



**Dynamics 365 &
Power Platform**
UK User Groups

Relegated Timelines and Replaced Business Process Flows – is this the future for D365 BizApps?

Presented by | Sharon Smith
12-Jan-25



SPEAKER



Sharon Smith

— Dynamics 365 Solution Architect —
ANS Group



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TODAY'S AGENDA

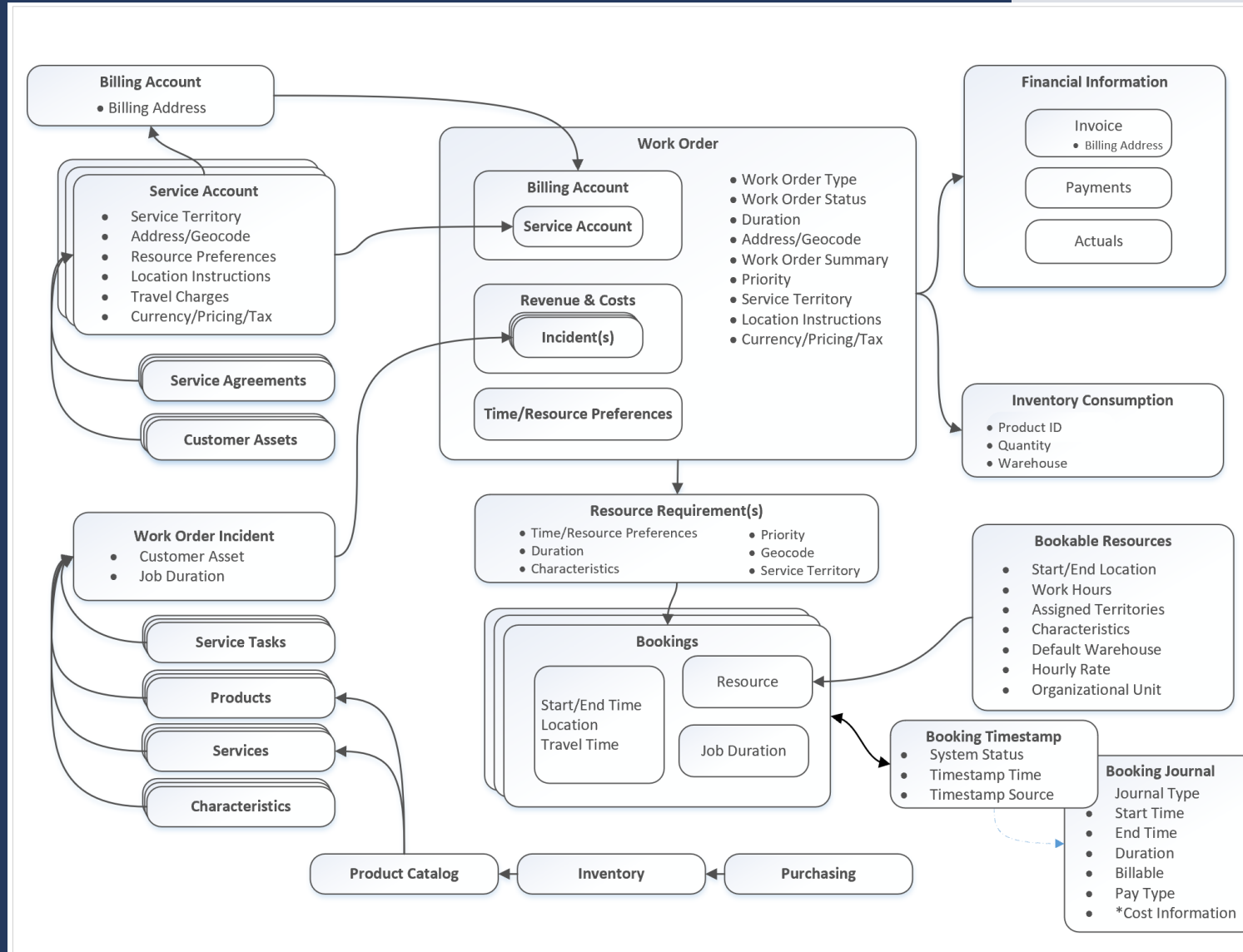
1. Who am I?
2. First Hints
3. Timelines
4. Business Process Flows v's Dynamic Booking Cards
5. The next Wave
6. RIP Business Process Flows?
7. The Future
8. Preparing for that Future
9. Questions

First hints

2023 Release Wave 2
Dynamics 365 Field Service

Where we're not going...

Don't Panic!!!



Where are we...

Almost...

Dynamics 365 | Field Service

Search

New look

Home

Recent

Pinned

My Work

Get Started

Dashboards

Scheduling

Work Orders

Schedule Board

Bookings

Resource Require...

