

Empiored

DYNAMICS DAY
2016



Dynamics 365 – making it real

Guy Riddle
Rowan Miller

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

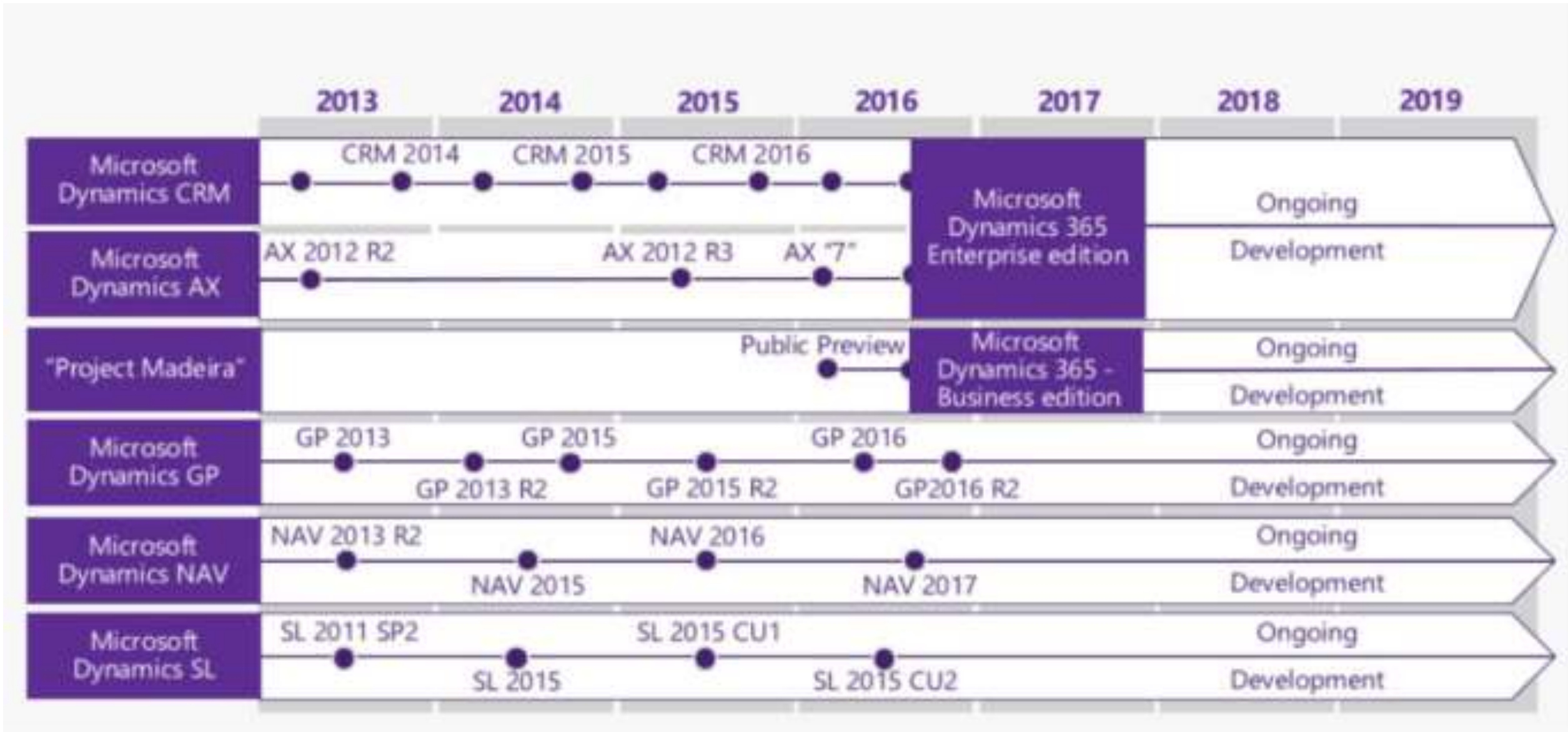
Dynamics SL

Dynamics GP

Dynamics NAV

Dynamics SL

The Microsoft Dynamics Portfolio Roadmap



Microsoft Dynamics 365



Sales



Marketing



Finance



Project Service
Automation



Customer
Service



Operations



Field Service

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 |

Sales examples

Dynamics 365 Sales Accounts A. Datum Corporation... **PREVIEW**

+ NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE FORM PROCESS ...

ACCOUNT
A. Datum Corporation (sample)

Summary

ACCOUNT INFORMATION

Account Name: A. Datum Corporation (sample)
Phone: 555-0158
Fax: --
Website: http://www.atatum.com/
Parent Account: --
Ticker Symbol: --

ADDRESS

2137 Birchwood Dr
Redmond, WA 98074
U.S.

POSTS ACTIVITIES NOTES

Enter post here POST

Both Auto posts User posts

Required Service (sample)
Cause: Closed by Guy Riddle for Account A. Datum Corporation (sample). On Required Service (sample)'s wall Today

Operating manual required (sample)
Cause: Closed by Guy Riddle for Account A. Datum Corporation (sample). On Operating manual required (sample)'s wall Today

Required Service (sample)
Cause: Created by Guy Riddle for Account A. Datum Corporation (sample). On Required Service (sample)'s wall Today

Operating manual required (sample)
Cause: Created by Guy Riddle for Account A. Datum Corporation (sample). On Operating manual required (sample)'s wall Today

Missing parts (sample)
Cause: Created by Guy Riddle for Account A. Datum Corporation (sample). On Missing parts (sample)'s wall Today

Very likely will order 73 Product SKU J1905 this year (sample)

Primary Contact
--

CONTACTS

Full Name Email
Rene Valdes (sample) someone_1@sample.com
Susan Burk (sample) someone_1@sample.com

RECENT OPPORTUNITIES

Type Status
Very likely will order 73 P... Won

Dynamics 365 Sales Opportunities Needs to restock the... **PREVIEW**

+ NEW CLOSE AS WON CLOSE AS LOST RECALCULATE OPPORTUNITY FORM PROCESS ASSIGN EMAIL A LINK DELETE ...

Opportunity
Needs to restock their supply of Product SKU ...

