



Microsoft

Microsoft Dynamics 365

Intelligent Business Applications

Patrick Kitchell
Technical Solution Specialist



How Microsoft can support retailers with different technological solution to enhance shopping experience, omnichannel strategy, CRM

The students will work with subjects like customer journey, shopper marketing, crosschannel/omnichannel, store management and interior design as well as communications strategy, pricing, assortment and merchandise strategy etc.

The objective is, that the students get an understanding of different technological tools the retailer can use to optimize their business. Based on this they must be able to incorporate suggestions for technological solutions that the retail should consider in their strategy development.



HoloLens



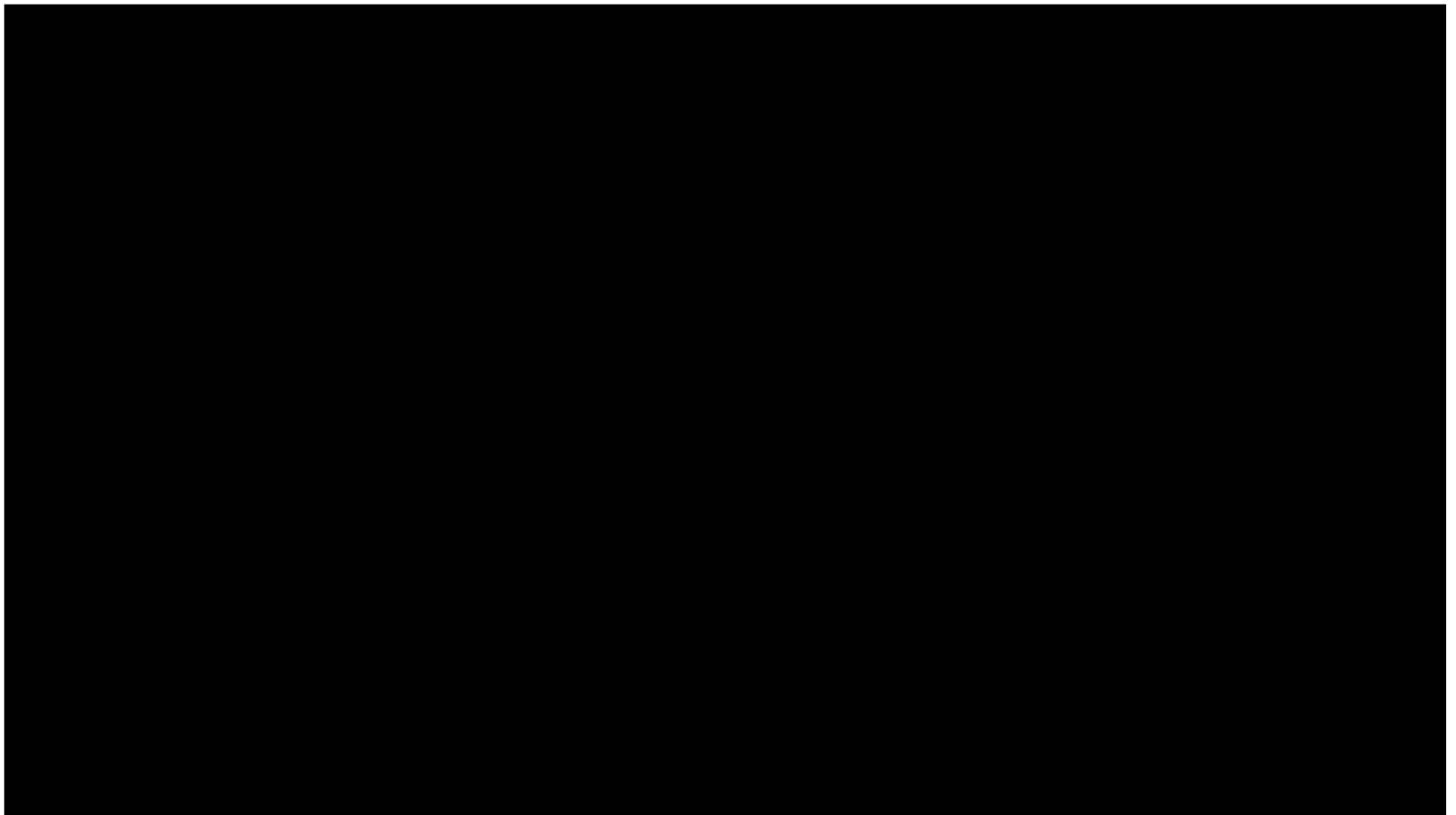
Holo portation

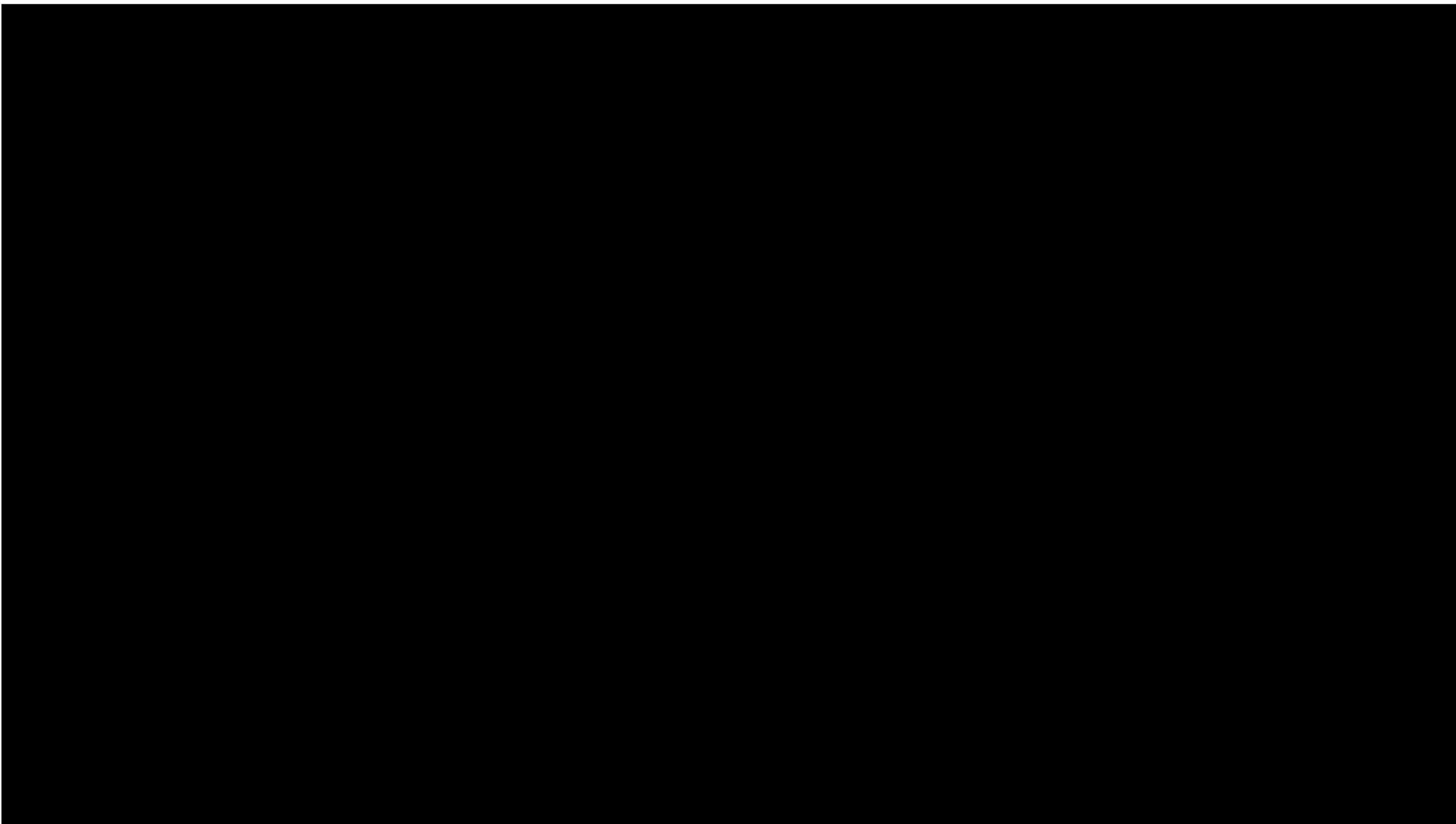


Surface Studio

INTRODUCING
amazon go







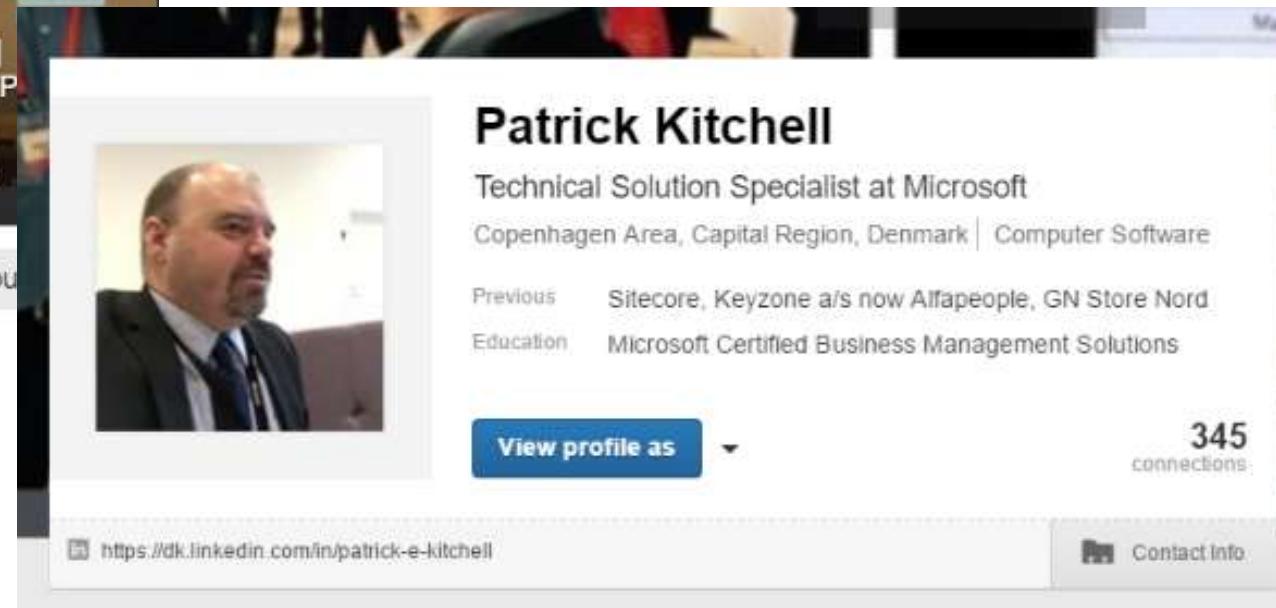
Patrick Kitchell

Technical Solution Professional, Dynamics CRM

Twitter: @denmark98

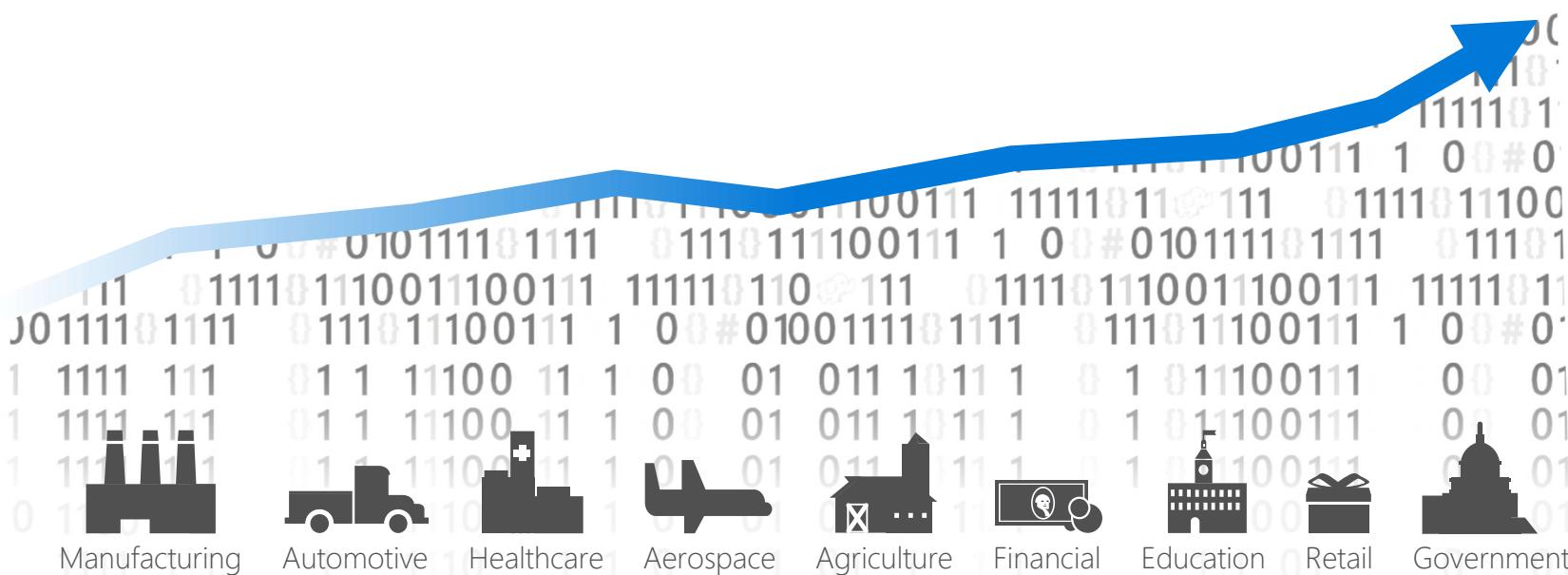


A screenshot of a Twitter profile for Patrick Kitchell (@denmark98). The profile picture shows a man with a beard. The bio reads: "IS IMPOSSIBLE TO C R THE PROCESSES T DELIVER LONG-TERI EXCELLENCE." Below the bio, it says "Patrick Kitchell" with a globe icon and a blue bird icon, followed by "@denmark98". The description continues: "Futurist, Artist, Technologist | CRM and Marketing Believer | Contributor on Digital Doughnut, Sitecore, Microsoft and More | P Speaker". At the bottom, it says "Copenhagen, Denmark · http://thebluecollarmarketer.com". The stats show: TWEETS 86,964, FOLLOWING 67,580, FOLLOWERS 83,015, LISTED 1,881. There is an "Edit your bio" button.



A screenshot of a LinkedIn profile for Patrick Kitchell. The profile picture shows a man with a beard. The name "Patrick Kitchell" is prominently displayed at the top. Below it, the title "Technical Solution Specialist at Microsoft" and location "Copenhagen Area, Capital Region, Denmark | Computer Software" are shown. The "Previous" section lists "Sitecore, Keyzone a/s now Alfapeople, GN Store Nord". The "Education" section lists "Microsoft Certified Business Management Solutions". A "View profile as" button is visible, along with a link to the profile page: "https://dk.linkedin.com/in/patrick-e-kitchell". The connection count "345 connections" is also present.

