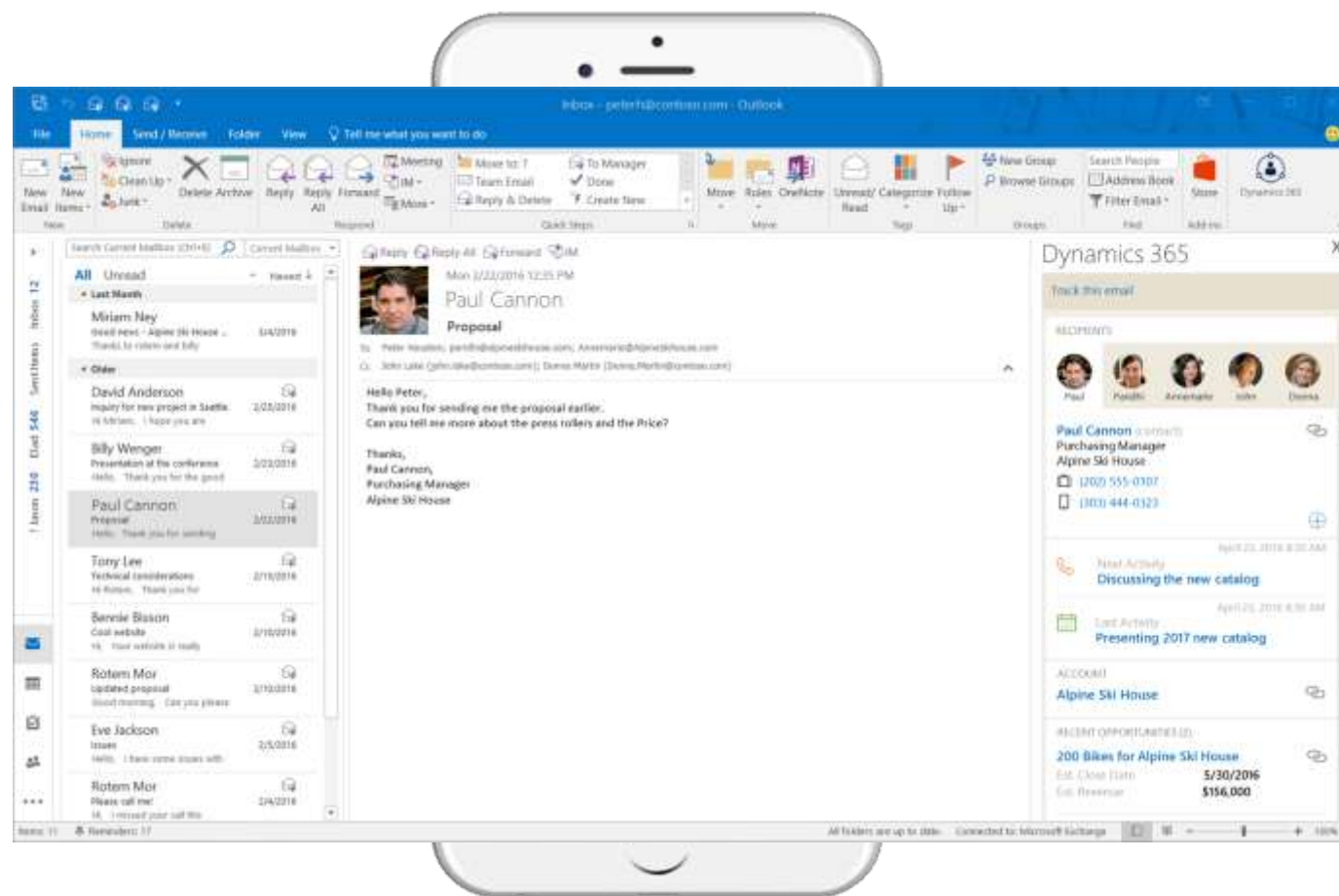
Group By: (no grouping)

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...	A	2137 Birchwood Dr Re...
Adventure Works (sample)	Accounting	\$0.00	0	555-0152	Santa Cruz	erew	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	---	<b>Rene Valdes</b> (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

