

XRM Labs 43

Welcome to M.
Reston MTC

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Goals

Dev - SDK^{✓✓}
CRM + SP[✓]
Testing Strategy
Built-in/VS Custom
WF - workflow +
Security
Reporting (Power BI...)

Licensing Models

Portals

VOIP + CRM

CRM + Outlook
Email

PARKING Lot

How to View Model?

ID/GUID

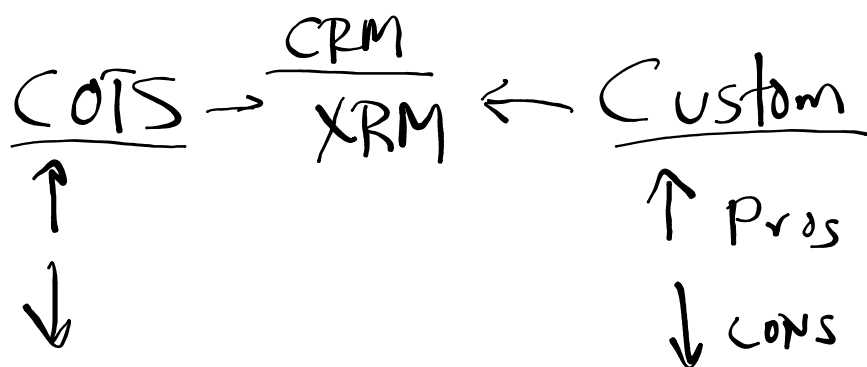
Reports Deployment

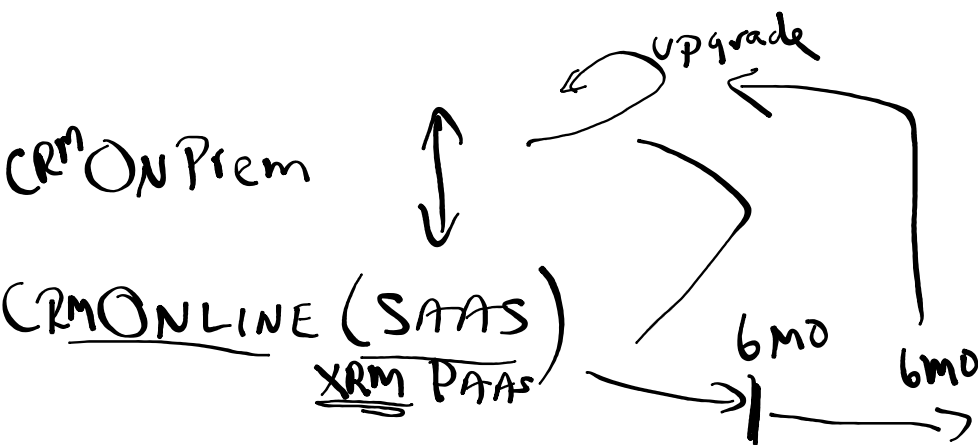
Guided Help/NAV

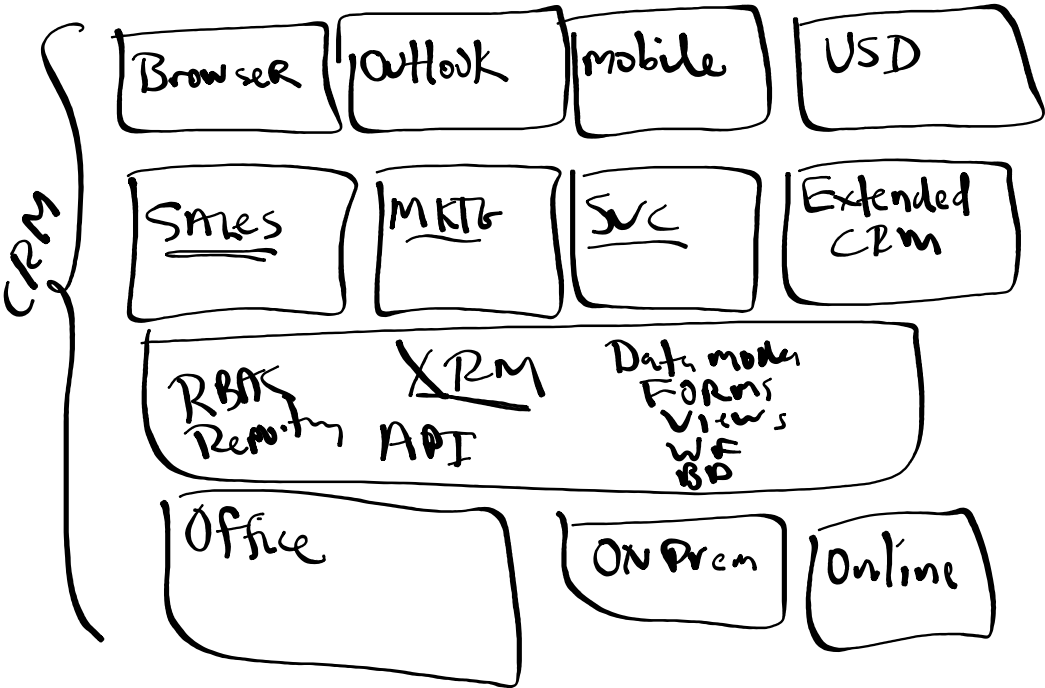
BP— Capture Movement..

