What’s new in Dynamics 365?

October 2018 – April 2019 Edition
The Good, the Bad and the Ugly

Your Presenters

Dave Harris
Solution Architect
cloudThing
@ukcrmguy

Adil Aslam
Dynamics Functional Consultant
cloudThing

Nathan Hawkins
Solution Architect
cloudThing
@dynamics365man
Layout of the session

• Each of us have 3 ‘Features’
• Applause how much you liked that feature
• The feature with the most applause wins the session!
Relationship Sales

(AKA Simple LinkedIn Integration)

General availability: April 2019
Relationship Sales

• Out-of-the-box LinkedIn integration
• Connect customers to LinkedIn, allowing sales people to prospect and research more easily
• To be enhanced with organisation charts, alerts when customers move jobs
• Available for all Dynamics 365 for Sales and Customer Engagement plans
Profile Cards

- Unified Interface of Dynamics 365 Customer Engagement apps.
- Available for the Contact and User entity lookups
- Hover over the record to see the Profile Card
- Information is from CDS for the Contact and O365 for the User
- Desktop/PC only, not mobile
- Useful for accessing alternative numbers or contact mechanisms
As part of this feature, administrators can add, remove, or edit any of the fields on the case resolution dialog and customize it as per their requirements.

(Core Customer Service)

Resolve Opportunity Form Customization
Coming Soon!
Suggest Similar Cases
Suggest Similar Cases

• Was in Preview since late 2017, announced in Oct 18 release notes, entered production in Dec 2018
• Uses Text Analytics in Azure
• Requires and shows in the Customer Service Hub
• After configuration, “Similar cases” are shown in the case form automatically
When are SIMILAR CASES different?

- **SIMILAR CASES** on Case form, which is for manually linking cases using connections.
- Suggested **SIMILAR CASES** in Case for Interactive experience form in the Customer Service Hub.
To configure suggested similar cases

• Settings | Data Management | Similar Records Suggestions Settings

• Create an advanced similarity rule
  • Seems to be only for cases (at present)
  • Only one rule per entity

• In the rule configure:
  • Noise phrases, Status filter and Match Fields

• Notice the mix of display and internal name

![All Advanced Similarity Rules]

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Source Entity</th>
<th>Target Entity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Similarity Rule</td>
<td>Active</td>
<td>Case</td>
<td>Incident</td>
</tr>
</tbody>
</table>
Noise Phrases

• Filters out cases from matches if one or more noise phrases appear in the match fields
• Separate phrases with semi-colon
• DEMO
  • Review a similarity rule
  • Case: Information on the Product – view suggested similar cases
  • In Resolved Case Contact Information Required, add Angry to My Custom Field
Questions I have

• Exact Match – shows no options
• Will this be enabled for other entities
• How to add Similar Cases control to a form
Simple Pipeline Forecasting
Public preview: April 2019
Pipeline Forecasting

- ‘Simple’ forecast modelling
- Intended to replace the spreadsheets and other manual forecasting
- Sales managers can see forecasts across the team for decision-making
- Sales people can see how they’re going to do against quota; spot pipeline risks
- Builds on existing goals functionality
- Available for the Sales Hub
Playbooks

Available now

General availability of new features: April 2019
Playbooks Overview

Playbooks provide guidance/best practices on recurring tasks following an expected action.

Create Tasks, Appointment, Phone Calls. On the following OOTB Entities (Lead, Opportunity, Quote, Order, Invoice)

Playbooks can be created using workflows, Users no longer need to add multiple activities to workflows they can just call a Playbook. (Users can also apply a Playbook manually from the record command ribbon)

April 2019 Update – Now allows a Playbook to be created using Microsoft Flow
Demo – Playbooks

Templates
Usage
Customer Insights

GA: July 1st
Power personalized experiences and processes

Get a holistic view of customers

Unlock insights and take action

Adapt and extend

Rely on a productive and trusted platform

Dynamics 365 Customer Insights (Preview)
Our approach
Unlock insights and take action