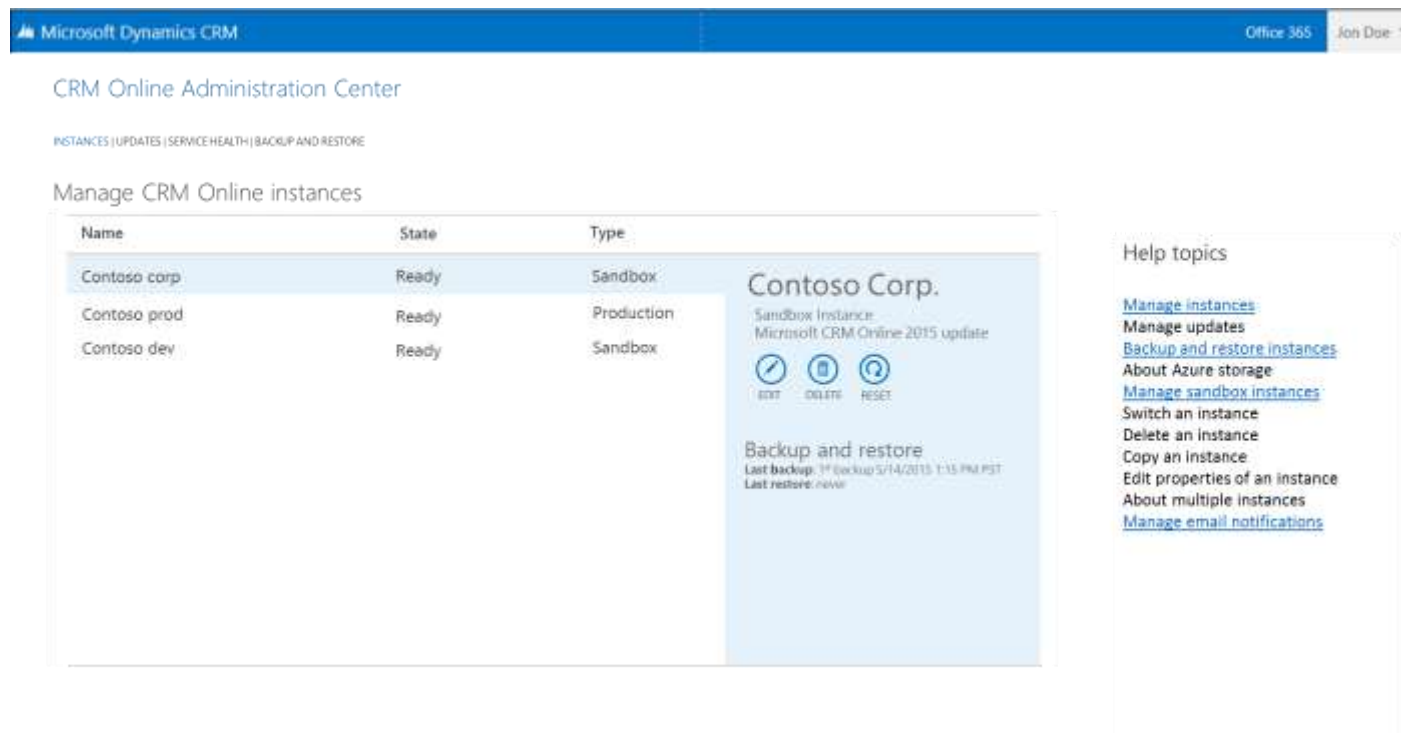
# Dynamics 365 App for Outlook

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



# Backup and Restore

- ✓ Backup to Azure storage
- ✓ Download & connect to On-Premise
- ✓ Secure transfer