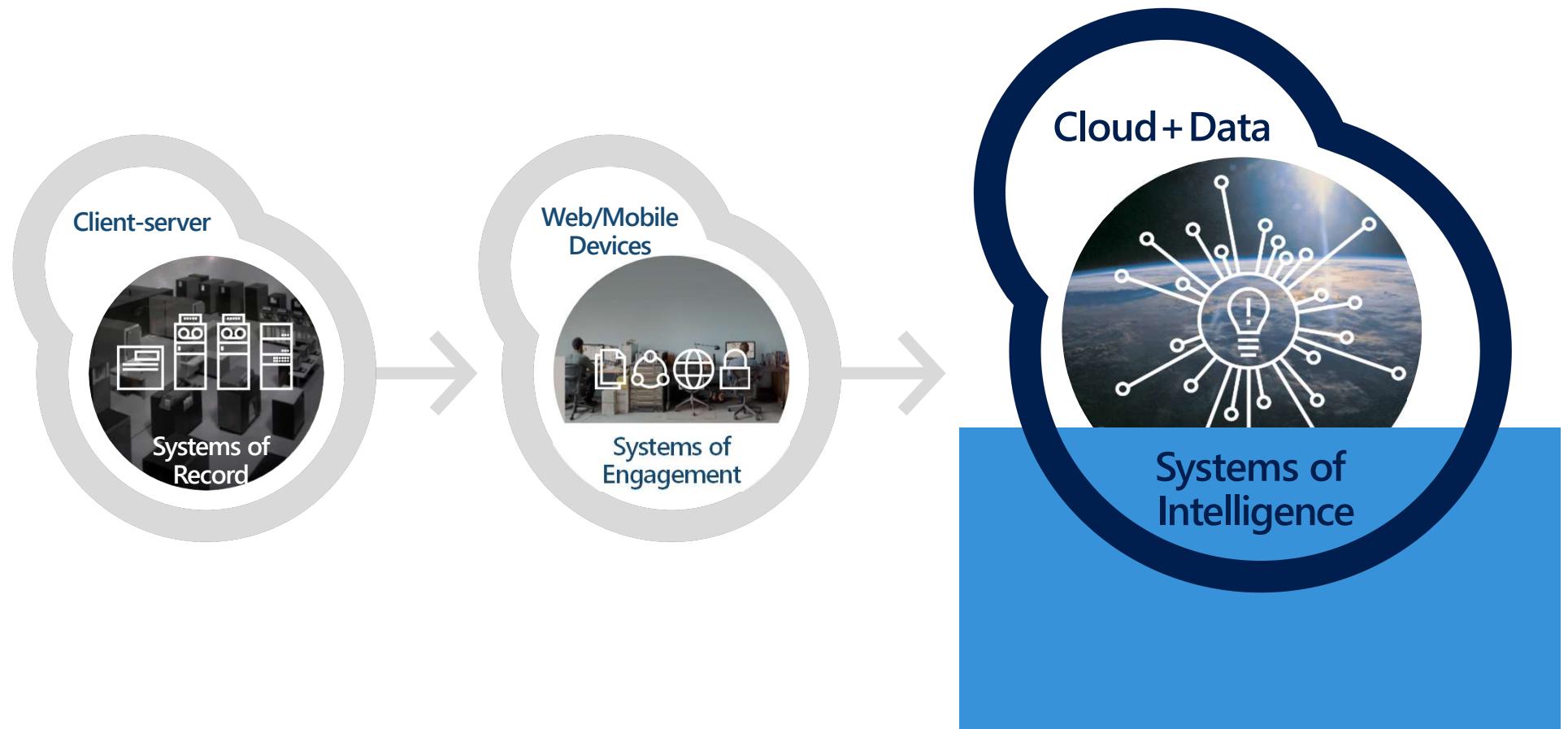
Data is transforming business



86% of CEOs
consider "Digital"
their #1 Priority

CEOs believe
technology will
transform their
business more
than any other
global trend

The era of systems of intelligence is here



#msdk10



Our society & technology





“

EMPOWER EVERY PERSON AND
EVERY ORGANIZATION ON THE
PLANET TO ACHIEVE MORE

”

SATYA NADELLA
[CEO, MICROSOFT - 2015]

#msdk10

Where is Microsoft Investing for the future?



"At our core, Microsoft is the productivity and platform company for the mobile-first and cloud-first world."

We will reinvent productivity to empower every person and every organization on the planet to do more and achieve more."

Satya Nadella, CEO Microsoft



Mission

Worldview

Strategy

Ambitions



Dynamics 365 Advantage

Purpose-built



Start with what
you need and grow
at your own pace

Productive



Familiar tools in
the context of your
business processes

Intelligent



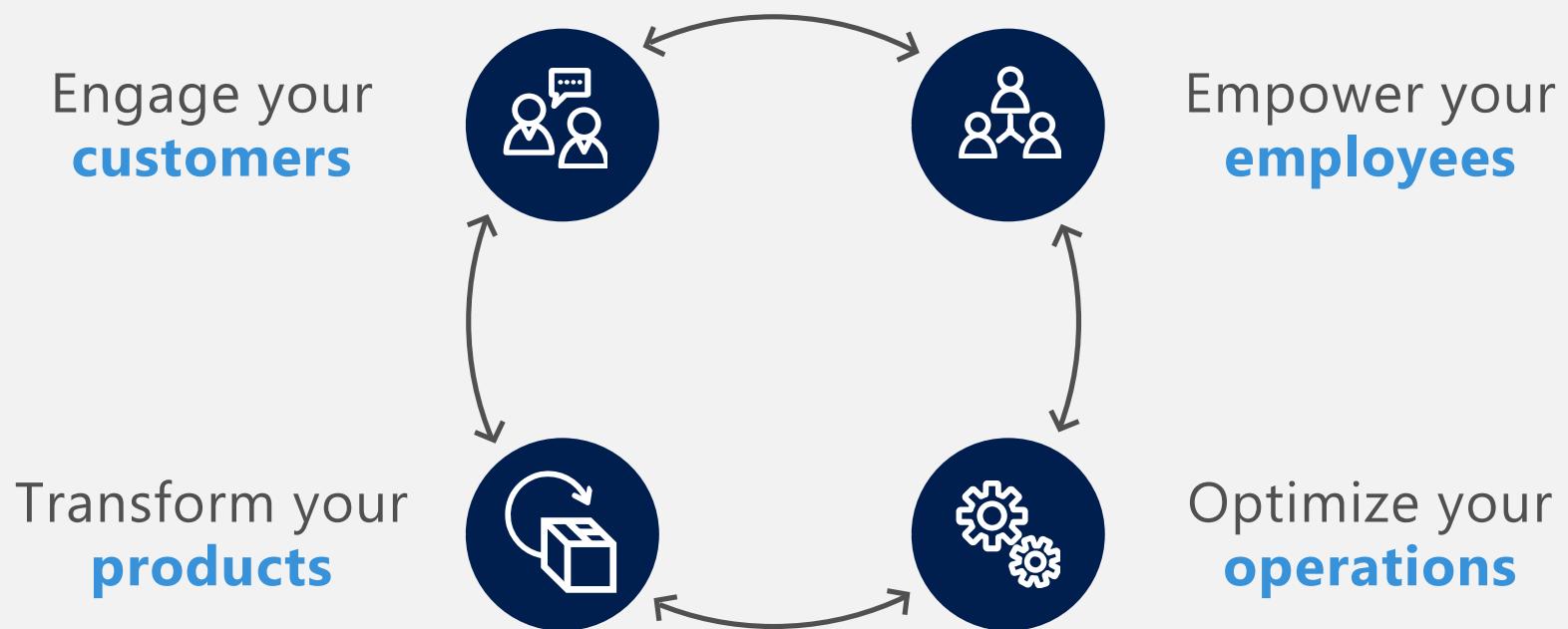
Built-in intelligence
to proactively guide
to optimal outcomes

Adaptable



Grow, evolve and
transform with modern,
extensible platform

Digital Transformation



Next Generation Intelligent Business Applications



CRM



ERP

Next Generation Intelligent Business Applications



Dynamics 365

Intelligent business applications in the cloud

Microsoft AppSource

Microsoft Dynamics 365



Sales



Customer Service



Operations



Field Service



Project Service
Automation



Marketing +
Adobe

Customer Insights



Office 365



Power BI

Cortana
Intelligence

Azure IoT

Common application platform: PowerApps, Microsoft Flow, Common Data Service

Dynamics 365 Business Process Support

Purpose-built business applications

 Sales	Opportunity management	Social selling	Content collaboration	Mobile sales	Planning & management	Intelligence
 Customer Service	Omni-channel	Portal	Agent enablement	Onsite service	Knowledge	Intelligence
 Marketing *						
 Field Service	Scheduling and dispatch	Asset and warranty management	Service agreements	Inventory management	Mobile	Intelligence
 Project Service Automation	Opportunity management	Resource management	Time and expenses	Project planning	Team collaboration	 Customer billing
 Operations	Retail	Procurement and sourcing	Supply chain management	Project accounting	Human capital management	 Manufacturing
						 Financial management
						Intelligence

* Adobe and Microsoft announced plans for a strategic partnership. Microsoft will make Adobe Marketing Cloud its preferred marketing service for Dynamics 365 Enterprise edition.

Purpose-built



Productive

Intelligent

Adaptable

- Built for your business, works with existing systems
- Implement business processes across silos
- Start with what you need, expand at your own pace

Unified experience across apps

The new home for all your business apps

Here you'll find all your Microsoft Dynamics 365 apps — from sales and service to operations and financials — along with apps that work with them from Microsoft AppSource.

Take a quick tour →

Learn more about Dynamics 365

Sync Filter

Search my apps ...

My Apps

- Dynamics 365 for Customer Service
- Dynamics 365 for Financials
- Dynamics 365 for Operations
- Dynamics 365 for Sales
- Dynamics 365 for Health360 Care Coordination

Earn loyalty by giving your agents the complete information and digital intelligence they need to provide seamless service.

Makes ordering, selling, invoicing, and reporting easier—starting on day one.

Optimize your operations with digital intelligence that helps you make smarter decisions faster and grow globally at your pace.

Increase your sales with automation and digital intelligence helping your salespeople stay focused and work smarter.

Engage patients, plan, coordination + personalize care.

Dynamics 365

Microsoft Dynamics 365



Project Service
Automation



Sales



Customer Service



Field Service



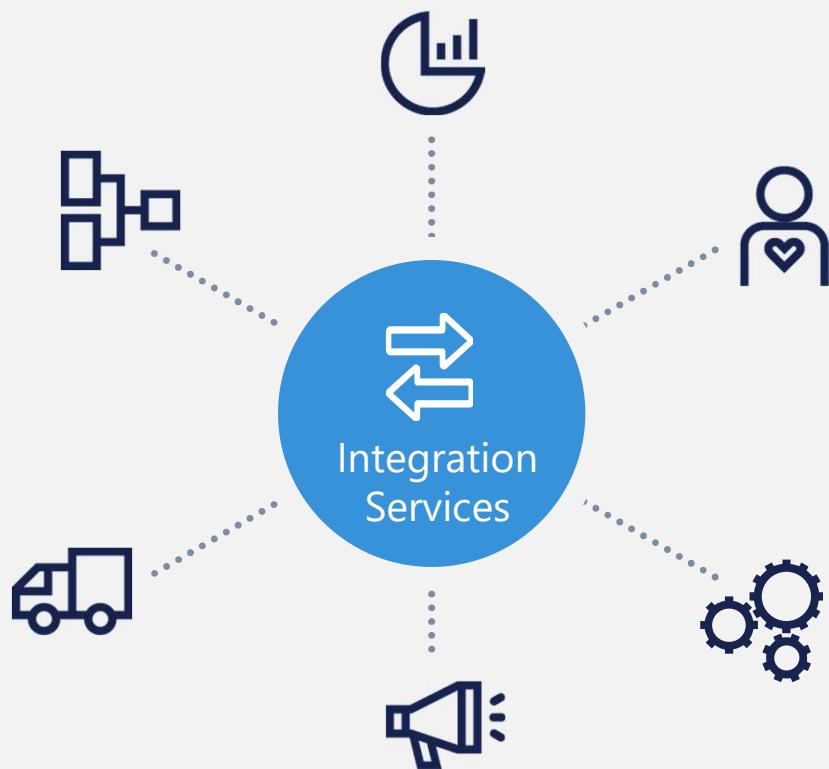
Operations



Marketing by
Adobe

Connected Business Platform

Purpose-built end-to-end business processes for Dynamics 365



➤ CONFIGURATION & MANAGEMENT

- Admin Portal
- Entity Mapping

➤ DATA SYNCHRONIZATION

- Change Tracking
- Templates
- Dynamics 365 apps only

Purpose-built end-to-end business process

Empower people to delight customers through an end-to-end view

PROCESS



PERSONAS



ACCOUNT
MANAGER



SALES
REPRESENTATIVE



SALES
MANAGER



PRODUCTION
PLANNER



CREDIT AND
COLLECTION
MANAGER

Customer
lifetime value

Payment
history*

Pricing, discounts,
taxation

Product
availability

Order information,
resource reservations

Purpose-built end-to-end business process

Empower people to delight customers through an end-to-end view

PROCESS



MASTER DATA



TRANSACTIONAL DATA



Productive



Intelligent

Adaptable

- Productivity where you want to work
- Immersive user experience with Office 365
- Available on iOS, Android, Windows and web

Dynamics 365 + Office 365

The Power of Office 365



New Tools in 'of the shelf' Office 2016 – Apps, Predictive Analytics etc.