Est. Close Date: 3/1/2017 Est. Amount: \$25,000.00 Status: In Progress Owner: Guy Riddle

Qualify **Develop (Active for 1 minutes)** **Propose** **Close**

✓ Customer Need Diversify into selling
✓ Proposed Solution Sell SKU AX005
✓ Identify Stakeholders completed

Identify Competitors **Identify Stakeholders**

Opportunity Sales Process (Active for 1 minutes) **Next Stage**

Summary

Tags: Needs to restock their supply of Product SKU AX005 (sample)
Contact: Blue Yonder Airlines (sample)
Account: --
Purchase Timeline: --
Currency: Australian dollar
Budget Amount: \$16,000.00
Purchase Process: Committee
Description: --

POSTS ACTIVITIES NOTES

Enter post here POST

Both Auto posts User posts

Needs to restock their supply of Product SKU AX005; will purchase at least 25% this year
Opportunity: Created by Guy Riddle for Account Blue Yonder Airlines (sample). On Needs to restock their supply of Product SKU AX005; will purchase at least 25% this year Today

STAKEHOLDERS

Name Role
No stakeholders found.

SALES TEAM

Name Role
No sales team members found.

Current Situation
Share prices dropping

Open

Marketing

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

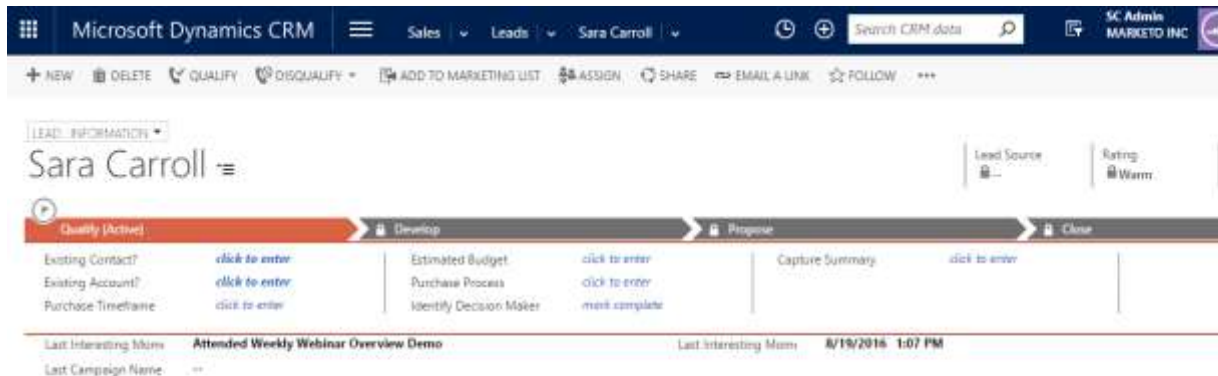


| Features |
|---|
| Lead Management |
| Campaign Planning |
| Marketing Lists |
| Social Engagement |
| Intelligence |
| Enterprise Marketing*  |
| Business Marketing*  |

| 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.

Marketing examples

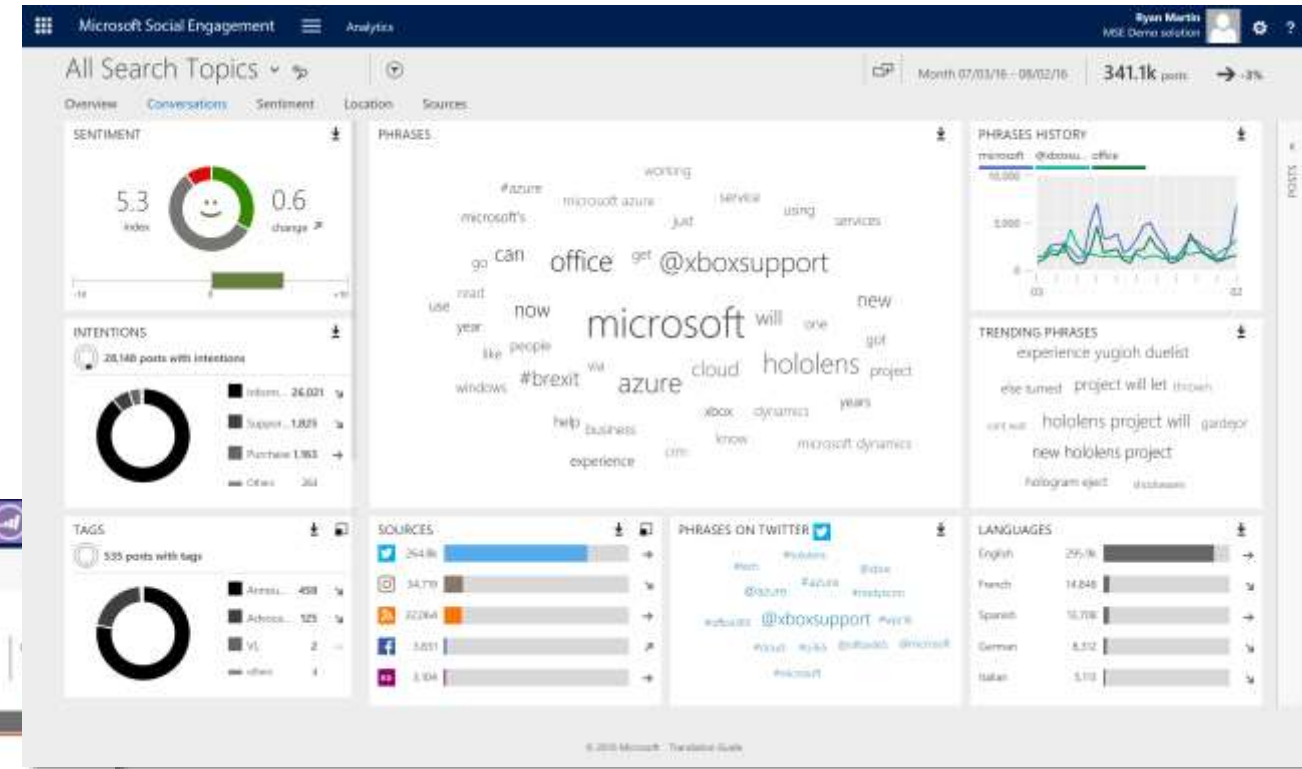


Marketo Sales Insight

Priority: 🔥🔥🔥 ⭐⭐⭐

| Activities | Interesting Moments | |
|--|---------------------|---------------------|
| Interesting Moments | Activities | Date |
| Web: Visited | Interesting Moments | 10/27/2018 09:29 AM |
| Web: Clicked | Web Activity | 10/26/2018 04:18 AM |
| Email: Opened | Score | 10/22/2018 05:38 AM |
| Milestone: R | Email | 10/20/2018 02:31 AM |
| Web: Multiple Web Visits in Last Week | | 10/18/2018 02:00 AM |
| Web: Subscribed to Blog | | 10/15/2018 10:09 AM |
| Web: Downloaded Forrester Market Overview Report | | 10/13/2018 09:09 AM |
| Milestone: Visited Booth at Cloudforce NYC | | 10/11/2018 08:07 AM |
| Milestone: Attended Weekly Webinar Overview Demo | | 10/09/2018 07:07 AM |
| Email: Clicked on Definitive Guide email | | 10/06/2018 06:23 AM |

