MICROSOFT DYNAMICS 365 CE (VER. 9)

Introduction to new features

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UX Enhancements

- Forms divided into containers for content display
- Field and section spacing standardized
- Default message/icon for empty sections
- Horizontal tabs and buttons
Data reflective changes

- Not in advanced find
- Multi-select
- Multi-select in views/advanced find
- Editable grids
- Subgrid header colors
- System wide text wrap
Editable grid control

- In-grid editing of views and sub-grids
- Works in the web and mobile clients
- Supports events, grouping, dragging columns
Advanced Find NOT IN

- New Filter Condition
- SQL Left Outer Join
- Does not allow any other filter condition after NOT IN
Subgrid header colors and text wrap
UX ENHANCEMENTS
DEMO
Timeline / Activities
UNIFIED FORMS AND TIMELINE DEMO
CUSTOM APPS AND VISUAL PROCESS DESIGNER
## Custom app module steps

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Define app properties.</td>
</tr>
<tr>
<td>2</td>
<td>Define navigation for an app using the site map designer.</td>
</tr>
<tr>
<td>3</td>
<td>Apps are composed of components like dashboards, entities, business process flows, forms, views, and charts. Include the required ones in your app by using the app designer.</td>
</tr>
<tr>
<td>4</td>
<td>Check your app for any required components you haven’t added.</td>
</tr>
<tr>
<td>5</td>
<td>Make the app available for use.</td>
</tr>
<tr>
<td>6</td>
<td>Give users access to the apps you created by using security roles.</td>
</tr>
</tbody>
</table>
Site map designer
App module 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
Process Designer – Business Rule

Business Rule (Text View)

IF

THEN

Equipment Brand equals "ResMed"

Show Recommendation "ResMed Device" on Equipment Model

Recommendation Title: "Hose Connector"

Recommendation Details: "ResMed devices all use a 20 mm hose with an F type connector."
CUSTOM APPS AND VISUAL PROCESS DESIGNER DEMO
ORGANIZATIONAL INSIGHTS DASHBOARD
Organization Insights dashboard

- Insight into Application Usage by users
- System Jobs
- Plug-ins

- API Calls Statistics
- Mailbox Usage
- Storage
New mobile app

- Built on Unified Interface
- Enhanced form switching
- Interactive dashboards & filters
- Easier & quicker navigation
- Mobile Offline
- Security Enhancements
QUESTIONS
AND ANSWERS?
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