



# 2021 RELEASE WAVE 1

What's new?

Dian Taylor

Director TMC Business Applications

## Presenter information



**Dian Taylor**

**RSM US LLP**

Director TMC Business Apps



Dian.Taylor@rsmus.com

561-682-1626



## Agenda

- Generic enhancements
- Dynamics 365 Sales
- Dynamics 365 Customer Service
- Dynamics 365 Field Service

# Generic enhancements

## Generic enhancements – early access

- Duplicate detection for UI automatically enabled
- Merge records for UI automatically enabled
- Improved global relevance search experience in model-driven apps

# Generic enhancements – early access

## Search Quick Actions

The screenshot displays the Dynamics 365 Customer Service Hub interface. The left sidebar contains navigation options: Home, Recent, Pinned, My Work (Dashboards, Activities), Customers (Accounts, Contacts, Social Profiles), and Service (Cases, Queues). The main area is titled 'Knowledge' and contains a search bar with the text 'Search articles'. Below the search bar, a message states 'You haven't searched for anything yet.' A search results window is open, showing a search for 'angel'. The results are categorized into: Contacts (Angel Castellar), Appointments (Onsite Meeting with Angel, Meeting with Angel), Phone Calls (Introduction Call Angel Castellar |, Call with Angel about project, Call with Angel regarding Flexband), and Email Messages (Email from Angel). Each result includes a status indicator (checkmark or X) and a menu icon. A tooltip 'Email a Link' is visible over the 'Email from Angel' result. A 'Show more results for angel' link is at the bottom of the search window.

# Generic enhancements – early access

## Search Quick Actions

The screenshot shows the Dynamics 365 Customer Service Hub interface. The search bar at the top contains the text 'angel'. The search results are displayed in a list view. The 'Contacts' section shows a table with columns: Full Name, Company Name, Address 1: City, Address 1: Phone, Business Phone, and Email. The contact 'Angel Castellar' is highlighted, and a red box highlights the quick action icons (person, link, envelope) next to the name. A tooltip for 'Angel Castellar' is visible below the name. The 'Phone Calls' section shows a table with columns: Subject, Activity Status, Priority, Due, Created By, and Regarding. The phone call 'Call with Angel regarding Flex...' is highlighted, and a red box highlights the quick action icons (checkmark, X, dots) next to the subject. A tooltip for this phone call is visible, showing options: 'Set Regarding', 'Assign', and 'Email a Link'.

**Contacts**

Full Name	Company Name	Address 1: City	Address 1: Phone	Business Phone	Email
<a href="#">Angel Castellar</a>	A. Datum Corporation (s...	New York		545-555-0158	angel.castellar1984@gm...

**Phone Calls**

Subject	Activity Status	Priority	Due	Created By	Regarding
Introduction Call Angel Castellar	Completed	Normal	12/4/2020 3:20 PM	Dian Taylor	Angel Castellar
2nd Follow Up Call with Angel Castellar	Open	Normal	12/6/2020 3:23 PM	Dian Taylor	Angel Castellar
Call with Angel regarding Flex...	Open	Normal	3/10/2020 1:30 PM	Dian Taylor	Angel Castellar
Call with Angel regarding Maint. Contract		Normal	3/21/2019 6:00 PM	Dian Taylor	Angel Castellar

## Generic enhancements – early access

Table	Actions available
Account	Assign, Share, Email a link
Contact	Assign, Share, Email a link
Appointment	Mark complete, Cancel, Set Regarding, Assign, Email a link
Task	Mark complete, Cancel, Set Regarding, Assign, Email a link
Phone Call	Mark complete, Cancel, Set Regarding, Assign, Email a link
Email	Cancel, Set Regarding, Email a link
Any custom table	Assign, Share, Email a link

## Generic enhancements – early access

- UX improvements in mobile app
- Views
  - Sorting
  - Search bar
- Forms
  - Tabs - scrollable
  - Command bar from bottom

Old

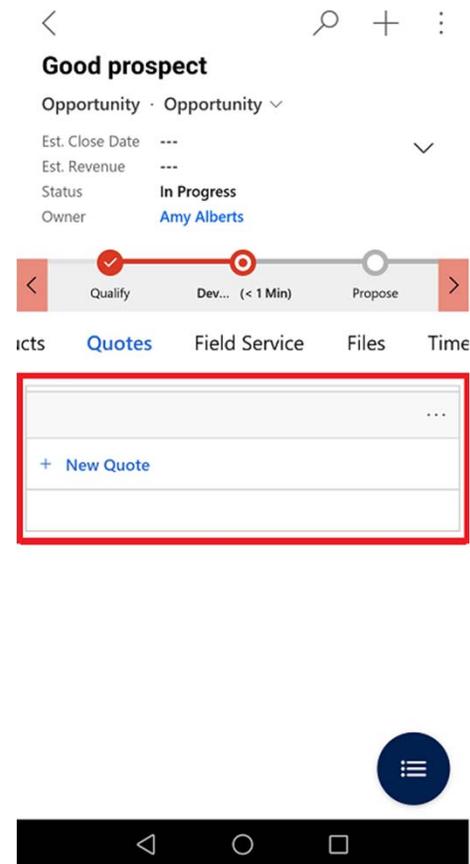
The 'Old' interface shows a mobile app screen for a 'New Lead by Matt' opportunity. The top section displays the opportunity name and a dropdown menu. Below this, there are fields for 'Status Reason' (New), 'Est. Close Date' (---), 'Est. Revenue' (\$225,000.00), and 'Weighted Revenue' (\$56,250.00). A progress bar at the bottom indicates the current stage: '1-Qualify', '2-Develop (24 D)', and '3-Propose'. A green box highlights the 'Summary' tab in the bottom navigation bar. The bottom-most bar contains icons for 'Save', 'Save & Close', 'New', and 'More'.

