

DYNAMICS 365 MOBILE – TAKE ANOTHER LOOK

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But first a little bit about us.....

Microsoft
Partner

Silver Cloud Customer Relationship Management
Silver Small and Midmarket Cloud Solutions



DYN 365
SUPPORT

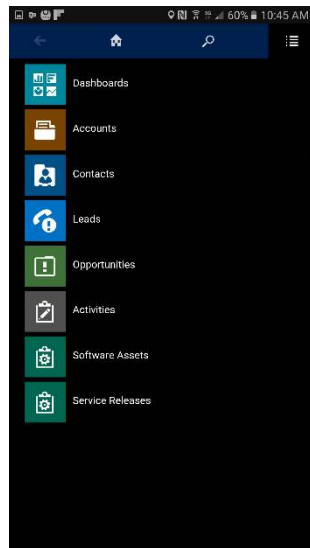
About enCloud9

- Dynamics 365 Cloud Customer Relationship Management – Silver 2014 - present
- 15 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

About Dynamics365Support.com

- Premier provider of low cost fixed fee support services for Dynamics 365, PowerApps and Flow

WAS DYNAMICS 365 MOBILE THAT BAD?



Mobile CRM was the afterthought to many CRM projects

Mobile App would load slowly, especially if customizations had recently been made to Dynamics CRM

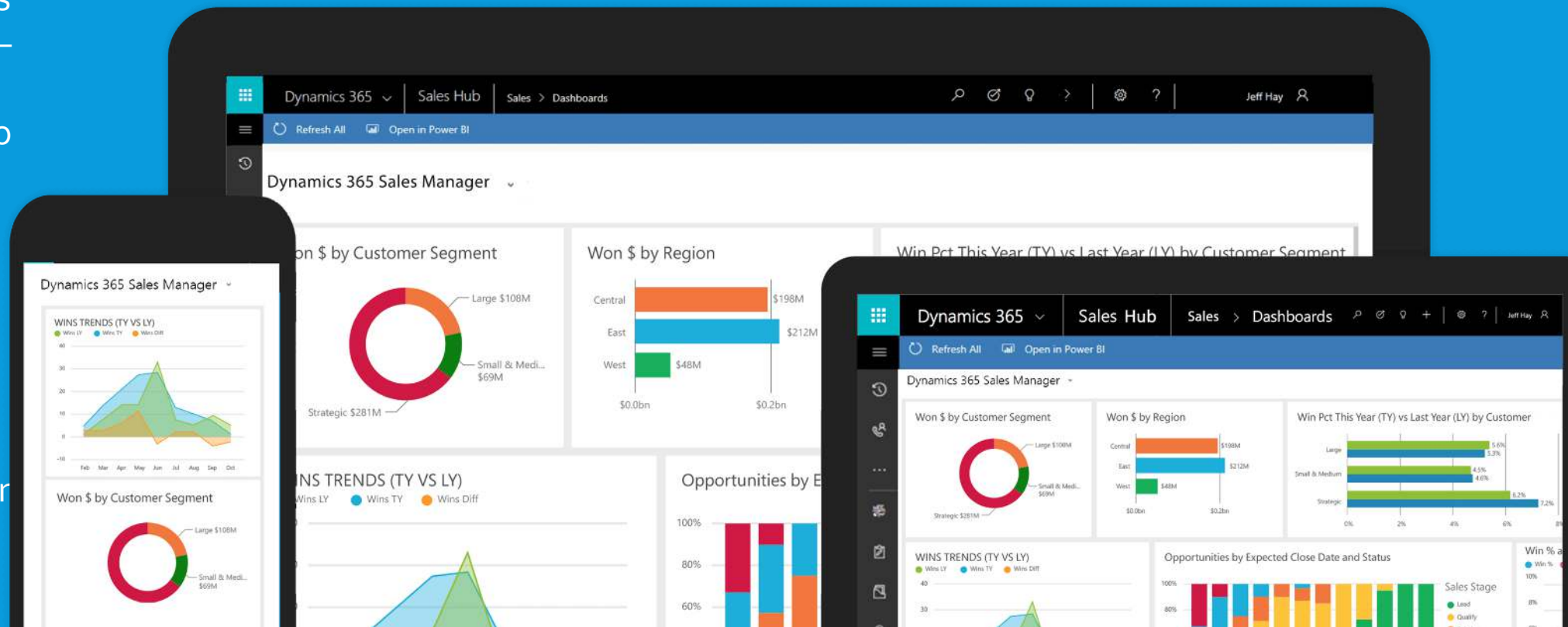
Older versions of the mobile app used forms that only had a subset of fields – so user forms had to be developed with mobile in mind

Impossible to track activities to CRM from your phone

Mobile experience did not adapt CRM very well to the mobile experience.