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

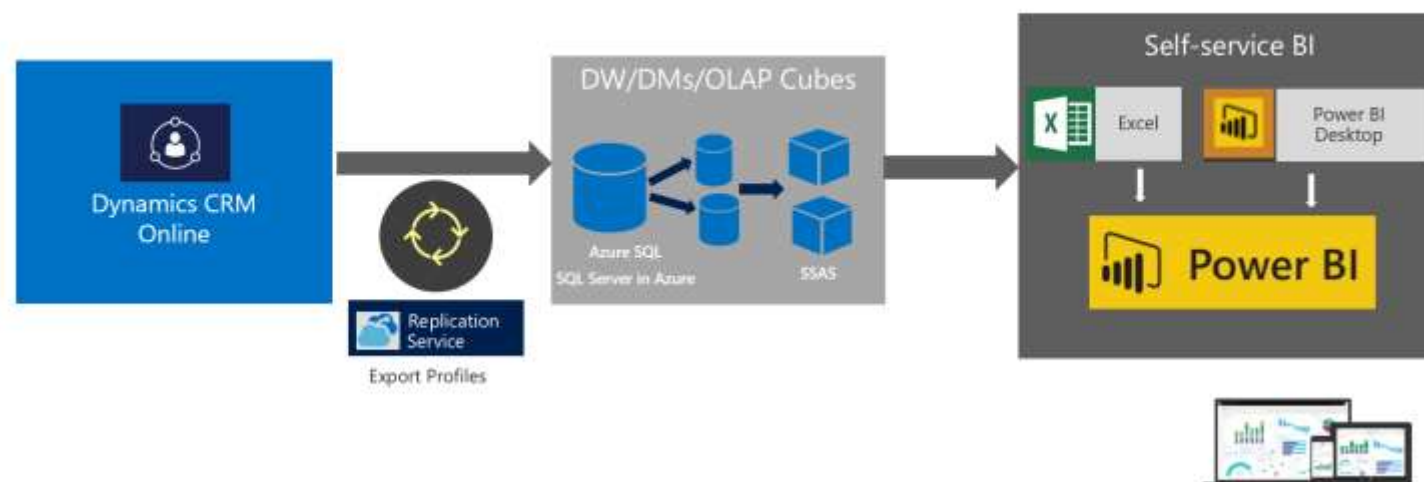
Last backup: 11/14/2015 1:15 PM PST  
Last restore: never

#### 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

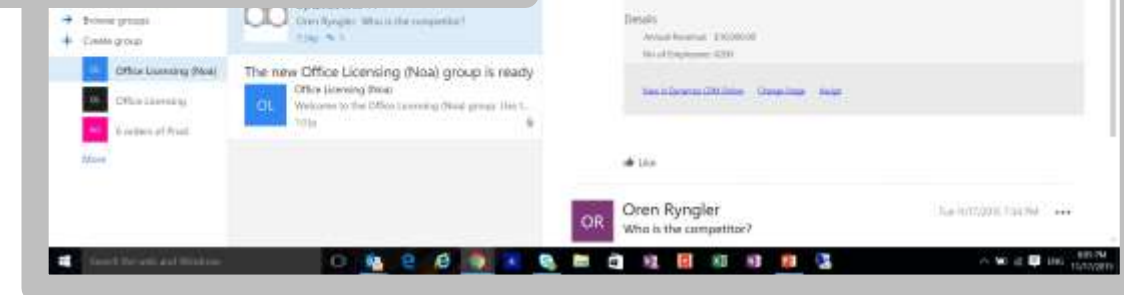
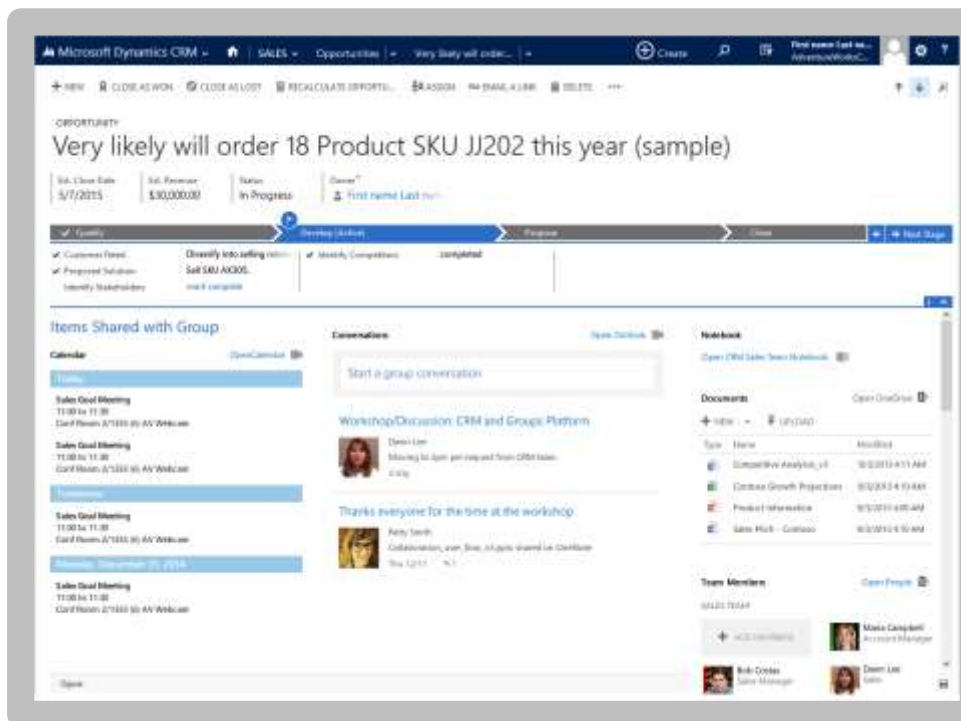
- ✓ Replication of data to customer owned stores
- ✓ Supports variety of data stores
- ✓ Full fidelity replication
- ✓ Visibility & diagnostics
- ✓ Data recovery, reset & rebuild





