X Rm Labs 43

Welcome to Microsoft 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?
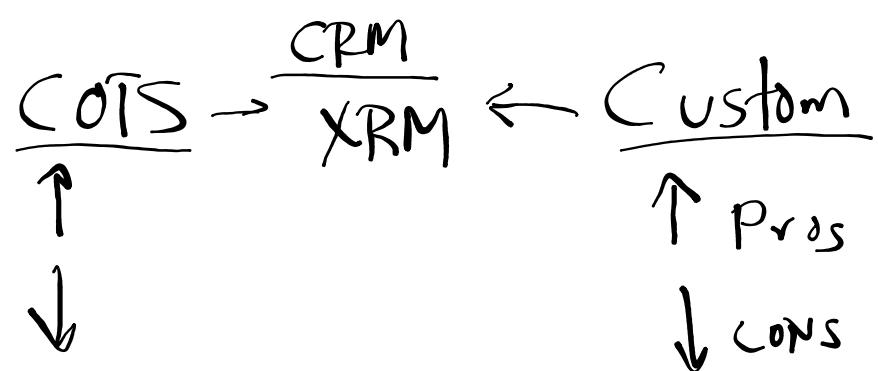
ID/GUID
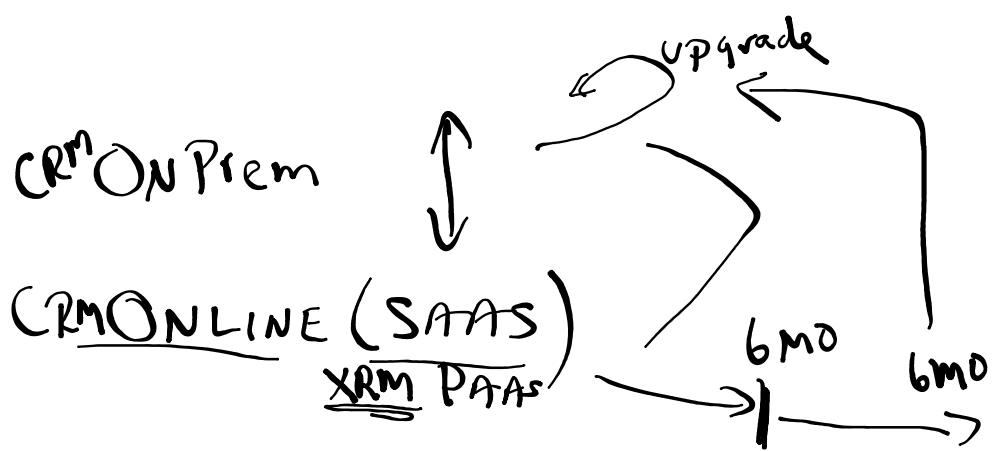
Reports Deployment
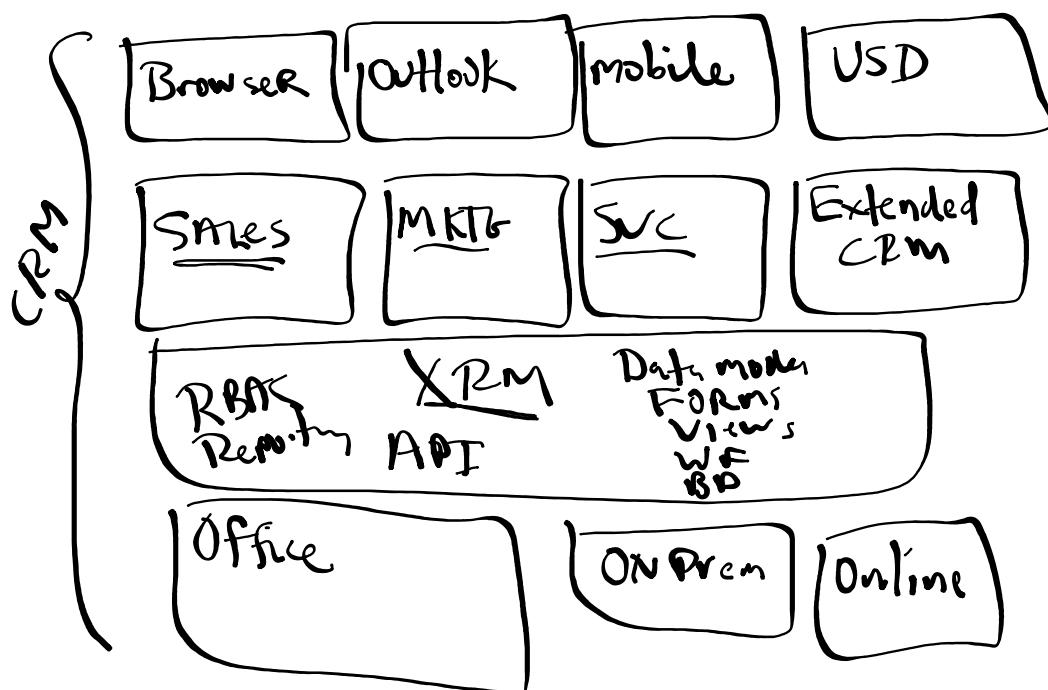
Guided Help/NAV
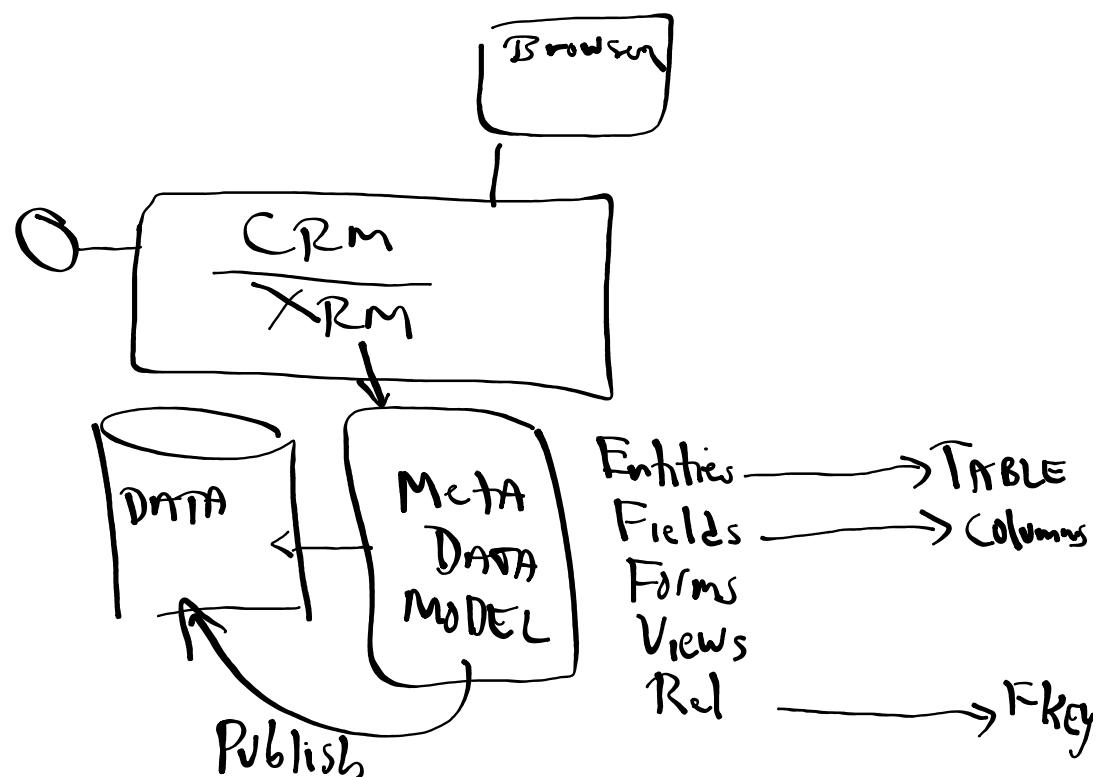
## LOB Platform

