



Transition to the new Unified Interface

Ottawa Power Platform User Group

January 10, 2020

Who Am I?

- **Nick Doelman**
- Power Platform/Dynamics 365 Specialist
- **Microsoft MVP - Business Applications**
- **Microsoft Certified Trainer (MCT)**
- Ottawa, ON, CANADA
- **EMAIL:** nick.doelman@readybms.com
- **TWITTER:** @readyxrm
- <https://readyxrm.blog>
- <https://www.linkedin.com/in/nickdoelman/>



Unified Interface



Change is coming! Automatic transition to Unified Interface

To: Nick Doelman

For organization: readyxrm ([https://\[redacted\]crm3.dynamics.com](https://[redacted]crm3.dynamics.com))

Summary

As [announced on September 10, 2019](#), the time is now to prepare for the move to Unified Interface. We have introduced an [optional early transition service](#) to help you with the move and assigned selected environments for **transition in the next 30 days** within your organization tenant. This requires your explicit approval for any transition to proceed. Read on for details.

Environment details

Environment Name

[redacted]

Planned Transition Date:

February, 07, 2020

What action should you take?

Please access the [Unified Interface scheduling portal](#) to view the environments that are scheduled to be moved to Unified Interface. Sign in using your corporate admin credentials. For further details, see the [FAQ](#).

This portal will show all the environments associated to your tenant. Please review and if required, update the transition dates. Please note that if you need to postpone a transition, you'll need to file an exception request within the portal. Environment transition dates will be locked down 2 days prior to the move.

Wondering where to begin? For more information about the process, please review the [FAQ](#) and [Planning Checklist](#)

Once transitioned, if there is business disruption, you will still be able to switch back to the legacy web client for up to 10 days post transition. You can make the [switch manually](#) for the first 4 days or after that point, raise a support request from your usual channel. Please see the [FAQ](#) for more details.

A community of support

Please check out the [Unified Interface Community Site](#).

We've created help and support materials including videos, articles, and documentation to help you plan and manage

Why Unified Interface

Consistent responsive experiences

Consistent and equivalent functionality across all surfaces – web, mobile and Outlook. Including native RTL support across all devices

Focused and Modular experience

Application Module concept available across all form factors. Scenario focused, Easy to build and shareable micro applications

Custom Controls

Rich visualization through custom controls adapts across all form factors provides reuse and better productivity

Performant

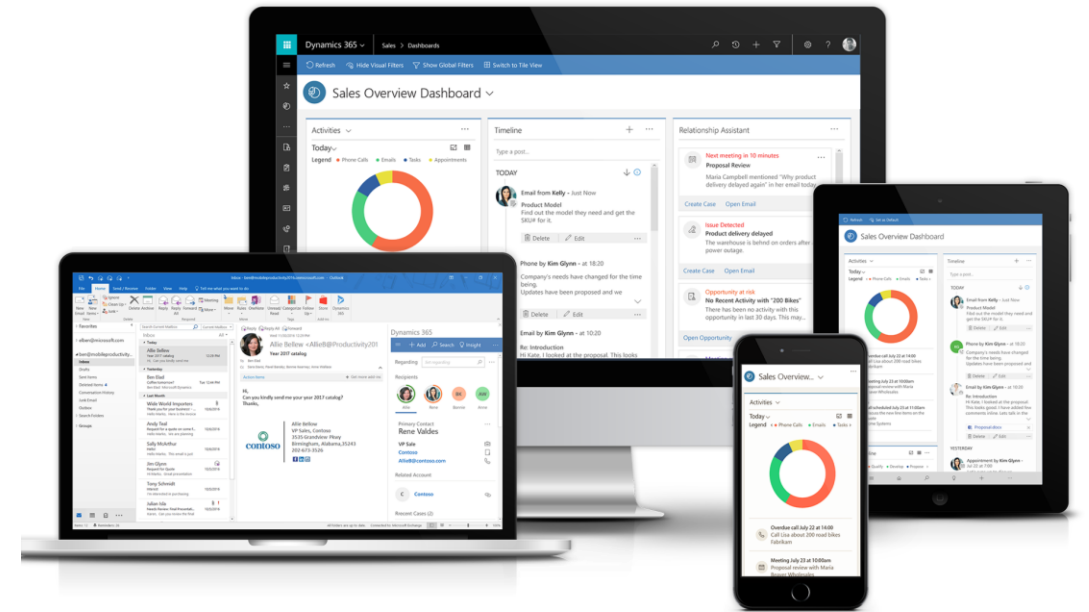
Efficient metadata synchronization for better performance and continued investments to improve speed across client experiences

Accessible

Built from ground up with Accessibility in mind

Enhanced experiences

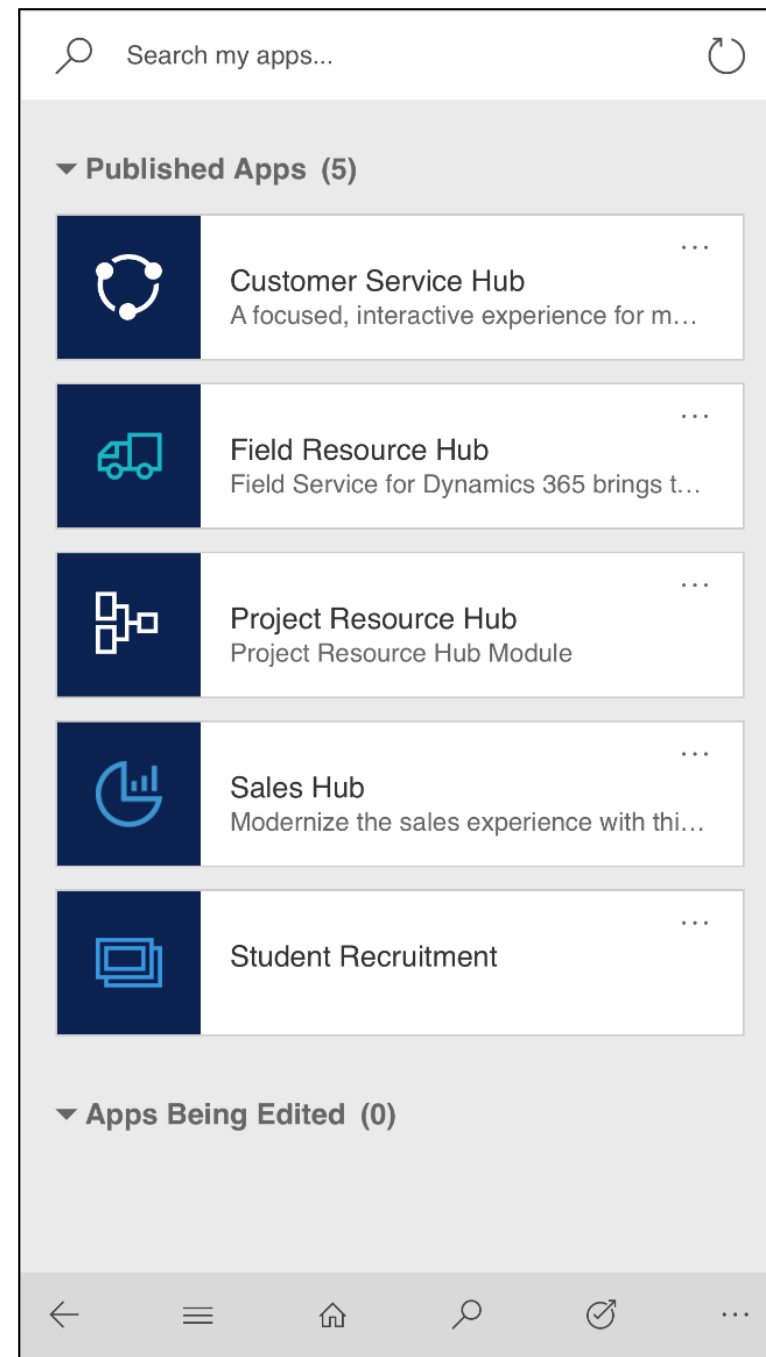
Additional dashboarding and PowerBI capabilities and enhanced user interactions for mobile and desktop usage.



Key Features

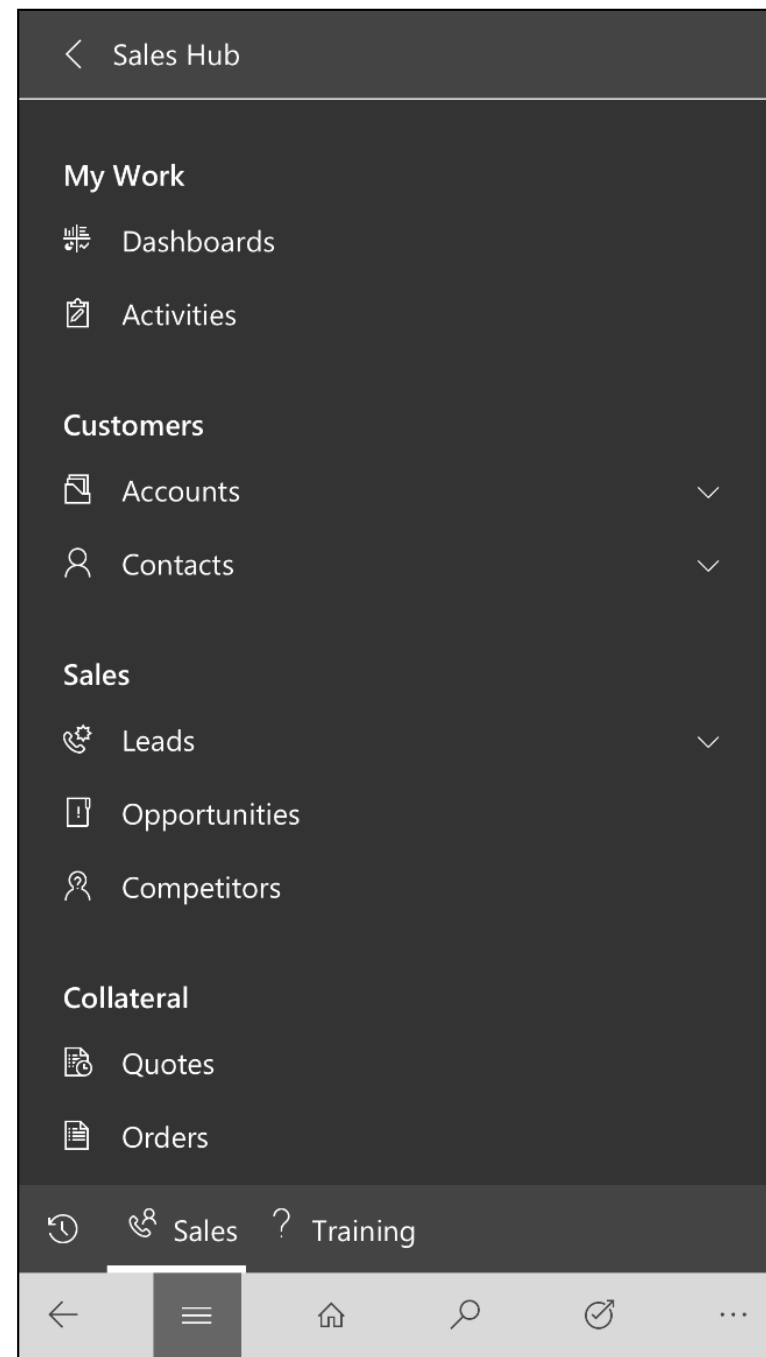
■ Unified Interface on Mobile

- Full sitemap on Mobile
- Responsive UI
- Semantic Zoom
- Interactive Dashboards
- Reference Panel
- Timeline Control
- Record set navigation
- Visualization
- Accessibility
- Removed limits: 75 fields, 10 sub grid and tabs
- And more...