New

The 'New' interface shows a mobile app screen for a 'New Lead by Matt' opportunity. The top section displays the opportunity name and a dropdown menu. Below this, there are fields for 'Status Reason' (New), 'Est. Close Date' (---), 'Est. Revenue' (\$225,000.00), and 'Weighted Revenue' (\$56,250.00). A progress bar at the bottom indicates the current stage: 'RSM Main Sales Process' (Active for 24 days) and '2-Develop (24 D)'. A green box highlights the 'Summary' tab in the bottom navigation bar. The bottom-most bar contains icons for 'Save', 'Save & Close', 'New', and 'More'.

## Generic enhancements – early access

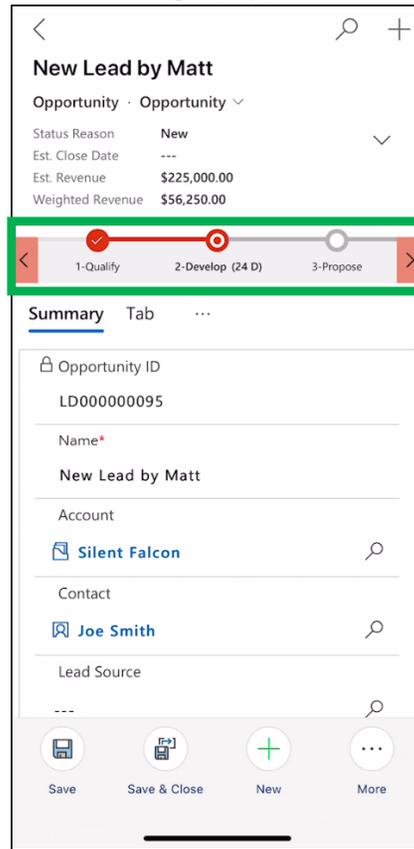
- UX improvements in mobile app
- Views
  - Sorting
  - Search bar
- Forms
  - Tabs - scrollable
  - Command bar from bottom
  - Grids



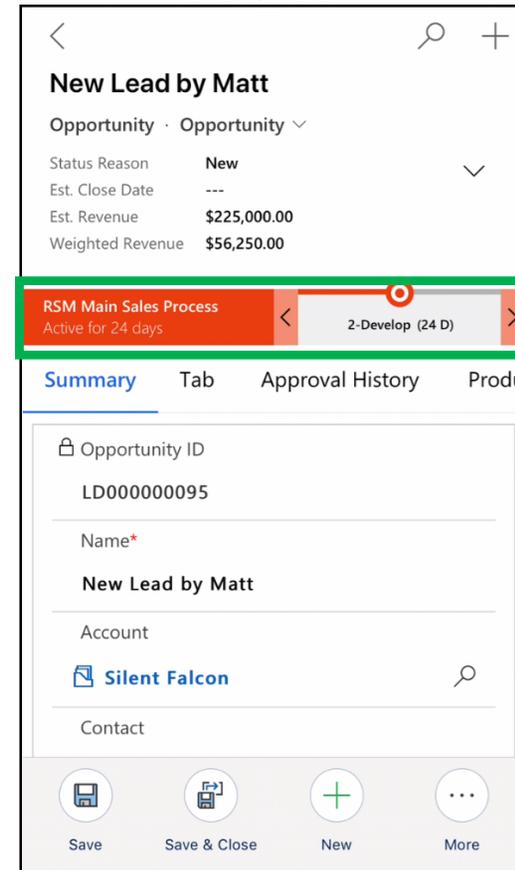
# Generic enhancements – early access

Business process flow improvements in mobile

Old



New



# Generic enhancements – early access

Multi-line text controls expand in quick view forms

The screenshot displays the Dynamics 365 Customer Service Hub interface. The left-hand navigation pane includes sections for Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Social Profiles, Service, Cases, Queues, Knowledge, and Knowledge Articles. The main content area shows the 'Adventure Works (sample)' account details, including Annual Revenue of \$50,000.00 and 4,300 employees. Below this, there are tabs for Summary, Details, and Related. The 'Details' tab is active, showing a 'Freight Terms' field and a 'Primary Contact' section. The 'Primary Contact' section contains several fields: First Name (Nancy), Last Name (Anderson (sample)), Email (someone\_c@example.com), Mobile Phone, and Company (Adventure Works (sample)). The 'Description' field is expanded, showing a multi-line text control with the text: 'Nancy Works in sales and procurement. Works out of the Seattle office but also works out of the Portland Oregon branch.'

## Generic enhancements – early access

Improved navigation

## Generic enhancements

Demonstration



# Generic enhancements – what else is coming?

Model-driven app in-app notifications

Preview April 2021 | GA June 2021

The screenshot displays the Dynamics 365 Customer Service Hub interface. The main view shows the account details for 'A. Datum Corporation (sample)'. The account information includes the account name, phone number (555-0158), and website. A contact, 'Rene Valdes (sample)', is associated with the account, with email 'someone\_j@example.com' and phone '555-0108'. The account's annual revenue is listed as \$10,000.00. A timeline of activities is visible, including auto-post notifications for required services, missing parts, operating machines, and very likely work opportunities. A notification panel is open on the right, showing a message: 'Account updated' with the text 'A. Datum Corporation account was updated.' and a link to 'Open account'.