BUILT FOR TEAMWORK



Co-authoring



Skype meetings



WORKS PERFECT WITH WINDOWS 10



Cortana + Office



Single Sign On



WORKS FOR YOU



New analysis opportunities



BI



OneNote Shared notebooks



Office everywhere



Office Mobile Apps



Continuum



Smart Lookup



Recently Used Dokumenter

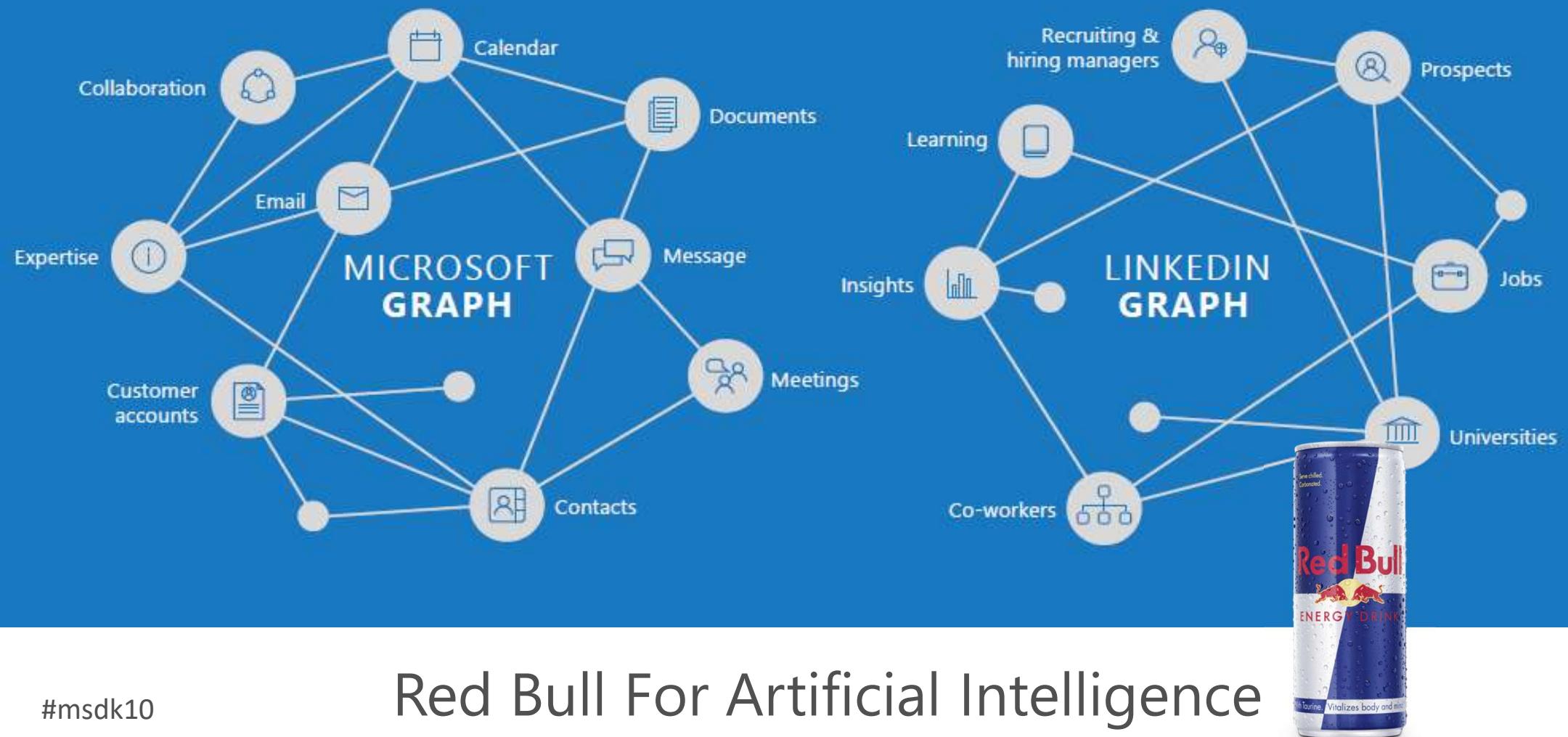


Modern attachments

<https://graph.microsoft.com/>



Linkedin and Microsoft Graph Combined



Office 365

Dynamics 365



Intelligent

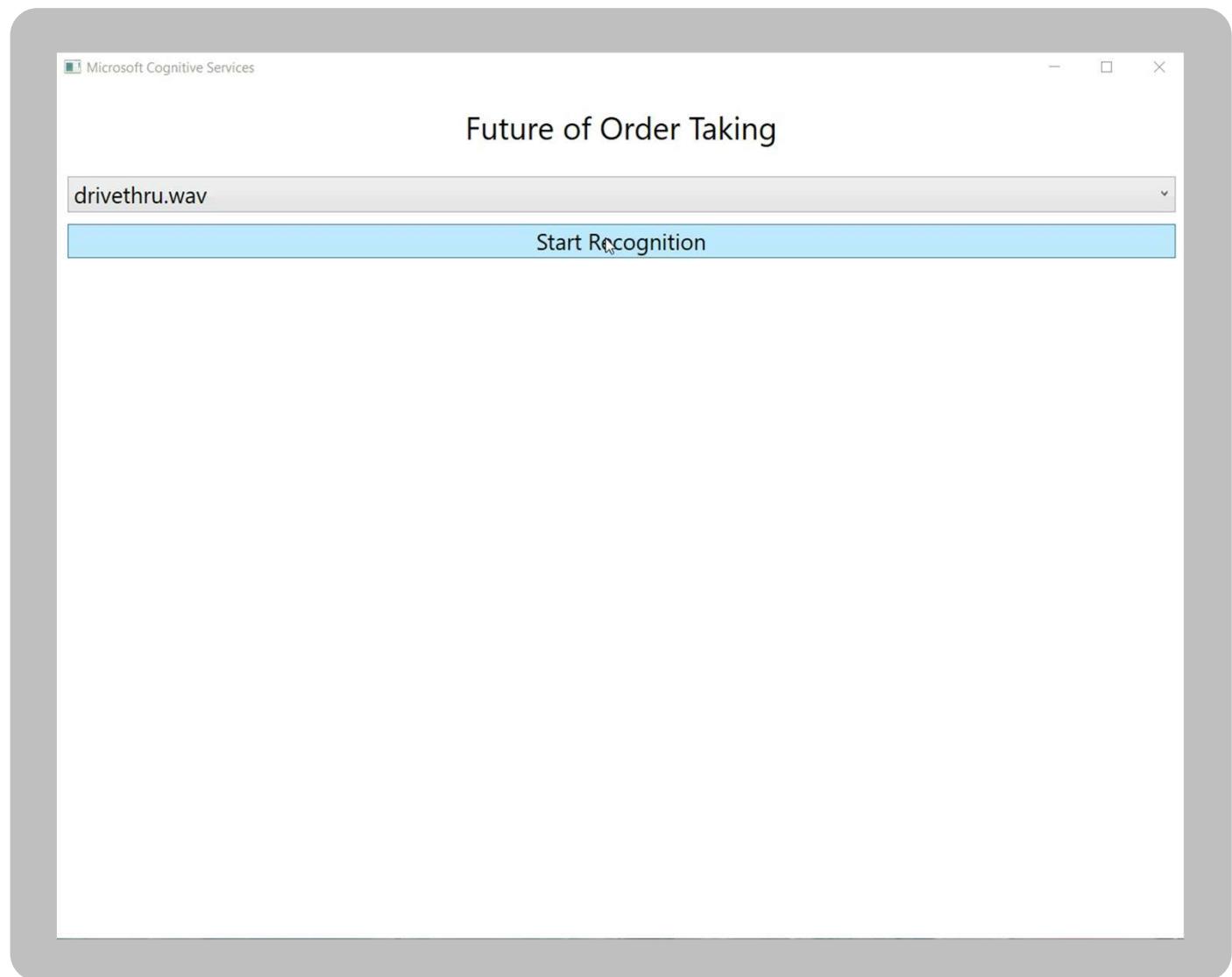


Adaptable

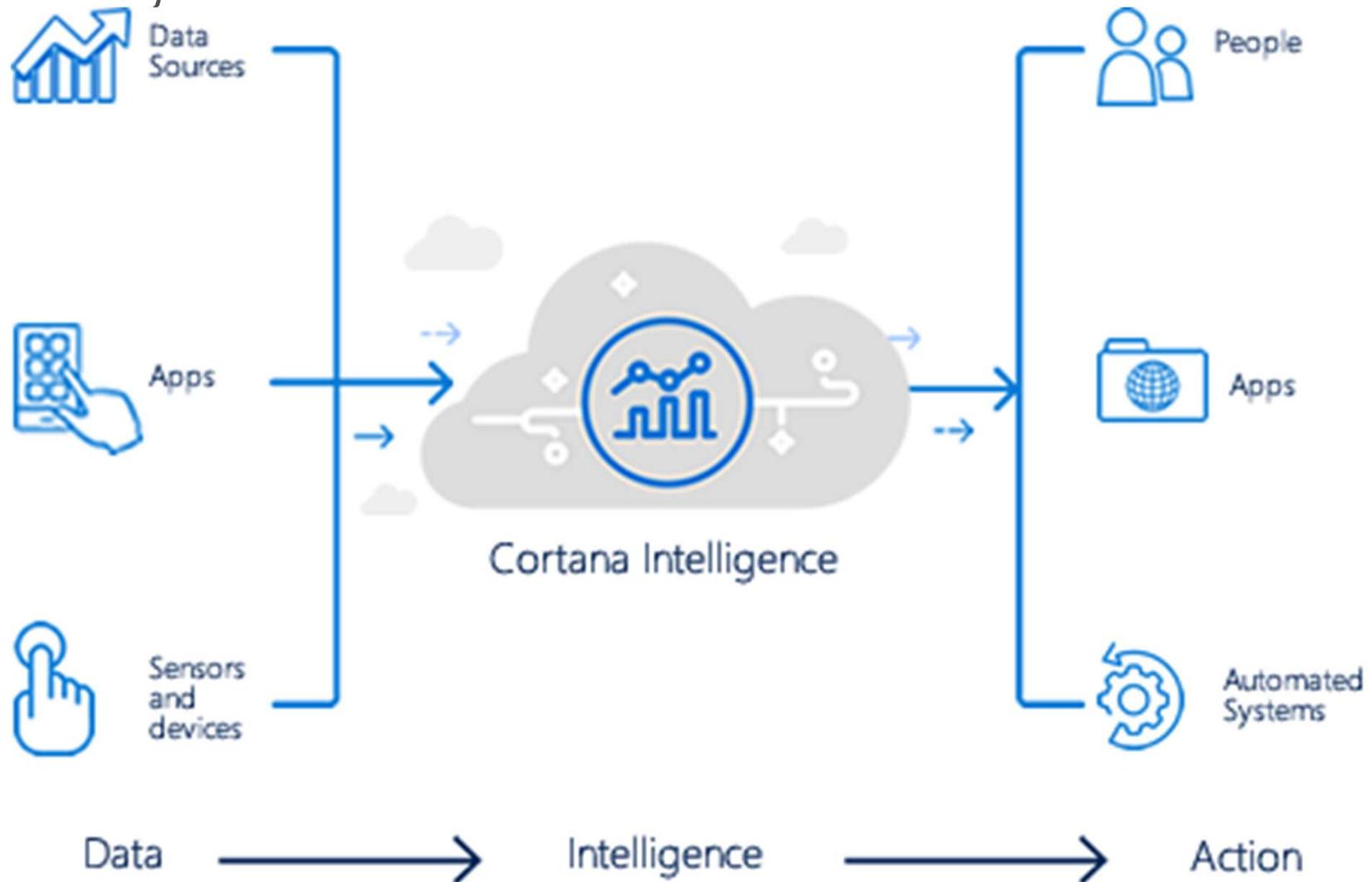
- Built-in Artificial Intelligence
- Out-of-box data visualizations and BI
- Transformational Advanced Analytics platform

Dynamics 365 + Cortana Intelligence





Cortana Intelligence



Cortana Intelligence

Cortana Analytics Suite Transform data into intelligent action



Cortana Intelligence

Cortana Intelligence Components



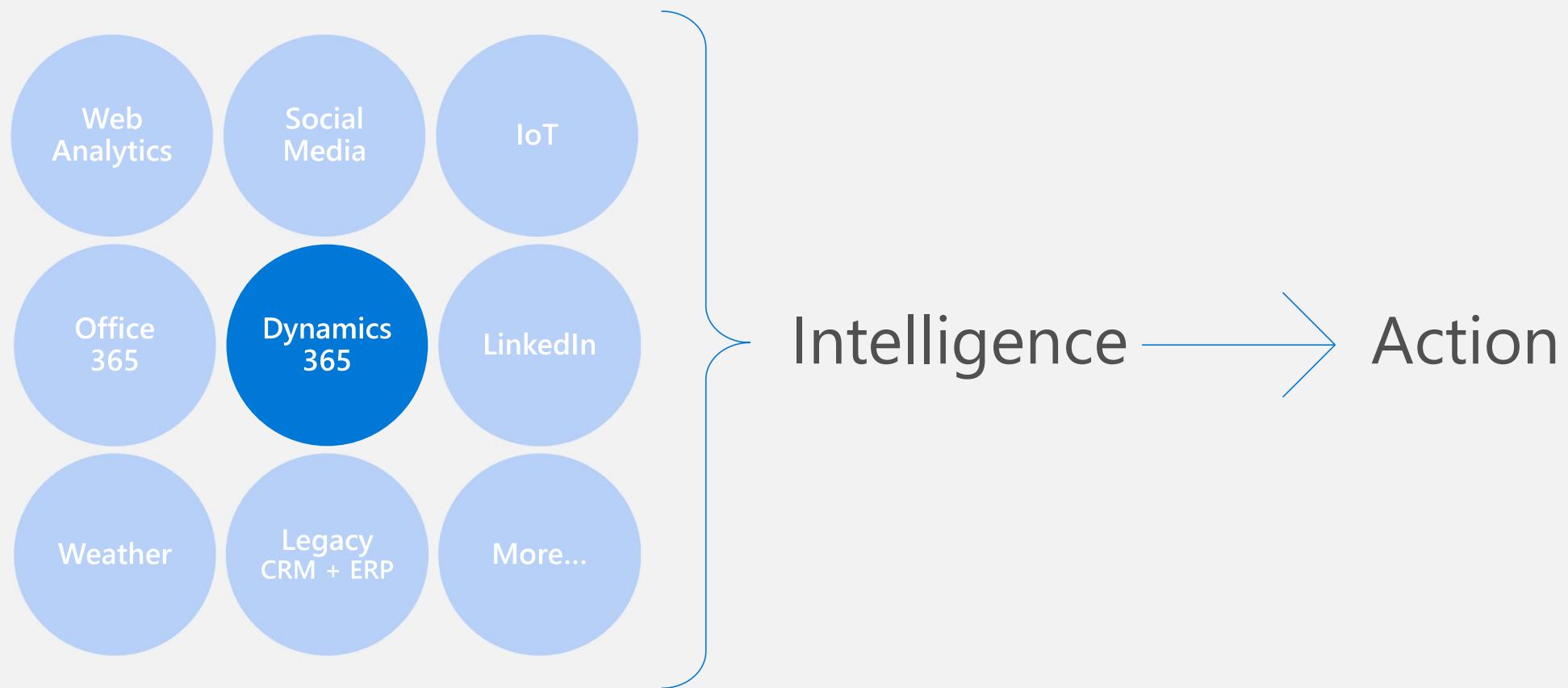
Plus other solution components such as:



Transformational intelligence platform



Transformational intelligence platform



Introducing Dynamics 365 for Customer Insights

Accelerate time to value with a SaaS solution built on Cortana Intelligence and Azure

Engage customers better in real-time

Empower every employee with actionable insights



"With Microsoft Dynamics 365 and Cortana Intelligence, we can analyze incredible volumes of social content, allowing us to understand our customers and act proactively and positively faster than ever before."

Paul Hume, Head of Technology Development at Marston's PLC

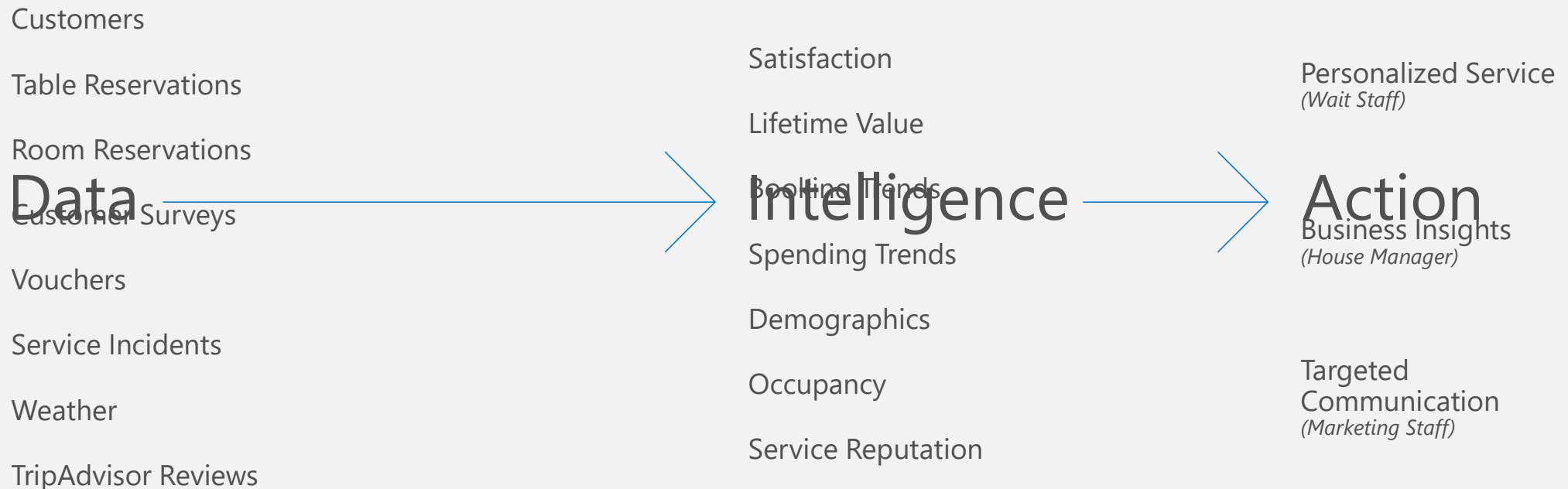
See Video



MARSTON'S

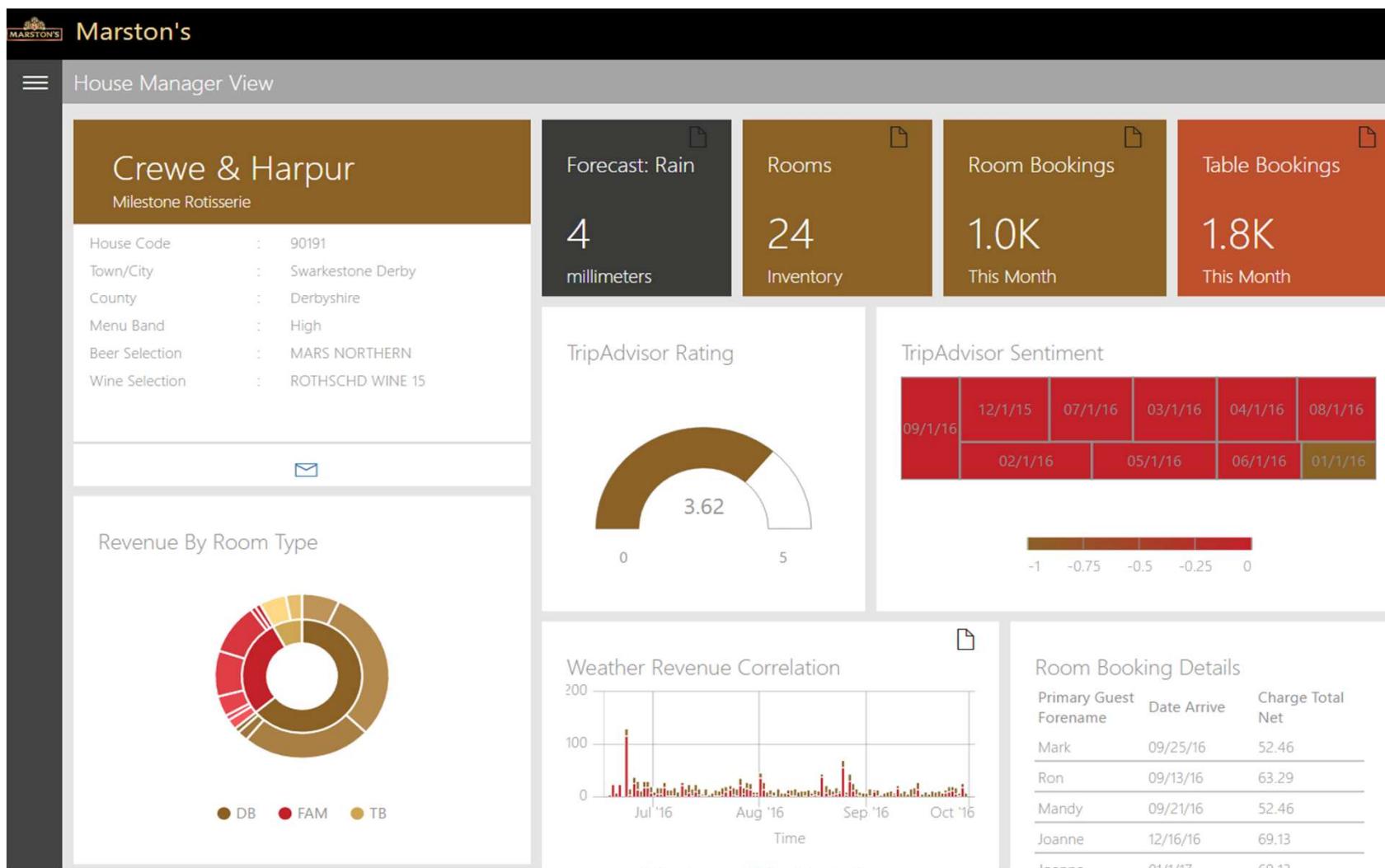
Mike McMinn

Marston's Customer Insights



Customer Insights

Insight into pub performance.



