



DYNAMICS 365 UNIFIED INTERFACE

Presented by Brian Begley – www.encloudg.com



ABOUT ENCLOUD₉

Dynamics 365 Cloud Customer Relationship Management – Silver 2014 - present

12 years experience working with small to mid sized businesses to modernize sales, marketing customer service

Work with companies throughout the US and Canada

Primary focus is on Cloud-based Dynamics 365 Customer Engagement Platform

Microsoft
Partner

Silver Cloud Customer Relationship Management
Silver Small and Midmarket Cloud Solutions

DYNAMICS 365 OCTOBER 2018 RELEASE

- Updates to both Dynamics 365 Online and On Premise – V9
- Dynamics 365 is part of the PowerPlatform
 - PowerBi
 - PowerApps
 - Microsoft Flow
 - Common Data Service for Apps
- Dynamics 365 is now on a constant release cycle

THE NEXT STEP IN YOUR DIGITAL TRANSFORMATION

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FEATURES RELEASING FROM OCTOBER 2018 THROUGH MARCH 2019



UNIFIED INTERFACE

- Most visible change in Dynamics 365 9.0
- Accelerate the Process of moving away from "Classic Mode"
- All new Trials will default to Unified Interface
- By Mid 2019 all features will be available through Unified Interface, so expect phase out to begin them - no set date
- UI is Easier on the eye - More Colors and previous
- UI is Responsive – Resizes no matter what the user experience

The screenshot displays the Dynamics 365 Unified Interface. At the top, the navigation bar includes 'Dynamics 365', 'Sales', and 'Dashboards'. Below this, a row of colorful tiles represents different functional areas: Sales (blue), Marketing (orange), Service (blue), Settings (red), Resource Scheduling (blue), and Portals (blue). The main content area is divided into sections for 'My Work', 'Customers', 'Sales', 'LinkedIn Lead Gen', 'Collateral', and 'Marketing'. A sidebar on the left provides a hierarchical view of the user's workspace, including 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Customers', 'Accounts', 'Contacts', 'Sales', 'Leads', 'Opportunities', 'Service', and 'Cases'. The central pane shows the 'Developer Dashboard' with a table of 'My Active Cases (NOT STARTED)'. The table has columns for Case Title, Priority, Account, Estima..., Remai..., Ready..., and Need t... The bottom section of the dashboard shows a summary of 'My Active Cases' with a list of case titles and their status.

Case Title	Priority	Account	Estima...	Remai...	Ready...	Need t...
Fill:Populate source campaign on lead using ref	Normal	First Impressio	---	---	No	No
CATCH Data Cleanup	High	Catch Intellige	8.00	---	No	No
Catch - Create Clone Opportunity Button on Oj	High	Catch Intellige	5.00	---	No	No
Lead Qualify >>Copy notes from Lead to Accoi	---	Catch Intellige	5.00	---	No	No

NAVIGATION AND VIEWS

- Navigation moved to the Left Side
- Commands still along the top
- Large Icon based menu is gone
- Recent and Pinned Items moved to left side
- Settings area no longer part of the Sitemap
- Many Views are Editable Grids by Default
- Subtle shading between rows

The screenshot shows the Dynamics 365 Sales Hub interface. The left-hand navigation pane is visible, showing options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Sales, Leads, Opportunities, Service, and Cases. The main area displays the 'Active Accounts' view, which is a table with columns: Account Name, Relationship T..., Main Phone, Address 1: City, Primary Contact, E-mail (Primary Conta..., and Owner. The table shows a list of accounts with alternating row shading. Annotations highlight the 'Left Hand Navigation is back!' and 'Shading between rows in views'.

Account Name	Relationship T...	Main Phone	Address 1: City	Primary Contact	E-mail (Primary Conta...	Owner
AbbeBridge	Partner	508-675-7953 4444	---	Satwinder Deol	sdeol@abbebridge.com	Brian Begley
Advanced Solutions & Consulting	Client	858-755-9200	Solana Beach	Jim Carroll	jcarroll@advancedsolutions.com	Brian Begley
Advantage Technologies	Former/Inactive CL...	877-723-8833 x117	Troy	Bryan Currier	bryan@adv-tech.com	Brian Begley
All Fox Cities	Client	920-245-1611	Appleton	Michael Mandella	mikemandella@gmail.com	Brian Begley
Alere US	Client	+1 704 351 8404	South Concord	Scott Schotter	scott.schotter@alere.com	Jodie Henry
Allen Barron	Client	---	San Diego	Kimberly Watts	kwatts@ALLENBARRON.C...	Brian Begley
AnchorSix	Client	801-225-3800	American Fork	---	---	Brian Begley
Apex Capital Advisors	Client	203-409-6301	New York	William Dombrowski	wdombrowski@apexcap...	Brian Begley

FORMS

- Forms are broken up by Tabs – no more scrolling all the way to the bottom
- Unified Timeline shows notes, activities, posts all in a single column.
 - Filterable
 - Sortable
- Quick Create forms have a new integrated look and feel
- More Color, shading between sections

The screenshot displays the enCloud9 CRM interface for a contact named Alex Rios. The interface is organized into three main columns. The left column contains two sections: 'INFORMATION' and 'CONTACT'. The 'INFORMATION' section includes fields for First Name (Alex), Middle Name (---), Last Name (Rios), Job Title (---), Company (enCloud9), and Invitation Code (---). The 'CONTACT' section includes fields for E-mail (alex.rios@encloud.com), Mobile Phone (---), and Business Phone (---). The middle column contains a 'Timeline' section with a 'Consolidated Timeline' label and a 'Relationship Assistant' section. The 'Timeline' section shows a list of activities, including an auto-post on Alex Rios's wall and an appointment from Jodie Henry. The 'Relationship Assistant' section displays a message: 'There are currently no insights.' The right column contains a 'Relationship Assistant' section. Annotations with dashed arrows point to the 'Summary' tab, the 'Consolidated Timeline' label, and the 'Timeline' section.