# D365 Sales

# Sales enhancements – early access

## Enhanced personal settings

The screenshot shows the Dynamics 365 Sales Hub interface. The left-hand navigation pane is open, and the 'Personal settings' option is highlighted with a red box. The main content area displays a list of 'All Email Templates' with columns for Title, Template Type, and Organization.

Title	Template Type	Organization
Account Reconnect	Account	Orga
Bulk Deletion Task Completed With Failure Tem	System Job	Orga
Bulk Deletion Task Completion Template	System Job	Orga
Bulk Deletion Task Failed Template	System Job	Orga
Case Auto Response	Case	Orga
Case Escalation	Case	Orga
Closed Case Acknowledgement	Case	Orga
Contact Reconnect	Contact	Orga
Contract Expiration Notification	Contract	Orga
Conversation transcript email template	User	Orga

## Sales enhancements - what else is coming

### Early access

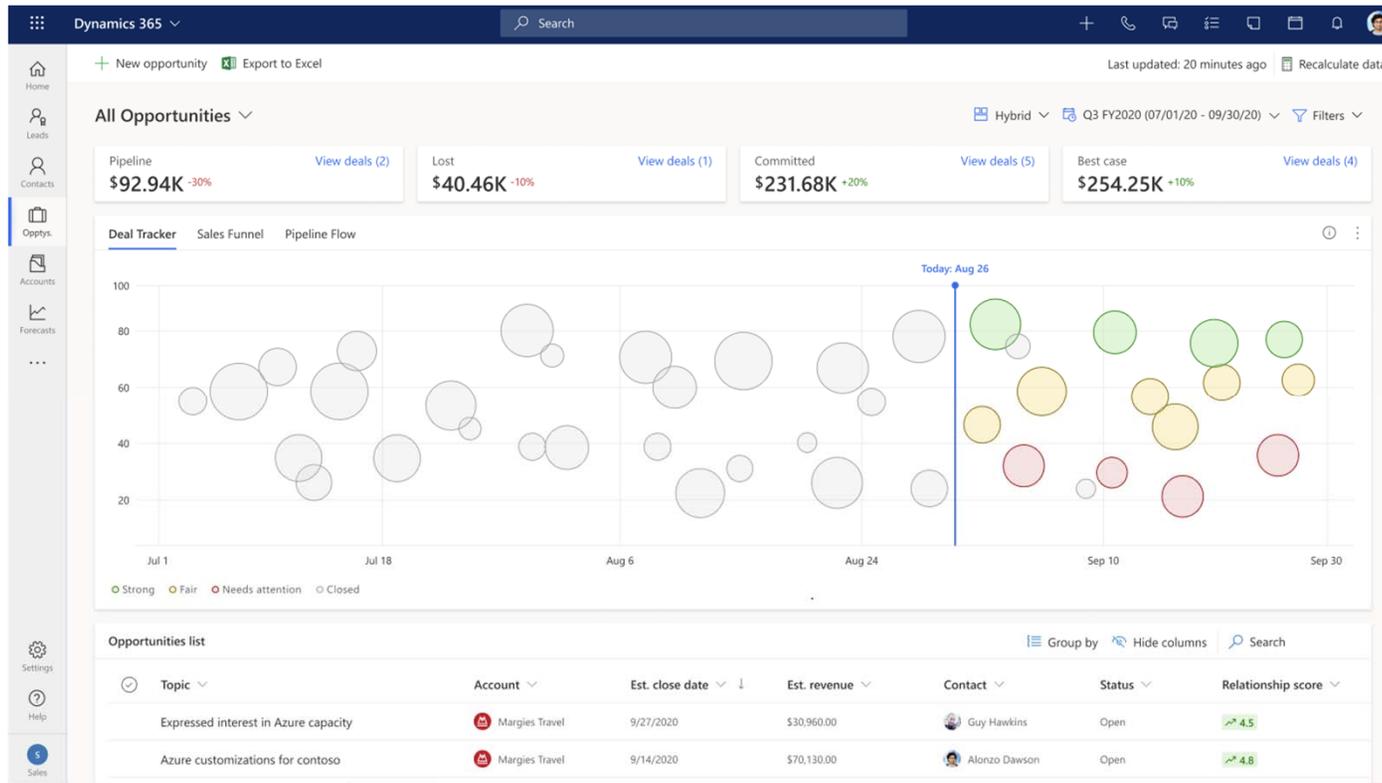
- Enhanced personal settings

### Public preview April 2021

- Automation and adaptive sequences
- Personalize work queue
- Pipeline manager workspace

# Sales enhancements - what else is coming

## Pipeline manager work space



## Sales enhancements - what else is coming?

### Early access

- Enhanced personal settings

### Public preview April 2021

- Automation and adaptive sequences
- Personalize work queue
- Pipeline manager workspace

### Public preview June 2021

- Seller KPI's and manager dashboards

## Sales enhancements - what else is coming?

### New D365 Sales mobile app enhancements

- Enriched information taken from LinkedIn and D365 Insights
- Access to personal contacts and a quick way to integrate them with D365
- Activity management inbox and to-do experience
- One-click follow-up actions
- Scan card and notes
- Notes analysis and tasks extraction