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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

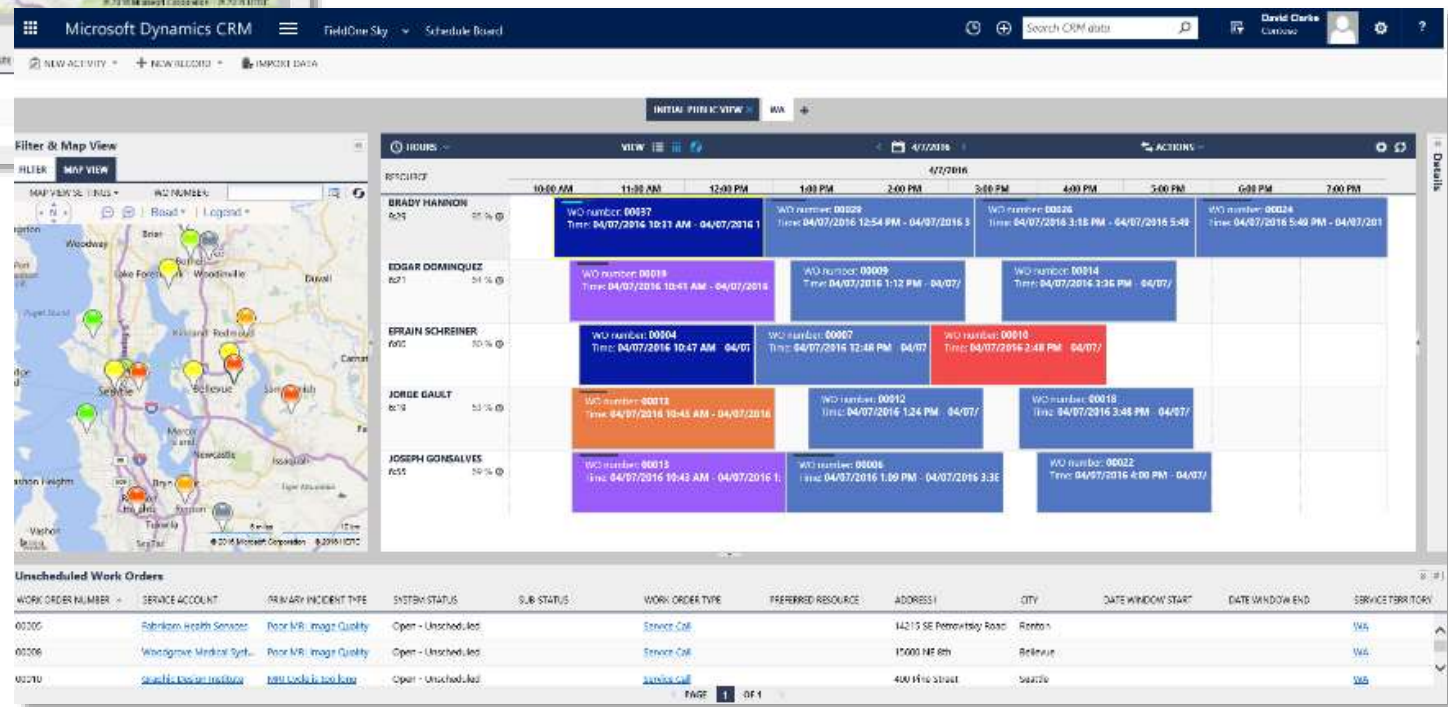
Financial services on-the-road

Home services (car service, home maintenance)

Facilities booking

The screenshot displays the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'Microsoft Dynamics CRM', a search bar, and user information. The main area is divided into a sidebar and a map view. The sidebar on the left contains a 'Filter & Map View' section with a 'FILTER' tab and a 'MAP VIEW' tab. Under 'FILTER', there are sections for 'Service Territory' (listing '(Unfiltered)' and 'VIA'), 'Resource' (listing 'Andy Larson', 'Edgar Dominguez', 'Philo Schreiner', 'Jorge Sout', 'Joseph Gonzales', 'Kris Nakamura', and 'Luka Lundgren'), and 'Status' (listing 'Open', 'Unscheduled', and 'Completed'). The map view shows a map of a region with various locations marked by colored pins. Below the map, there is a table titled 'Unscheduled Work Orders' with the following columns: 'Work Order Number', 'Service Account', 'Primary Incident Type', 'System Status', 'Sub-Status', 'Work Order Type', 'Preferred Resource', 'Address', 'QTV', and 'Date'. The table contains three rows of data.

| Work Order Number | Service Account | Primary Incident Type | System Status | Sub-Status | Work Order Type | Preferred Resource | Address | QTV | Date |
|-------------------|-------------------------|-------------------------|--------------------|------------|-----------------|--------------------|-------------------------|---------|------|
| 00005 | Artesian Water Services | Water Mtl Usage Quality | Open - Unscheduled | | Service Call | | 14713 SE Petrovsky R... | Enter | |
| 00006 | Woodhouse Water S... | Water Mtl Usage Quality | Open - Unscheduled | | Service Call | | 15000 NE 5th | Believe | |
| 00017 | Ballou's Coffee | Thermistor in Back... | Open - Unscheduled | | Service Call | | 10404 120th Avenue NE | Budell | |