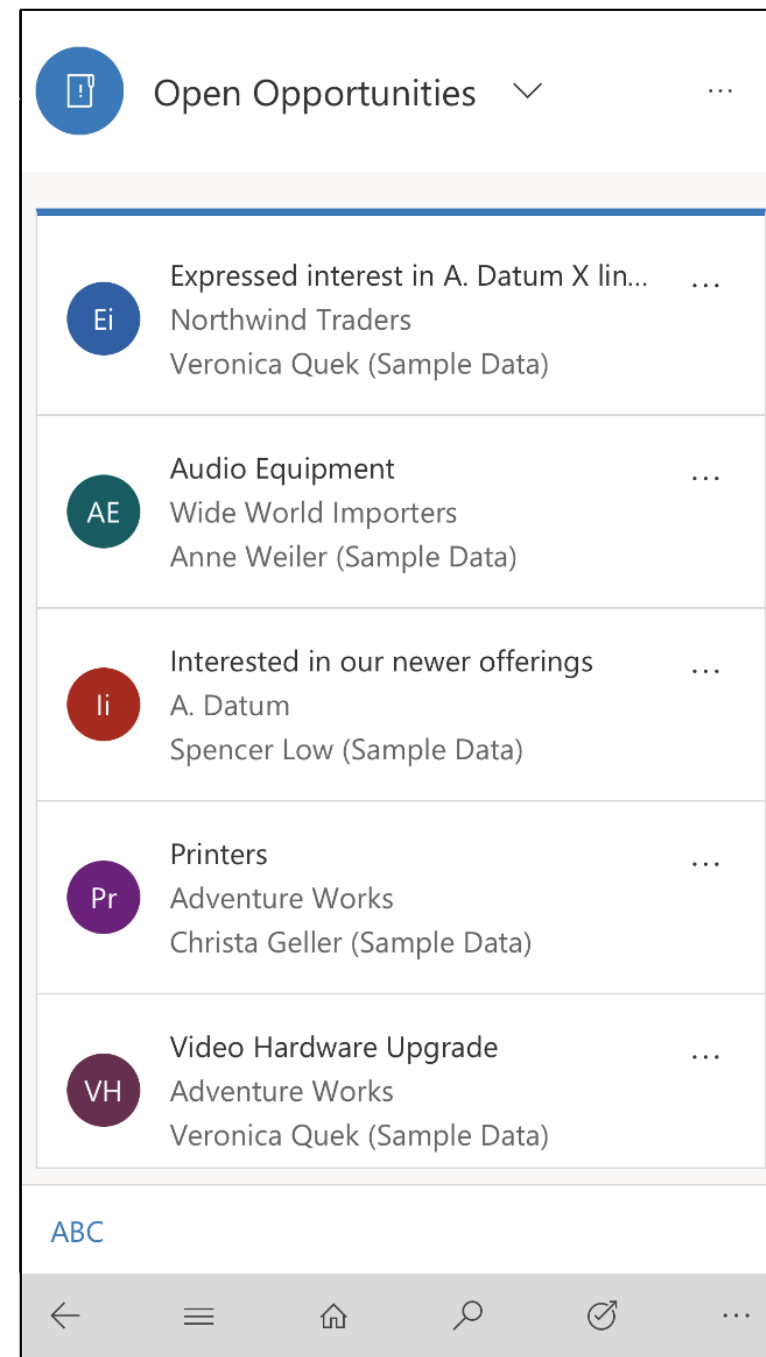
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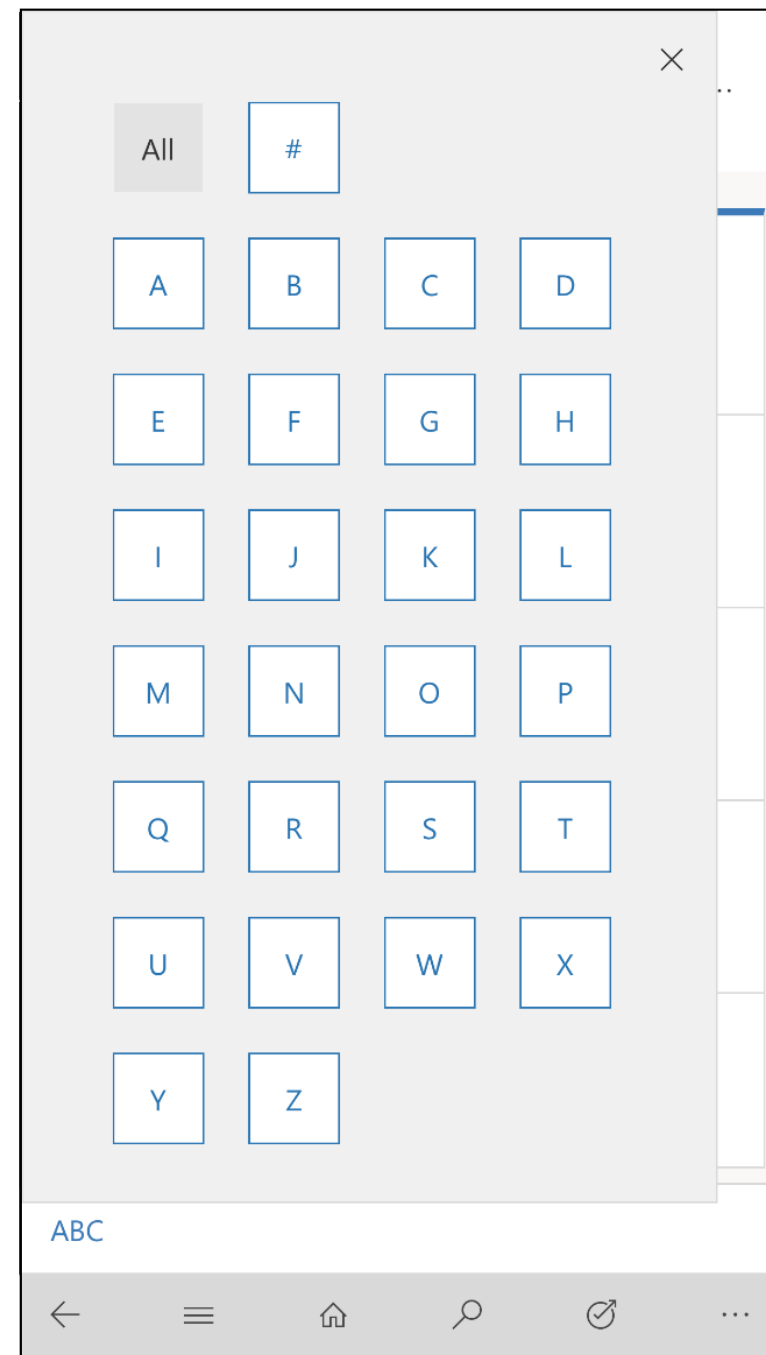
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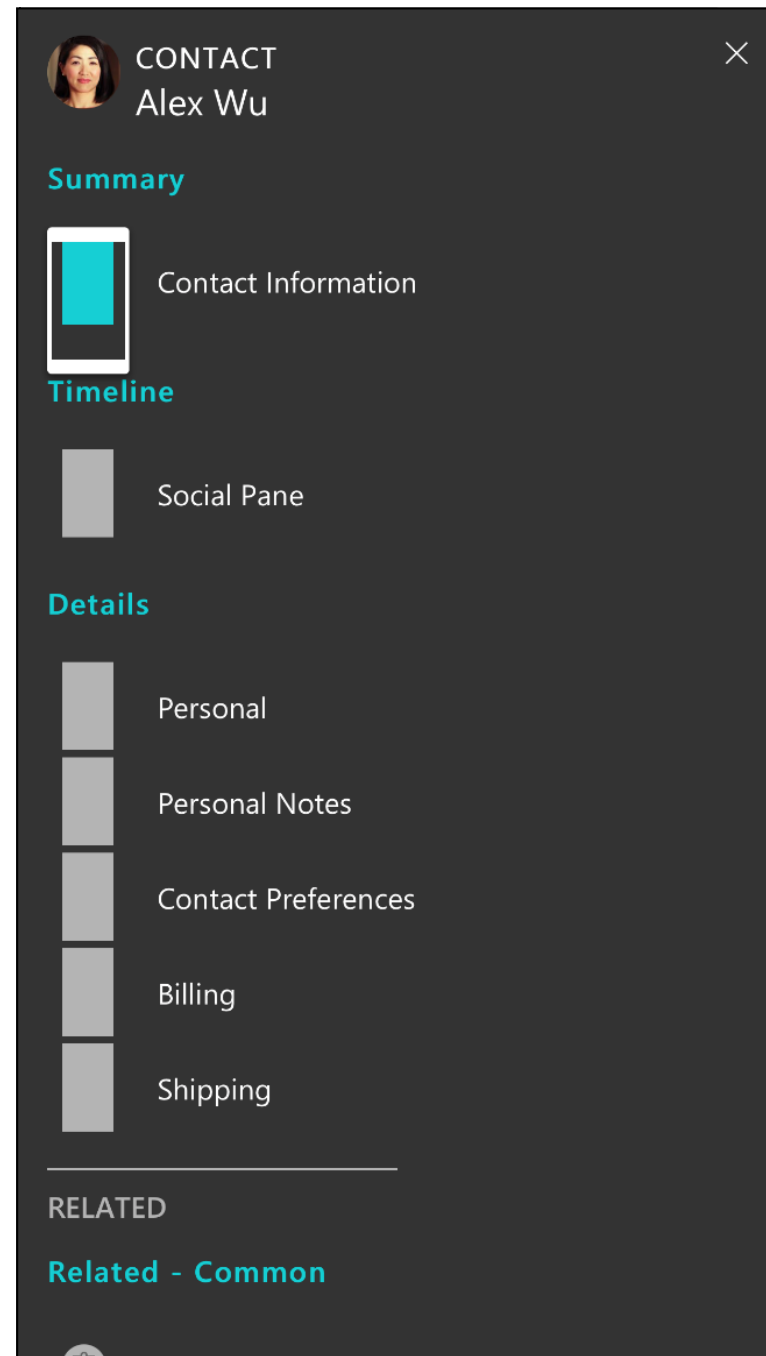
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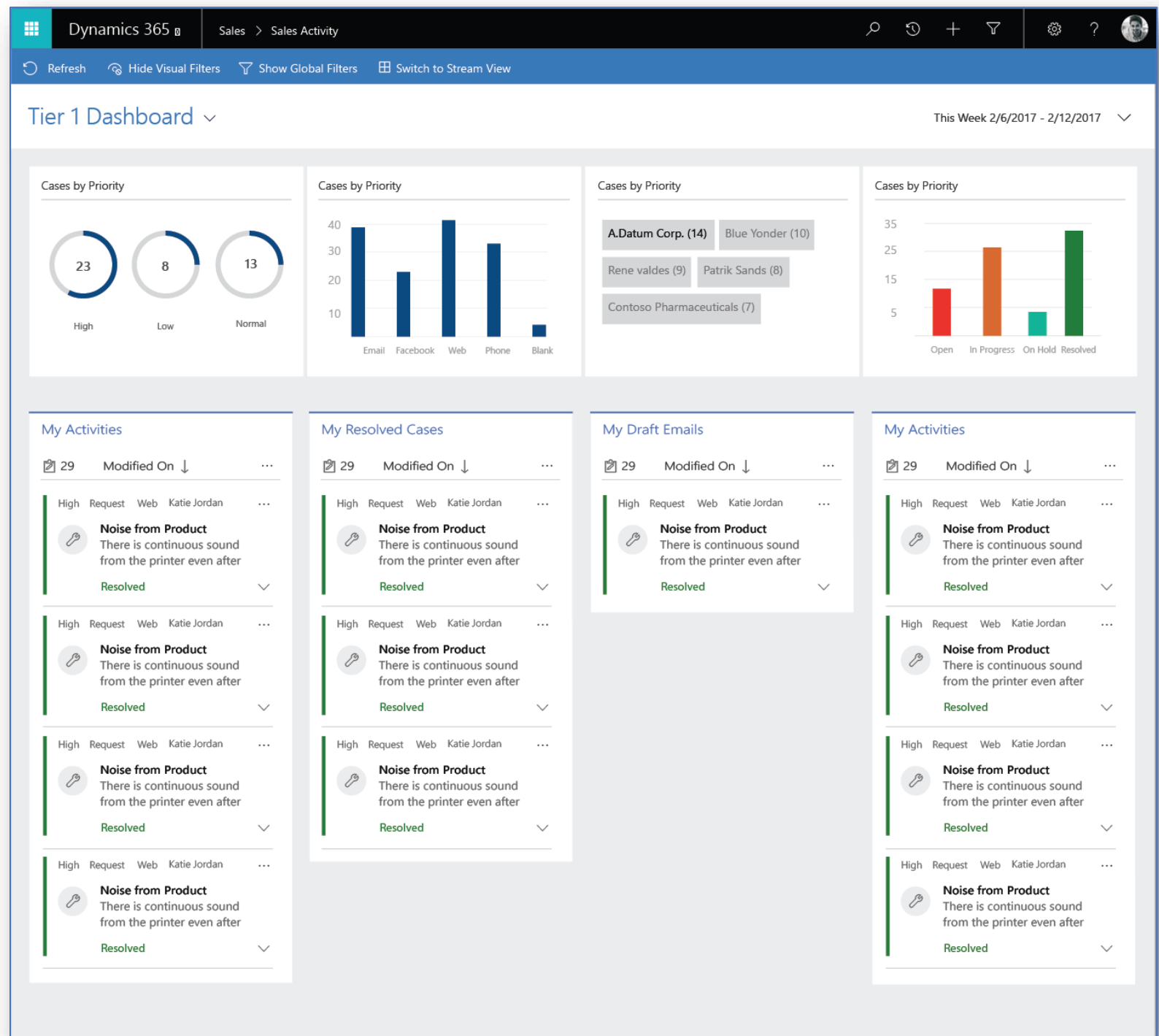
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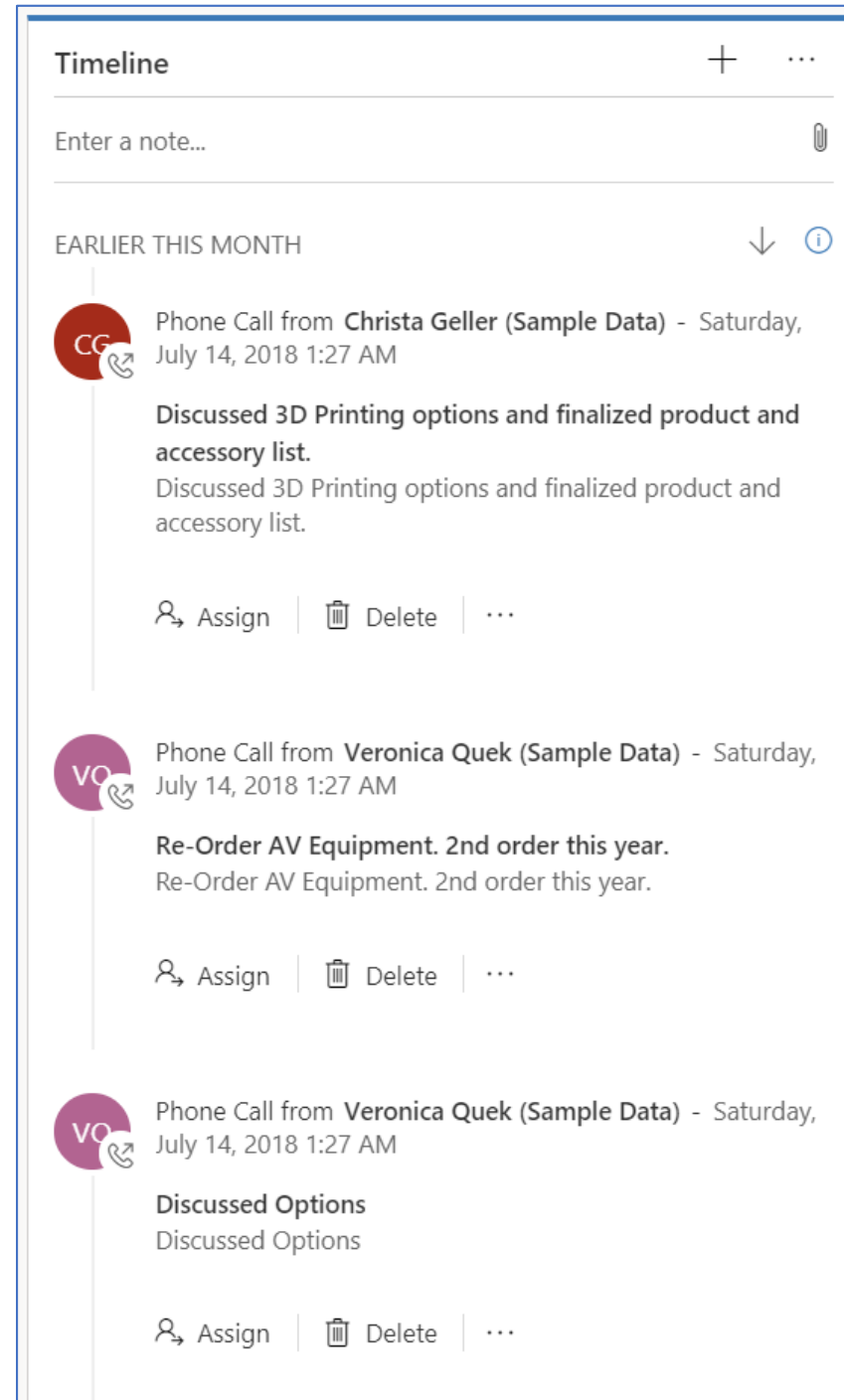
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The screenshot displays the 'CHALLENGE Connected Operations' interface. At the top, there's a header with the logo and title. A progress bar shows 'Setup' (completed) and 'Track (5 D)' (active). Below this, a tabbed interface shows 'Details', 'Timeframe', 'Ideas' (selected), and 'Related'. A red box highlights a panel titled 'Integrated service management' which contains the following details:

Name	* Integrated service management
Number of Votes	6
Originating challenge	Connected Operations
Invite contributors	No
Idea Score	---

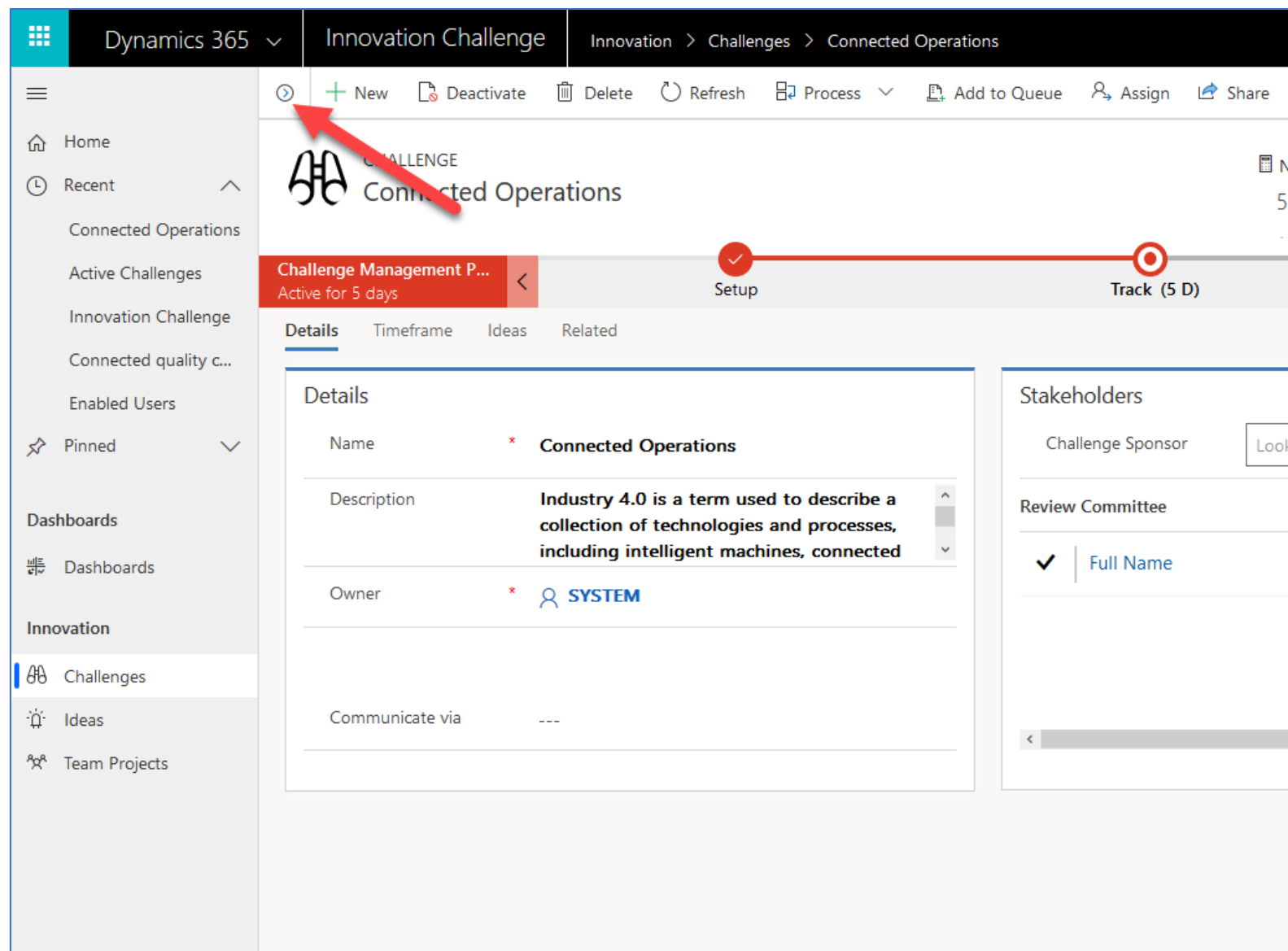
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The screenshot displays the Dynamics 365 Innovation Challenge interface. The top navigation bar shows 'Dynamics 365' and 'Innovation Challenge'. The breadcrumb trail indicates the path: 'Innovation > Challenges > Connected Operations'. The left sidebar contains a navigation menu with options like Home, Recent, Connected Operations, Active Challenges, Innovation Challenge, Connected quality c..., Enabled Users, Pinned, Dashboards, and Challenges (highlighted). The main content area is divided into two sections. The top section, titled 'ACTIVE CHALLENGES', lists several challenges: 'Connected Operations' (5), 'Enterprise sustainability' (4), 'Connected products' (3), '3D Printing' (2), 'Smarter manufacturing' (2), and 'Big data' (2). The bottom section, titled 'CHALLENGE Connected Operations', provides a detailed view of the selected challenge. It includes a 'Challenge Management P...' status bar with a progress indicator showing 'Setup' and 'Track (5 D)'. The 'Details' tab is active, showing fields for Name, Description, Owner, and Communicate via. The 'Stakeholders' section on the right lists 'Challenge Sponsor' and 'Review Committee'.

Dynamics 365 | Innovation Challenge | Innovation > Challenges > Connected Operations

ACTIVE CHALLENGES

Challenge Name	Count
Connected Operations	5
Enterprise sustainability	4
Connected products	3
3D Printing	2
Smarter manufacturing	2
Big data	2

CHALLENGE Connected Operations

Challenge Management P... Active for 5 days

Setup Track (5 D)

Details Timeframe Ideas Related

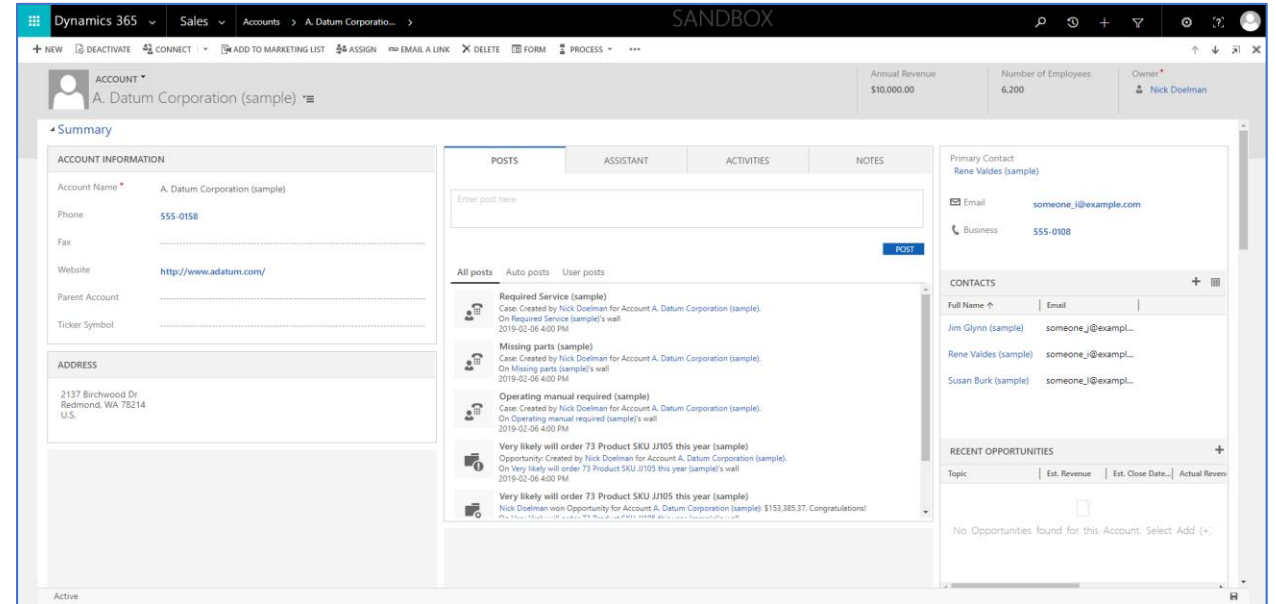
Details

Field	Value
Name	* Connected Operations
Description	Industry 4.0 is a term used to describe a collection of technologies and processes,
Owner	* SYSTEM
Communicate via	---

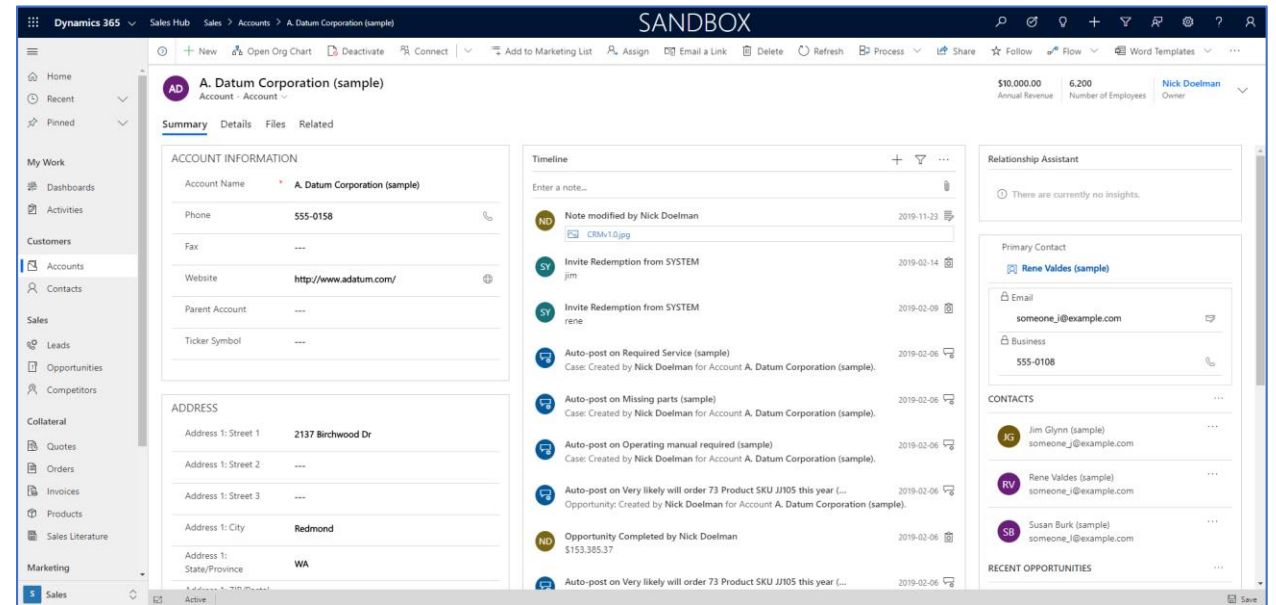
Stakeholders

Stakeholder
Challenge Sponsor
Review Committee
Full Name

Classic Web vs Unified Interface



This screenshot shows the Dynamics 365 Classic Web Interface. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Accounts > A. Datum Corporation (sample)'. The main header displays account statistics: Annual Revenue (\$10,000.00), Number of Employees (6,200), and Owner (Nick Doelman). The left sidebar shows a 'Summary' tab. The main content area is divided into three sections: 'ACCOUNT INFORMATION' (Account Name, Phone, Fax, Website, Parent Account, Ticker Symbol), 'ADDRESS' (2137 Birchwood Dr, Redmond, WA 98014, U.S.), and 'POSTS' (a list of posts including 'Required Service (sample)', 'Missing parts (sample)', 'Operating manual required (sample)', and 'Very likely will order 73 Product SKU JJ105 this year (sample)'). The right sidebar shows 'Primary Contact' (Rene Valdes (sample)), 'CONTACTS' (a list of contacts including Jim Glynn (sample), Rene Valdes (sample), and Susan Burk (sample)), and 'RECENT OPPORTUNITIES'.