OUTLOOK AND MOBILE EXPERIENCE

- Outlook App for Dynamics 365 use Unified Interface to present information
- App Reflows based on size of device.
- More Custom Controls are available in Mobile App
- Using Dynamics 365 App for Outlook webinar Next Week – link in email

The image displays a side-by-side comparison of the Outlook and Dynamics 365 mobile app interfaces. On the left, the Outlook app shows an email from Todd Collins at Rockne Construction, Inc. The email content discusses reconciling invoices and includes contact information for Todd Collins, Chief Financial Officer. On the right, the Dynamics 365 app shows a lead profile for Bob Webinar. The lead is in the 'Qualify (1 Hrs)' stage of a sales funnel. The interface includes a 'Summary' tab with fields for Contact, Topic, First Name, Middle Name, Last Name, Webinar, and Job Title. It also features a 'DESCRIPTION/QUESTIONS' section with details about Pot. Services, Licensing, New Implementation, Estimated Seat Count, Budget Amount (38500), Is a Good Fit (Yes), and Rating (Warm). A map is visible at the bottom right of the Dynamics 365 interface.

GOTCHAS

- Certain Features still not surfaced in UI
 - On Demand Workflows
 - Application Customization
- Certain Features use Hybrid experience
 - Merging Records
 - Advanced Find
- Microsoft is working to move these to Unified Interface ASAP!

Merge Records

Select the master record, and then select the fields to merge into the master record.

Master Record and Field Selection	
Master Record :	<input checked="" type="radio"/> AbleBridge <input type="radio"/> Advanced Solutions & Consulting
	<input checked="" type="radio"/> Select all fields in this section <input type="radio"/> Select all fields in this section
Relationship Type	<input checked="" type="radio"/> Partner <input type="radio"/> Client
Billable rate	<input checked="" type="radio"/> <input type="radio"/> \$95.00
ACCOUNT INFORMATION	<input checked="" type="radio"/> Select all fields in this section <input type="radio"/> Select all fields in this section
Account Name *	<input checked="" type="radio"/> AbleBridge <input type="radio"/> Advanced Solutions & Consulting
Main Phone	<input checked="" type="radio"/> 5084757953 4444 <input type="radio"/> 858-755-9200
Street 1	<input checked="" type="radio"/> <input type="radio"/> 215 S Hwy 101, Suite 204
City	<input checked="" type="radio"/> <input type="radio"/> Solana Beach
State/Province	<input checked="" type="radio"/> <input type="radio"/> CA
ZIP/Postal Code	<input checked="" type="radio"/> <input type="radio"/> 92075
Country/Region	<input checked="" type="radio"/> <input type="radio"/> USA
Web Site	<input checked="" type="radio"/> http://www.ablebridge.com <input type="radio"/> http://www.solutionsco.com

OK Cancel

MIGRATING TO UI

- enCloud9 has begun moving to Unified Interface
- Start by moving a small group of users to Unified Interface
- Dynamics 365 Outlook App uses Unified Interface, So migrating to Outlook app will drive acceptance

The screenshot displays the Dynamics 365 Unified Interface for a contact record. At the top, a navigation bar includes buttons for 'New', 'Deactivate', 'Connect', 'Assign', 'Email a Link', 'Delete', 'Create Invitation', 'Refresh', 'Process', 'Send Email', and 'ClickDimensions Quick...'. Below this, the contact's name 'Alex Rios' is shown with a dropdown menu. To the right, the owner 'Jodie Henry' is listed. The main content area is divided into three sections: 'Summary' (selected), 'Details', and 'Related'. The 'Summary' section contains two panels: 'INFORMATION' and 'CONTACT'. The 'INFORMATION' panel lists fields like First Name (Alex), Middle Name (---), Last Name (Rios), Job Title (---), Company (enCloud9), and Invitation Code (---). The 'CONTACT' panel lists E-mail (alex.rios@encloud9.com), Mobile Phone (---), and Business Phone (---). The 'Details' section is titled 'Timeline' and shows a list of activities, including an 'Auto-post on Alex Rios's wall' and an 'Appointment from Jodie Henry'. A 'Relationship Assistant' panel on the right indicates 'There are currently no insights.' Annotations with dashed arrows point to the 'Summary' tab and the 'Timeline' section, with labels 'Tabs for sections and related records' and 'Consolidated Timeline' respectively.

RESOURCES

- [enCloud9 events](https://encloud9.com/about-encloud9/events/) - encloud9.com/about-encloud9/events/
 - 12/12/18 – Dynamics 365 for Outlook App
 - 12/19/18 – Building PowerApps and Hubs for Dynamics 365
- [October 2018 Release Notes](https://docs.microsoft.com/en-us/business-applications-release-notes/october18/powerapps/) - docs.microsoft.com/en-us/business-applications-release-notes/october18/powerapps/
- [Microsoft Community Site](https://community.dynamics.com/) - <https://community.dynamics.com/>
- [Brian Begley](mailto:bbegley@encloud9.com) – [bbegley @ encloud9.com](mailto:bbegley@encloud9.com)
- [LinkedIn](https://www.linkedin.com/in/brianbegleydynamicscrm) [linkedin.com/in/brianbegleydynamicscrm](https://www.linkedin.com/in/brianbegleydynamicscrm)

