APRIL 2019 RELEASE MICROSOFT DYNAMICS 365
APRIL 2019 RELEASE MICROSOFT DYNAMICS 365
Presenter Information

Seth Bacon
Seth.Bacon@rsmus.com
206.341.8049

Steven Trefz
Steven.Trefz@rsmus.com
267.419.2216
CUSTOMER SERVICE
Dynamics 365 for Customer Service

• Knowledge Management
  - Improvements to the Knowledge Article process

• Channels
  - Provide more communication Channels for internal and external communication
Knowledge Articles

• Templates
  - Edit out of the box, create custom templates
  - Settings -> Service Management -> Article Templates
Knowledge Articles

- Rating and Feedback
- Filtering
Knowledge Articles

• Usage Dashboards In Customer Service Hub
Channels

• Single Sign On for Unified Service Desk
• Multi-session capabilities
• Transfer Conversations to other Agents
• SMS
  - Telesign subscription required
Channels cont.

• Live Chat
  - Integration available for multiple chat widgets

• Chat Bots
  - "Bring Your Own Bot" - Built on Microsoft Bot Framework
SALES
Teams Integration
Teams Integration

- Microsoft Teams integration with Adventure Works (sample) in Dynamics 365.
- This record is successfully connected to Dynamics 365. Learn more.

**Account Information**
- **Account Name**: Adventure Works (sample)
- **Phone**: 555-0152
- **Website**: http://www.adventure-works.com

**Timeline**
- **Auto-post on Adventure Works (sample)’s wall**
  - October 5, 2010 7:01 AM
  - Account Created By: Veronika Quirk.

© 2019 RSM US LLP. All Rights Reserved.
Forecasting (Preview)
• Visualizations – July 2019
  - Real time information captured by IoT devices can be displayed in Dynamics 365
• Device Commands
Scheduling

• Optimizer enhancements
  - Configure capacity greater than 1
  - Match Resource Role
  - Must Chose [specific] Resource
  - ASAP
AI for Dynamics 365

• AI for Sales
  - Predictive Forecasting
  - Relationship Assistant
  - Call Intelligence Capabilities
    • Talk to listen ratio
    • Speaking speed

• Customer Insights
  - Cleanse and standardize customer data across data sources
  - Customize Predictive Models
POWER APPS
PowerApps

• Enhancement to the Power Platform admin center
• PowerApp embedded in Teams
• Offline capabilities
• Dependency Tracking
• Microsoft Stream Video control
• Usage Reports
• Responsive layout (not automatic)
• Customize CE front end in PowerPlatform
  - Add/edit fields, forms and views
PowerApps

- Form Modifications Live Preview
Flow

• Copy and Paste Steps
• Improved Flow Checker
  - More specific error and warning messages
• Access to location data for mobile devices
• Add attachments to Approvals
• Extend Automated flow maximum time to 90 days (from 30)
GENERAL
Unified Interface

1. Sitemap is now expanded by default and persistently pinned.
2. The sub area in focus is highlighted to indicate where in the app the user is.
3. Recent and pinned items are moved to the top level for easy access. Entity level recent items are removed to eliminate hierarchy.
4. Area switcher with flyout eliminates the cluttered tabs in the previous site map.
5. Command bar background color is changed to show association with the area it effects.
6. Unique colors are added to icons to create differentiation between commands.
Microsoft Forms Pro

Customer satisfaction survey

1. Overall, how satisfied are you with your
   [Product name]?
   [Scale from 1 to 5]

2. How likely are you to recommend [Product name] to a friend or a colleague?
   [Rating scale from 0 to 10]
   - Not at all likely
   - Extremely likely
PowerApps Portals

Welcome to your website!
This is a sample landing page for you to start creating your website.
This website uses sample data for illustration purposes.
You can create pages by using the available templates.
**Presenter Information**

Seth Bacon  
Manager  
Industry Focus: Technology and Public Sector

Steven Trefz  
Senior Associate  
Industry Focus: Consumer Products and Public Sector
This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute audit, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM US LLP, its affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person. Internal Revenue Service rules require us to inform you that this communication may be deemed a solicitation to provide tax services. This communication is being sent to individuals who have subscribed to receive it or who we believe would have an interest in the topics discussed.

RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International.

RSM, the RSM logo and the power of being understood are registered trademarks of RSM International Association.

© 2019 RSM US LLP. All Rights Reserved.