Customer Insights

Insights into customer preferences and satisfaction levels.

Marston's

Guest Insights View

Toverstone
Paul

Street : Sunnyside Street
City : Claycourt
Email : paul@contoso.com
Birthday : 10/12/1980
Anniversary : NA

Active Case
Delay in seating.

Table Bookings
3 Lifetime

Room Bookings
2 Lifetime

Journey

Marstons BookingU... 10/14/15

Marstons BookingU... 04/20/16

Contact SurveyUpsert 04/23/16

Contact Registrat. 06/11/16

Contact Registrat... 05/11/16

Satisfaction

Ambience
Service
Overall
Food
Drinks

Lifetime Value

BookingLTV 1

The screenshot displays the Marston's Guest Insights View dashboard. At the top, there's a header with the Marston's logo and a navigation menu. Below the header, the title "Guest Insights View" is displayed. The dashboard is divided into several sections: 1) A "Guest Profile" section for "Toverstone Paul" showing basic information like address, city, email, birthday, and anniversary. 2) An "Active Case" section titled "Delay in seating." 3) Two "Lifetime" booking sections: "Table Bookings" (3) and "Room Bookings" (2). 4) A "Journey" timeline showing interactions: "Marstons BookingU..." (10/14/15), "Marstons BookingU..." (04/20/16), "Contact SurveyUpsert" (04/23/16), "Contact Registrat." (06/11/16), and "Contact Registrat... 05/11/16". 5) A "Satisfaction" section featuring a radar chart with axes for Ambience, Service, Overall, Food, and Drinks. 6) A "Lifetime Value" section with a gauge chart showing a value of 1, with a legend indicating "BookingLTV".

Customer Insights

Insights to deliver personalized experiences to each customer.

Paul Toverstone

FREQUENT ★★★★☆

Value trend ↑ Last visit 10/1/2016 Birthday 10/12/1980

Seat in Zone 2

Recommended for Paul

Drink Double Drop Ale >

Meal Combo Platter >

Deal £12 2 Curries + 2 Drinks >

Relationship Insights

Uses data from Dynamics 365 + Office 365 to proactively prompt follow up activities

The screenshot shows the Microsoft Dynamics 365 Relationship Insights interface. At the top left is a circular profile picture of a person in a boat. Below it is the name "Veronica Quek". On the left, there's a sidebar titled "Today" with several items:

- Next meeting in 21 minutes**: Discuss Proposal. Description: We'll review the proposal we sent last week and do a complete review of all issues raised for it. Actions: Get Direction, Email Attendees.
- Task Due in 20 minutes**: Update Proposal. Description: Need to include comments from Sidney to the proposal. Actions: Mark Complete, Close Task.
- Opportunity is set to close soon**: New store opened - Follow up. Description: New store opened - Follow up closes on Friday, October 14, 2016. Actions: Open Opportunity.
- Phone Call due in 2 hours**: Follow up new lead.

At the bottom of the sidebar are five icons with labels: New Activity, New Record, New Note, After Meeting, and Update Contact.

On the right side of the interface, there's a sidebar titled "Favorites (3)" and "Recent (3)".

- Favorites:
 - Nancy Anderson (sample) Lead
 - My Open Opportunities by Relationsh... Opportunity
 - Sales Activity Social Dashboard System Form
- Recent:
 - Up ↑
 - Star ⭐
 - Star ⭐

Relationship Insights

Uses data from Dynamics 365 + Office 365 to proactively prompt follow up activities

The screenshot shows the Microsoft Dynamics 365 Relationship Insights interface. At the top left is a user profile for Veronica Quek with a photo of a person in a boat. Below it is a 'Today' section with two notifications:

- Sidney Higa just opened your email**
Re: Proposal Update
"Re: Proposal Update" was just opened by Sidney Higa at 01:20 PM from San Francisco, CA, USA
[Open Email](#)
- Jill Frank's email looks like potential lead**
Introduction
"I am interested in learning more to upgrade our conference room connectivity globally."
[Open Email](#)

To the right is a sidebar with 'Favorites' and 'Recent' items:

- Favorites (3)
 - Nancy Anderson (sample) Lead
 - My Open Opportunities by Relationsh... Opportunity
 - Sales Activity Social Dashboard System Form
- Recent (3)
 - Up ↑
 - Star ⭐
 - Star ⭐

A central callout box highlights an 'Opportunity at risk' for '500 3D Printers'. It states: 'There has no activity with this opportunity in last 30 days. This may affect the relationship score' and includes a large blue 'Open Opportunity' button.

At the bottom are quick action icons:

- New Activity
- New Record
- New Note
- After Meeting
- Update Contact

Relationship Insights

Uses data from Dynamics 365 + Office 365 to proactively prompt follow up activities

The screenshot shows the Microsoft Dynamics 365 interface with a floating 'Relationship Insights' window. The window displays a notification: "Sidney Higa just opened your email Re: Proposal Update". Below the notification, a message states: "'Re: Proposal Update' was just opened by Sidney Higa at 01:20 PM from San Francisco, CA, USA". A large blue button labeled "Open Email" is prominently displayed. At the bottom of the window, a message says: "There has no activity with this opportunity in last 30 days. This may affect the relationship score". A "Open Opportunity" button is also present. The main Dynamics 365 interface shows a navigation bar with icons for Home, Opportunities, and more. On the left, there's a sidebar with sections like Today, Favorites, Recent, and a sample contact entry for Nancy Anderson. The bottom navigation bar includes links for New Activity, New Record, New Note, After Meeting, and Update Contact.

Relationship Insights

Uses data from Dynamics 365 + Office 365 to proactively prompt follow up activities

The screenshot shows a Dynamics 365 interface for a contact named Veronica Quek. On the left, there's a profile picture of a person in a boat, the name "Veronica Quek", and a "Today" section. The "RECIPIENT ACTIVITY" section shows 5 Opened emails and 5 Attachment Views. Below this, a timeline lists four specific interactions:

- 11:30 am: Opened on iPhone 6 near Boston, NY |
- 11:22 am: Viewed Litware #D Printer.pdf
- 11:20 am: Clicked Hyperlink to visit <http://www.liware.com>.
- 11:30 am: Opened on iPhone 6 near Boston, NY |

At the bottom, there are "New Activity" and "New Record" buttons.

Recipient Activity will be followed.
DON'T FOLLOW

We'll remind you if Sidney Higa (sample) doesn't reply by 10/6/2016 11:13 PM.
CHANGE REMINDER REMOVE REMINDER

RECIPIENT ACTIVITY

5 Open 5 Attachment Views 5 Links Clicked 0 Replied

11:30 am Opened on iPhone 6 near Boston, NY |
11:22 am Viewed Litware #D Printer.pdf
11:20 am Clicked Hyperlink to visit <http://www.liware.com>.
11:30 am Opened on iPhone 6 near Boston, NY |

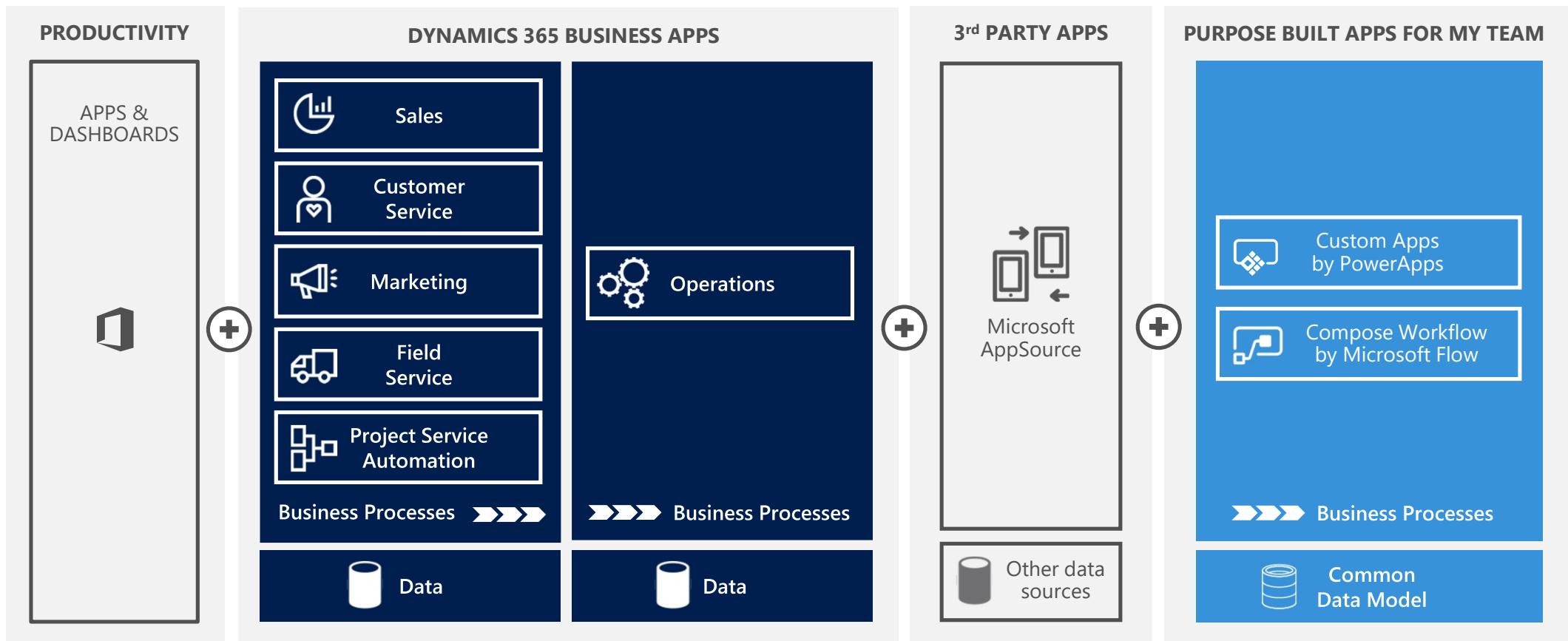
New Activity New Record

Adaptable

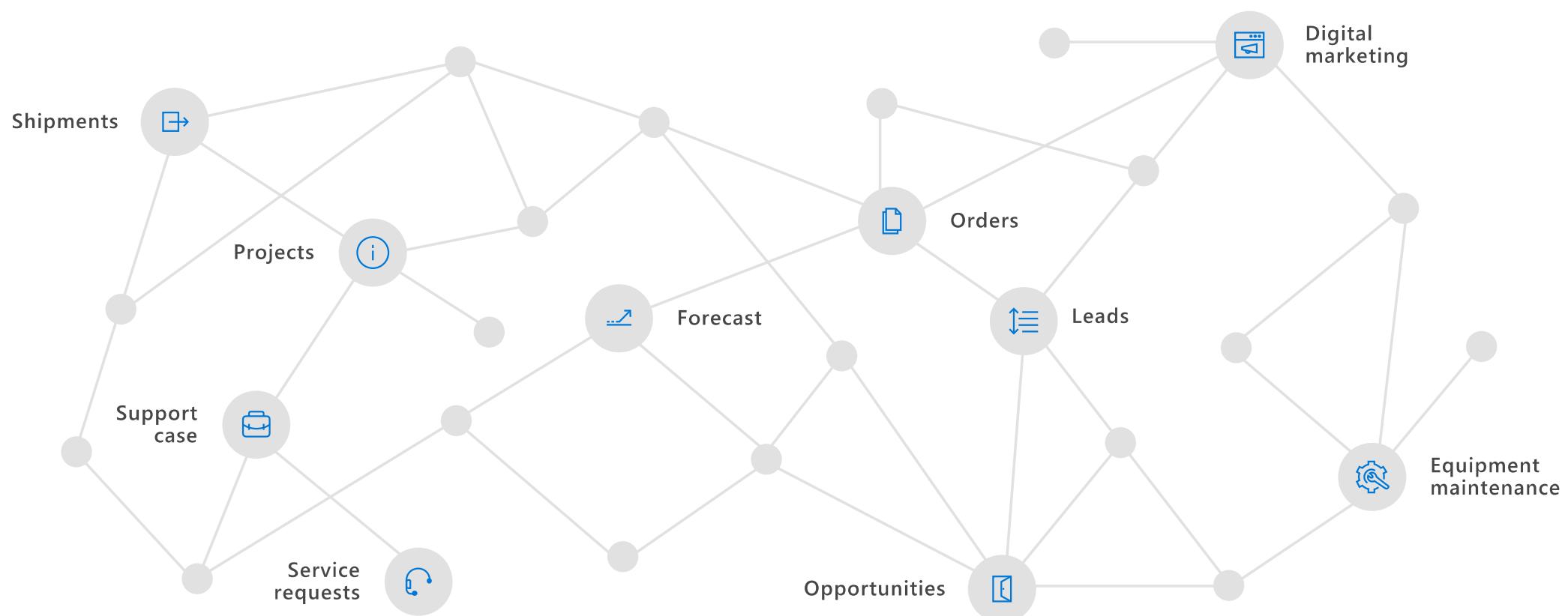


- Common Data Service across all your business
- Automate tasks by integrating across applications
- Build apps without writing code using PowerApps