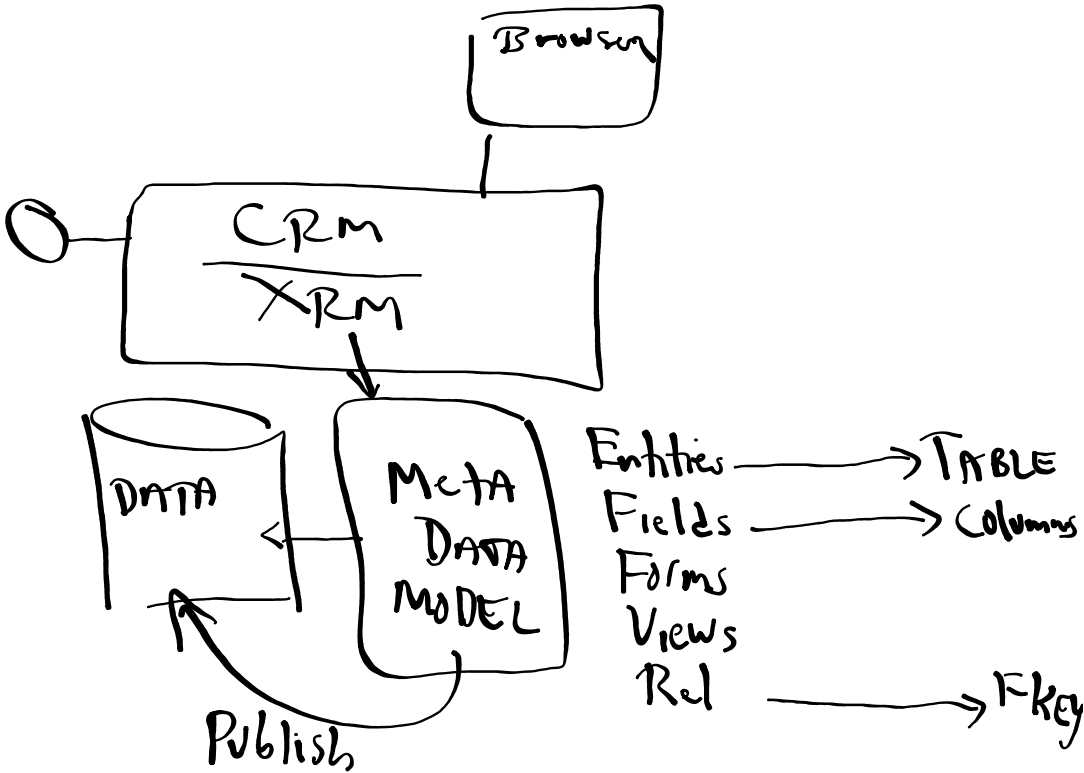
LOB Platform

- Data Model
- Forms
- Reports/Dashboard
- Messages
- Routing
- Security - RBAC
- Integration
- BP / WF