- Predict customer intent
- Spot trends and patterns
- Create richer customer segments
- Drive personalized engagement across channels
- Automate customer-centric experiences and processes
Key phases

**Ingestion**
Bring customer and activity data from all sources

**Mapping and matching**
Identify and understand profile data from transactional and observational sources

**Conflation**
Consolidate data into a single customer profile with source lineage

**Enrichment**
Enrich profiles using AI models and proprietary signals from Microsoft Graph

**Insights**
Derive insights that automate and optimize processes

**Action**
Leverage insights across all channels of engagement with connectors and APIs
Dynamics 365 Customer Insights done differently

**Data**
- External:
  - Credit ratings
  - Surveys
  - Loyalty
  - Events
  - Partner data
  - Twitter
  - Facebook
  - LinkedIn
  - Geo location
  - WiFi
- Internal:
  - Campaigns
  - Leads
  - Activities
  - Purchases
  - Cases
  - Web interactions
  - Email interactions
  - Mobile App data
  - Gamification
  - IoT data

**Unify**
- Ingestion
- Mapping and matching
- Conflation
- Enrichment

**Insights**
- Predictive analytics
- Contextual insights
- Segmentation
- Process optimization and automation

---

Dynamics 365 Customer Insights

Citizen Intelligence Platform

Data Factory
Data Catalog
Event Hubs
Data Lake
HDInsight (Hadoop)
Machine Learning
Stream Analytics
SQL Data Warehouse
Azure PaaS
Service Management Settings
Customer Service Admin Settings

- Service Management settings are now available in the Customer Service Hub
- Announced in Oct 18, available late Dec 18
Set up customer service for your organization.

**Case Settings with Record Creation and Update Rules**

- **Queues**
  - Create and manage service queues, and manage the membership of private queues.

**Routing Rule Sets**
- Create or delete case routing rules. Change existing rules.

---

**Case Settings**

Select the case attribute that will inherit from parent case to child case.

- **Available**
  - (Deprecated) Stage Id
  - (Deprecated) Traversed Path
  - Activities Complete
  - Case Stage
  - Case Type
  - Check Email
  - Contact
  - Contact
  - Contract
  - Contract Line

- **Selected**
  - Case Title
  - Customer

You can select a cascade closure preference for parent and child cases. Specify closure.
A few settings missing

• Three settings are still only available in the web interface:
  • Routing Rule Sets
  • Automatic Record Creation and Update Rules
  • Service Level Agreements
• The Oct 18 release guide states, "... will be available in the Customer Service Hub sitemap beginning with the January '19 release"
• However, at version 9.1.0000.2829, these three settings are still not available in the Customer Service Hub
Other areas missing

<table>
<thead>
<tr>
<th>Email Templates</th>
<th>Article Templates</th>
<th>Contract Templates</th>
<th>Service Scheduling</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Use Personal Options or web interface</td>
<td>• Deprecated, use Knowledge Articles</td>
<td>• Deprecated, use Entitlements</td>
<td>• Whole area missing, deprecated</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Use Universal Resource Scheduling</td>
</tr>
</tbody>
</table>
CDS Storage
Storage Costs

• New pricing model comes into effect on 1st April 2019
• Microsoft had considered making the change last year but postponed the change
Will I have to pay more?
Current model – before April 2019 changes

• Every subscription to Dynamics 365 customer engagement has a base entitlement and incremental entitlements.

• Base Entitlement:
  • 10GB storage
  • 2 database instances (one production and one sandbox)

• Incremental Entitlements:
  • For every 20 full licence users, an additional 5GB of storage (equivalent to 250MB per user)

• All storage is charged at the same price per gigabyte (GB) regardless of the type of data
# Buying additional items

<table>
<thead>
<tr>
<th></th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Storage</strong></td>
<td>$5 per GB</td>
</tr>
<tr>
<td><strong>Production Instance</strong></td>
<td>$550 per month</td>
</tr>
<tr>
<td><strong>Sandbox Instance</strong></td>
<td>$150 per month</td>
</tr>
</tbody>
</table>
New model