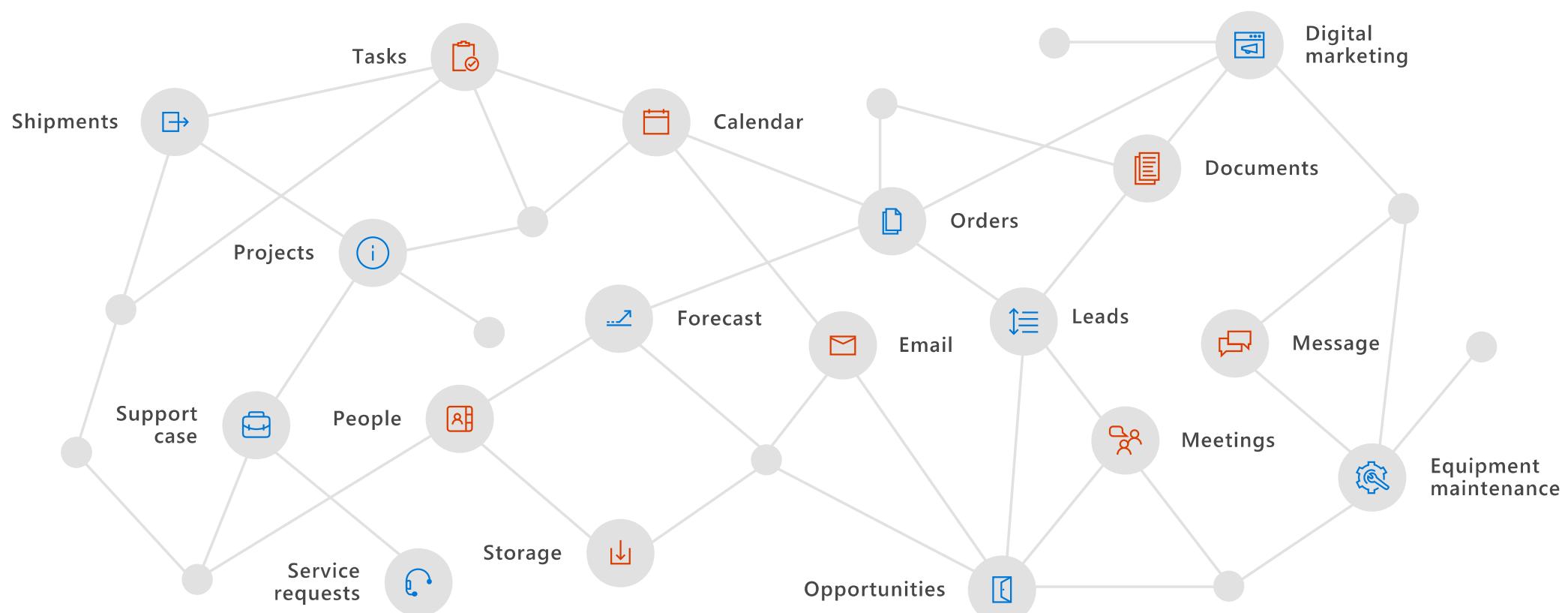
Adaptability of business processes



Dynamics 365

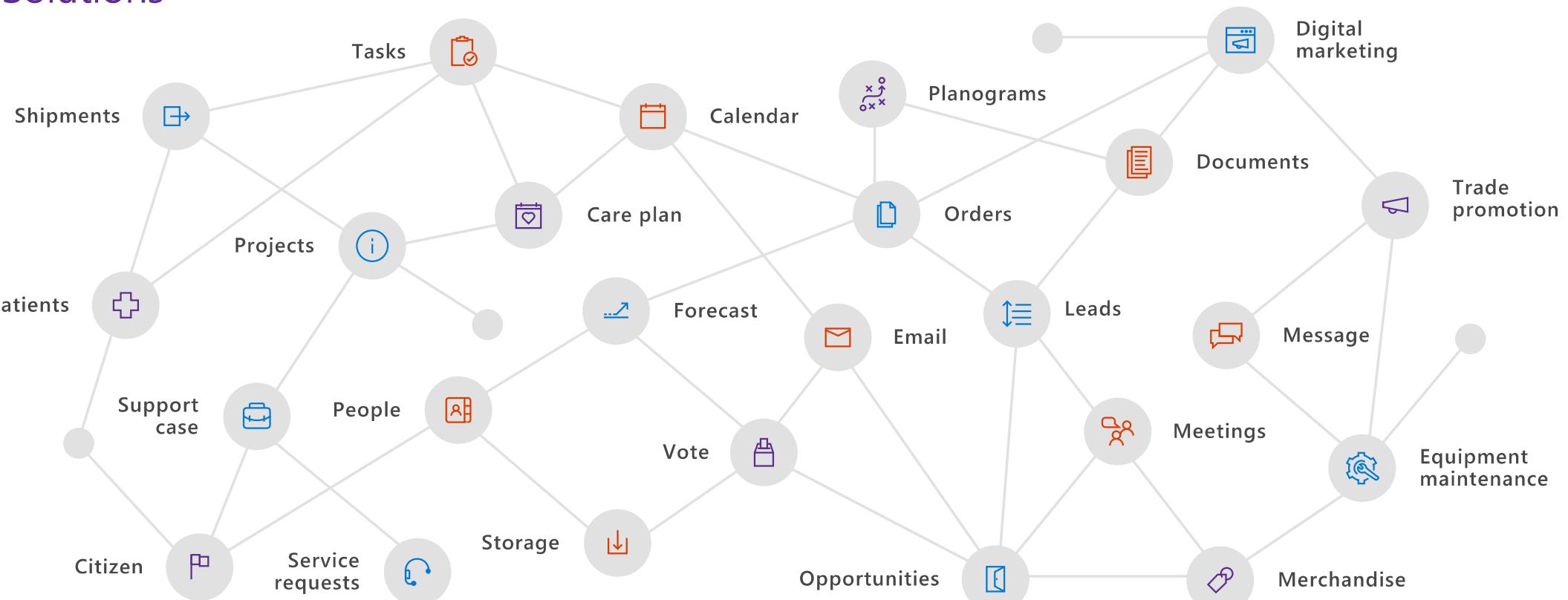


Dynamics 365 + Office 365

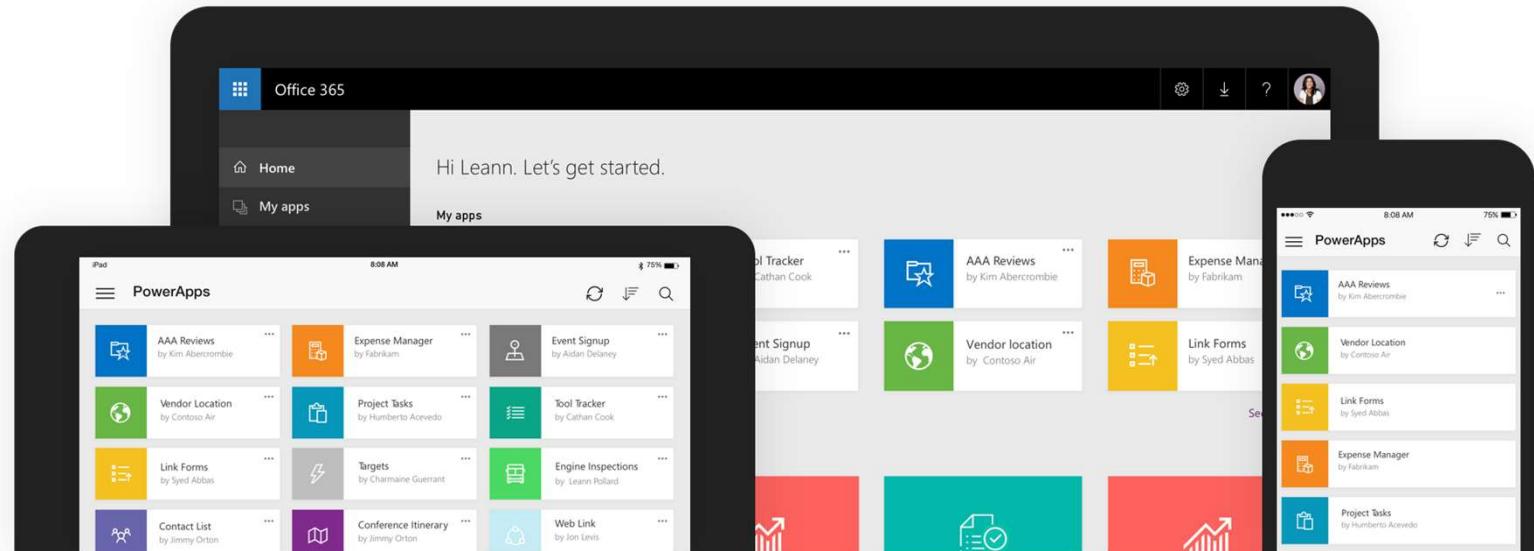


Solutions

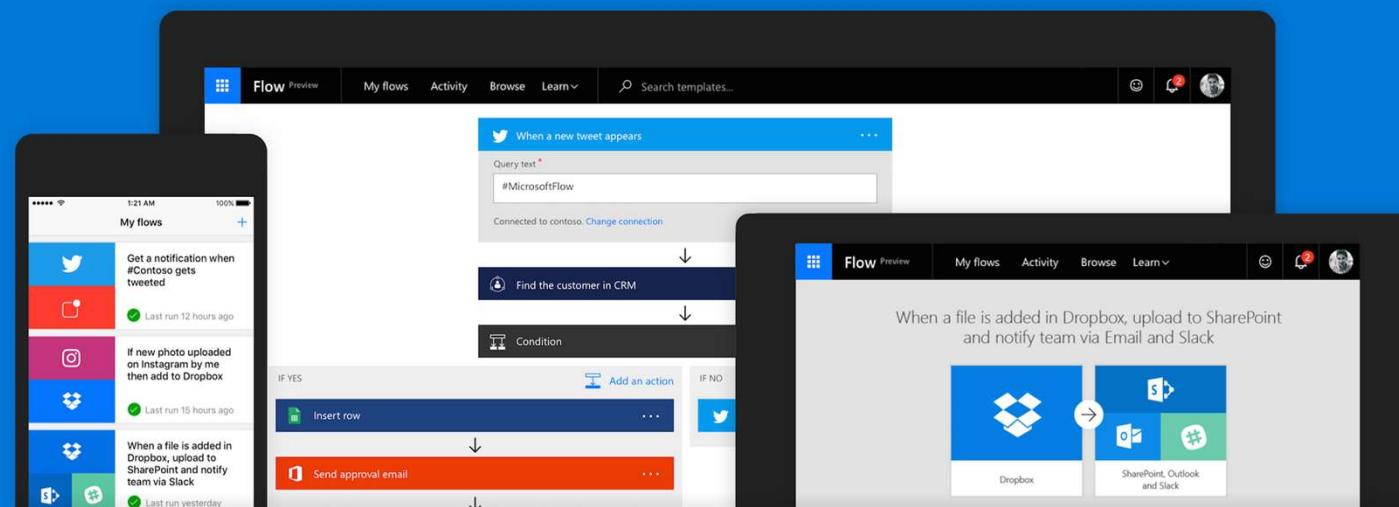
Dynamics 365 + Office 365 + Partner Industry



PowerApps



Microsoft Flow



Dynamics 365

Intelligent business applications in the cloud

Microsoft AppSource

Microsoft Dynamics 365



Sales



Customer Service



Operations



Field Service



Project Service
Automation



Marketing +
Adobe

Customer Insights



Office 365



Power BI

Cortana
Intelligence

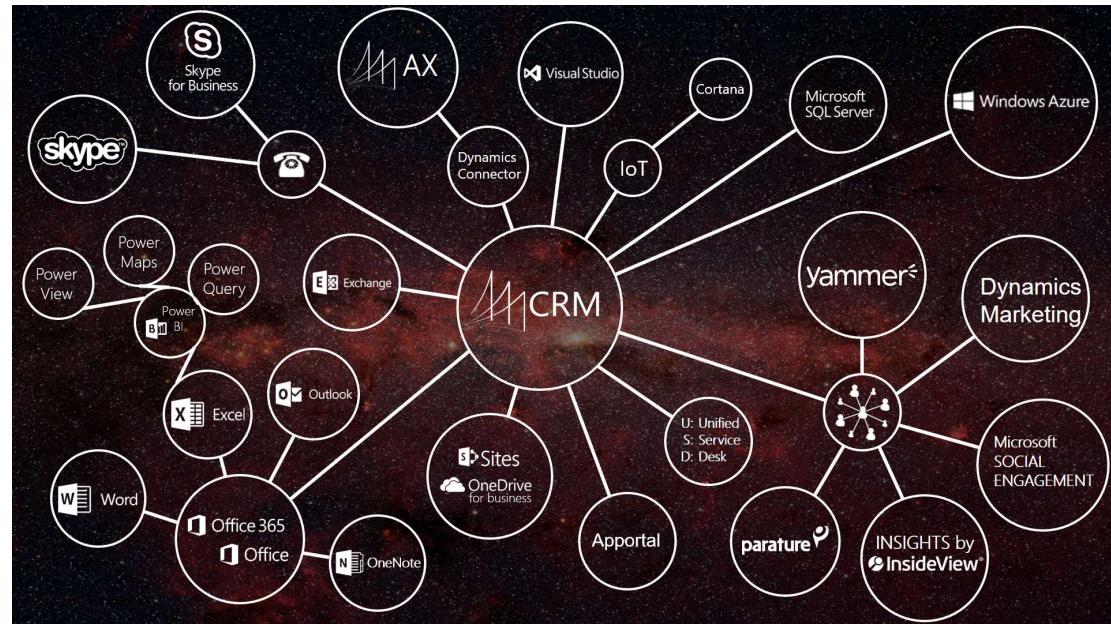
Azure IoT

Common application platform: PowerApps, Microsoft Flow, Common Data Service

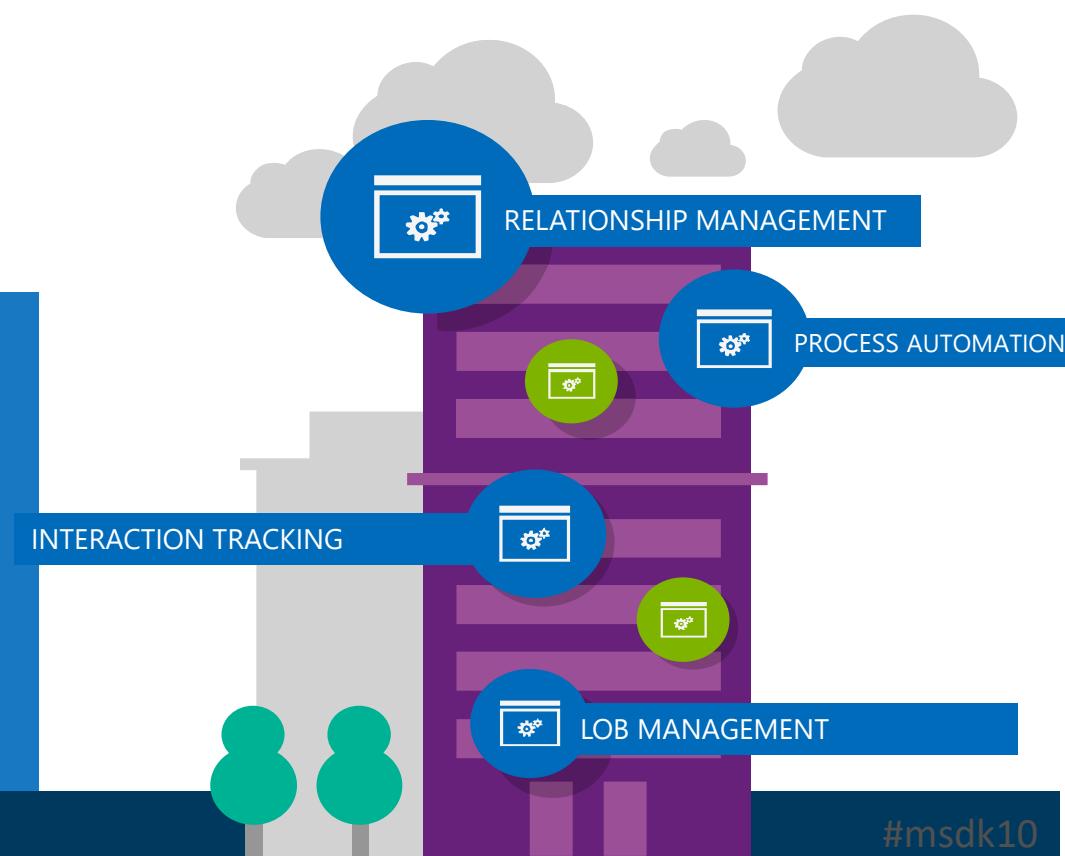
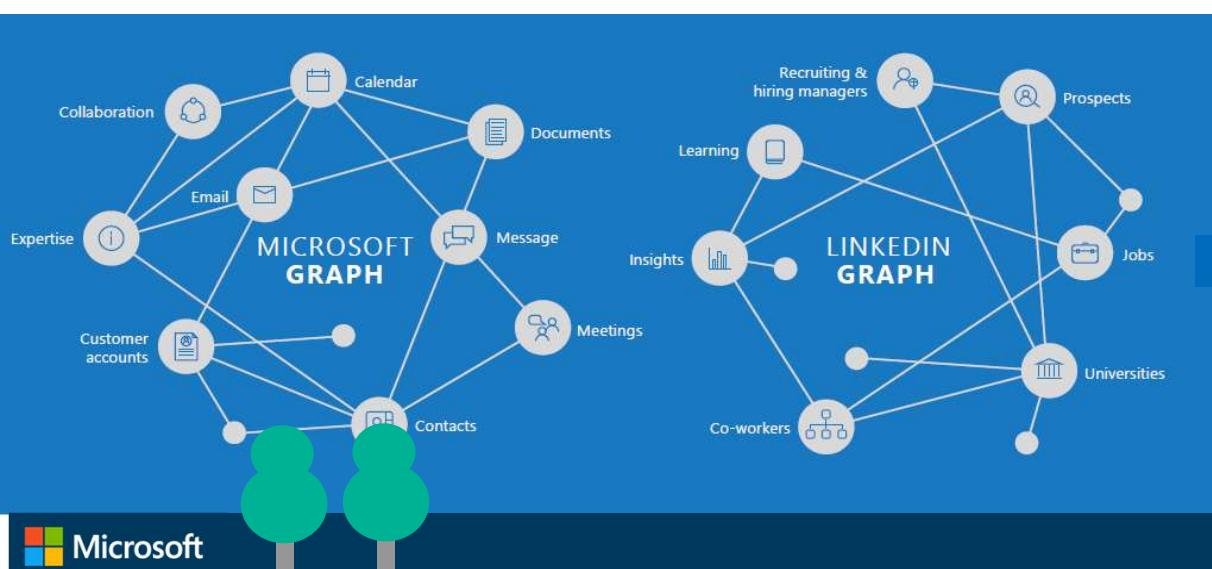
A photograph of two men in a professional setting. One man is in the foreground, seen from the side, wearing a white shirt and a patterned tie. The other man is in the background, smiling and pointing his finger towards the camera. A blue rectangular overlay covers the left side of the image.

