DYNAMICS 365 UNIFIED INTERFACE

Presented by Brian Begley – www.encloud9.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
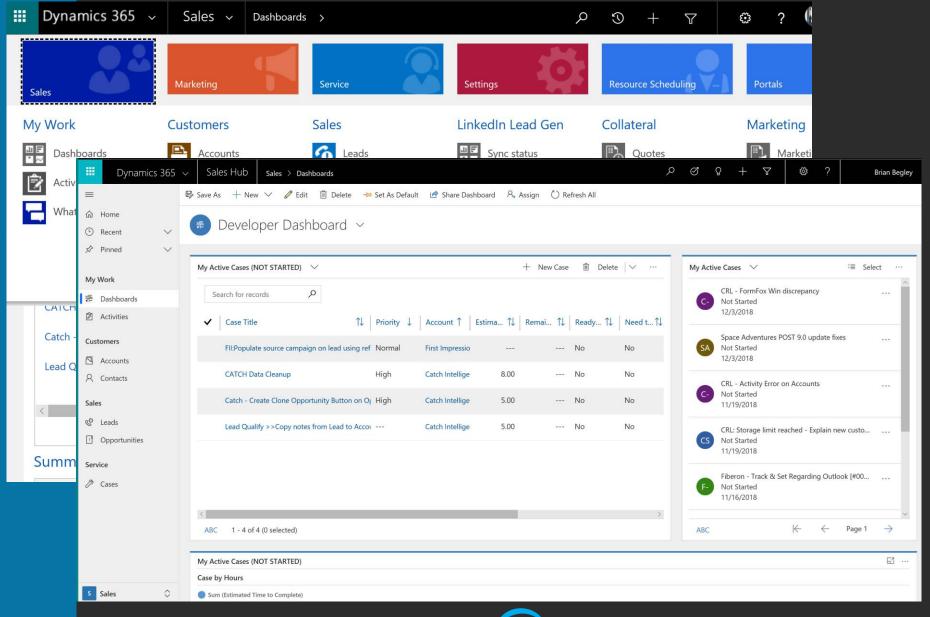Silver Small and Midmarket Cloud Solutions

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

DOWNLOAD THE RELEASE NOTES PDF >

FEATURES RELEASING FROM OCTOBER 2018 THROUGH MARCH 2019
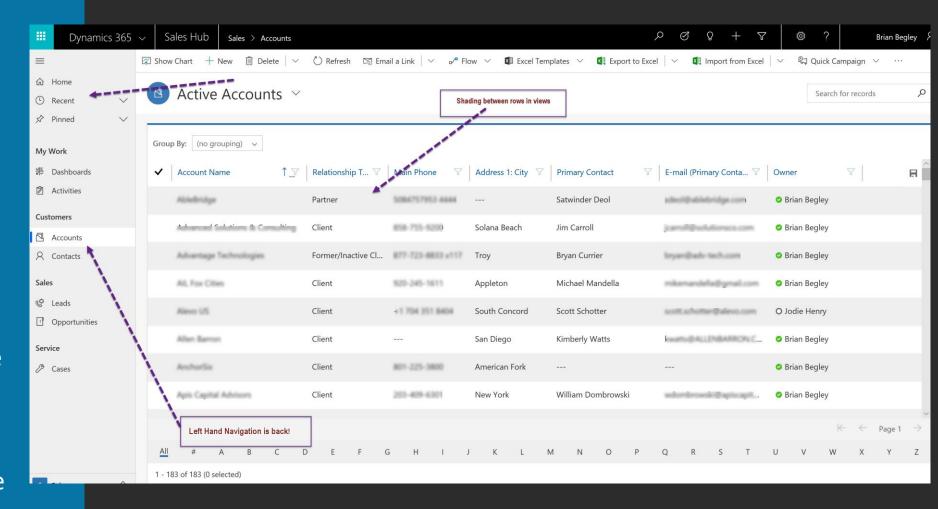
UNIFIED INTERFACE

- 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
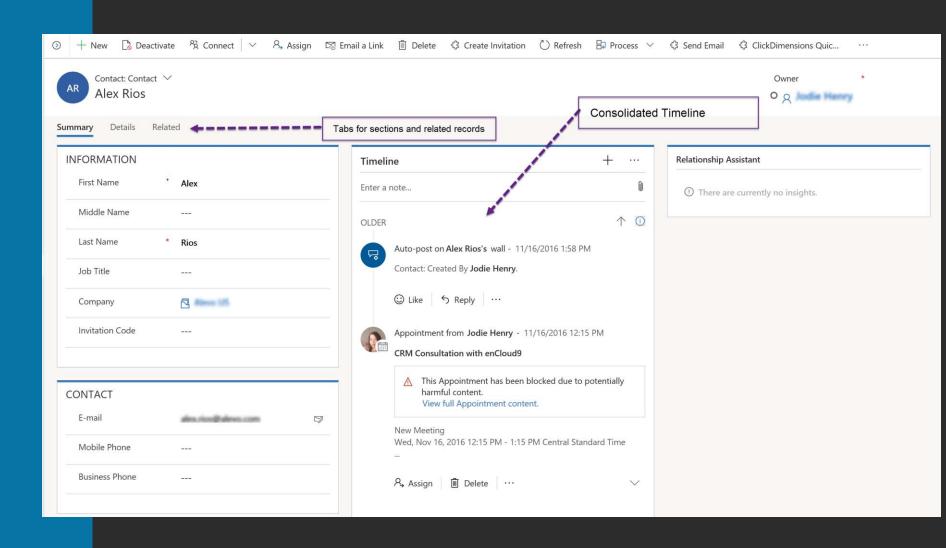