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 |
| IT |

Project Service examples

Filters

Organizational Units

Select Organizational Units

Contoso US

Business Units

Select Business Units

psbootcamp20

Resource Types

Select Resource Types

Contact

User

Teams

Select Teams

Roles

Select Roles

Skills

Select Skills

Match Resources Using

Skills in Profile

RESET

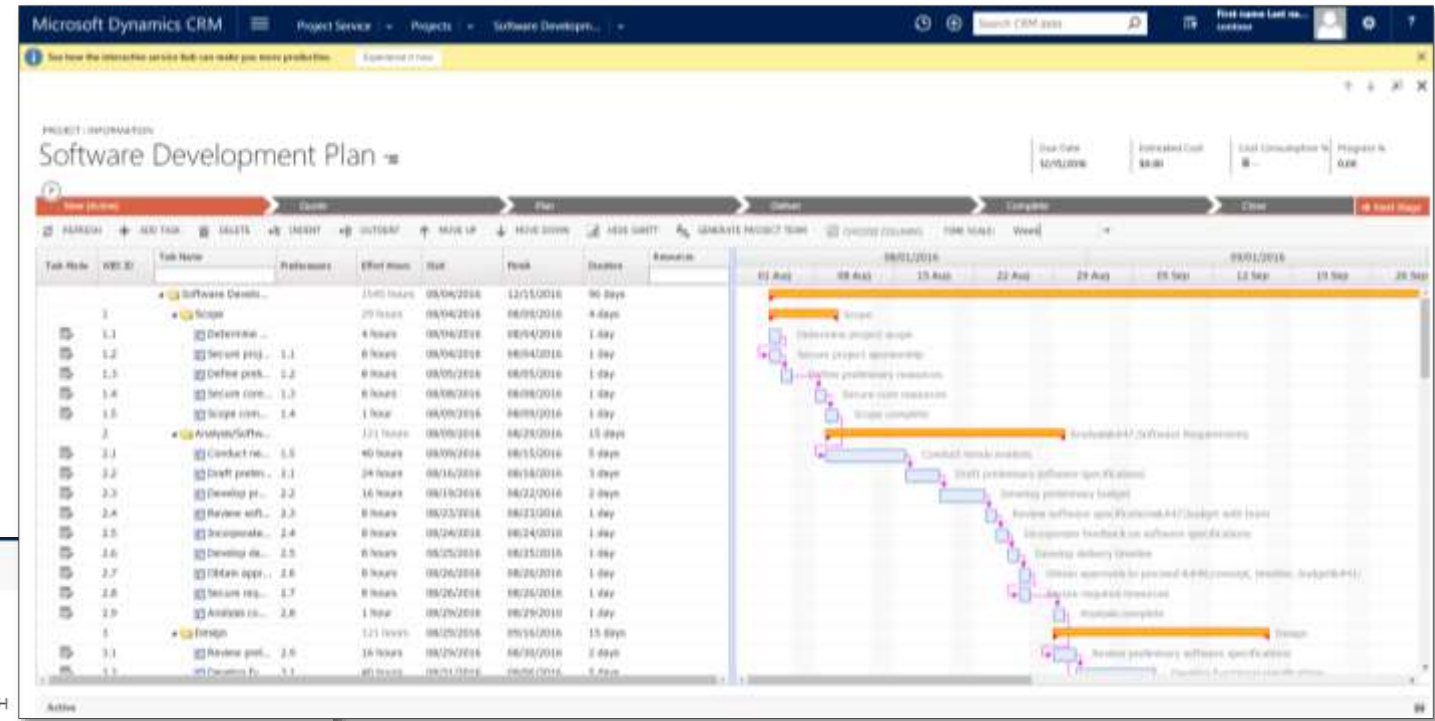
APPLY

Resource Availability

5/15/2016 - 10/28/2016

DAY WEEK MONTH

| | SUNDAY MAY 15 | MONDAY 16 | TUESDAY 17 | WEDNESDAY 18 | THURSDAY 19 | FRIDAY 20 | SATURDAY 21 |
|---|------------------|--------------|---------------|-----------------|----------------|--------------|----------------|
| Ashley Chinn Project Manager | | 8 | 8 | 8 | 8 | 8 | |
| Alpine CRM Project | | 8 | 8 | 8 | 8 | 8 | |
| Bernadette Foley Functional consultant | | 6 | 6 | 6 | 6 | 6 | |
| Bob Kozak Developer | | 9.6 | 9.6 | 9.6 | 9.6 | 9.6 | |
| Christal Robles Technical consultant | | 8 | 8 | 8 | 8 | 8 | |
| Christie Dawson Technical consultant | | | | | | | |
| Davis Flournoy Architect | | 8 | 8 | 8 | 8 | 8 | |
| Dianna Woodwa... Functional consultant | | 8 | 8 | 8 | 8 | 8 | |
| Dick Cowley Developer | | 8 | 8 | 8 | 8 | 8 | |



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 |

Operations examples

The screenshot displays the Microsoft Dynamics AX user interface for the 'Contoso Retail USA' organization. The interface is divided into several sections:

- Header:** Shows 'Dynamics AX' and 'Contoso Retail USA'.
- Left Navigation Pane:** Contains a 'Retail' section with a 'Summary' card showing '38 Retail stores', '127 Registers', and '74 Workers'. Below this is a 'Proc' section with a 'Summary' card showing '11/2/20' and 'Number 100'. Further down are '5', '1', and '2' buttons, with 'Autom. orders release' visible below the '2' button.
- Main Content Area:**
 - Calendar:** Displays a calendar for November 2016, with the 2nd highlighted.
 - Work items assigned to me:** Lists tasks such as 'Cash advance request : Record returned', 'Expense reports : Record returned', and 'Catalog : catalog approval'.
 - Functional Area Tiles:** A grid of 20 tiles representing various business processes, including:
 - Budget planning
 - Employee self service
 - Product readiness for process manufacturing
 - Resource lifecycle management
 - Catalog management
 - Financial period close
 - Product variant model definition
 - Retail IT
 - Category and product management
 - General journal processing
 - Production floor management
 - Retail store financials
 - Channel deployment
 - Ledger budgets and forecasts
 - Project management
 - Retail store management
 - Compensation management
 - Manager self service
 - Purchase order confirmation
 - Sales order processing and inquiry
 - Cost administration
 - Master planning
 - Purchase order preparation
 - Sales return processing
 - Cost analysis
 - Outbound work monitoring
 - Purchase order receipt and follow-up
 - System administration
- Right Navigation Pane:** Contains a 'Links' section with 'Orders', 'All production orders', and 'Subcontracted work'. Below this is a 'Resources' section with 'Resources' and 'Resource groups'. Further down are 'Journals', 'Picking list', 'Route card', 'Job card', and 'Report as finished'. The bottom section is 'Time and attendance', including 'Calculate', 'Approve', 'Raw registrations', 'Registration history', and 'Transferred registrations'. The 'Jobs' section at the bottom includes 'Job card terminal', 'Job card device', and 'Change feedback'.

