LEARN WHAT'S NEW IN DYNAMICS 365 FOR CUSTOMER ENGAGEMENT VERSION 9.0

Introduction to new features

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Presenters

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Agenda

• Introduction
• User Experience (UX) enhancements – User Interface Refresh
• New mobile apps – Built on a unified interface platform
• Process/business process flow enhancements
• Microsoft Flow in Dynamics 365
• Virtual Entities
• Questions/Comments
USER EXPERIENCE (UX) ENHANCEMENTS
UX Enhancements

• Forms divided into containers for content display
• Field and section spacing standardized
• Default message/icon for empty sections
• Horizontal tabs and buttons
• Subgrid header colors
• System wide text wrap
• Multi-select

• Not in-advanced find
• Editable grids
• Unified forms and Interface
NEW DYNAMICS MOBILE APP
New Dynamics Mobile App

• New Mobile App - Built on the New Unified Interface platform
• New Extensibility
• Work Area & Navigation bar
• Working with records
• Searching records
• Task Flows
• Sending email & making a call
• Dashboards
DEMO
VISUAL PROCESS DESIGNER
Visual Process Designer

- Allows for streamlined processes for different business groups
- Visual drag and drop editor
- Can be used for business rules, process flows, and task flows
- Floating and docked stages
- Vertical and Horizontal layout
- Includes new Recommendation action for business rules
- Contains export to image functionality to easily document business processes
DEMO
Microsoft Flow

• Completely new workflow engine
• Can operate within a single Org
• Opportunity to link to external data sources
  - Twitter
  - SharePoint
  - Outlook
• Near real time, async processing
• Works with custom entities
• Not officially depreciating current workflow ending
VIRTUAL ENTITIES
Virtual Entities

• Getting Started with Virtual Entities
• What are Virtual Entities?
• Virtual Entities – Data providers and Data sources
• Virtual Entity Limitations
• Setting up a Virtual Entity
Virtual Entities

- What are Virtual Entities?
- Virtual Entities – Data providers and Data sources
- Setting up a Virtual Entity
- Virtual Entity Limitations
Virtual Entities Limitations

• Data is read-only. The virtual entity feature doesn’t support pushing changes made in Dynamics 365 back to the external system.
• Only organization-owned entities are supported.
• Access to the virtual entity data can be turned on or off for individual users based on their security role. Field-level security is not supported.
• It must be possible to model the external data as a Dynamics 365 entity. This means:
  - All entities in the external data source must have an associated GUID primary key.
  - All entity properties must be represented as Dynamics 365 attributes. You can use simple types representing text, numbers, optionsets, dates, images, and lookups.
  - You must be able to model any entity relationships in Dynamics 365.
  - An attribute on a virtual entity cannot be calculated or rollup. Any desired calculations must be done on the external side, possibly within or directed by the data provider.
Virtual Entities Limitations Continued…

• Virtual entities cannot be enabled for queues and offline caching of values is not supported for virtual entities.

• A virtual entity cannot represent an activity and do not support business process flows.

• Once created, a virtual entity cannot be changed to be a standard (non-virtual) entity.

• Virtual Entity Resources:
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QUESTIONS AND ANSWERS?
THANK YOU FOR YOUR TIME AND ATTENTION