Productivity by Microsoft
O365+CRM+PowerBI

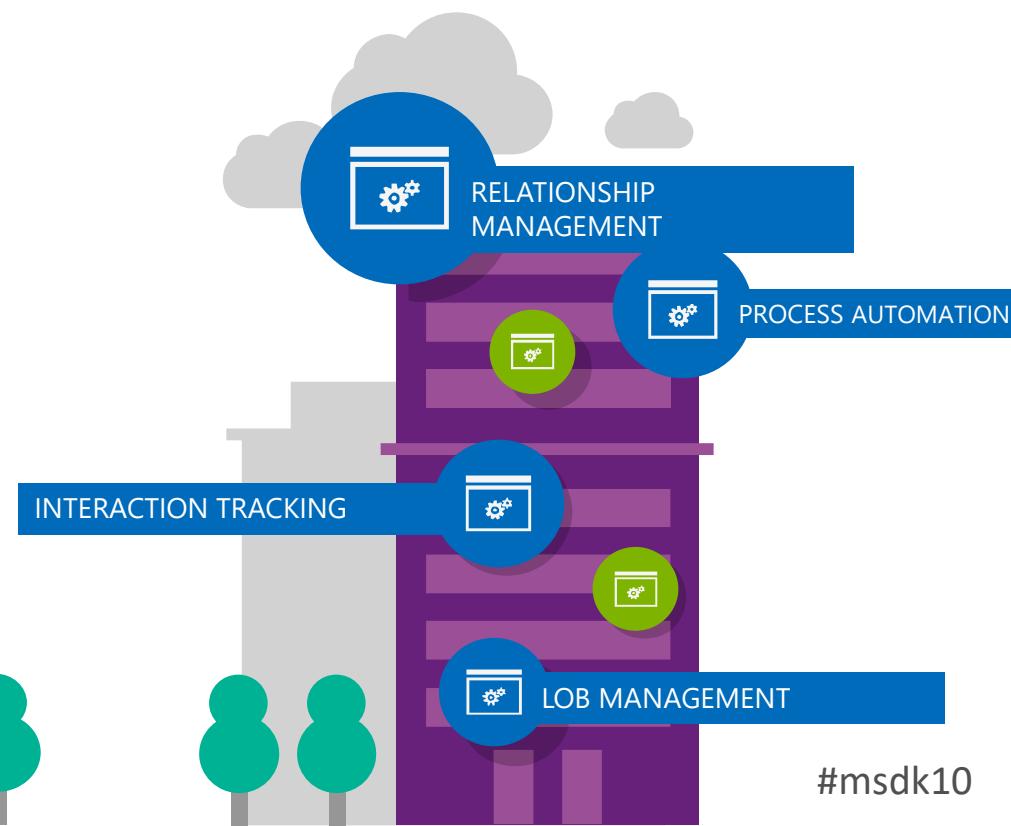
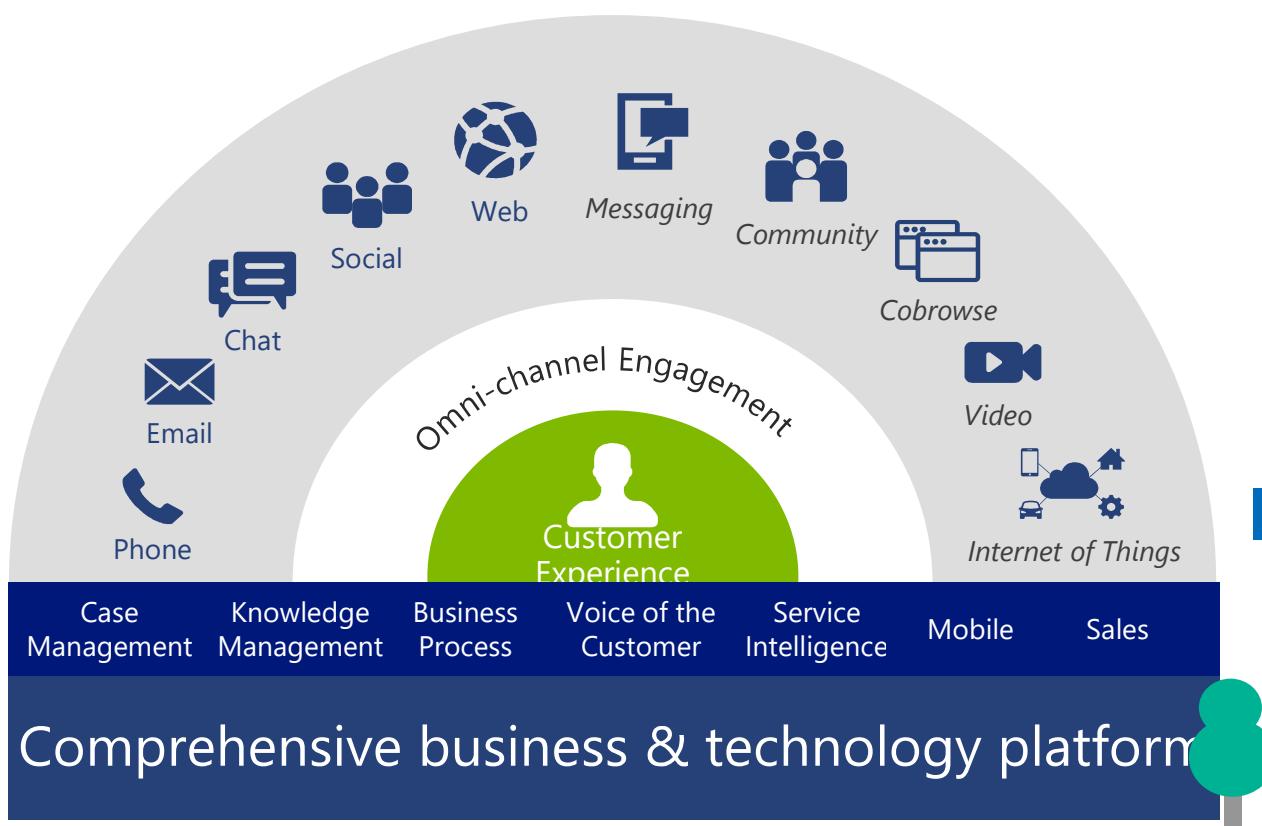
Microsoft Dynamics



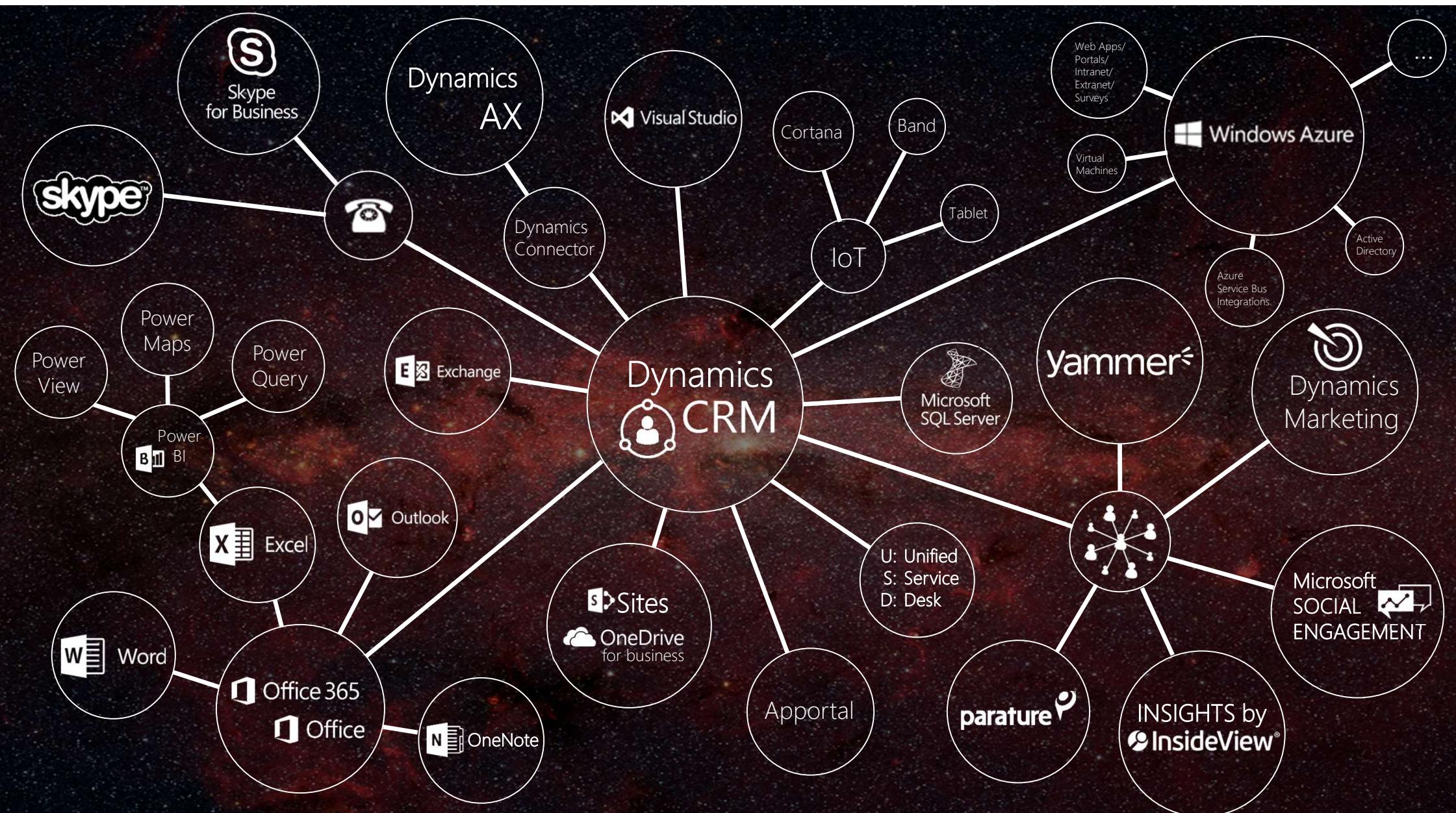
Make CRM as the Brain



CRM As A Customer Centric Hub



#msdk10

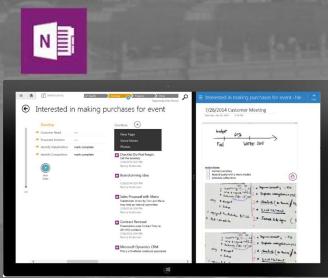


CRM productivity with Office 365

[VIDEO](#)



Track incoming
email



Take notes while
visiting a client



Discover relevant
documents



Create
presentation



Pipeline
management

Qualify

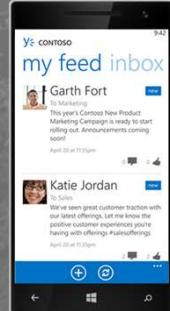
Develop

Propose

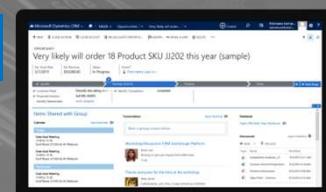
Close



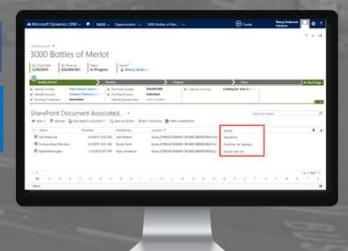
Follow-up call
with lead



Post updates



Practice or
Enterprise
collaboration



Generate document and
share with customer



Contextual and Immersive



Intelligent and Predictive



Cloud, Mobile

Your sales office. Wherever. Whenever.



The collage includes:

- A large screenshot of the Microsoft Dynamics CRM web interface showing a contact record for "Adam Carter".
- A smaller screenshot of the Microsoft Dynamics CRM mobile app on a tablet, showing a lead record for "Interested in CRM Online".
- A screenshot of the Microsoft Dynamics CRM mobile app on a smartphone, showing a lead record for "Interested in CRM Online".
- A screenshot of the Microsoft Dynamics CRM mobile app on a smartphone, showing an opportunity record for "3000 Bottles of Merlot".

[VIDEO](#)

[USER GUIDE](#)

Provide a consistent experience across your PC, phone, and tablet. Configure once deploy everywhere.