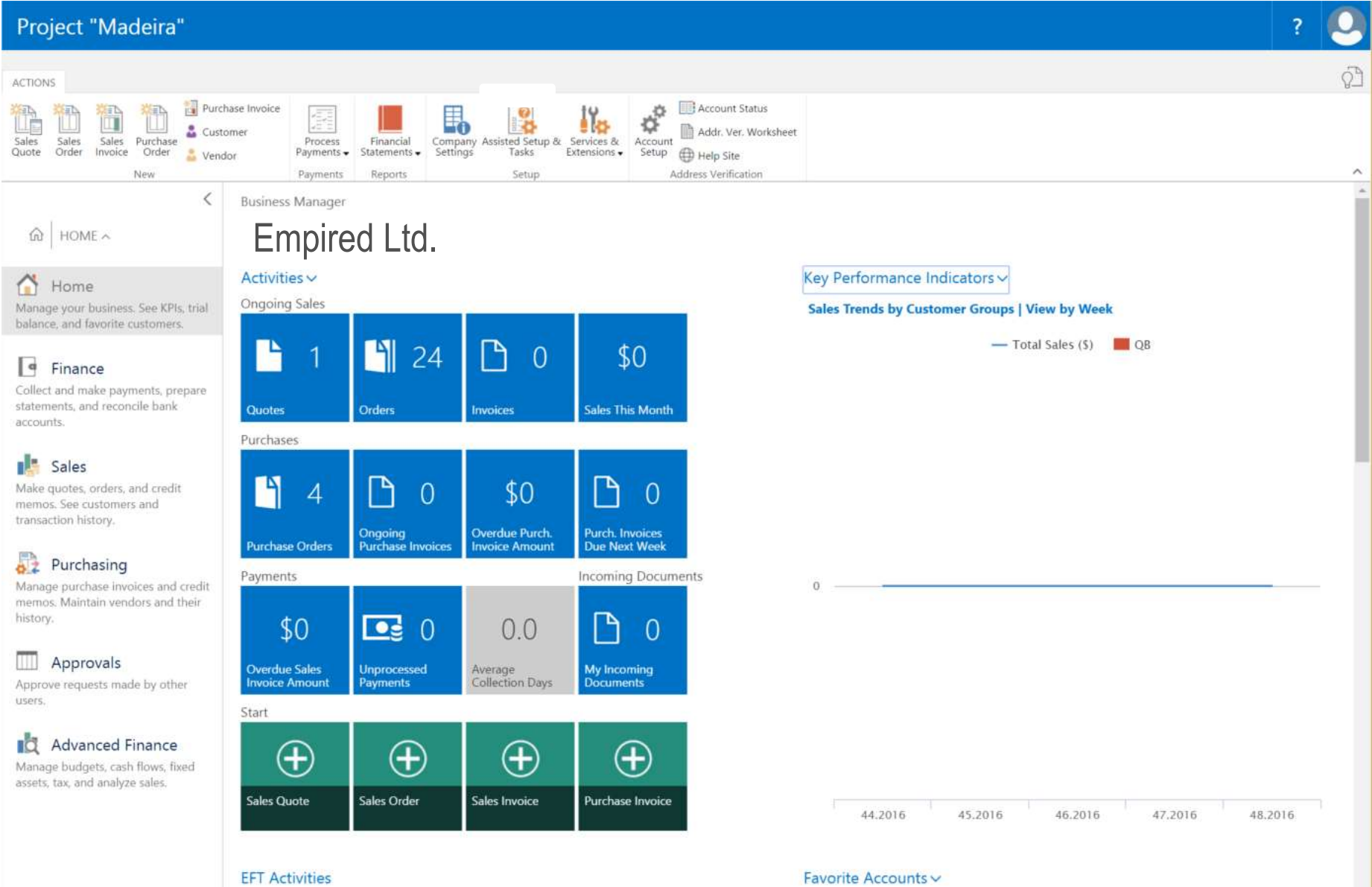
Finance ('Project Madeira')



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

| Features | |
|------------------------------|-------------------------|
| Supplier / Vendor Management | Sales Invoicing |
| General Ledger | Product Management |
| Accounts Payable | Mobility |
| Accounts Receivable | Analytics and Reporting |

Financials example



Empired Ltd.

