LEVERAGING APPLICATIONS IN DYNAMICS 365

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Today’s presenter

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APPS IN MICROSOFT DYNAMICS 365 CE
What are Apps in CRM?

- Native feature for customizing CRM interface beyond out of box CRM sitemap & related record data within CRM.
- Simplified role-tailored experience configurable to multi-tiered organizations needing more strict segregation of data & processes.
CASE STUDY
Apps in D365 CE
Client Background

• Multinational organization with 4 individual business units
  – Global HQ
  – US Sales
  – UK Sales
  – APAC Sales

• One current instance of D365 Online at single business unit
  – Light configurations (“Proof of Concept”)
  – Integration to Office365 Exchange
  – Configured for SharePoint Online
  – Core D365 for Client Engagement entities used
    • Accounts
    • Contacts
    • Leads
    • Opportunities
    • Activities
    • Dashboards
Use Case

Global HQ

UK Sales Team
- Accounts
- Contacts
- Activities

US Sales Team
- Accounts
- Contacts
- Activities
- Tasks

APAC Business Unit
- Accounts
- Contacts
- Activities
- Tasks
The Issue

• Multi-tiered data structure is causing issues in system administration & solution management.
• Need to segregate data access for each agency to accessing individual information.
• Client requires different KPIs & data needs for performance metrics & KPIs of agency teams.
• UK Sales team has different business process flow than US & APAC team.
• D365 CE has over 60 system views for each major entity (Accounts, Contacts, Leads, Opportunities).
• Security access needed from HQ & business unit (sales team) level for data requirements.
• CRM OOB security doesn’t give flexibility to pick views specific to role (all or nothing).
The Solution

• Build D365 Apps for each business unit/agency in order to simplify & segment data.
  - Master HQ CRM App
  - Sales Team Level Apps

• Build agency based views, charts & dashboards that are accessible by the agencies with relevant data.

• Clean up the UX to hide unnecessary records & data types for the agencies perspective in CRM.

• Assign security access to the apps in D365 to align users at the agency levels to their specific apps.
  - Users with Field Agents in Asia get assigned to the Asia Field Agency App
HOW DO I BUILD IT?

Apps in D365 CE
What can I configure in My Apps?

- Sitemap
- Dashboards
- Business Process Flows
- Entities
  - Views
  - Forms
  - Charts
DEMO
Apps in D365 CE
NOW WHAT?

Apps in D365 CE
What should you know before configuring?

- Each App must be tied to at least one Security Role.
- Each App gets its own unique URL.
  - E.g. https://mycompany.crm.dynamics.com/apps/uniqueappname
- Each Security Role must have read access to Apps enabled to use this feature.
- This should be an admin function **only**.
- Each solution can have one or many D365 Apps appended.
- Each App is supported in mobile experience if using D365 native apps.
- Native On-Premise CRM 2016 & D365 CE Online.
Pros and Cons

Pros

• Out of the box supported functionality.
• Native D365 Security Model is followed.
• Segmentation of system data & user experience at the application level.
  – Entity
  – Business Process Flows
  – Forms
  – System Views
  – System Charts
• Simplification of user experience without custom development.
Pros and Cons

Cons

• System Administration for build of new system views, entities, BPFs and charts.

• Dependencies of apps within the solutions.
  – Must be cognizant of solution deployment methodology for patching of large scale components (accounts, contacts, users, etc.)
ALTERNATIVE USE CASES

Apps in D365 CE
Alternate Use Cases

• Mobile App Development
  − Sales Mobile App
  − Service Mobile App
  − Executive Mobile App
  − Inside Sales App
  − Conference Apps
  − CRM Beginners App

• D365 for Outlook App

Microsoft KB article

QUESTIONS AND ANSWERS?
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