Requirement Gro...

Time Off Requests

Time Entries

Customers

Accounts

Contacts

Service Delivery

Cases

Agreements

Service

Show Chart

New

Refresh

Visualize this view

Export to Excel

Show As

Work Order list (New)

Share

Active Work Orders

Edit columns

Edit filters

Filter by keyword

<input type="checkbox"/>	Work Order Number	Service Account	Functional Location	Substatus	System Status	Created On	Work Order Type	Primary Incident Type	Primary Incident Description
<input type="checkbox"/>	Sample_WO00016	Bean-to-Cup Machines			Scheduled	1/13/2024 4:25 PM	Heat Bed Sensor Failu		
<input type="checkbox"/>	Sample_WO00013	Cafe Duo			Scheduled	1/13/2024 4:25 PM	Switch Valve non-ope		
<input type="checkbox"/>	Sample_WO00001	Bean-to-Cup Machines			Unscheduled	1/13/2024 4:25 PM	Maintenance request		
<input type="checkbox"/>	Sample_WO00020	Cafe Duo			Scheduled	1/13/2024 4:25 PM	Service Call		
<input type="checkbox"/>	Sample_WO00017	Fourth Coffee			Scheduled	1/13/2024 4:25 PM	Diagnosis and Repair		
<input type="checkbox"/>	Sample_WO00014	Cafe Duo			Scheduled	1/13/2024 4:25 PM	Heat Bed Sensor Failu		
<input type="checkbox"/>	Sample_WO00018	Bean-to-Cup Machines			Scheduled	1/13/2024 4:25 PM	Heat Bed Sensor Failu		
<input type="checkbox"/>	Sample_WO00010	Cafe Duo			Scheduled	1/13/2024 4:25 PM	Heat Bed Sensor Failu		
<input type="checkbox"/>	Sample_WO00006	Cafe Duo			Completed	1/13/2024 4:25 PM	Diagnosis and Repair		
<input type="checkbox"/>	Sample_WO00004	Bean-to-Cup Machines			In Progress	1/13/2024 4:25 PM	Heat Bed Sensor Failu		
<input type="checkbox"/>	Sample_WO00021	Cafe Duo			Scheduled	1/13/2024 4:25 PM	Standard Maintenance		
<input type="checkbox"/>	Sample_WO00002	Cafe Duo			In Progress	1/13/2024 4:25 PM	Maintenance request		
<input type="checkbox"/>	Sample_WO00012	Bean-to-Cup Machines			In Progress	1/13/2024 4:25 PM	Heat Bed Sensor Failu		
<input type="checkbox"/>	Sample_WO00019	Cafe Duo			Scheduled	1/13/2024 4:25 PM	Heat Bed Sensor Failu		
<input type="checkbox"/>	Sample_WO00015	Bean-to-Cup Machines			In Progress	1/13/2024 4:25 PM	Diagnosis and Repair		

Rows: 41

Where we are Got there!

Dynamics 365 | Field Service

Search

New Location

Home
Recent
Pinned

My Work
Get Started
Dashboards

Scheduling
Work Orders
Schedule Board
Bookings
Resource Require...
Requirement Gro...
Time Off Requests
Time Entries

Customers
Accounts
Contacts

Service Delivery
Cases
Agreements

Service

Sample_WO13799 - Saved
Work Order - Work Order

Work Order Business Professional
Active for 35 days

Work Order (35 D)

Schedule Work Order

Summary
Work Order - Mobile Services
Service Tasks
Articles
Location
Record Log
Related

GENERAL

Work Order Number * Sample_WO13799

Service Account * Fourth Coffee

Billing Account Fourth Coffee

Timeline

Search timeline

Enter a note...

Recent

Modified on: 5:47 PM

Phone Call from: Alex Baker Active

Reschedule of Diagnosis & Repair call
Booked call missed. Requested reschedule

View more

CUSTOMER DETAIL

Primary Contact

Email claudia@pmgdemo.onmicrosoft.com

Address Phone

INCIDENTS

Water flow issues
Cafe Duo-Device Controller
Sample_WO13799

1 - 1 of 1

BOOKINGS

Sample_WO13799
Sample_WO13799
1/19/2024 9:15 AM

1 - 1 of 1

Work Order (Legacy)
Work Order
Work Order - Mobile Services
Service Tasks
Articles

Where we're going / got to

Streamlined

Dynamics 365

Field Service

Search

New look

SS

Home

Recent

Pinned

My Work

Get Started

Dashboards

Scheduling

Work Orders

Schedule Board

Bookings

Resource Require...

Requirement Gro...