Activities

Ongoing Sales



Purchases



Payments



Incoming Documents

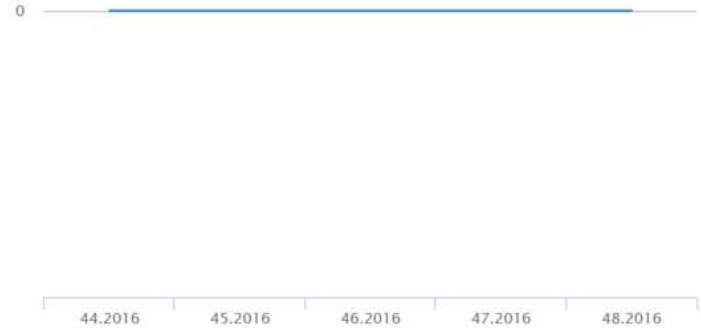
Start



Key Performance Indicators

Sales Trends by Customer Groups | View by Week

Total Sales (\$) Q8

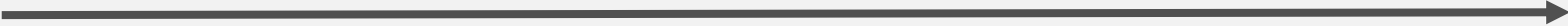


Favorite Accounts

Purpose-built end-to-end business process

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

PROCESS

Prospect  Cash



PERSONAS

**ACCOUNT
MANAGER**



Customer
lifetime value

**SALES
REPRESENTATIVE**



Payment
history

**SALES
MANAGER**



Pricing, discounts,
taxation

**PRODUCTION
PLANNER**



Product
availability

**CREDIT AND
COLLECTION
MANAGER**



Order information,
resource
reservations

**CUSTOMER
SERVICE**

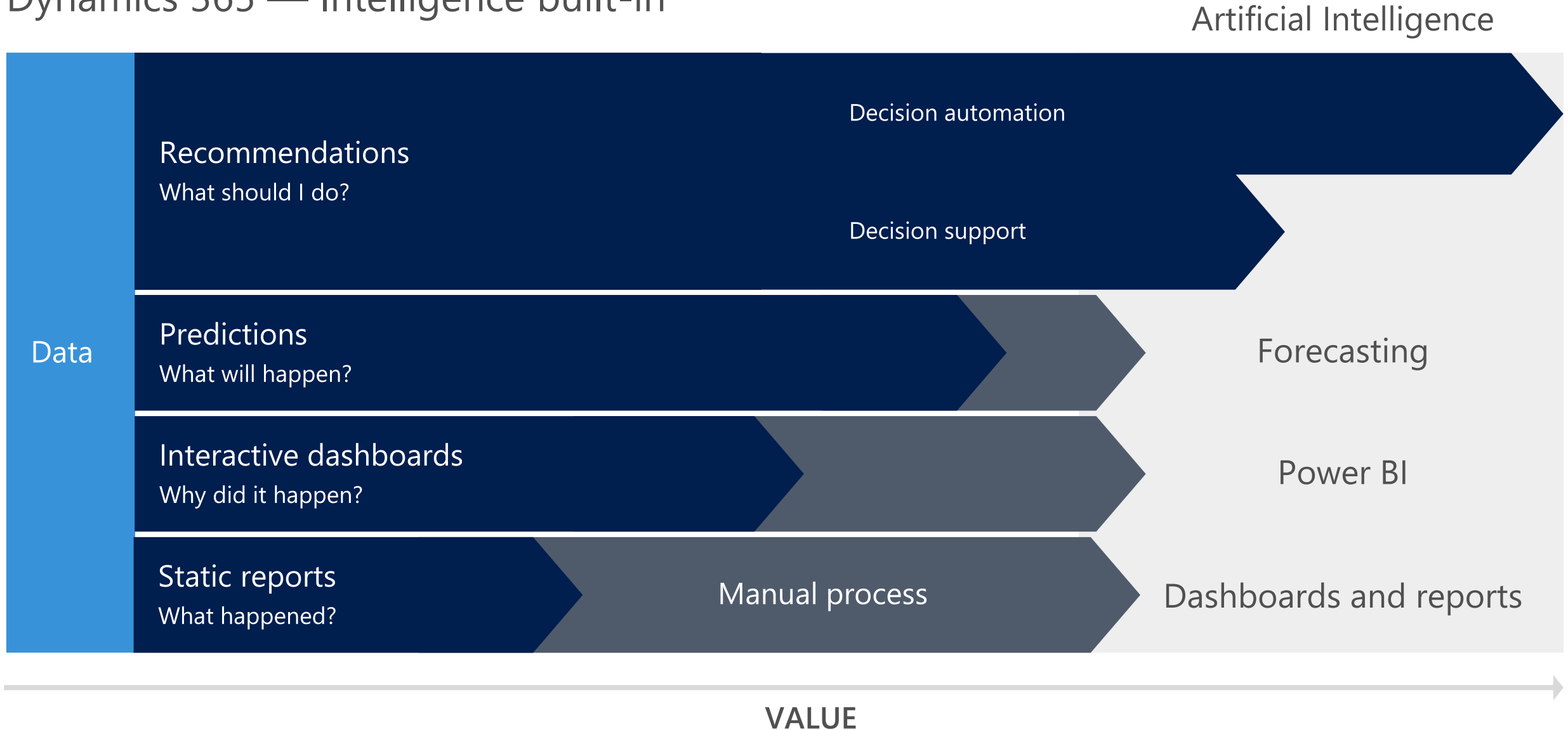


Problems, Issues,
Requests

How are my people supported
in their decision making?

Journey from data to action...

Dynamics 365 — Intelligence built-in









Built-in artificial Intelligence



Relationship Insights
Lead Scoring
Cross-Sell/Up-Sell
Knowledge Base Insights
Demand Forecasting
Cash Flow Forecast
Product Recommendations
Preemptive Service
Resource Optimization
Predictive Sales and Inventory Forecast
Intent Analysis
Sentiment Analysis

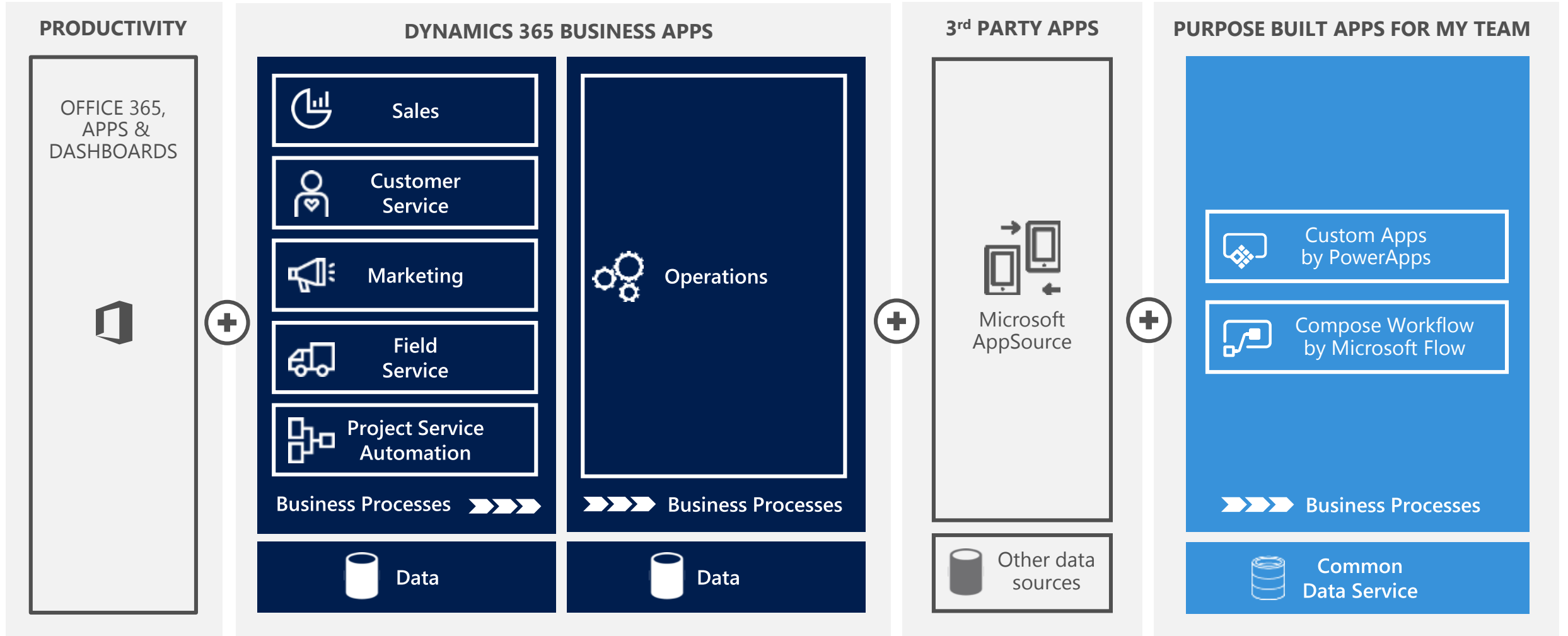
Dynamics 365 intelligence

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

Microsoft AppSource

One destination for business users to discover, trial, and acquire line-of-business SaaS apps