This screenshot shows the Dynamics 365 Unified Interface. The top navigation bar includes 'Dynamics 365', 'Sales Hub', 'Sales', and 'Accounts > A. Datum Corporation (sample)'. The main header displays account statistics: Annual Revenue (\$10,000.00), Number of Employees (6,200), and Owner (Nick Doelman). The left sidebar shows a 'Summary' tab. The main content area is divided into three sections: 'ACCOUNT INFORMATION' (Account Name, Phone, Fax, Website, Parent Account, Ticker Symbol), 'ADDRESS' (2137 Birchwood Dr, Redmond, WA 98014, U.S.), and 'Timeline' (a list of timeline items including 'Note modified by Nick Doelman', 'Invite Redemption from SYSTEM', 'Auto-post on Required Service (sample)', 'Auto-post on Missing parts (sample)', 'Auto-post on Operating manual required (sample)', 'Auto-post on Very likely will order 73 Product SKU JJ105 this year (sample)', 'Opportunity Completed by Nick Doelman', and 'Auto-post on Very likely will order 73 Product SKU JJ105 this year (sample)'). The right sidebar shows 'Relationship Assistant', 'Primary Contact' (Rene Valdes (sample)), 'CONTACTS' (a list of contacts including Jim Glynn (sample), Rene Valdes (sample), and Susan Burk (sample)), and 'RECENT OPPORTUNITIES'.

Scheduled to Transition – What does that mean?

- <https://runone.powerappsportals.com/>
- You currently need to “opt in”
- No – opt in, no automatic transition, a new date will be proposed (for a while)
- October 2, 2020 is absolute deadline!

Microsoft | PowerApps

Home | My Environments | My Requests | Nick Doelman

Home > My Environments

My Environments

Environments for the tenant for which you're signed in:

Tenant: [redacted]

Tip If you wish to manage environments for another tenant, please sign out and sign in again with the admin credentials for the tenant you want to manage.

Environments listed below are due to be automatically updated to the Unified Interface on the **Target Date** assigned. Please open the environment for further details and select the **Approve** button if you wish them to be transitioned. Users with global admin or Dynamics service admin role can reschedule an auto transition date to postpone the move.

Please note Environments will only be transitioned if they have been explicitly approved by your administrator. (Note: all the dates are shown in the MM/DD/YYYY format)
If you want to move earlier than the stated date, choose from the selected options on the drop-down list. If the available dates aren't suitable, you can also **switch manually**.

Current Status **Production** **PowerApps Only**

☐ Scheduled ☐ Yes ☐ Yes
☐ Already transitioned ☐ No ☐ No
☐ Not yet scheduled

[Filter Environments](#)

Search

Friendly Name	Current Status	Target Date (MM/DD/YYYY)	Production	PowerApps Only	Organization Id
[redacted]	Schedule proposed, not approved	2/28/2020	Yes	No	9[redacted]aa8-7a
[redacted]	Schedule proposed, not approved	2/7/2020	No	No	8[redacted]fb-85b84

Request a Transition Date

- You can request a specific date
- Can't change within 48 hours
- Can move back manually after 4 days, if within 10 days, raise a support ticket, cannot switch back after 10 days.
- There will be reminders
- Switch will happen Fridays during maintenance windows (late)

Microsoft | PowerApps

Home | My Environments | My Requests | Nick Doelman

Home > My Environments > Environment Details

Environment Details

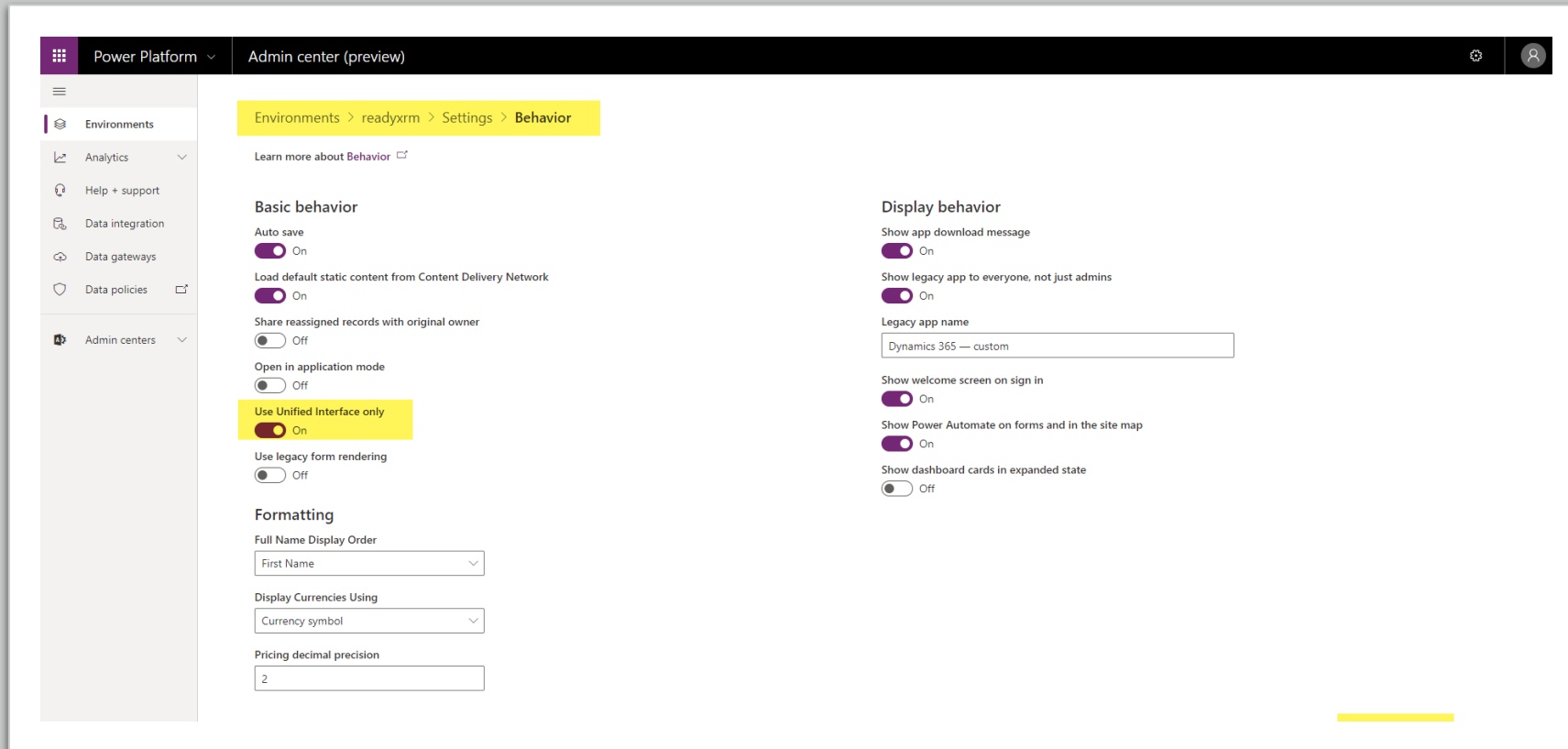
Note: all the dates are shown in the MM/DD/YYYY format

[Approve Transition Date](#) [Schedule Transition Date](#)

Friendly Name * readyxrm	Organization Id a6189136-2ebf-43e6-996f-36868458e6ff
Domain Name readyxrm	Tenant READYBMS LTD
Target Transition Date 2/7/2020	Tenant Id 7c86c508-866b-4a3c-a6b4-365bb6602c22
Current Status Schedule proposed, not approved	Production No
Approved for Transition No	PowerApps Only No

Rescheduling Requests

Status	Current Target Date (MM/DD/YYYY)	Preferred Date (MM/DD/YYYY)	Reason	Additional Justification	Requested By	Requested On Date (MM/DD/YYYY) ↓
Approved	10/2/2020	10/02/2020	Other	I like to procrastinate. :)	Nick Doelman	1/9/2020 1:47 PM

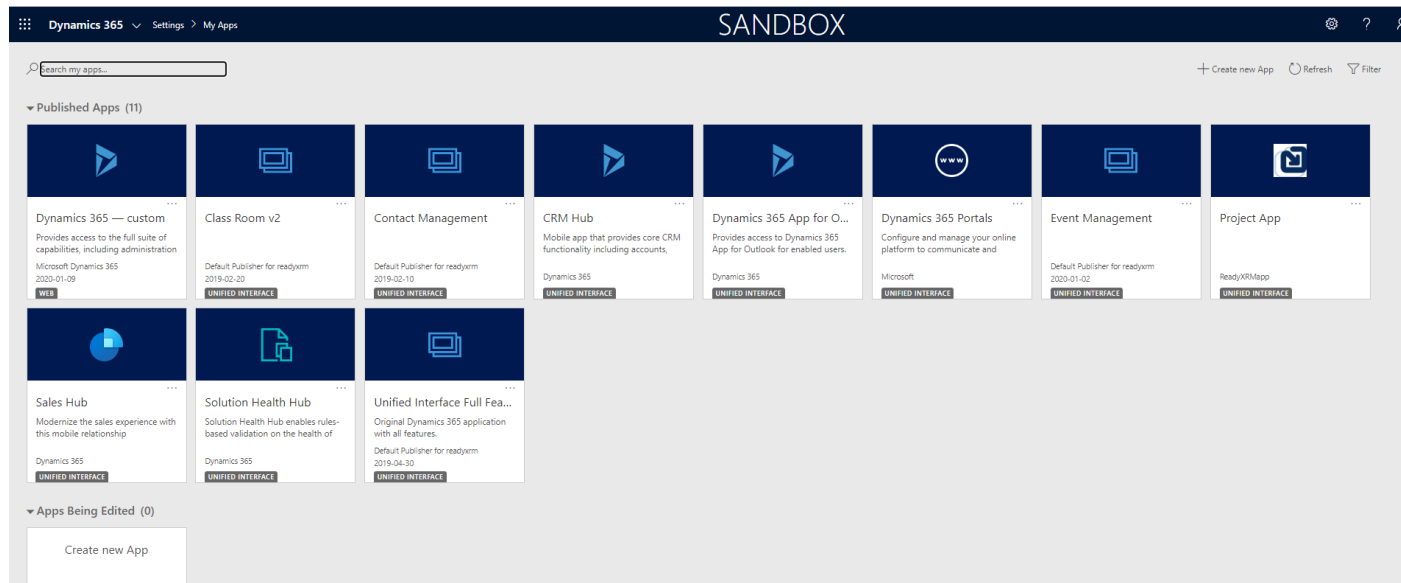


Can you Switch Manually? – YES!