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NAVIGATION AND VIEWS

- 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
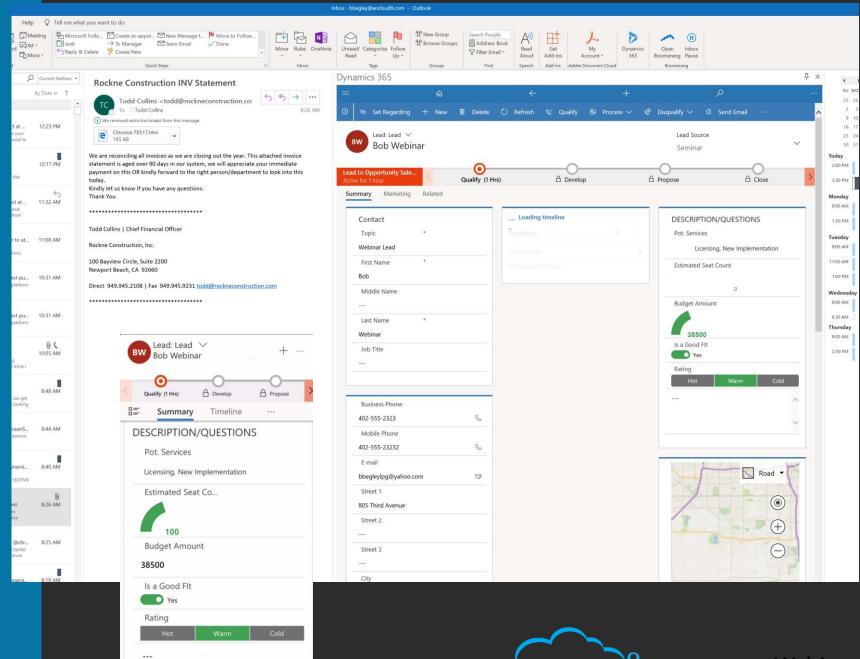
- Subtle shading between rows

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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
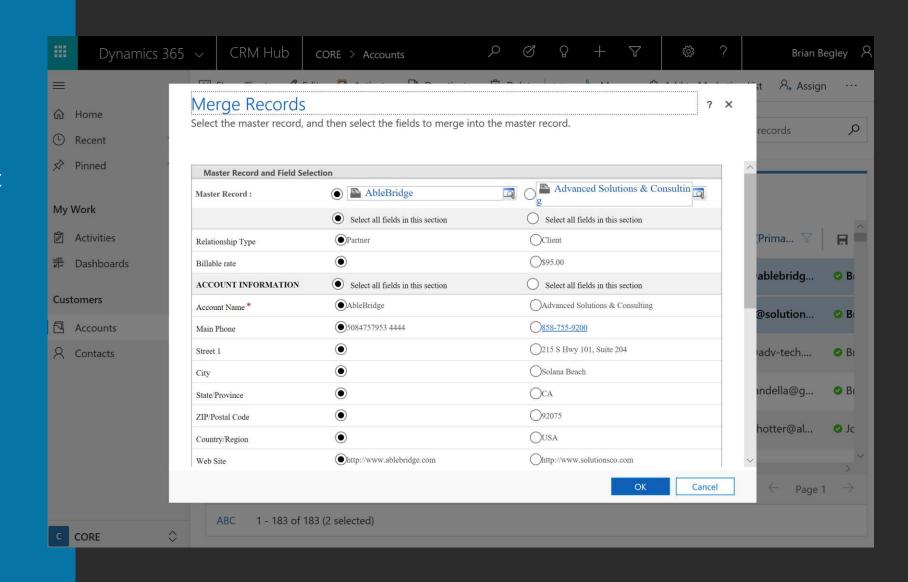
OUTLOOK AND MOBILE EXPERIENCE

- 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

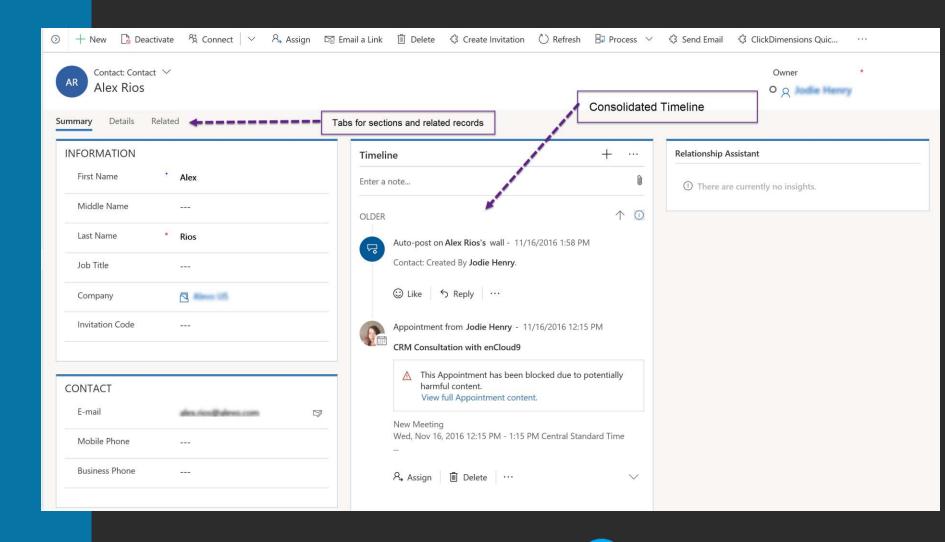- Using Dynamics 365 App for Outlook webinar Next Week – link in email

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!

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

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RESOURCES

- 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 - docs.microsoft.com/en-us/business-applications-release-notes/october18/powerapps/

- Microsoft Community Site - https://community.dynamics.com/

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