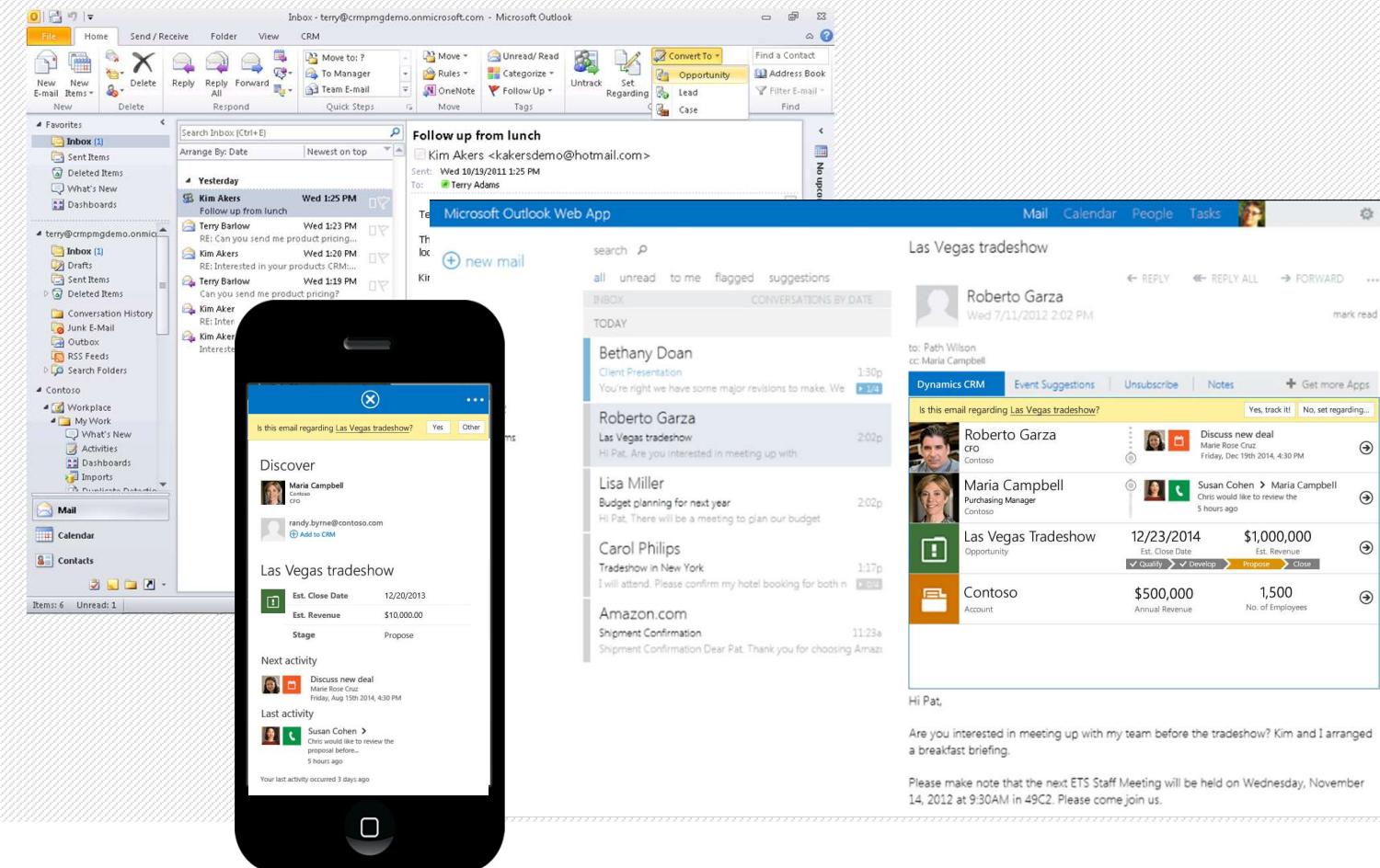
Take advantage of touch-first mobile applications

- Work with Office for iPad or use Office Mobile on other devices

New Controls, Doc Mgt.
Deep Linking, MAM through
Good or Intune

Offline ([VIDEO](#))

Familiar tools for personal productivity



[CRM FOR OUTLOOK VIDEO](#)

[TECHNET ARTICLE](#)

[CRM APP FOR OUTLOOK VIDEO](#)

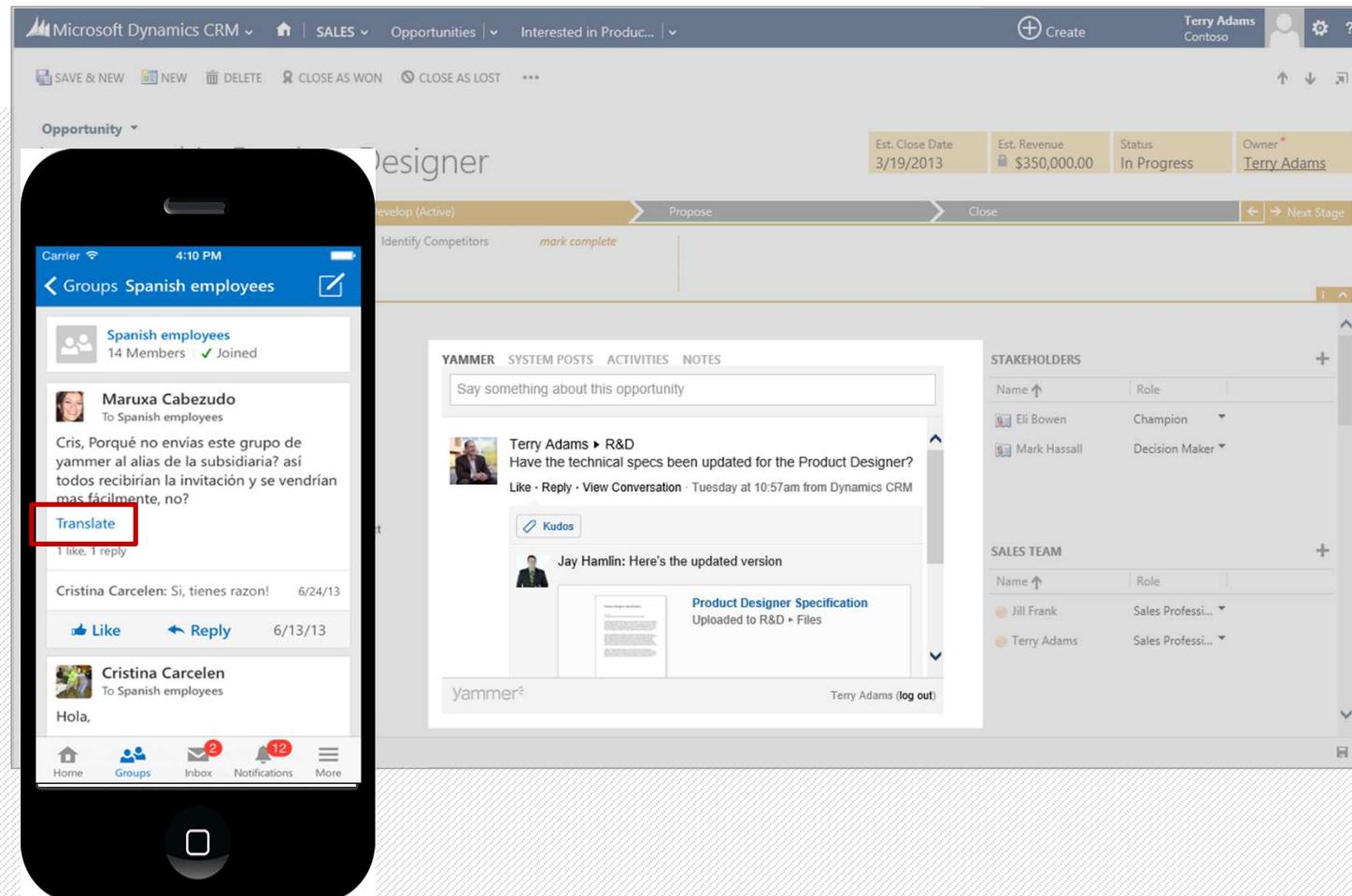
Direct access to your CRM records from Outlook. No wasted time app flipping.

Contacts, Tasks, Email and Appointments Sync'd

Support for both Outlook on the Web for desktop & phone, desktop app or Outlook for MAC

Track emails, add contacts from within an email, create new records re email and tracking during compose

Tap into the combined social intellect of your company



[VIDEO](#)

[TECHNET ARTICLE](#)

Direct access to your entire company social network regardless if they are a CRM users

Collaborate with Team members in real-time across Office and CRM apps

View and participate in conversations on the go on any device

UI localized to 23 languages and instant in-line message translation in Android and iOS

Provide A Shared Workspace Across the Enterprise

The screenshot shows the Microsoft Dynamics CRM interface for an opportunity named "Very likely will order 18 Product SKU JJ202 this year (sample)". The top navigation bar includes links for Sales, Opportunities, Recalculate Opportunity, Assign, Email a Link, Delete, and a search bar. The main content area displays the opportunity details: Est. Close Date (5/7/2015), Est. Revenue (\$30,000.00), Status (In Progress), and Owner (First name Last name: AdventureWorksC...). Below this is a workflow timeline with stages: Qualify, Develop (Active), Propose, Close, and Next Stage. The "Develop (Active)" stage is currently selected, showing tasks like "Identify Competitors" which is marked as completed. To the left, a "Items Shared with Group" sidebar lists calendar events for today, tomorrow, and Monday, December 15, 2014. To the right, there are sections for Conversations (with a link to Open Outlook), Notebook (with a link to Open CRM Sales Team Notebook), Documents (listing files like Competitive Analysis_v3, Contoso Growth Projections, Product Information, and Sales Pitch - Contoso), and Team Members (listing SALES TEAM members like Maria Campbell, Account Manager).

Group Email, Group Calendar, Group Conversations & Group Documents

- Available on the road via any device

Ideal for team collaboration on RFP's, Account Business Planning, Contracts, etc.

[VIDEO](#)

[TECHNICAL ARTICLE](#)

CRM Online Only

Use the Right Storage Option for the Right Situation

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there's a navigation bar with 'Microsoft Dynamics CRM' and links for Sales, Accounts, and A. Datum Corporati... The main area displays an account record for 'A. Datum Corporation (sample)'. Below the account details, there's a 'Document Associated Grid' section. This grid lists two documents: 'Contract Renewal Presentation.pptx' and 'DSC06060.JPG', along with their modification dates and modified by user. To the right of the grid, a 'Document Location' column is shown, with 'SharePoint' and 'OneDrive' listed. A red box highlights this column. In the bottom right corner of the grid area, another red box highlights a 'New Documents Tile'.

Store private docs using the new OneDrive for Business option. For collaborative storage use O365 Groups and for public docs use SharePoint

For collaborative docs, team members can co-edit customer documents in real-time to accelerate the development process. Utilize version controls, check in/out alerts.

OneDrive for Business docs are auto synced to your desktop and mobile devices. Access documents on phones and tablets.

[VIDEO 1](#)

[TECHNET ARTICLE](#)

[VIDEO 2](#)

Easily Generate Documents from CRM

The screenshot shows the Microsoft Dynamics CRM interface with the 'Business Management' tab selected. In the top navigation bar, there are three command buttons labeled 'COMMAND 1', 'COMMAND 2', and 'COMMAND 3', followed by a 'DOC GEN' button with a dropdown menu. The 'DOC GEN' menu lists several options: 'Word Docs', 'PowerPoint', 'Command name', 'Sales Proposal v2', 'Opportunity Product summary', 'Generate Quote', and 'Marketing Sheet'. A large orange arrow points from the 'DOC GEN' menu down to a preview window displaying an 'INVOICE 103016' document. The document header reads 'RONUS INTERNATIONAL LTD.' and '13.January 2017'. It contains sections for 'Bill To' and 'Ship To' with customer details, and a table for invoice items. The XML mapping pane at the bottom shows the structure of the generated XML.

[VIDEO](#)

[HOW TO ARTICLE](#)

Auto-generate formatted Documents based on CRM Records

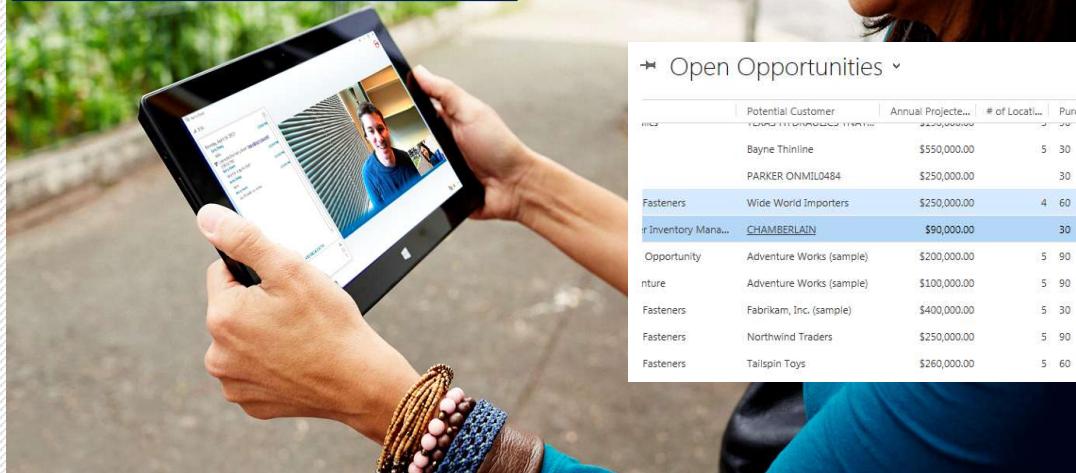
Generate docs as part of a workflow

Create and edit Templates to achieve the desired document structure



Bring together the right people

Meet with colleagues, customers remotely with web, video conferencing or instant message



Open Opportunities						
	Potential Customer	Annual Projected Revenue	# of Locations	Purchase Type	Sales Stage	NAOS
Fasteners	Bayne Thinline	\$550,000.00	5	30		Ken Blakemore
Fasteners	PARKER ONMIL0484	\$250,000.00		30		Jen Olson
Fasteners	Wide World Importers	\$250,000.00	4	60		Bob Lam
Fasteners	CHAMBERLAIN	\$90,000.00		30		Eric Rea
Opportunity	Adventure Works (sample)	\$200,000.00	5	90		Terry Adams
Opportunity	Adventure Works (sample)	\$100,000.00	5	90		Terry Adams
Fasteners	Fabrikam, Inc. (sample)	\$400,000.00	5	30		Bob Lam
Fasteners	Northwind Traders	\$250,000.00	5	90		Jonathan Thomas
Fasteners	Tailspin Toys	\$260,000.00	5	60		Terry Adams

Bring together the right people wherever they are to create value for your customers

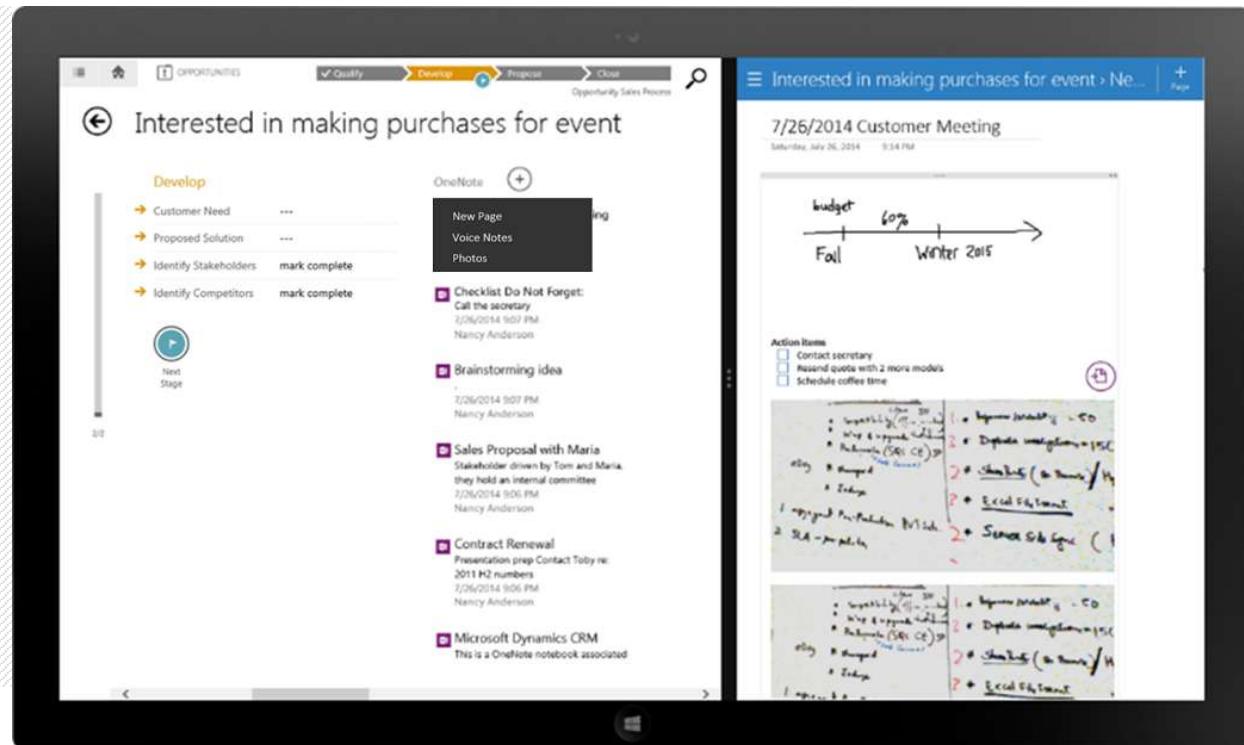
Meet face-to-face with customers as frequently as you need without prohibitive travel costs

View online presence indicator from within CRM forms and views. Initiate a chat, video call, schedule a meeting or share desktop to collaborate all from here. Track activity in CRM if desired.