Switch Over to
Unified Interface

DEMO

Hubs and Apps

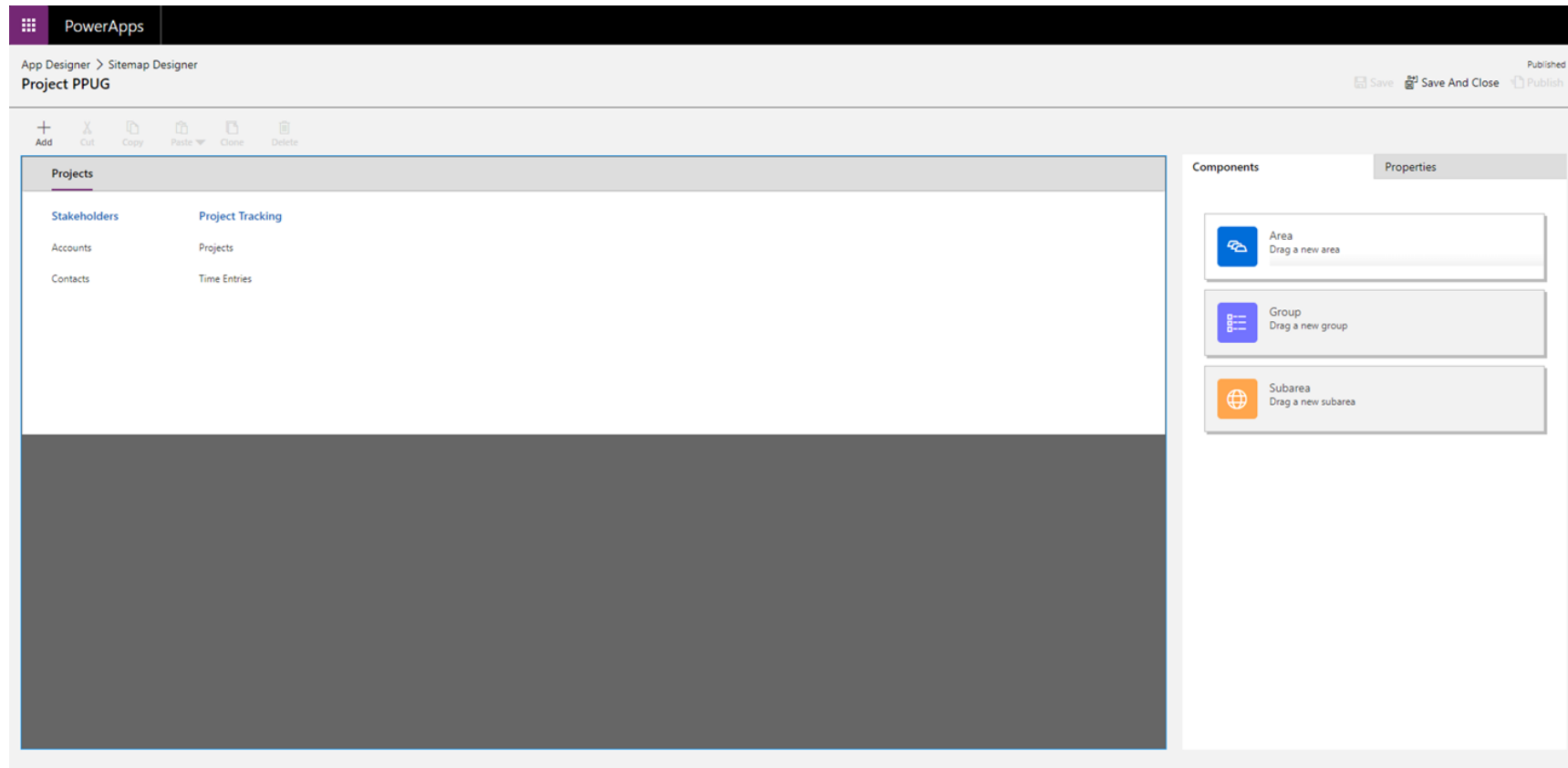


- User will navigate automatically based on security role
- Keep specific functionality to particular set of tasks or workload
- E.g. Dynamics 365 Sales, Dynamics 365 Customer Service, etc
- Create your own “Apps”

Create a Model
Driven App based
off xRM solution



Sitemap Design



App Assets

The screenshot displays the Microsoft PowerApps App Designer interface for a project named "Project PPUG". The top navigation bar includes the PowerApps logo and the project name. The main canvas area shows a hierarchical structure of app assets. On the left, there is a "Site Map" section with a "Site Map" asset. Below it, there is a "Dashboards" section with a "Dashboards" asset. The central area is titled "Entity View (4)" and contains a grid of assets for four entities: "Account", "Contact", "Project", and "Time Entry". Each entity has a "Forms" asset, a "Views" asset, a "Charts" asset, and a "Dashboards" asset. On the right, there is a "Components" panel with two tabs: "Components" and "Properties". The "Components" tab is active, showing a list of "ARTIFACTS" and "ENTITY ASSETS". The "ARTIFACTS" section includes "Entities", "Dashboards", and "Business Process Flow". The "ENTITY ASSETS" section includes "Forms", "Views", "Charts", and "Dashboards".

PowerApps

App Designer
Project PPUG

Last Saved on: 2020-01-09 4:20 PM Published

Save Save And Close Validate Publish Play

Add Edit Remove Search Canvas

Site Map Site Map

Dashboards Dashboards All

Business Process Flows Business Proces... All

Entity View (4)

Account Forms All Views 4 Charts All Dashboards All

Contact Forms All Views 2 Charts All Dashboards All

Project Forms All Views All Charts All Dashboards All

Time Entry Forms All Views All Charts All Dashboards All

Components Properties

ARTIFACTS

- Entities: Model and manage business data.
- Dashboards: Provide an insightful and graphical overview of bu...
- Business Process Flow: Define a sequence of steps required to complete ...

ENTITY ASSETS

- Forms: Define how users will see and interact with busine...
- Views: Create a list view of records for an entity.
- Charts: Show data in a meaningful and visual representati...
- Dashboards: Provide an insightful and graphical overview of bu...

Create a Model
Driven App based
off full CRM solution





Create a New App

Create and publish your own app in minutes. You can start simple and add more components later.

[Next](#)[Cancel](#)

Name :*

Dynamics CRM 2020

Unique Name :*

rbms_DynamicsCRM2020

Description:

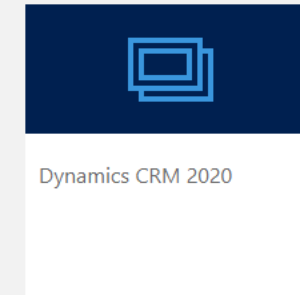
Icon:

☒ Use Default Image

Unified Interface URL:

https://readyxrm.crm3.dynamics.com/Apps/uniquename/rbms_DynamicsCRM2020☒ Use existing solution to create the App☐ Choose a welcome page for the app☐ Enable Mobile Offline

App Tile:



Create a new App, choose “existing solution”

o from existing solution
nd site map to create your new app from.

[Previous](#)[Done](#)[Can](#)

Select Solution:*

Default Solution



☐ Configure site map later

Select Sitemap:*

Site Map



Choosing the default solution will add only the site map picked (if any) and its corresponding components to the app.

Pick default solution and Site Map

Dynamics 365

SANDBOX

Search my apps...

Create new AppRefreshFilter

Published Apps (13)

Dynamics 365 — custom

Provides access to the full suite of capabilities, including administration

Microsoft Dynamics 365

2020-01-09

WEB

Class Room v2

Default Publisher for readyxrm

2019-02-20

UNIFIED INTERFACE

Contact Management

Default Publisher for readyxrm

2019-02-10

UNIFIED INTERFACE

CRM Hub

Mobile app that provides core CRM functionality including accounts,

Dynamics 365

UNIFIED INTERFACE

Dynamics 365 App for O...

Provides access to Dynamics 365 App for Outlook for enabled users.

Dynamics 365

UNIFIED INTERFACE

Dynamics 365 Portals

Configure and manage your online platform to communicate and

Microsoft

UNIFIED INTERFACE

Dynamics CRM 2020

Default Publisher for readyxrm

2020-01-09

UNIFIED INTERFACE

Project App

ReadyXRMap

UNIFIED INTERFACE

Project PPUG

Default Publisher for readyxrm

2020-01-09

UNIFIED INTERFACE

Sales Hub

Modernize the sales experience with this mobile relationship

Dynamics 365

UNIFIED INTERFACE

Solution Health Hub

Solution Health Hub enables rules-based validation on the health of

Dynamics 365

UNIFIED INTERFACE

Unified Interface Full Fea...

Original Dynamics 365 application with all features.