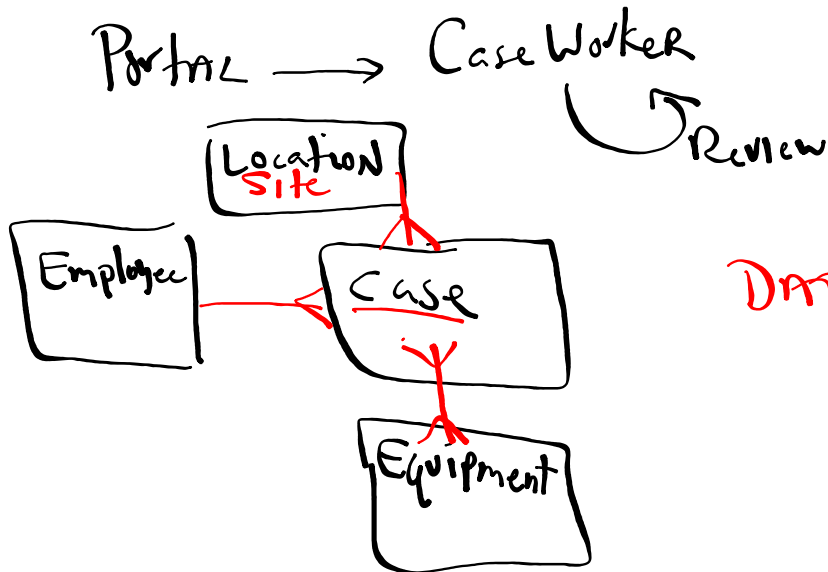


Use Cases

Accident Reports

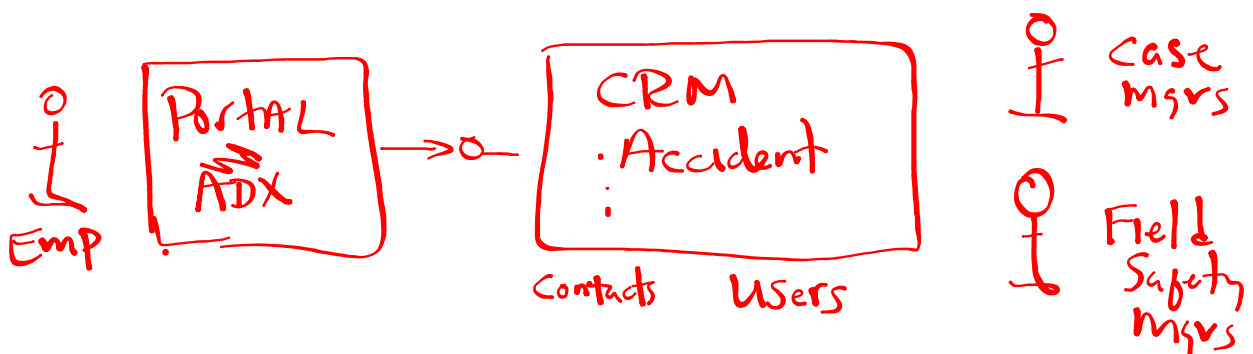
ex osha

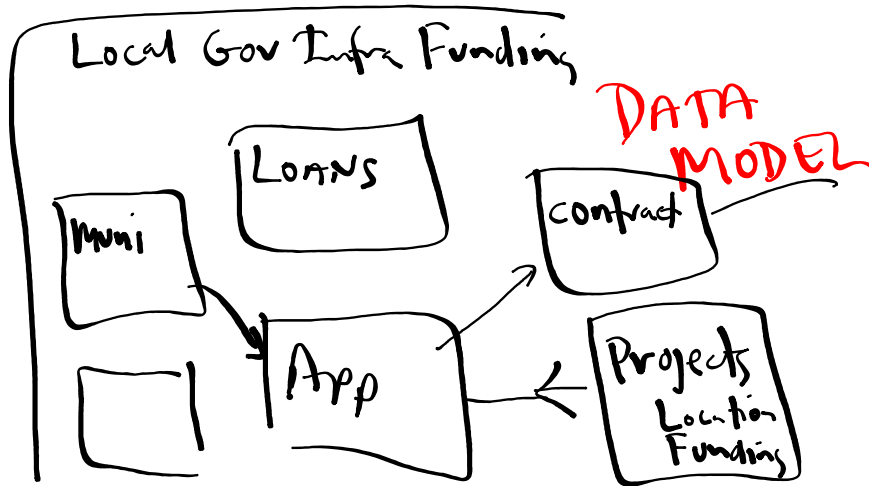
ARS

NORMA - SAFE

DATA MODEL

Business Process





BP App Submission > Review > Funding

WF

- Empty mini
- Assign 1st Reviewer

Roles

- Reviewer
- Approver
- Loan Proc
- MANAGER

Reporting

Integrations



DAY 2 Agenda

- ✓ Recap DAY 1
- ✓ Mobile
- ✓ Biz Processes
- ✓ Workflow
- ✓ Multi Tenancy
- ✓ Deployment