[TECHNET ARTICLE](#)

All your notes on all your devices

Share notes with colleagues



[VIDEO](#)

[HOW TO ARTICLE](#)

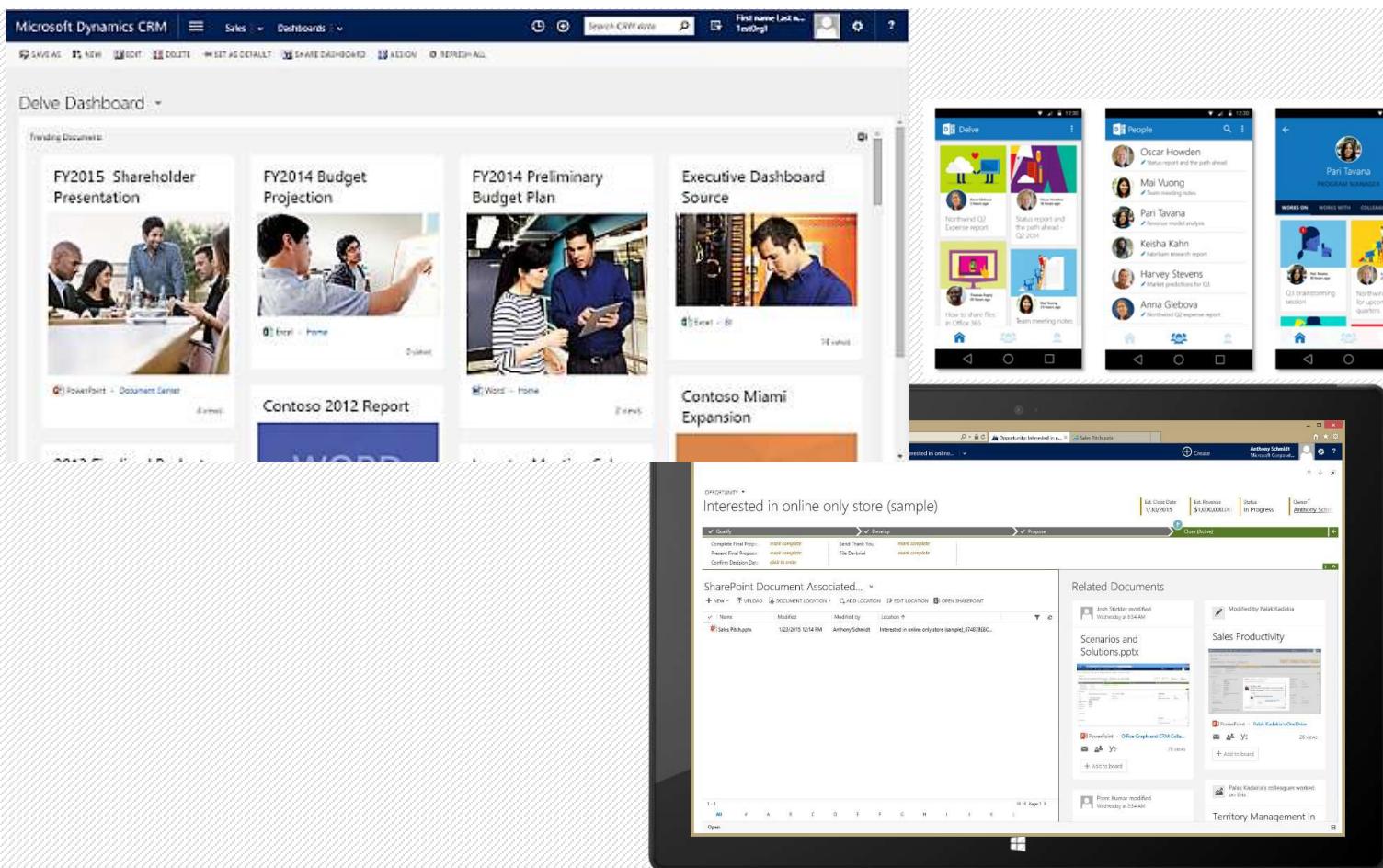
Take notes with OneNote and Share with a team across the enterprise regardless if they are a CRM user

Notebook created automatically, notes contextual stored in CRM

All notes are tracked to CRM record

Find the right content and people. Fast

Discover relevant information via machine learning



[VIDEO](#)

[HOW TO ARTICLE](#)

A natural new way to navigate, discover, and search across an organization. Add Office Delve to your CRM dashboards.

Discover new information tailored to you from your network

- Stay connected with access from almost anywhere, any device

Future: View trending information in context with CRM records

CRM Online Only

See your data. In a whole new way.

Manage performance and identify opportunities & trends



Everyone can get immediate insights across all your data with self-service BI

Natural language questioning and sharing of content

- Access your data from anywhere, on any device

PowerBI Connectors for CRM and MDM providing out of the box role-tailored dashboards for sales, service & marketing

[VIDEO](#)

[TECHNET ARTICLE](#)

See your data. In a whole new way.

The collage illustrates the integration of mobile and desktop experiences. It shows a desktop browser window with the 'Opportunities' screen, a smartphone displaying the 'Leads' screen, and a larger window showing a dashboard with three charts: 'Goals Across Quarters', 'Pipeline Across Quarters', and 'Pipeline History'. A separate window titled 'Available Templates View' lists various pre-built templates for Microsoft Excel and Word, such as 'Pipeline Management', 'Campaign Overview', and 'Case Summary'. A red box highlights the 'ANALYZE' button in the top right corner of the desktop interface.

Manage performance and identify opportunities & trends

Perform what-if analysis with CRM data, contextual inside of CRM and analyze with formulas & annotate

Pre-built templates for pipeline mgt, campaign overview, cases sla status and case summary

Private and Organizational templates

Share templates across team members

Export to Excel from your mobile device

[VIDEO](#)

[HOW TO ARTICLE](#)

CRM Online Only

Administration and IT

Office 365 Admin Center

Work across devices, from almost any location

The screenshot displays two main sections of the Office 365 Admin Center:

- Service Overview:** This section provides a high-level status report for various services. It includes a "current health" summary with icons for CRM, Exchange, Identity Service, Lync, Microsoft Social Listening, Office 365 Portal, Office Subscription, Power BI for Office 365, Rights Management Service, SharePoint, and Yammer Enterprise. Below this, there's a "planned maintenance" notice for Dynamics CRM Online on October 7, 2014.
- Active Users:** This section lists active users with their display names, user names, and status (In cloud). The users shown are Asif Ahmed, Amy Petri, and Brandy Burnett.

[VIDEO](#)

[FURTHER DETAILS](#)

Easily check your service health across all services

Manage users, manage licenses, and more for all the online services associated with your account

- Reliable 99.9% Financially Backed SLA

Industry Trusted Certifications

CRM Online Only

Authentication - CRM Online

- Shared identity system with Office 365
- Claims Based Authentication provided by Azure Active Directory
 - WS-Federation, WS-Trust, OAuth 2.0
 - Federation with on-premise Active Directory
- Users are created in Office 365 admin center
- Single user name for all online services: someone@yourcompany.onmicrosoft.com
- Microsoft Online Services Global and Service Administrators are added to CRM as “Administrative Access” users
- Microsoft Online Services Global and Service Administrators are given the System Administrator Role
- Administrative access is limited to CRM configuration

Federating: Microsoft Online

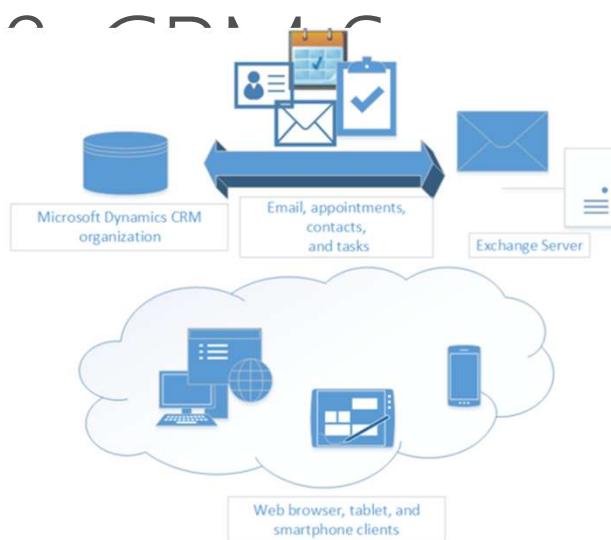
User accounts are synchronized between their local Active Directory and Microsoft Online Services Portal

Benefits:

- Eliminates need to maintain Microsoft Online Services user accounts
- AD changes are synchronized to Windows Azure AD
- More convenient for users
- Forefront Identity Manager can be used to filter AD which AD containers are synchronized

[TECH ARTICLE](#)

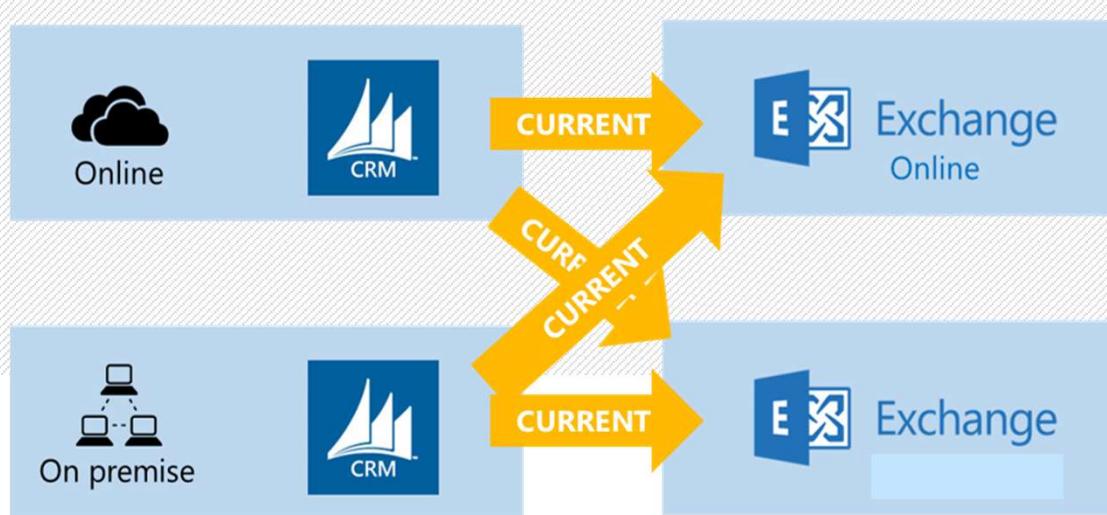
Exchange



Side Synchronization

Simple setup and maintenance reducing the total cost of ownership

Centrally manage mailboxes and profiles, configure email for users and queues, and track errors about email processing

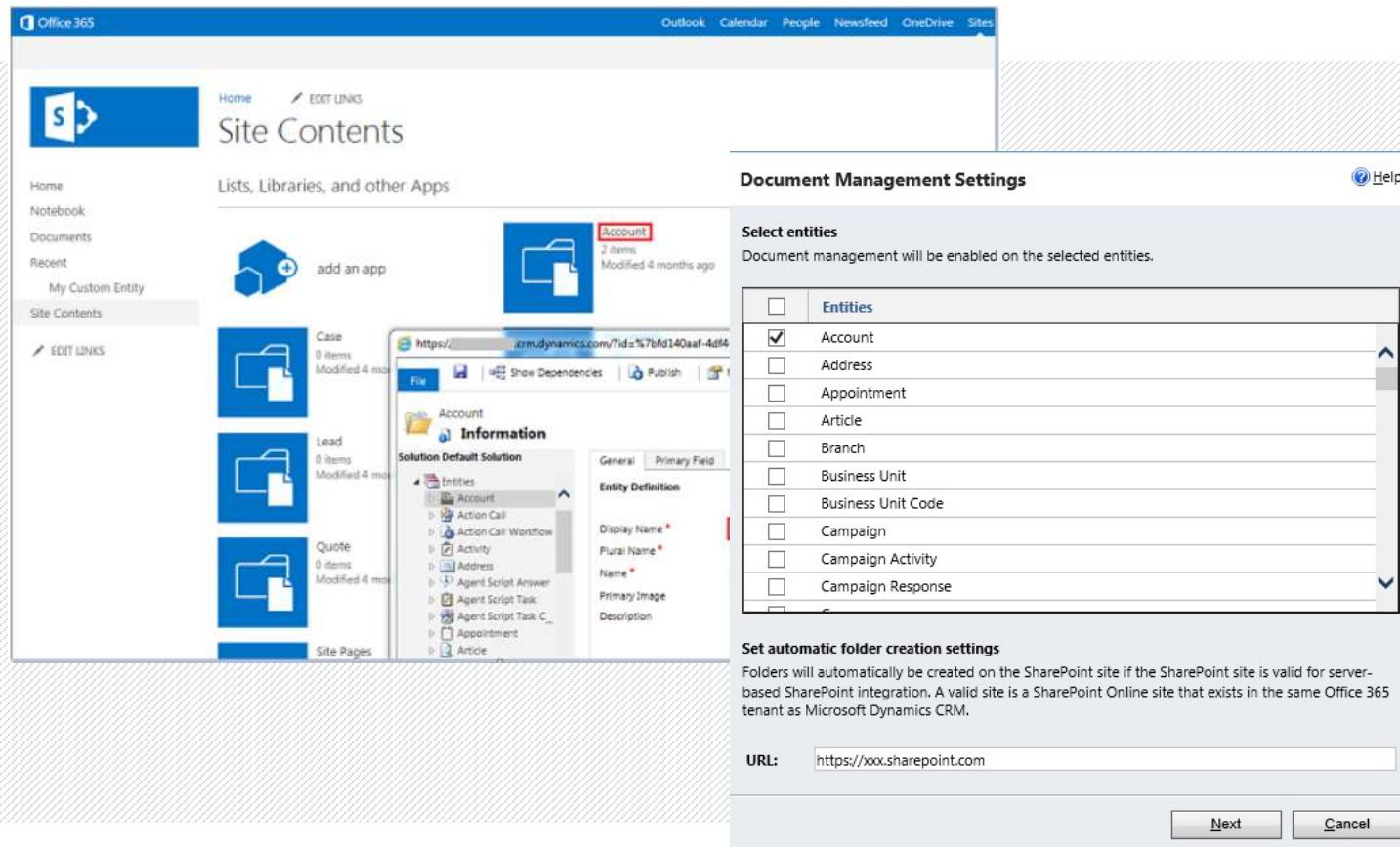


Hybrid Scenario, Support for CRM 2016 and Windows 10

[VIDEO](#)

[TECHNET ARTICLE](#)

SharePoint & CRM Server Side Synchronization



The screenshot shows the 'Document Management Settings' dialog box from Microsoft Dynamics CRM overlaid on a SharePoint 'Site Contents' page. The dialog box is titled 'Document Management Settings' and contains a section titled 'Select entities'. It lists various CRM entities with checkboxes: Account (checked), Address, Appointment, Article, Branch, Business Unit, Business Unit Code, Campaign, Campaign Activity, Campaign Response, and Contact. Below this is a section for 'Set automatic folder creation settings' with a URL field containing 'https://xxx.sharepoint.com'. At the bottom are 'Next' and 'Cancel' buttons.

[VIDEO](#)

[TECHNET ARTICLE](#)

CRM Online Only

Available for SharePoint
Online & On Premise to CRM
Online & On Premise

Simple Set Up and
Maintenance reducing total
cost of ownership

Documents are displayed in
the native CRM grids and
users can access SharePoint
actions directly from the
CRM command bar

CRM Becomes a System of Intelligence via Azure ML

The screenshot shows the Microsoft Dynamics CRM interface for an opportunity record. The top navigation bar includes links for Sales, Opportunities, and a specific opportunity named 'Sell X600 Server for...'. The main content area displays the opportunity details: Estimated Close Date (6/30/2015), Estimated Revenue (\$10,000,000.00), Status (In Progress), and Owner (First name Last name). A progress bar at the top indicates the stage from 'Qualify (Active)' to 'Close'. Below the summary, there's a 'Summary' section with fields for Contact, Account, Purchase Timeframe, Currency, Budget Amount, Purchase Process, and Description. The 'Related' section shows a timeline of interactions, including a case titled 'Problems with credit cards' and several messages from users like Lisa Soley and Jason. The bottom of the screen shows a ribbon menu with options like Create, Search, and Settings.

[VIDEO](#)

Cross-sell Recommendations

Topic Analysis

Suggested Knowledge Articles

[HOW TO ARTICLE](#)

CRM Online Only