• The new model changes pricing for storage and instances
• Key change is that storage is classed as one of three types:
  - Files
    - Attachments (to emails and notes)
  - Logs
    - Audit Logs
  - SQL Database
    - Everything else (relational data in tables)
Attachments

• Will not be stored in SQL Server
• Instead will be stored in Azure file store
• Existing attachments will be moved by Microsoft
  • No change to user interface
  • Exactly the same behaviour as before in queries, API calls
New storage pricing

• Not yet publicly announced by Microsoft
• Visible to CSPs who have access to the April Preview price list

<table>
<thead>
<tr>
<th>Storage Type</th>
<th>Price per GB per month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Files</td>
<td>??</td>
</tr>
<tr>
<td>Audit Logs</td>
<td>??</td>
</tr>
<tr>
<td>Database</td>
<td>??</td>
</tr>
</tbody>
</table>
## Base entitlement in the new model

<table>
<thead>
<tr>
<th>Storage Type</th>
<th>Included Entitlement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Files</td>
<td>20GB (new)</td>
</tr>
<tr>
<td>Audit Logs</td>
<td>2GB (new)</td>
</tr>
<tr>
<td>Database</td>
<td>10GB (same)</td>
</tr>
</tbody>
</table>
Incremental Entitlements

• For each full licence user

- Files: 2GB
- Audit Logs: None
- SQL Database: 250MB (was 5GB per 20 users)
Instances in the new model

• Depending on your usage, this could be the best bit:

No charge for additional instances
Provisioning Instances

- Each instance uses a minimum of 1GB of SQL storage
- You can only provision a new instance if you have at least 1GB of free storage
- Limit to number of instances? Subject to storage requirement, I think not
Am I better off?

• Depends on your usage pattern
• If you have lots of instances for dev/testing then probably
• If you have a lot of data that isn’t file attachments or audit logs then probably not
• A report within Dynamics 365 will be provided to show the amount of data used by type
### Capacity Storage Analysis CDS/Dynamics 365

#### Environment Details

<table>
<thead>
<tr>
<th>Environment</th>
<th>Type</th>
<th>State</th>
<th>Database version</th>
</tr>
</thead>
<tbody>
<tr>
<td>CloudThing Demo</td>
<td>Sandbox</td>
<td>Ready</td>
<td>9.1.0.4430</td>
</tr>
<tr>
<td>CloudThing Demo</td>
<td>Default</td>
<td>Ready</td>
<td>9.1.0.4432</td>
</tr>
<tr>
<td>NPD Demo</td>
<td>Sandbox</td>
<td>Ready</td>
<td>9.1.0.4430</td>
</tr>
</tbody>
</table>
Portals
Portal diagnostics tool

• First announced in the Oct 18 release notes
• Helps to identify issues with a portal and provides suggestions on how to fix them
• Run from the Admin Centre, Application tab, select portal and then Manage
Diagnose and resolve problems

Welcome to the Dynamics 365 Portal diagnostics. Please click Run diagnostics to get started. Learn more about this feature.
## Diagnostic Results

<table>
<thead>
<tr>
<th>Issue</th>
<th>Category</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potential cache invalidation issues on your portal</td>
<td>Cache Invalidation</td>
<td>Warning</td>
</tr>
<tr>
<td>Portal does not load and displays &quot;Server Error&quot;</td>
<td>Portal Startup Issue</td>
<td>Pass</td>
</tr>
<tr>
<td>Entities not enabled for cache invalidation</td>
<td>Cache Invalidation</td>
<td>Pass</td>
</tr>
<tr>
<td>Web page tracking</td>
<td>Performance</td>
<td>Pass</td>
</tr>
<tr>
<td>Web file tracking</td>
<td>Performance</td>
<td>Pass</td>
</tr>
<tr>
<td>Login tracking</td>
<td>Performance</td>
<td>Pass</td>
</tr>
<tr>
<td>Header output cache</td>
<td>Performance</td>
<td>Pass</td>
</tr>
<tr>
<td>Footer output cache</td>
<td>Performance</td>
<td>Pass</td>
</tr>
<tr>
<td>Large number of web file records</td>
<td>Performance</td>
<td>Pass</td>
</tr>
</tbody>
</table>
### Diagnostic Results

<table>
<thead>
<tr>
<th>Issue</th>
<th>Category</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️ Potential cache invalidation issues on your portal</td>
<td>Cache Invalidation</td>
<td>Warning</td>
</tr>
</tbody>
</table>

**Issue**

Dynamics 365 organization associated to this portal is potentially not enabled for change notification. This can lead to cache invalidation issues on your portal.