Sales

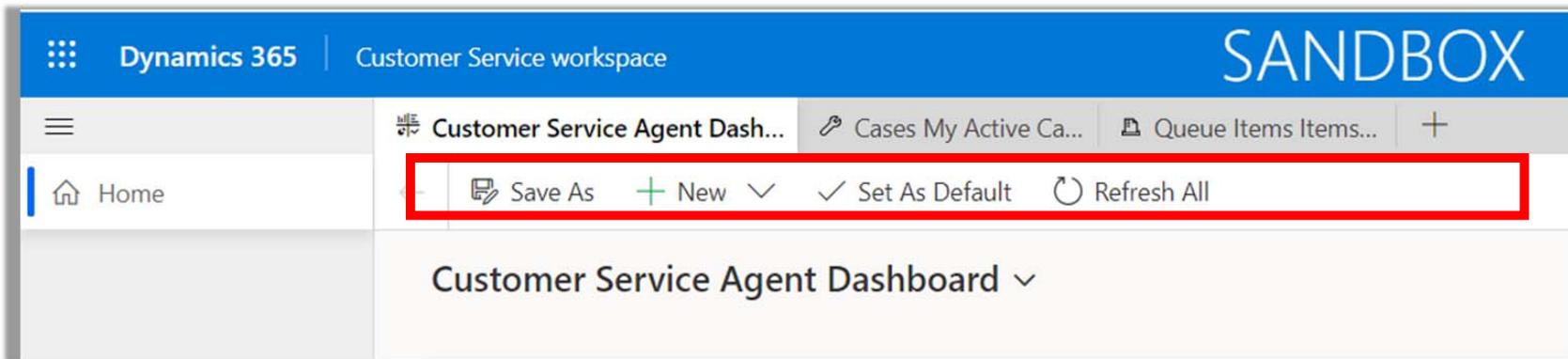
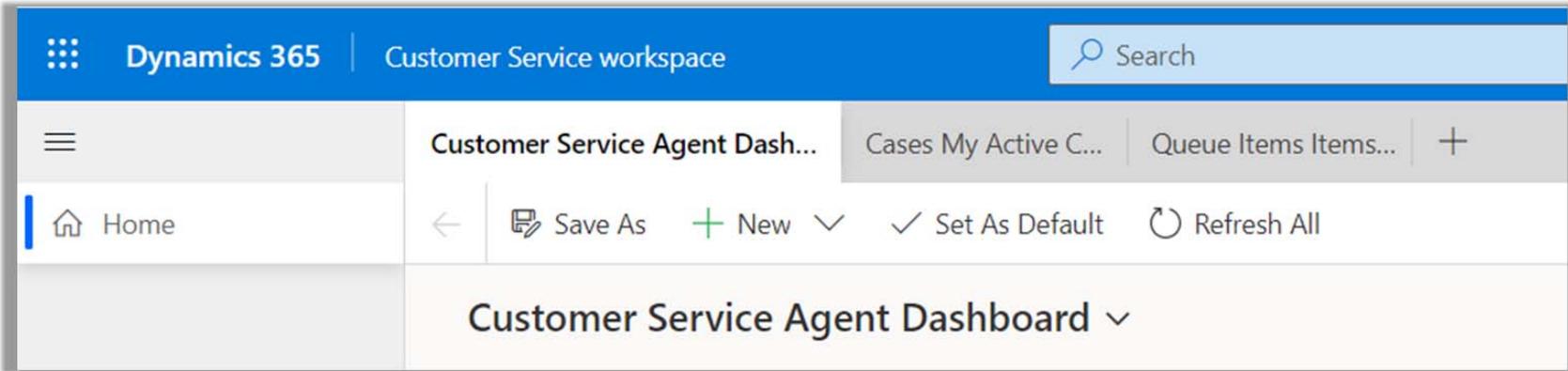
Demonstration



# D365 Customer Service

# Customer Service enhancements

Visual improvements for multi-session apps



# Customer Service enhancements

## Weekly and monthly view support schedule board

The screenshot displays the Dynamics 365 Customer Service Hub interface. The top navigation bar includes 'Dynamics 365', 'Customer Service Hub', and a 'SANDBOX' environment indicator. A 'New Schedule Board' toggle is set to 'On'. The main area is divided into a left-hand navigation pane and a central workspace. The workspace shows a weekly and monthly view of a schedule board for August 2020. The weekly view shows tasks for August 4th, 12th, 19th, 26th, and 31st. The monthly view shows tasks for August 2nd, 8th, 15th, and 22nd. A map on the right side shows the location of the tasks, with a date selector set to 2/8/2021. Below the schedule board, there is a table of work orders.

Work Order	Service Acc...	Primary Inci...	Work Order...	Work Orde...	System Stat...	Duration	Priority	Time From ...	Time To Pro...	Work Locati...	Service Terri...
WO00000550	Agrarian Ab...	HVAC-AC N...	Service Call	HVAC Not ...	Open - Uns...	3 hrs				Onsite	NY
WO00000483	Alpine Ski H...	Fan Out	Service Call	Fan out wit...	Open - Uns...	2 hrs 15 mins				Onsite	NY

# Customer Service enhancements

## Weekly and monthly view support schedule board

**Dynamics 365** | Customer Service Hub | **SANDBOX**

NY Sales Pools Crew Equipment PSA HC Demo Initial public view Dumpsters My Schedule

Filters Monthly view List view 4/1/2020 - 3/31/2021 Book

Search

2020 2021

April May June July August September October November December January February March

Allison Dickson 2h 46m (1)

Brady Hannon 2h 27m (1) 7h 35m (4)