Default Publisher for readyxrm

2019-04-30

UNIFIED INTERFACE

Dynamics CRM 2020

OPEN IN APP DESIGNER

MANAGE ROLES

Default Publisher for readyxrm

2020-01-02

UNIFIED INTERFACE

Apps Being Edited (0)

Configure Security Roles for your App

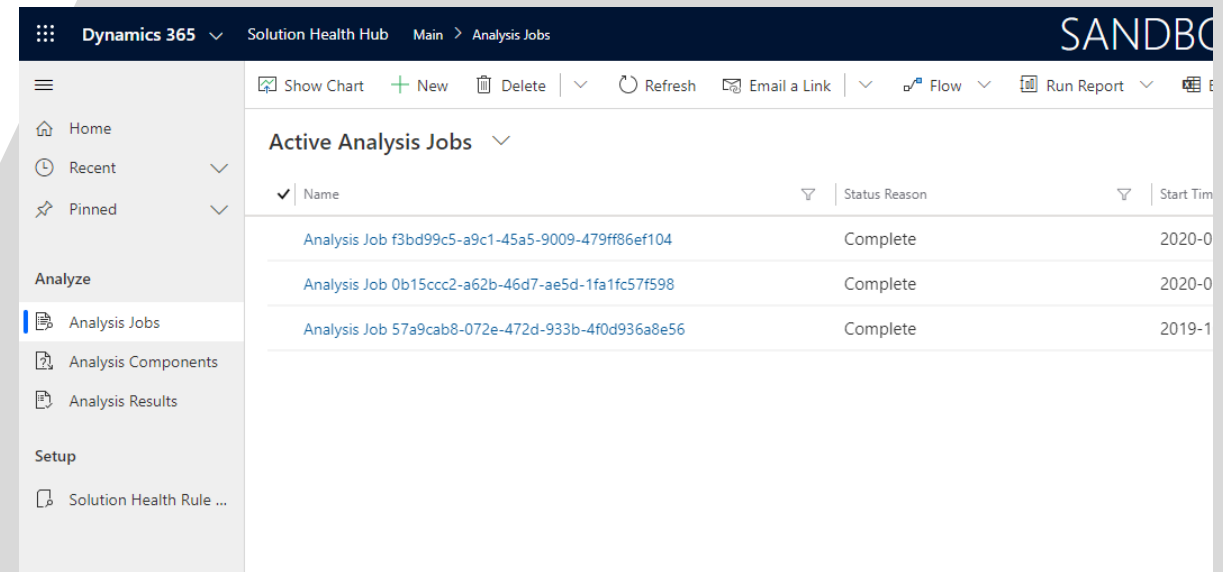


Checklist for a Smooth Transition



Power Apps Solution Checker on Solutions

- Help to identify issues
 - Plug-ins
 - Custom Workflows
 - Web Resources/JavaScript
 - SDK Messages

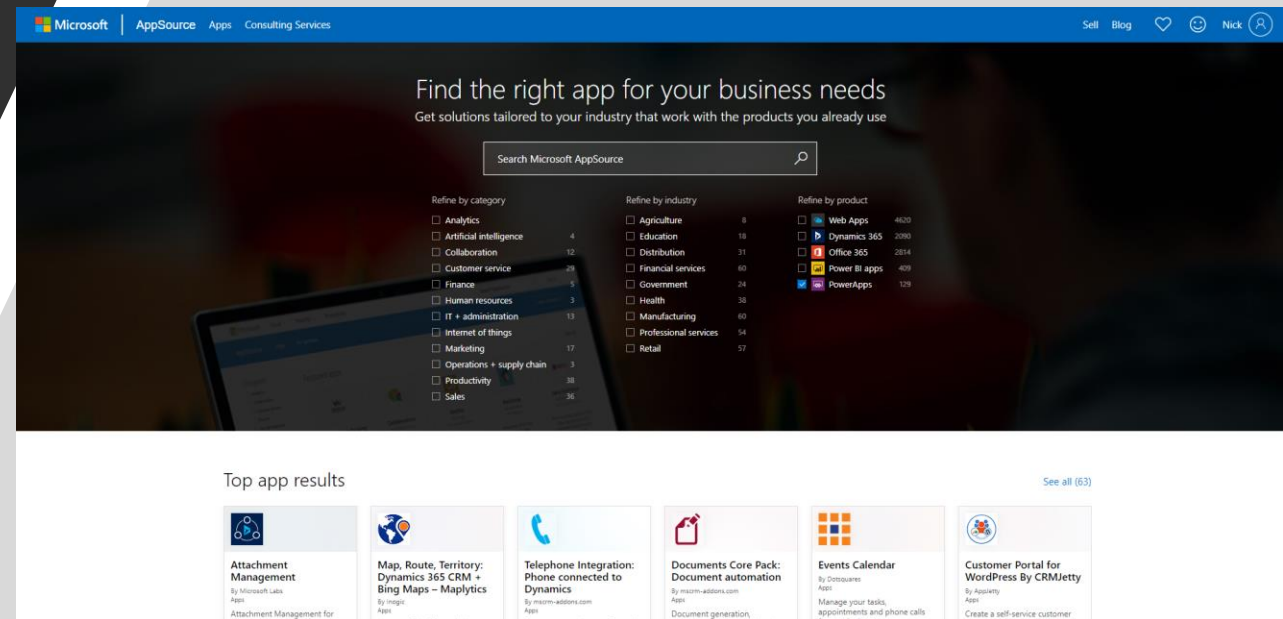


The screenshot displays the Dynamics 365 Solution Health Hub interface. The top navigation bar includes 'Dynamics 365', 'Solution Health Hub', 'Main', and 'Analysis Jobs'. The left sidebar contains a menu with 'Home', 'Recent', 'Pinned', 'Analyze' (expanded), 'Analysis Components', 'Analysis Results', 'Setup', and 'Solution Health Rule ...'. The main content area shows 'Active Analysis Jobs' with a table of three completed jobs.

Name	Status Reason	Start Time
Analysis Job f3bd99c5-a9c1-45a5-9009-479ff86ef104	Complete	2020-0
Analysis Job 0b15ccc2-a62b-46d7-ae5d-1fa1fc57f598	Complete	2020-0
Analysis Job 57a9cab8-072e-472d-933b-4f0d936a8e56	Complete	2019-1

3rd Party Applications

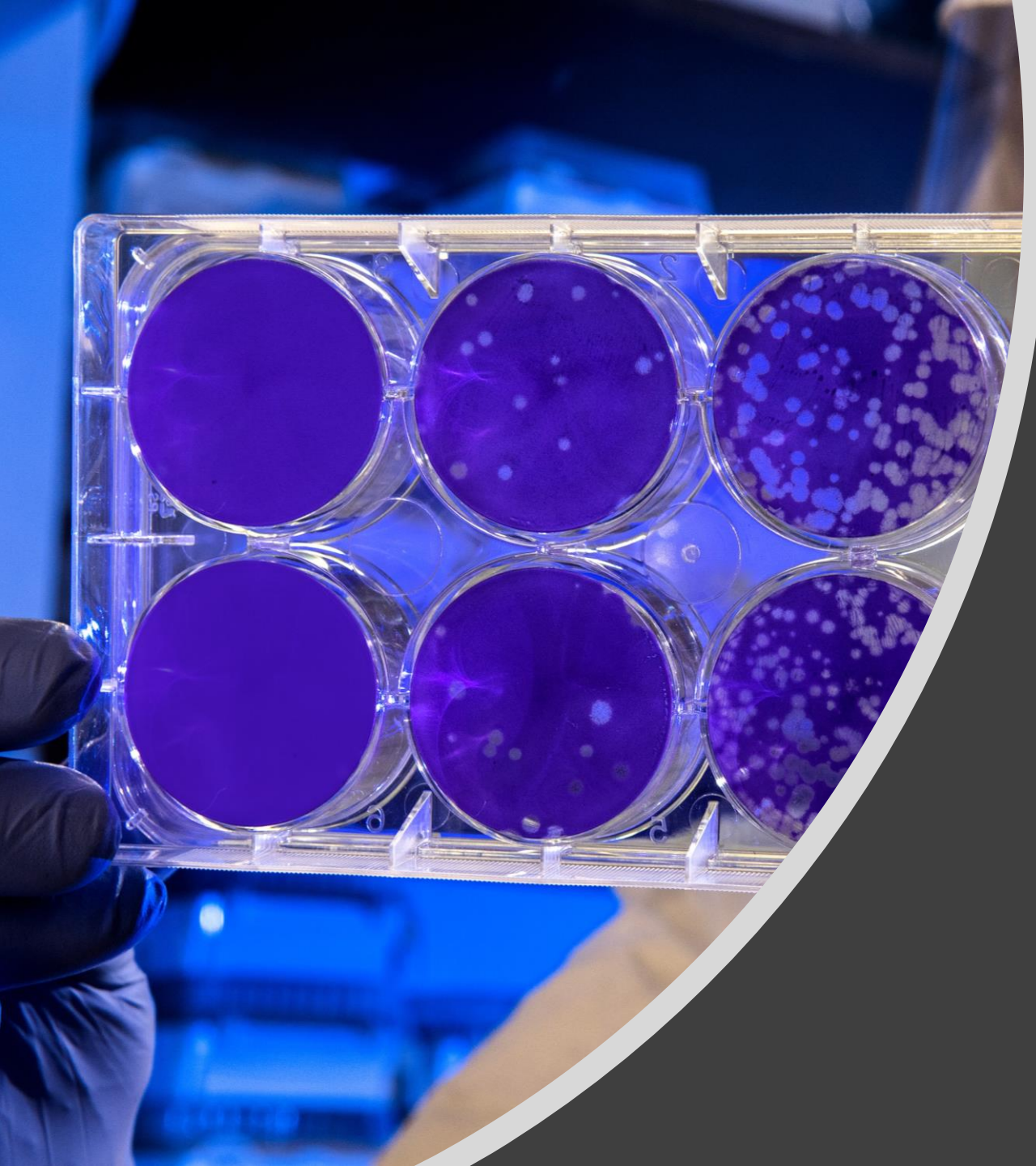
- AppSource
- Partner Solutions
- Custom Solutions



Deprecations!

