D365 CE: Unified Interface

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What is the Unified Interface?
Why Unified Interface?
Pro’s
Capabilities not yet on Unified Interface
Demo
What is the Unified Interface

- Provides a consistent interface for optimal viewing on any screen size or device
- Designed to provide a consistent experience across all devices using Model Driven Apps
- Most of the core functionality of sales and customer service has moved to the Unified Interface Client
- Ability to create custom Model Driven Apps
  - Select Forms
  - Select Views
  - Select Dashboards
Why Unified Interface

• Prior to UI: Inconsistent experiences across devices
  • Different look & Feel for Mobile, Classic Interface and Outlook App
  • Classic Interface didn’t translate well across clients
• D365 is becoming more App-Centric
  • Quick deploy
  • Shared across clients
  • One form
• Built on PowerApps Framework
  • Allows Custom Controls (Greater Visualizations) on fields
• UI will become primary and only interface (October 2020)
**Understand the App Model**

**Understand Model-Driven Apps**
- App Designer
- Reduce Clutter

**Review Design Principles**
- User Personas
- Limit Distractions
- Focus on insights, not data
- Measure outcomes not actions

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**New Capabilities**

**Reference Panel**
- Get work done without leaving the form
- **Custom Controls for business impact**
  - 20+ included controls
  - PowerApps Component Framework
- **Canvas Apps for tailored experiences**
  - Build with PowerApps
  - Run standalone or embedded on form
  - Hundred of connectors

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**User Experience Guidelines**

**Navigation**
- Site Map
- Dashboards
- Interactive Dashboards

**Form Design**
- Balance number of forms
- Tab order/ No. of tabs
- Design and test for reflow
- Optimize for create & consume
- Capitalization

**Views and Grids**
- Multiple Apps
- Business Process
- Custom Theming

**Principles**
- Balanced use of color
- Reduce clicks and scrolling
- Reduce Clutter

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Radial Knob
Arc Knob
Linear Gauge
Linear Slider
Star Rating
Flip Switch
Option Set
Bullet Graph
Number Input
Input Mask

[Image]

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Pro’s

• Enhanced User Experience
• One form for UI (and Classic Interface)
  • **Timeline control** – Aka Activities/Posts, advanced filtering
  • **Business process enhancement** – The business process flow has been improved by the docking mechanism.
  • **Navigation** – The new menu options let you swiftly navigate the different apps in the system
  • **Record Set Navigation** – Allows for viewing of list view within a record
  • **Reflow** – Scales by reflowing the components on the screen based on screen size
  • **Reference Panel** – Allows us to switch between grids on form without having to leave the page
  • **Rich Controls** – Editable Grids, Field Controls
Pro’s (continued)

• Dashboards
  • Legacy and Interactive Dashboards
  • UI Only Charts
• Focused Role based Experience
  • Easily build apps based on user roles
  • Apps Security
• Quickly deploy apps
  • OOB Apps
• New enhancements will exclusively be released for UI, not Classic UI
  • I. E Playbooks
Unified Interface

1. Sitemap
2. The sub area in focus is highlighted to indicate where in the app the user is.
3. Recent and pinned items are on the top level for easy access.
4. Area switcher with flyout
5. Command bar background color shows association with the area it effects.
6. Unique colors for icons to create differentiation between commands.
Reference Panel

Active Transport

Summary
- Product Price List
  - Select
  - 3 M Hornell, Inc.
  - Influencer
  - Consultant
- John Henderson
  - Partnership
  - He has a partnership with Active Transport

Related
- Phone Call from Dian Taylor - Monday, December 17, 2018 11:38 AM
  - Call with Harry
  - We discussed abc and blablablablablablabla
  - Assign
  - Delete
  - …
- Phone Call from Dian Taylor - Monday, December 17, 2018 11:25 AM
  - Follow up through Outlook

Contacts
- Harry Windsor
  - harry.winsor1234@gmail.com
- Roland Roybal
  - someone@example.com
New Chart Types

• Legacy and Interactive Dashboards
  • New Chart types for Interactive Dashboards
  • Doughnut – Not visible in legacy UI
  • Tag Chart – Not visible in legacy UI
There are certain capabilities that continue to be unavailable in the Unified Interface:

- Custom styling of advanced chart properties (excluding colors and basic formatting)
- Composite address control (fly out address control)
- Global notifications
- Admin experiences
- Editable grids on phones
- Learning Path
- Mail Merge (deprecated)
- View Filtering “Contains Data” or “Doesn’t Contain Data”
- Letter, Fax and recurring Appointment activities
Hybrid Experience

- Ability to display on command bar in Unified Interface
  - Advanced Find
  - Bulk Edit
  - Merge Records
  - Record Sharing
Enable Unified Interface Only

System Settings
Set system-level settings for Microsoft Dynamics 365.

- **Use the new Unified Interface only (recommended)**
  - Enable only the Unified Interface: Yes/No
  - Setting to No will allow use of the legacy web client and make it the default. Learn more

- **Show legacy Dynamics 365 — custom app**
  - Show this app to all users, not just administrators: Yes/No
  - Recommended only for backwards compatibility. Opens in Unified Interface if Use Unified Interface only is enabled. Learn more
  - Select a custom name for the legacy app: Dynamics 365 — custom

- **Use legacy form rendering**
  - For compatibility, use the legacy form rendering engine. Note that performance may be adversely affected: Yes/No

- **Set the default card state for Interactive Dashboards**
  - Display cards in expanded state: Yes/No

- **Enable embedding of certain legacy dialogs in Unified Interface browser client**
  - See a list of supported dialogs. Note that some legacy features may not be fully accessible: Yes/No

[OK] [Cancel]
Activities Tab Properties
Modify the properties for the Activities tab.

Name
Enter a unique name
Name "Timeline"

Filter by
Show these modules
- Activities
- Notes
- Posts

Additional Options
Default Module for Create Experience
- Notes
- Show filter pane
- Expand filter pane by default
- Sort
- Descending
- Number of results
- 10

Label
Specify the label for this field in forms.
- Display label on the form

Locking
Specify whether to lock this field on the form.
- Lock the field on the form

Availability
Specify the default availability of this field on phone.
- Available on phone

Default tab
Select the tab you want to be visible when the form opens.
- Tab
- Activities
Field Configuration

• Different Controls based on Field Types
  – Configurable for Web, Phone or Tablet Apps
  – Examples
    • Single Line of Text – Mask Control (Formatting)
    • Single Line of Text (URL Format) – Website Preview
    • Single Line of Text (URL Format) – Multimedia Control
    • Two Options - Flip – Switch
    • Currency – Bullet Graph, Linear Gauge, Radial Knob, etc
    • Option Set – Option Set Control
Model Driven Apps

- No coding required
- Component focused

Approach to MD App Making:
- Modeling Business Data
- Defining Business Processes
- Composing the app
Model Driven Apps

Anatomy of a Model Driven App

- Site Map
- Dashboards
- Business Process Flows
- Entities
  - Forms
  - Views
  - Charts
What is your schedule?

https://runone.powerappsportals.com/
What is your schedule?

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QUESTIONS AND ANSWERS
THANK YOU FOR YOUR TIME AND ATTENTION