Dian Taylor 8h (1) 48h (2) 32h 25m (3) 30h 25m (4)

Fdoar Dominguez 1h 16m (1)

2/8/2021

100 feet 25 m

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1 - 7 of 7

70

Unscheduled Work Orders Scheduled Work Orders Partially Scheduled WO's Unscheduled PSA Tasks Unscheduled Requirement Groups Sales Appointments Unscheduled D

Work Order	Service Acc...	Primary Inci...	Work Order...	Work Orde...	System Stat...	Duration	Priority	Time From ...	Time To Pro...	Work Locati...	Service Terri...
WO00000550	Agrarian Ab...	HVAC-AC N...	Service Call	HVAC Not ...	Open - Uns...	3 hrs				Onsite	NY
WO00000483	Alpine Ski H...	Fan Out	Service Call	Fan out wit...	Open - Uns...	2 hrs 15 mins				Onsite	NY

1 - 35 of 35

# Customer Service enhancements

## Map support schedule board

The screenshot displays the Dynamics 365 Customer Service Hub interface. The top navigation bar shows 'Dynamics 365 Customer Service Hub' and 'SANDBOX'. The main area is divided into a left-hand navigation pane, a central map view, and a bottom table view.

**Navigation Pane (Left):**

- Home
- Recent
- Pinned
- Scheduling
  - Resources
  - Facilities/Equipment
  - Resource Categories
  - Services
  - Service Activities
  - Fulfillment Preferences
- Tools
- Scheduling (Active)
- Settings
  - Organizational Units
  - Business Closures

**Map View (Center):**

The map shows a city grid with several blue location pins. A profile card for 'Dian Taylor' is overlaid on the map, showing her name, photo, and skills.

**Skills List:**

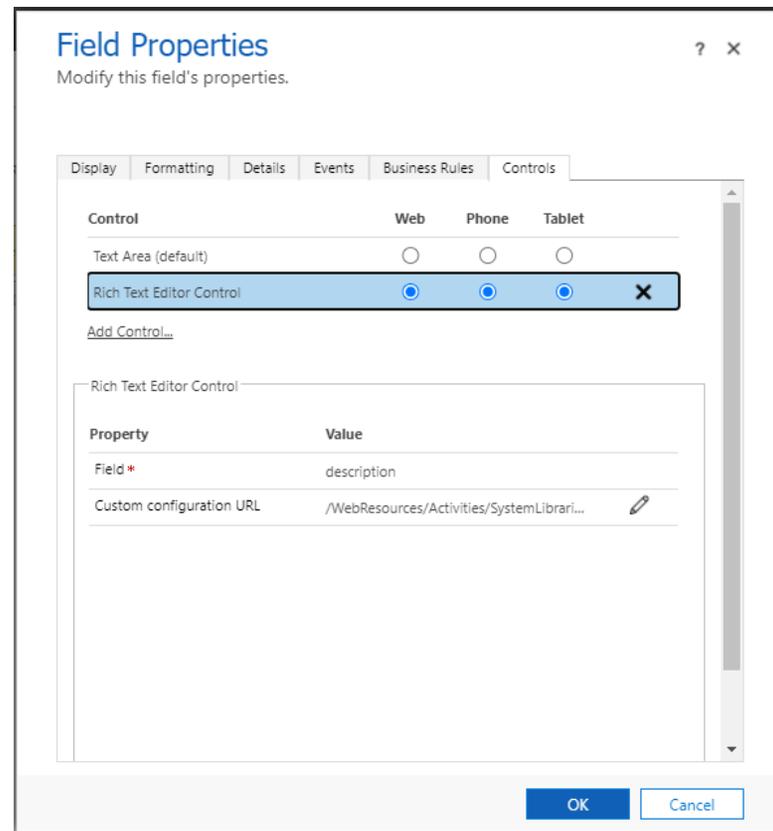
- Agile Methodology
- AR12 Certification
- Building 12 Access
- Electrical
- Fryer Installer
- Pickup
- Project Management
- Sales Measurements
- T200/T300/T600 Install
- Truck Driver License

**Table View (Bottom):**

Work Order Typ...	Work Order Su...	System Status (...)	Duration	Priority	Time From Prom...	Time to Promised	Work Location	Service Territory ...
Preventative Mai...	Preventative Mai...	Open - Unsched...	1 hr 40 mins	Low			Onsite	NY
Preventative Mai...	Fan not working ...	Open - Unsched...	2 hrs 15 mins	Low			Onsite	NY
Preventative Mai...		Open - Unsched...	2 hrs	Moderate			Onsite	NY