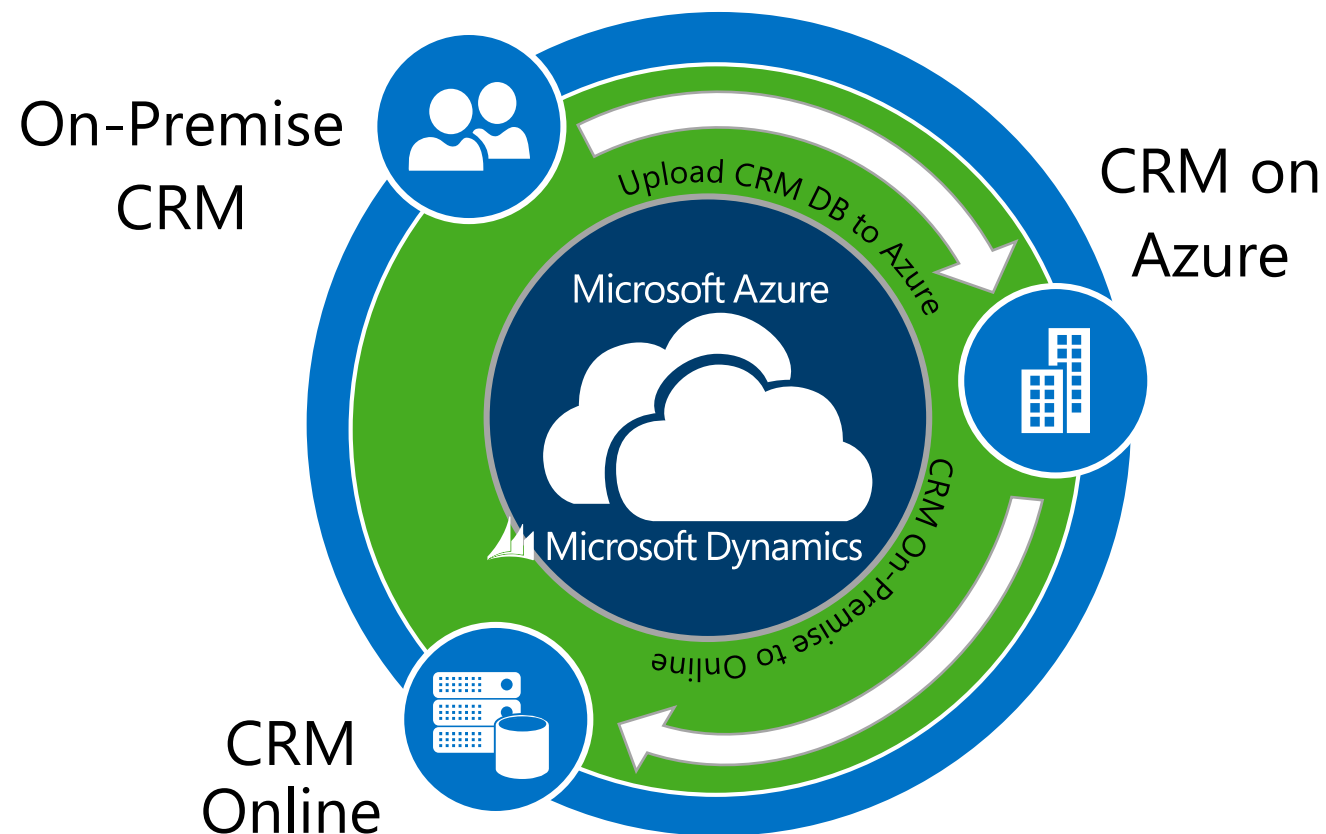
# Office 365

- ✓ 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