- Data Model
- Forms
- Reports/Dashboard
  Messages
  Routing

- Security - RBAC
- Integration
- BP/WF

$$\text{COTS} \rightarrow \frac{\text{CRM}}{\text{XRM}} \leftarrow \text{Custom}$$

COTS: ↑ ↓

Custom: ↑ Pros ↓ CONS

CRM ON Prem

CRM ONLINE (SAAS)
XRM PAAS

upgrade

6 MO

6 MO

CRM

| Browser | Outlook | mobile | USD |

| Sales | MKTG | SVC | Extended CRM |

RBAC	XRM	Data model
Reporting	API	FORMS
		Views
		WF
		BD

| Office | ON Prem | Online |

Browser

CRM / XRM

DATA

Meta Data Model

Publish

Entities ⟶ TABLE
Fields ⟶ Columns
Forms
Views
Rel ⟶ F-key
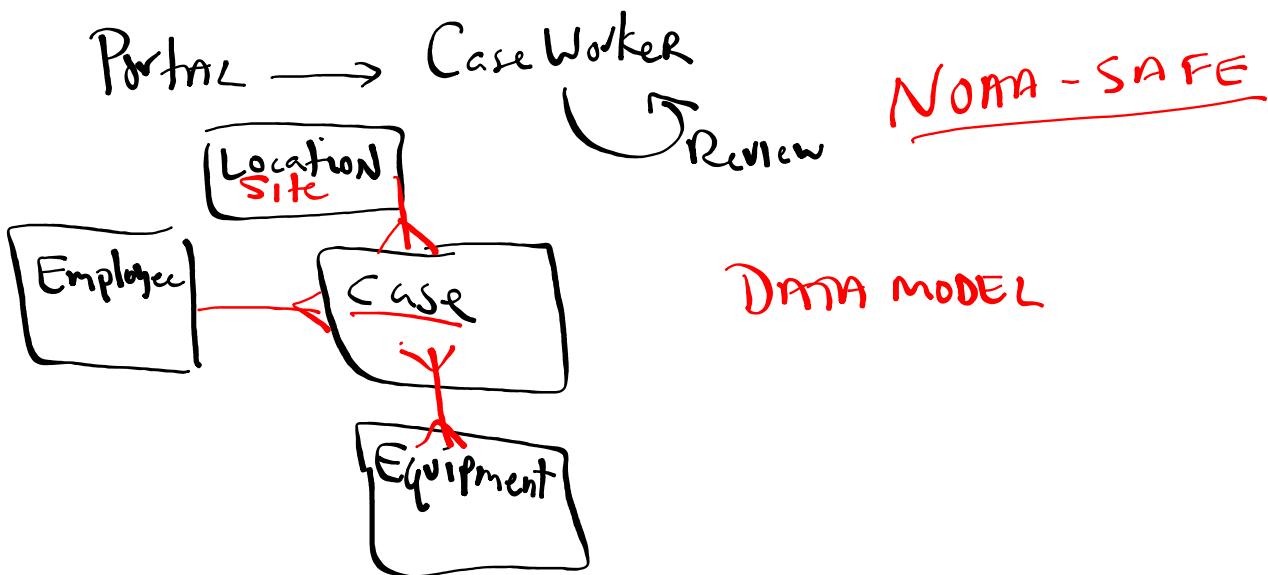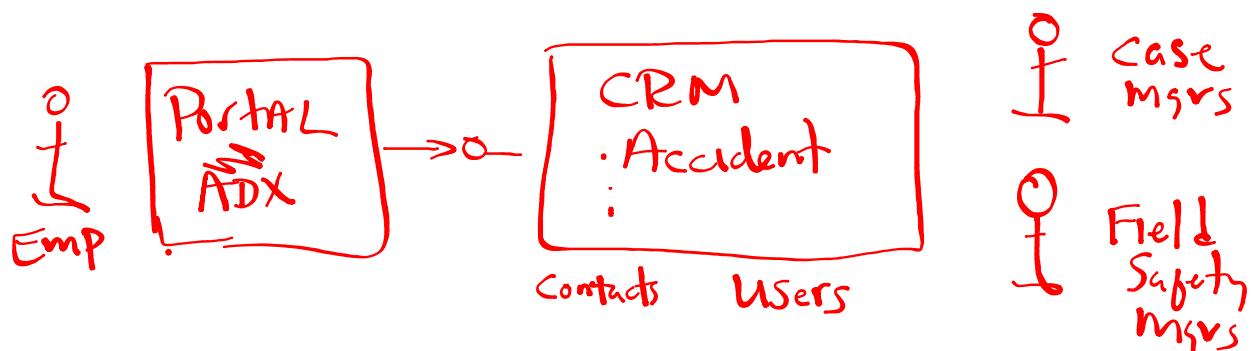
Use Cases
Accident Reports
ex osha

ARS

Portal ⟶ Case Worker
↳ Review

NOAA - SAFE

DATA MODEL

Location Site

Employee — Case

Equipment

Business Process

Portal ADX → o — CRM
· Accident
:

Emp

Contacts   Users

Case mgrs

Field Safety mgrs

Local Gov Infra Funding

DATA MODEL

LOANS

Muni

Contract

App

Projects
Location
Funding
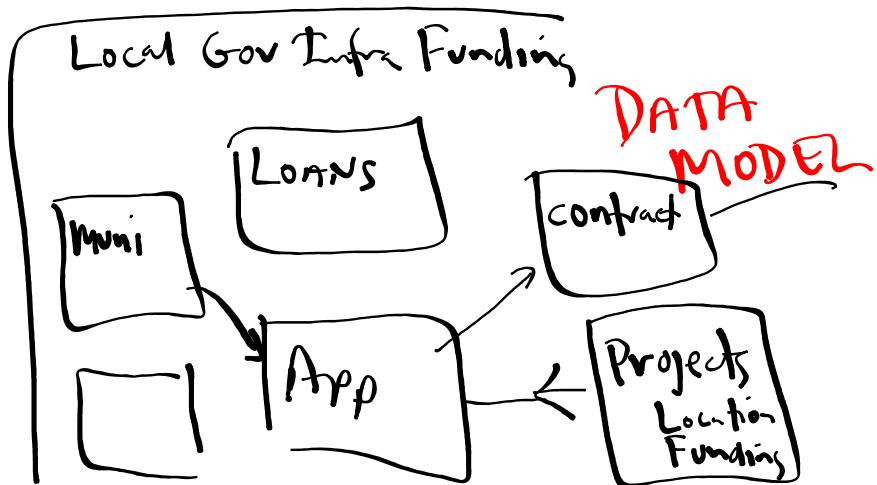
BP   App
     Submission > Review > Funding

WE
    • Email muni
    • Assign 1st Reviewer

Roles
    – Revier
    – Approver
    – Loan Proc
    – MANAGER

Reporting

Integrations