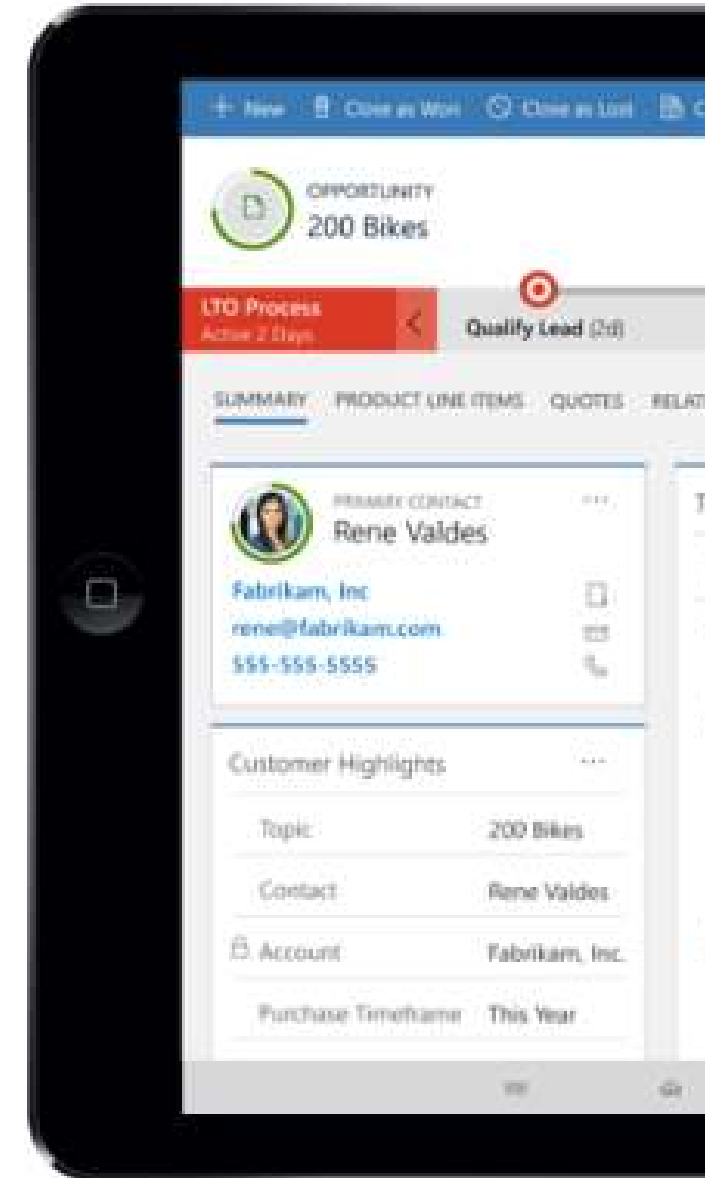
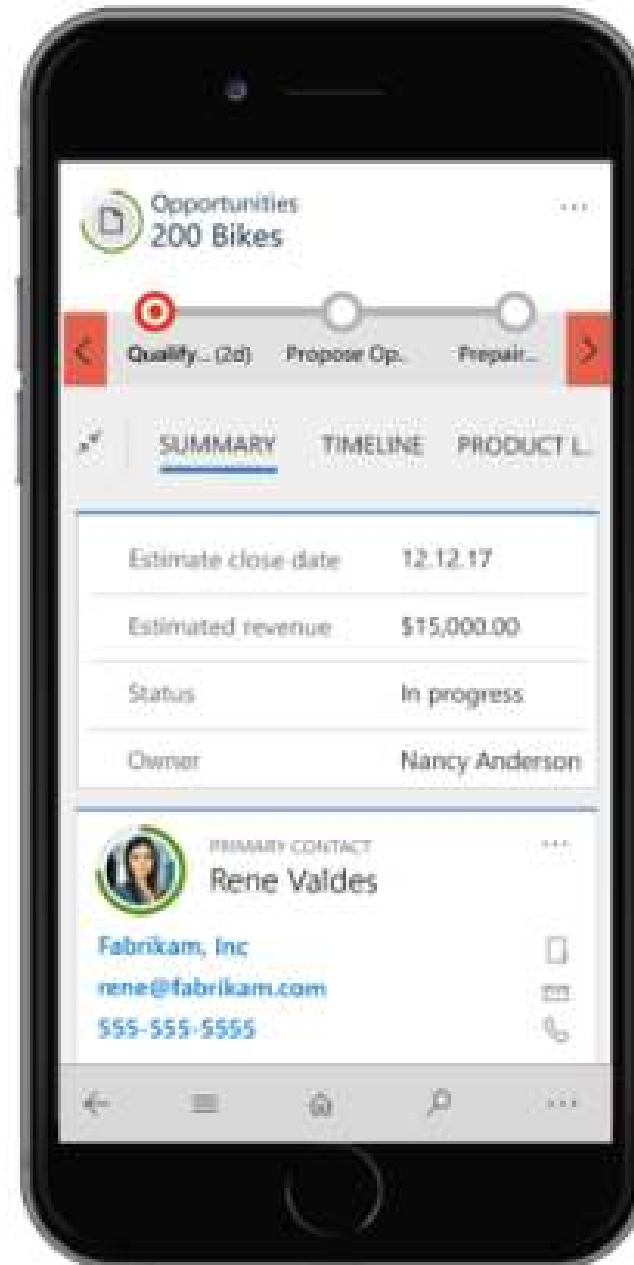
Today the Unified Interface makes all the difference