**Mitigation**

To fix this issue, enable organization for change notification. Learn more. [Enable Change Notification](#)

---

- Portal does not load and displays "Server Error"
- Entities not enabled for cache invalidation
- Web page tracking
- Web file tracking
- Login tracking
- Header output cache
- Footer output cache
- Large number of web file records

**Result**

- Pass
- Pass
- Performance
- Performance
- Performance
- Performance
- Performance
- Performance
- Performance
Portal diagnostics tool – Apr 19

Additional checks added:
• Identify incorrectly configured site markers
• Identify performance impacting entity permissions and slow running queries
• Identify portal solution installation and update failures and suggestions
• Instead of showing “website unavailable” error can display a configurable *website under maintenance* message
Display external data in portals

• Portals show data from Dynamics 365
• This feature will allow data from other (non Dynamics 365) applications to be displayed in portals
• Client-side calls to external APIs and secure them by using OAuth Implicit Grant Type flow.
• Power BI Embedded, customizers can provide access to Power BI dashboards and reports to users who don't have a Power BI account.
CDS Starter Portal – Apr 19

• Can connect a portal to a CDS for Apps environment that does not have a Dynamics 365 applications (Sales, Service, or Marketing) installed.

• New template, CDS Starter, which can be installed in CDS for Apps organizations.
AI for Sales

Available now

Public preview of new features: July 2019
AI for Sales

• Combines AI with BI for insight difficult to produce in Power BI alone.

• Surface customer sentiment, keywords, and conversational key performance indicators (KPIs) such as talk-to-listen ratio and speaking speed with call intelligence capabilities.

• Provide timely feedback and coaching based on seller engagement and productivity metrics, such as time spent with customers, calculated from Dynamics 365 and Office 365 data.

• Lead proactively throughout the entire sales cycle with interactive reports that include KPIs for pipeline and deals.

• Use natural language-based Q&A embedded directly in the application.
AI for Sales

- Four Core Dashboards
- Using NLP
- Clustering
- Spot Trends
- Goes beyond standard
Demo AI for Sales

Available now

Public preview of new features: July 2019
AI for Sales

• How much is it?

Dynamics 365 Sales Insights*

£37.70

Per user/month
AI for Customer Service

Sometimes referred to as ‘Customer Service Insights’
General availability: TBC
In Preview: Now
AI for Customer Service

• Combines AI with BI for insight difficult to produce in Power BI alone

• Gain a comprehensive understanding of customer satisfaction score (CSAT) drivers and use AI insights to implement data-driven improvements.

• Streamline operations with case resolution insights, backlog trends, and historical comparisons
AI for Customer Service

- Four Core Dashboards
- Using NLP
- Clustering
- Spot Trends
- Goes beyond standard
Demo
AI for Customer Service
KPIs & Visuals
AI for Customer Service

• How much is it?

Dynamics 365 Customer Service Insights

£56.60
Per user/month
Up to 100,000 cases per license 1 2

Included
with Dynamics 365 for Customer Service Enterprise 3
Up to 100,000 cases per license 1 2

Contact us

1 The 100,000 is based on the total number of case records imported into Customer Service Insights workspaces.

2 Additional capacity can be purchased, please review the licensing guide for more details.

3 Any plan that includes Dynamics 365 for Customer Service Enterprise also includes Customer Service Insights.
Which feature is the winner?!
Finally…

• Release Notes for April 2019 are here: https://docs.microsoft.com/en-us/business-applications-release-notes/April19/
Please complete your Feedback Form!

(update for Bham)