Simplifies the discovery,
trial, and acquisition of
line-of-business apps



An ecosystem to help
business users get started
using apps faster



An ecosystem to help
business users get started
using apps faster

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

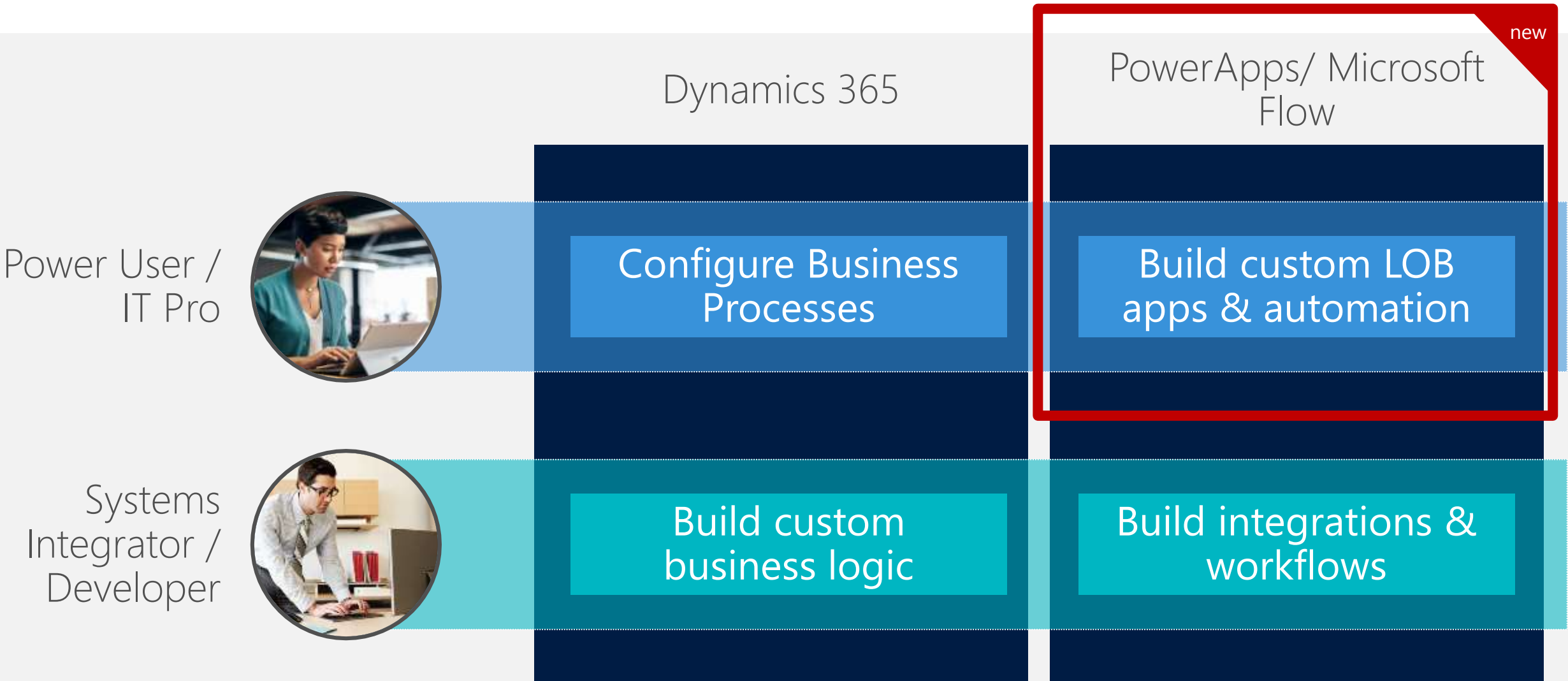
**Avanade Advanced Store Replenishment**