# Customer Service enhancements

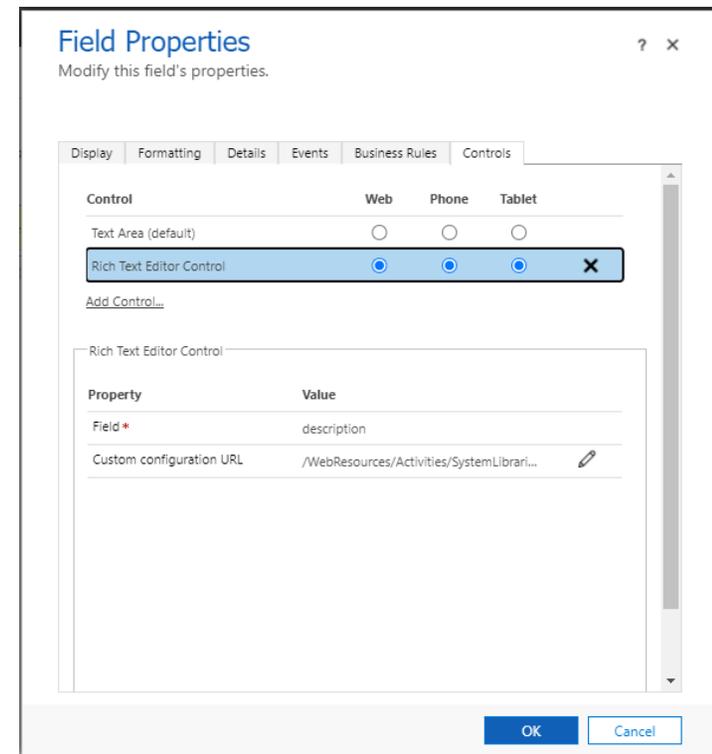
Improved user experience through email configurability



# Customer Service enhancements

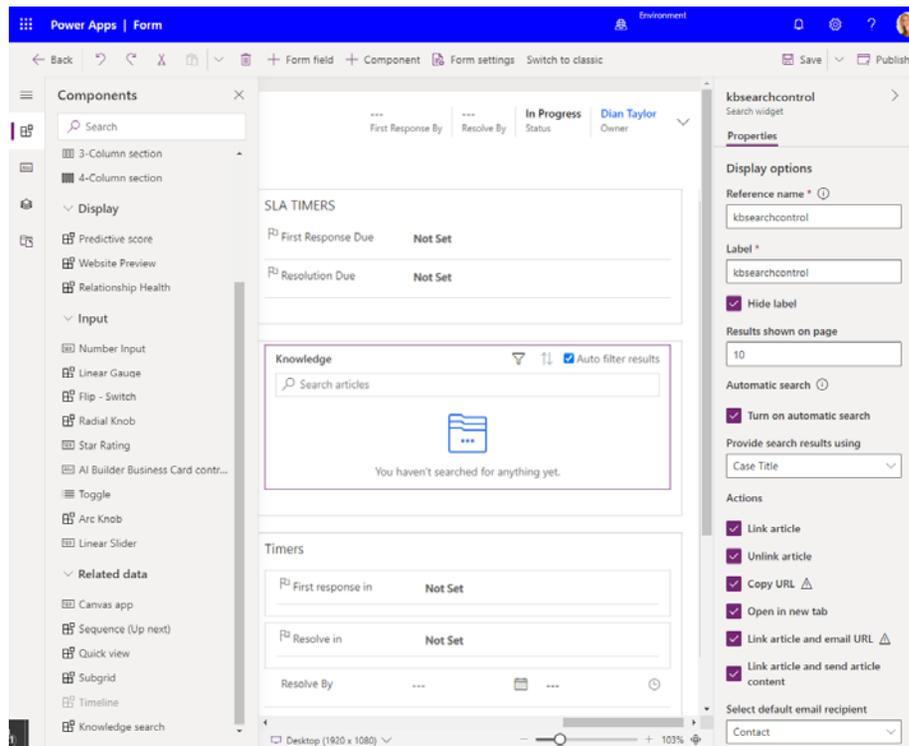
Improved user experience through email configurability

- Customize the list of available fonts.
- Set a default font.
- Add their own font.
- Adjust the toolbar location and buttons.
- Automatically increase the editor height to fit the content.
- Access the HTML.



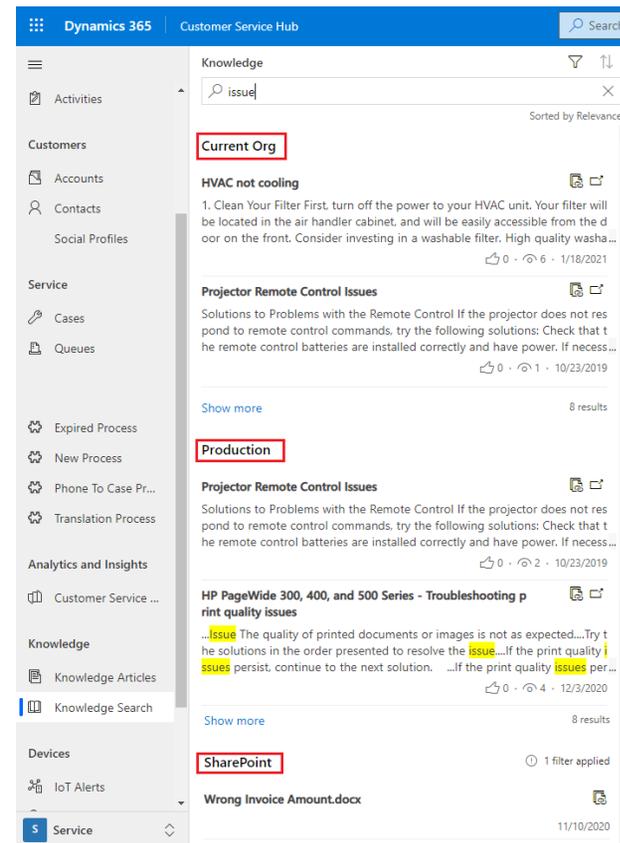
# Customer Service enhancements

Configure knowledge search control in the new form designer



# Customer Service enhancements

Configure knowledge search control in the new form designer federated knowledge search (GA April)



## Customer Service enhancements - what else is coming?

Scheduled for April 2021

- Federated knowledge search
- Appointments data included in core service scheduling