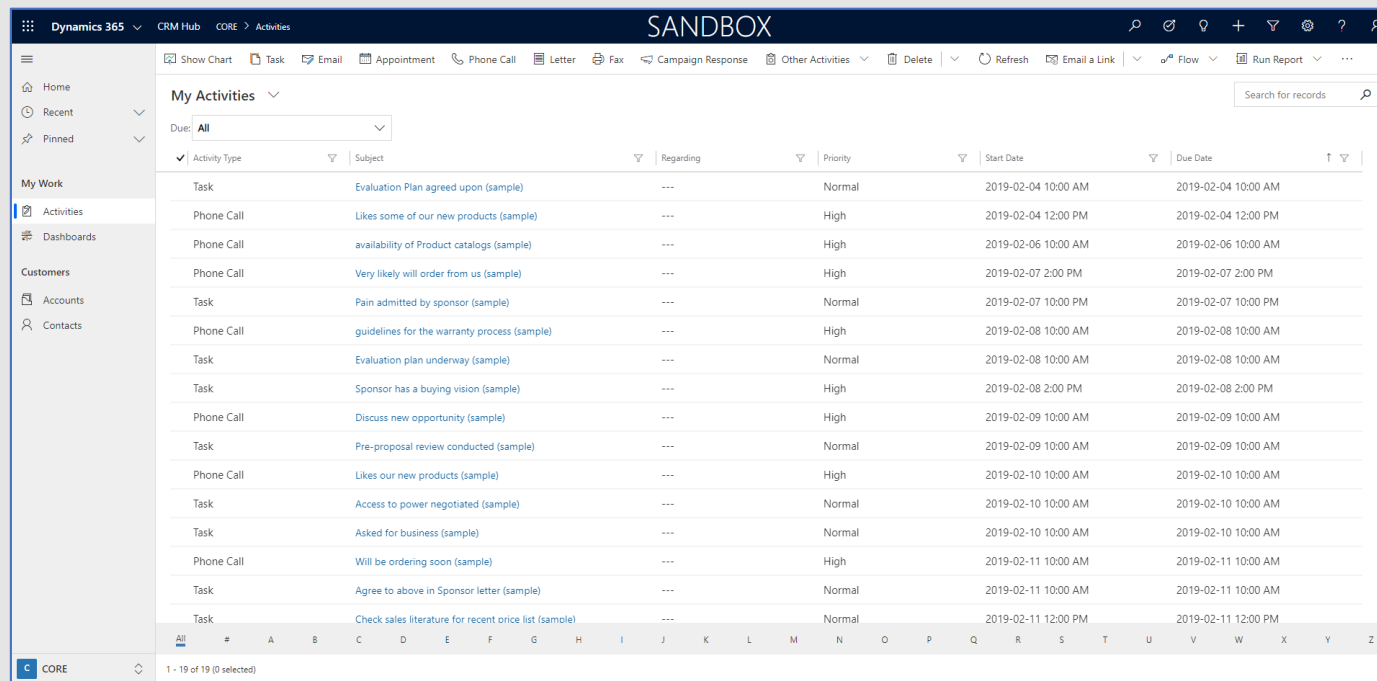
- Client API
- Dialogs
- Task flows
- Service Scheduling

The image shows two overlapping screenshots from a Microsoft Dynamics 365 environment. The background screenshot is a web browser window titled 'Project - Add Task To Objective - Google Chrome'. It displays a dialog box with the following fields: 'Which Objective do you want to associate this new task?' (a dropdown menu with 'A-1 Key Planning' selected), 'Date of Task' (a date picker), 'Enter subject/title of Task' (a text input field), and 'Add Details of Task' (a larger text area). At the bottom are 'Help' and 'Summary' buttons. The foreground screenshot is the 'Project Tracking' application interface for '(A) Sample Project'. It features a left-hand navigation pane with categories like 'STAKEHOLDERS', 'PROJECT MANAGEMENT', 'ACTIVITY TRACKING', and 'EVENTS'. The main content area shows tabs for 'General', 'Objectives', 'Project Participants', 'Project Tasks' (which is active), 'Admin', and 'Related'. Under the 'Project Tasks' tab, there is a form for '(A) Sample Project' with fields for 'Choose Objective' (dropdown with 'A-1 Key Planning'), 'Task Date' (date picker with '5/8/2019'), 'Subject' (text input), and 'Description' (text area). An 'Add Task' button is at the bottom right of this form.



TEST YOUR
APPS!

Define App Strategy



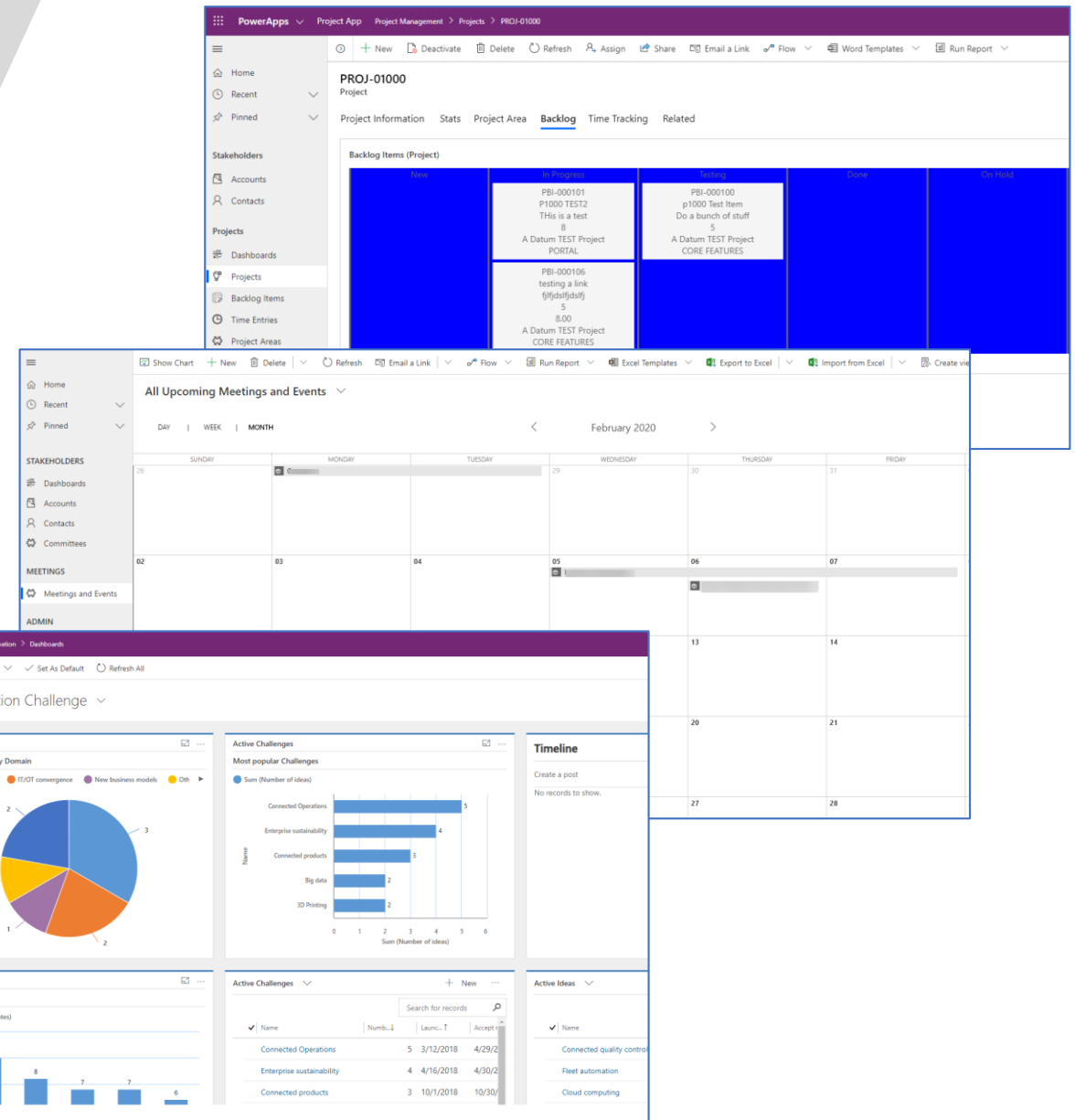
The screenshot displays the Microsoft Dynamics 365 CRM Hub interface. The top navigation bar includes 'Dynamics 365', 'CRM Hub', and 'CORE > Activities'. The main header area shows 'SANDBOX' and various action icons. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Activities (selected), Dashboards, Customers, Accounts, and Contacts. The main content area is titled 'My Activities' and features a table of activities. The table has columns for Activity Type, Subject, Regarding, Priority, Start Date, and Due Date. The activities listed include tasks and phone calls with various subjects related to product catalogs, warranty processes, and business negotiations. At the bottom, a status bar indicates '1 - 19 of 19 (0 selected)'.

Activity Type	Subject	Regarding	Priority	Start Date	Due Date
Task	Evaluation Plan agreed upon (sample)	---	Normal	2019-02-04 10:00 AM	2019-02-04 10:00 AM
Phone Call	Likes some of our new products (sample)	---	High	2019-02-04 12:00 PM	2019-02-04 12:00 PM
Phone Call	availability of Product catalogs (sample)	---	High	2019-02-06 10:00 AM	2019-02-06 10:00 AM
Phone Call	Very likely will order from us (sample)	---	High	2019-02-07 2:00 PM	2019-02-07 2:00 PM
Task	Pain admitted by sponsor (sample)	---	Normal	2019-02-07 10:00 PM	2019-02-07 10:00 PM
Phone Call	guidelines for the warranty process (sample)	---	High	2019-02-08 10:00 AM	2019-02-08 10:00 AM
Task	Evaluation plan underway (sample)	---	Normal	2019-02-08 10:00 AM	2019-02-08 10:00 AM
Task	Sponsor has a buying vision (sample)	---	High	2019-02-08 2:00 PM	2019-02-08 2:00 PM
Phone Call	Discuss new opportunity (sample)	---	High	2019-02-09 10:00 AM	2019-02-09 10:00 AM
Task	Pre-proposal review conducted (sample)	---	Normal	2019-02-09 10:00 AM	2019-02-09 10:00 AM
Phone Call	Likes our new products (sample)	---	High	2019-02-10 10:00 AM	2019-02-10 10:00 AM
Task	Access to power negotiated (sample)	---	Normal	2019-02-10 10:00 AM	2019-02-10 10:00 AM
Task	Asked for business (sample)	---	Normal	2019-02-10 10:00 AM	2019-02-10 10:00 AM
Phone Call	Will be ordering soon (sample)	---	High	2019-02-11 10:00 AM	2019-02-11 10:00 AM
Task	Agree to above in Sponsor letter (sample)	---	Normal	2019-02-11 10:00 AM	2019-02-11 10:00 AM
Task	Check sales literature for recent price list (sample)	---	Normal	2019-02-11 12:00 PM	2019-02-11 12:00 PM

- Purpose Apps
- Dynamics 365 Hubs
- All in one App

Enrichment! (or what's the point?)

- Organize site map
- Form Optimization
- View Optimization
- Update Icons (SVG)
- Custom Controls
- Reference Panels
- Embed Canvas Apps
- Embed Power BI reports and Tiles
- Interactive Dashboards



QUESTIONS?