By Avanade, Inc.
Dynamics 365 for Operations

Avanade Advanced Store Replenishment for Microsoft

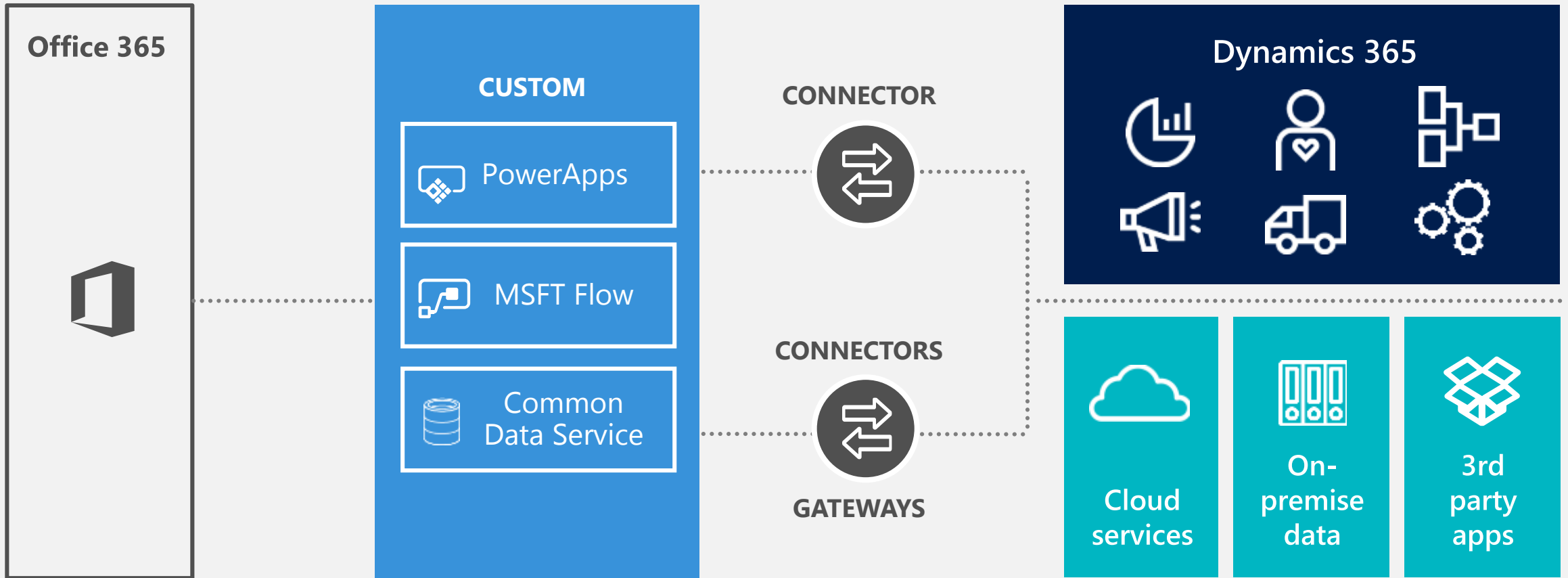
PowerApps

Extensibility



Extensibility

Build custom LOB apps & automation



Licensing

Licensing – Teams, Apps, Plans

1

Users that can see everything in Read-Only and carry out a few key functions



Team Member

2

Users that can use all the functionality of 1 App only (e.g. Field Service or Operations) but nothing else of the platform



App User

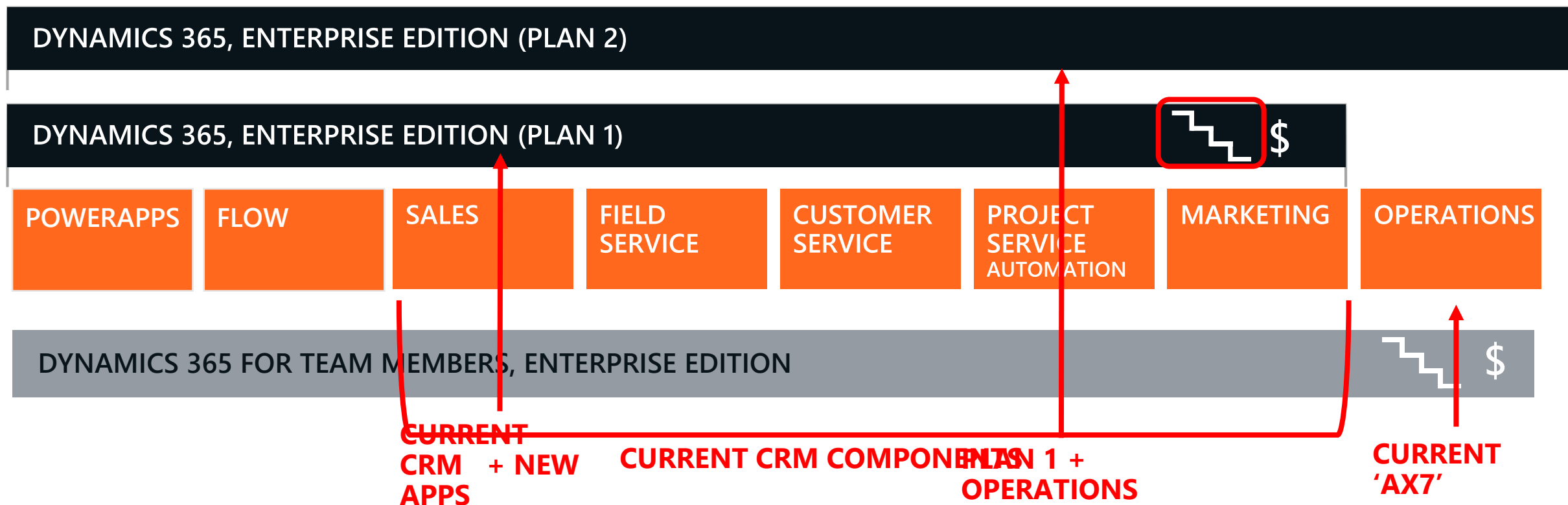
3

Users that can use a COLLECTION of Apps (PowerApps, Operations, Sales, Field Service)

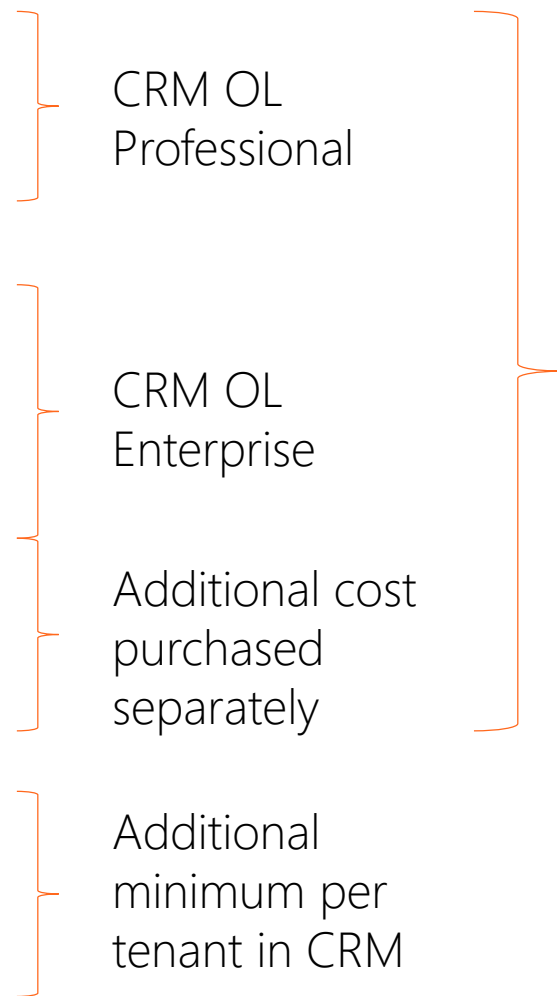


Plan User

Enterprise Edition – Apps & Plans



| Dynamics 365 Enterprise Plan 1 |
|--|
| Sales & Customer Service Functionality |
| Mobile Offline |
| Social Engagement Professional |
| + |
| Field Service Functionality |
| Project Service Functionality |
| Social Engagement Enterprise |
| Voice of Customer |
| Gamification |
| AX Task User |
| PowerApps and Flow |
| + |
| 10 GB storage + 5GB / 20 Full users (no cap) |
| Included non-production instance (no min) |
| Included Portal |



All included in Dynamics 365 Plan 1

**40% – 80%
additional value**