## Customer Service enhancements - what else is coming?

Scheduled for April 2021

- Federated knowledge search
- Appointments data included in core service scheduling
- Invoke Power Automate flows from macros in Customer Service workspace

# Customer Service enhancements - what else is coming?

Scheduled for April 2021

- Federated knowledge search
- Appointments data included in core service scheduling
- Invoke Power Automate flows from macros in Customer Service workspace
- Multiple language support for AI-suggested knowledge articles and similar cases
  - Dutch
  - French
  - German
  - Italian
  - Japanese
  - Spanish

# Customer Service enhancements - what else is coming?

Scheduled for April 2021

- Configuration to allow updates to resolved/cancelled cases
- Configure knowledge article search filters
- Personalize language settings for knowledge article authoring, and filters for search experience
- Timeline configuration enhancements
  - Set the command buttons
  - Select default filters
  - Remove unnecessary filters
  - Visually configure fields and labels

# Customer Service

Demonstration



# D365 Field Service

# Field Service

## Work order resolution details

The screenshot displays the Dynamics 365 Field Service Mobile interface. The main view is for work order WO00000560, showing a list of service tasks: Arrival Check-In, Gear Check, Diagnostics, and Customer Sign Off. Below the tasks is a 'Linked Articles' section with a 'No data available' message. At the bottom, there is a 'SERVICES' section with an 'Hourly Service Fee' of 2 hours. A 'Quick Create: Work Order Resolution' dialog is open on the right, showing a list of resolutions: Replaced circuit breaker and Replaced filter. The dialog also includes fields for Work Order (WO00000560), Work Order Incident, Customer Asset, and Resolution. At the bottom of the dialog are 'Save and Close' and 'Cancel' buttons.

# Field Service

## Account address usability

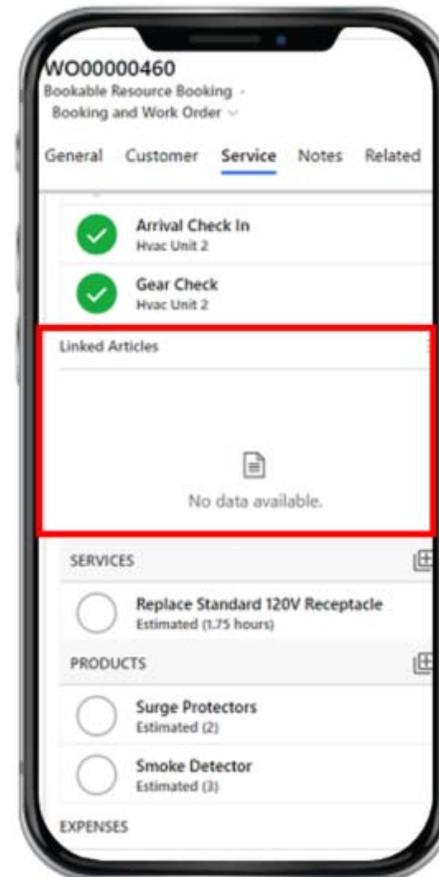
The screenshot displays the Dynamics 365 Field Service Mobile interface. At the top, the header shows 'Dynamics 365 | Field Service Mobile' and 'SANDBOX'. Below the header is a navigation bar with icons for Home, Recent, Pinned, My Work, Customers, Time Reporting, and Assets. The main content area shows an 'Address' form with the following fields:

- Street 1: 630 Old country rd
- Street 2: ---
- Street 3: ---
- City: Garden City
- State/Province: NJ
- Zip/Postal Code: 11530
- Country/Region: ---

At the bottom of the form, there are two buttons: 'Done' and 'Discard'.

# Field Service

Knowledge management articles to enhance technician productivity



# Field Service

## Weekly and monthly view support schedule board

The screenshot displays the Dynamics 365 Field Service 'New Schedule Board' interface. The top navigation bar shows 'Dynamics 365 Customer Service Hub' and 'SANDBOX'. The left-hand navigation pane includes sections for 'Scheduling' (Resources, Facilities/Equipment, Resource Categories, Services, Service Activities, Fulfillment Preferences) and 'Tools' (Litware | Vendor, Truck 2). The main area features a weekly view calendar for August 2020, with a search bar and filters. A list of work orders is shown below the calendar, and a map view on the right displays the geographic context of the work orders.

Work Order	Service Acc...	Primary Inci...	Work Order...	Work Orde...	System Stat...	Duration	Priority	Time From ...	Time To Pro...	Work Locati...	Service Terri...
<a href="#">WO00000550</a>	Agrarian Ab...	HVAC-AC N...	Service Call	HVAC Not ...	Open - Uns...	3 hrs				Onsite	NY
<a href="#">WO00000483</a>	Alpine Ski H...	Fan Out	Service Call	Fan out wit...	Open - Uns...	2 hrs 15 mins				Onsite	NY

# Field Service

## Weekly and monthly view support schedule board

**Dynamics 365 | Customer Service Hub | SANDBOX**

NY Sales Pools Crew Equipment PSA HC Demo Initial public view Dumpsters My Schedule

Filters Monthly view List view 4/1/2020 - 3/31/2021 Book

2020 2021

April May June July August September October November December January February March

Search

Allison Dickson 2h 46m (1) 4h 34m (2) 3h 16m (8)

Brady Hannon 2h 27m (1) 7h 35m (4) 4h 10m (2) 3h 49m (6)

(44h 59m booked)