- Dynamics Mobile uses the Unified Interface – A consistent user experience from PC to Phone
- Responsive forms refactor to size of your mobile screen
- Users can use Dynamics 365 on their computer and mobile device without any retraining required



How to be more productive on the road

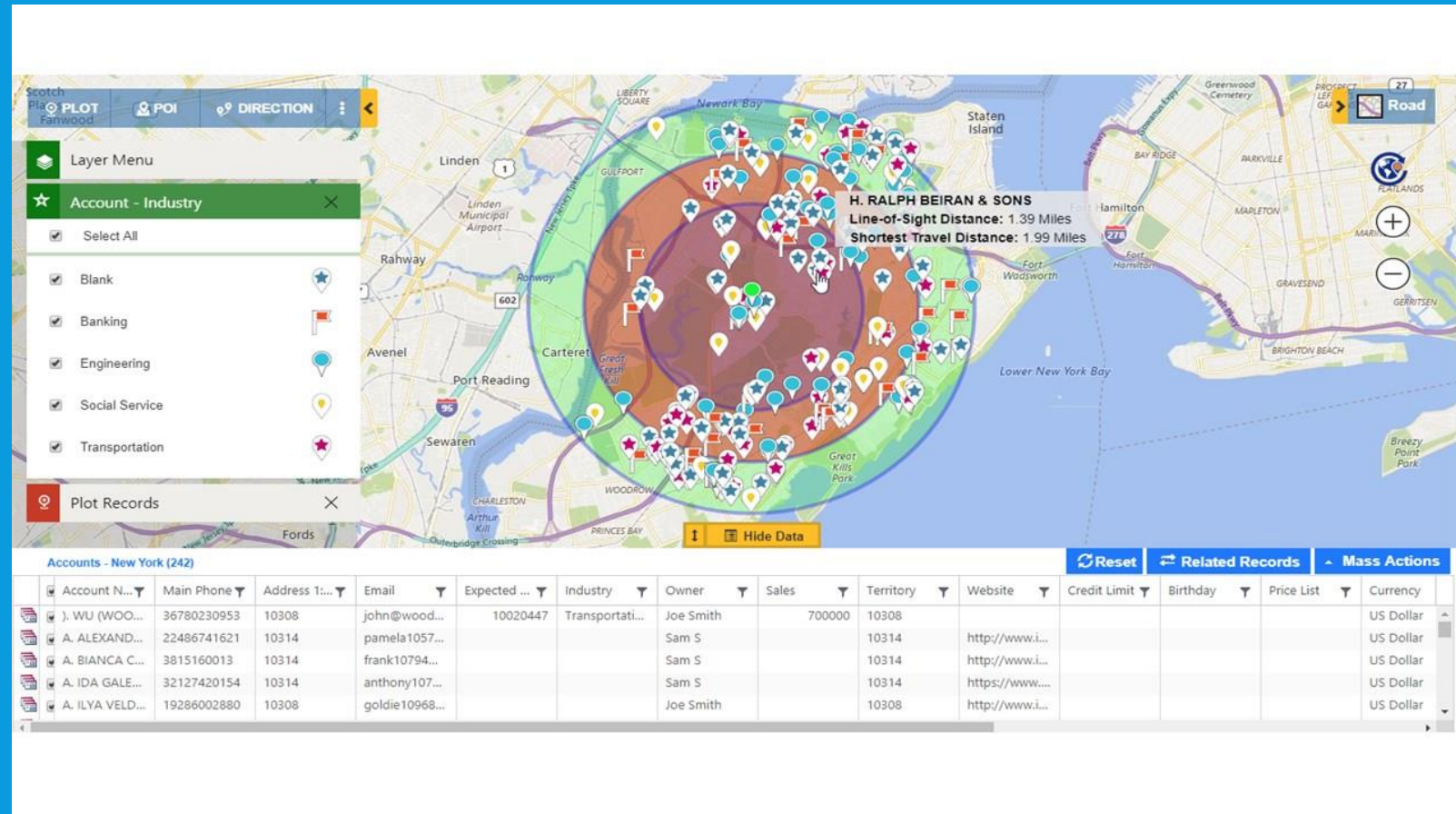
- Keep an eye on your Timelines and Dashboards
- Scan Business Cards
- Track emails and activities from Outlook
- Take pictures using your phone to attach to records or notes
- Use relationship assistant to see your next steps
- Use Reference Panels to quickly see related records



Take mobile productivity to the next level

Maplytics by Inogic -

- CRM Data Mapping
- Radius Search
- Auto scheduling
- Route Optimization
- Nearby Places



Let's test drive Mobile Dynamics 365

Next steps

Download Dynamics 365 for Phones from your App Store

Test out how your forms and views look in Mobile App

Review the user guide at

<https://docs.microsoft.com/en-us/dynamics365/mobile-app/dynamics-365-phones-tablets-users-guide>

Contact us at enCloud9/Dynamics 365 support with any questions

Sign up for our January 17 Webinar – Dynamics 365 for Outlook