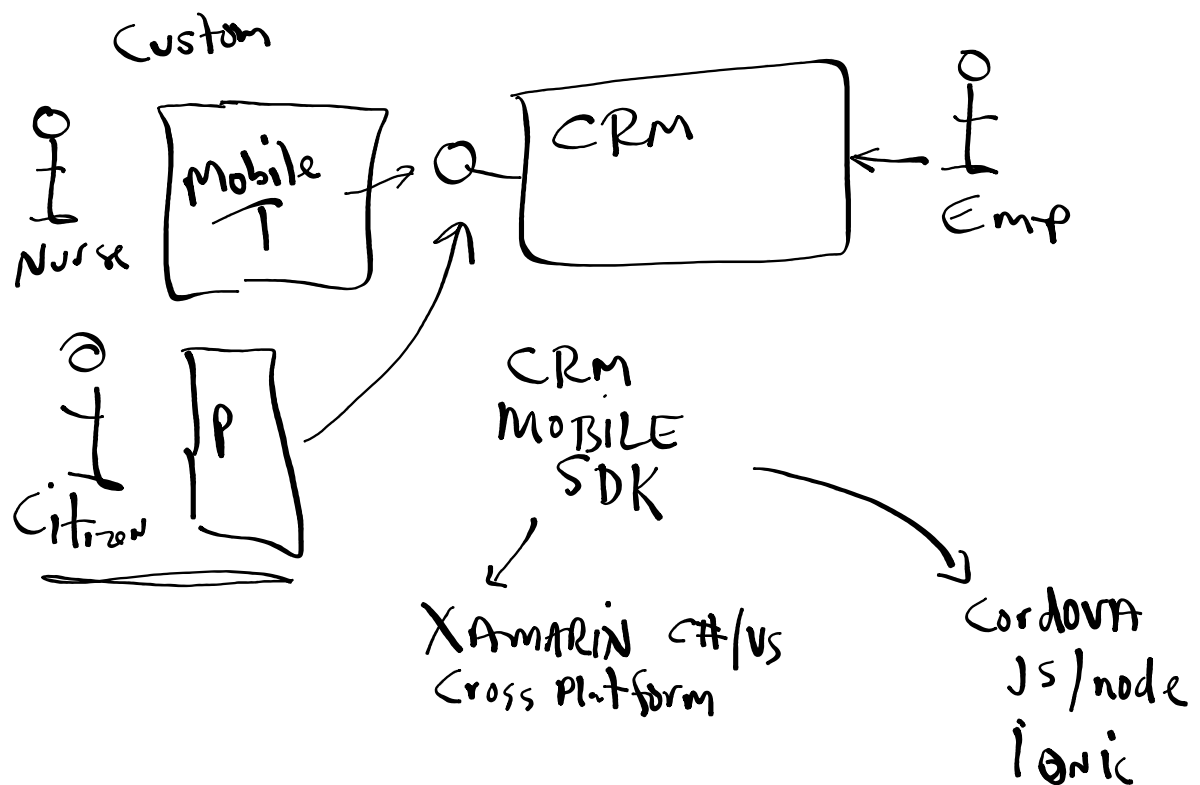
Security / Biz Units
FLS/RBF

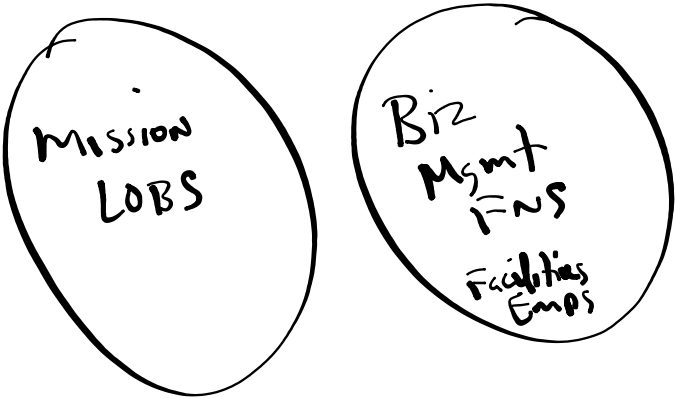
[CRM + SP/Office

✓ Reporting