4:31 PM 8:01 AM 8:00 AM 8:01 AM

9:12 AM 4:50 PM 8:02 AM

11:46 AM 8:05 AM

2:06 PM 12:22 PM

2:08 PM 4:17 PM

Dian Taylor 8h (1) 48h (2) 3h 25m (3) 3h 25m (4) 1h 18m (1) 1h 13m (1) 1h 42m (4) 1h 26m (1)

Edoar Domiguez 1h 16m (1) 3h 03m (1) 3h 51m (1)

2/8/2021

100 feet 25 m

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1 - 7 of 7 70

Unscheduled Work Orders Scheduled Work Orders Partially Scheduled WO's Unscheduled PSA Tasks Unscheduled Requirement Groups Sales Appointments Unscheduled D

Work Order	Service Acc...	Primary Inci...	Work Order...	Work Orde...	System Stat...	Duration	Priority	Time From ...	Time To Pro...	Work Locati...	Service Terri...
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WO00000483	Alpine Ski H...	Fan Out	Service Call	Fan out wit...	Open - Uns...	2 hrs 15 mins				Onsite	NY

1 - 35 of 35

# Field Service

## Map support schedule board

The screenshot displays the Dynamics 365 Customer Service Hub interface. The top navigation bar includes 'Dynamics 365', 'Customer Service Hub', and 'SANDBOX'. The main content area is divided into several sections:

- Left Navigation Panel:** Contains 'Home', 'Recent', 'Pinned', 'Scheduling', 'Resources', 'Facilities/Equipment', 'Resource Categories', 'Services', 'Service Activities', 'Fulfillment Preferences', 'Tools', 'Scheduling', 'Organizational Units', and 'Business Closures'.
- Filters and View Controls:** Shows 'NY Sales Pools Crew Equipment PSA HC Demo Initial public view Dumpsters My Schedule'. Below this are 'Filters', 'Hourly view', 'List view', and date range '2/8/2021 - 2/14/2021'.
- Scheduling Grid:** A calendar view for Monday (2/8/2021) and Tuesday (2/9/2021) with time slots from 7:00 AM to 11:00 AM.
- Resource List:** Lists resources with their booking status:
  - Allison Dickson: 0% (0m booked)
  - Brady Hannon: 0% (0m booked)
  - Dian Taylor: 3% (1h 26m booked)
  - Edgar Dominequez: 0% (0m booked)
  - Kris Nakamura: 0% (0m booked)
  - Litware | Vendor: 0% (0m booked)
  - Truck 2: 0% (0m booked)
- Resource Detail Panel (Dian Taylor):** Shows skills: Agile Methodology, AR12 Certification, Building 12 Access, Electrical, Fryer Installer, Pickup, Project Management, Sales Measurements, T200/T300/T600 Install, and Truck Driver License.
- Map:** A map of a city area with several blue location pins and a red circle around a specific location.
- Table of Work Orders:** A table with columns: Work Order, System Status, Duration, Priority, Time From Promised, Time To Promised, Work Location, and Service Territory. It lists several work orders, including 'Preventative Maintenance' and 'Fan not working'.

# Field Service

Demonstration



# Additional enhancements and features

Coming in April 2021

- Customer self-service scheduling
- Simplify work order adoption
- Simplify front-line worker setup
- Appointments data included in resource scheduling
- Intelligent virtual agent to assist technicians (Public Preview April)
- Technician locator

# Technician locator

Hosted on Power App portal

The screenshot displays a mobile application interface for a technician locator. At the top, a blue header bar features the 'Contoso' logo. The main area is a map of Seattle, Washington, with a blue route line starting from a location near 'Ross' and heading towards 'Central Waterfront'. A blue car icon is positioned on the route. The sidebar on the left contains the following information:

- Estimated arrival:** 2:32 PM, accompanied by a blue car icon.
- Caleb is heading your way**
- Technician:** Caleb Burton, Your technician, with a profile picture icon.
- Booking #00023**
- Date and Time:** Thursday, Jan 21, 8:30 PM, with a calendar icon.
- Address:** 1912 Pikes Pl, Seattle, WA 98101, with a location pin icon.
- Contact:** Reach us, 360-440-4077, support@contoso.com, with a person icon.

# Technician locator

Hosted on Power App portal  
Mobile Experience

The screenshot shows a mobile application interface for 'Contoso'. At the top, the 'Contoso' logo is displayed in a blue header. Below the header, the text 'Estimated arrival' is followed by '2:33 PM' and a blue van icon. A status bar indicates 'Caleb is heading your way' with a black dot representing the technician's location. The main part of the screen is a map of Seattle, showing a blue route from the technician's current location (marked with a van icon) to the destination (marked with a location pin). The map includes labels for various neighborhoods like Fremont, University, and Central Waterfront. Below the map, the technician's name 'Caleb Burton' and title 'Your technician' are shown with a profile picture icon. The bottom section of the screen displays booking details: 'Booking #00023', 'Thursday, Jan 21' at '8:30 PM', and the address '1912 Pikes Pl, Seattle, WA 98101'.

# Power Platform



# QUESTIONS AND ANSWERS



THANK YOU  
FOR YOUR TIME  
AND ATTENTION

# Our Promise to You

If you provide honest, thoughtful feedback on this course, we promise to listen and improve.

– National Learning & Professional Development



## RSM US LLP

30 S Wacker Dr.  
Suite 3300  
Chicago, IL 60606

+1 800 274 3978  
rsmus.com

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