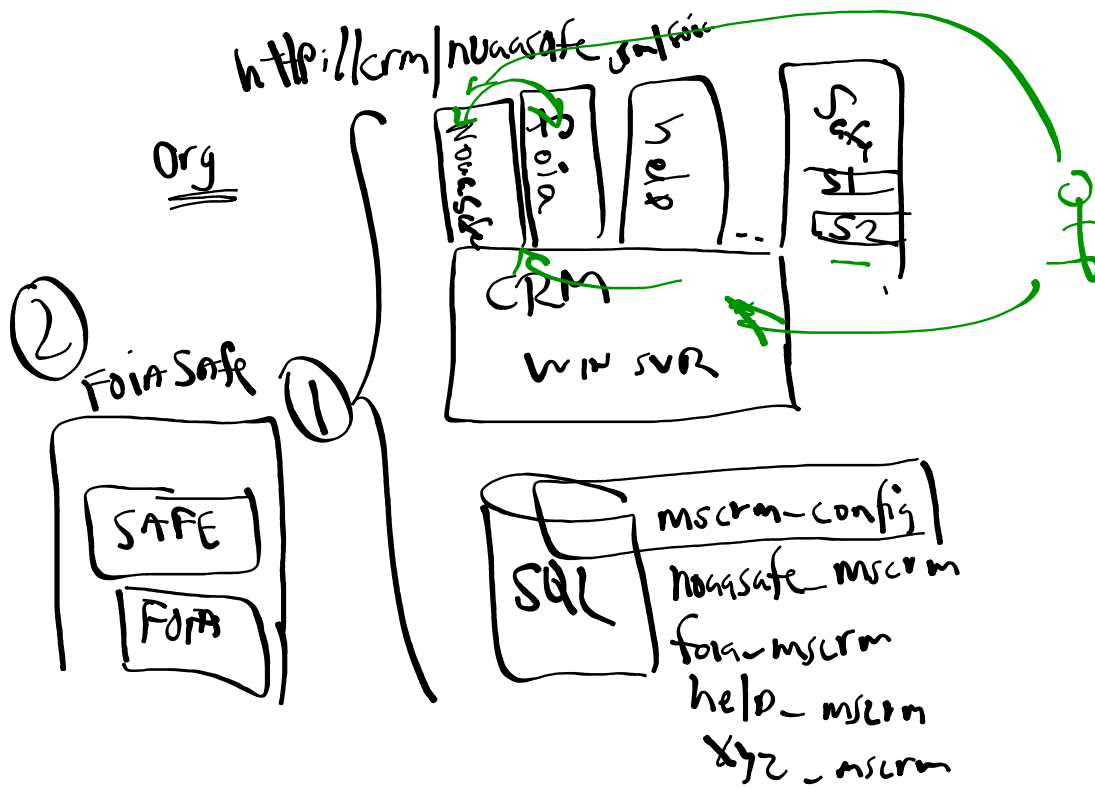
Roadmap

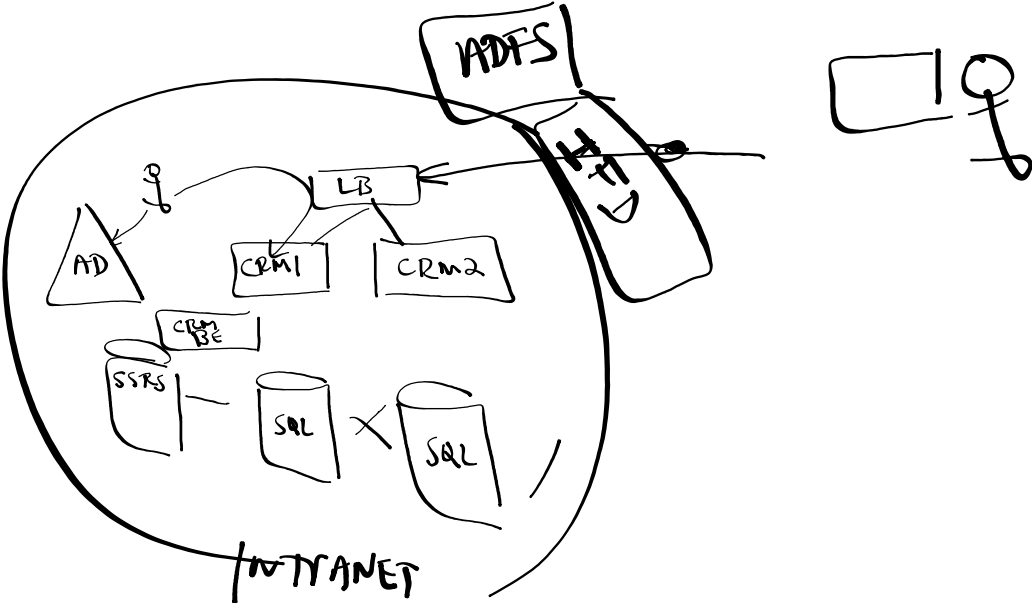
Config Summary/Wrap Up











PLA - Prod Line Arch