Time Off Requests

Time Entries

Customers

Accounts

Contacts

Service Delivery

Cases

Agreements

Service

←

↶

Save

Save & Close

+ New

Book

Rebook

Delete

Refresh

Share

Sample_WO13799 - Unsaved

Work Order · Work Order (New)

1/13/2024 4:25 PM
Created on

Fourth Coffee
Service account

General

Products and services

Tasks

Reference

Timeline

Related

Details

Status *
Scheduled

Priority
Urgent

Service account *
Fourth Coffee

Work order type *
Diagnosis and Repair

Incident type *
Water flow issues

Agreement
Sample_Agr00138

Summary
Assess the water flow in Cafe Duo machine. Clean machine. Conduct repairs as required.

Account instructions
Conduct required repairs under Sample Agr00138. Quote approval required if above auto-approval limit

Promised window

Booking


JP Jabez Parker
567-555-0164
jabez@contoso.com
Fri, Jan 19, 2024
9:15 AM - 12:10 PM
2h 15min
40min travel time
Scheduled
Rebook
Requirements
1h 30min duration
Find availability

Contacts

Reported by
Alex Baker
Account contacts are populated from the service account's primary contact

Assets

Primary asset
Cafe Duo-Device Controller

 D365PPUG UK

Document Classification: Public

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Timelines

Relegation or Promotion?

Everything's Important

What should be on the General tab?

Dynamics 365 | Field Service

Search

New look

Home Recent Pinned My Work Get Started Dashboards Scheduling Work Orders Schedule Board Bookings Resource Require... Requirement Grou... Time Off Requests Time Entries Customers Accounts Contacts Service Delivery Cases Agreements Assets Assets Service

Sample_WO13799 - Saved
Work Order - Work Order

Work Order Business Pro... Active for 40 days

Work Order (40 D) Schedule Work Order Close Work Order

Summary Settings Products Services Service Tasks Articles Location Record Log Related

GENERAL

Work Order Number Sample_WO13799

Service Account * Fourth Coffee

Billing Account Fourth Coffee

Functional Location

System Status * Scheduled

Substatus

Work Order Type * Diagnosis and Repair

Price List * Regular Price List

Work Hour Template

Work Order Summary Assess the water flow in Cafe Duo machine. Clean machine. Conduct repairs as required.

PRIMARY INCIDENT

Primary Incident * Water flow issues

Timeline

Search timeline

Enter a note...

Recent

Modified on: 7:07 PM
Email from: Sharon Smith Active
Confirmation of Rescheduling of Diagnosis & Repair call
Hello Alex, Just a short email to confirm, as agreed during our telephone call on 17 Febru...
View more

Modified on: 2/17/2024 8:04 PM
Note modified by Sharon Smith
Rescheduling of Diagnosis & Repair call
Call rescheduled for Friday 1 March 2024 @ 9am.
View more

Modified on: 2/17/2024 5:47 PM
Phone Call from: Alex Baker Active
Reschedule of Diagnosis & Repair call
Booked call missed. Requested reschedule
View more

CUSTOMER DETAIL

Primary Contact

Email claudia@pmgdemo.onmicrosoft.com

Address Phone

INCIDENTS

Rows: 1

BOOKINGS

Name	Work O...	Start ...	End Time
Sample	Sample_WO13799	3/1/2024	3/1/2024

Until it isn't

Streamlined

Dynamics 365

Field Service

Search

New look

Home

Recent

Pinned

My Work

Get Started

Dashboards

Scheduling

Work Orders

Schedule Board

Bookings

Resource Require...

Requirement Gro...

Time Off Requests

Time Entries

Customers

Accounts

Contacts

Service Delivery

Cases

Agreements

Service

←

↶

Save

Save & Close

+ New

Book

Rebook

Delete

Refresh

Share

Sample_WO13799 - Unsaved

Work Order · Work Order (New)

1/13/2024 4:25 PM
Created on

Fourth Coffee
Service account

General

Products and services

Tasks

Reference

Timeline

Related

Details

Status *
Scheduled

Priority
Urgent

Service account *
Fourth Coffee

Work order type *
Diagnosis and Repair

Incident type *
Water flow issues

Agreement
Sample_Agr00138

Summary
Assess the water flow in Cafe Duo machine. Clean machine. Conduct repairs as required.

Account instructions
Conduct required repairs under Sample Agr00138. Quote approval required if above auto-approval limit

Promised window

Booking

JP Jabez Parker
Fri, Jan 19, 2024
9:15 AM - 12:10 PM
2h 15min
40min travel time

Scheduled

Rebook


Find availability

Requirements
1h 30min duration

Contacts

Reported by
Alex Baker

Assets
Cafe Duo-Device Controller

 D365PPUG UK

Document Classification: Public

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Relegation or Promotion?

Making room

The screenshot displays the Microsoft Dynamics 365 Field Service interface. The top navigation bar includes the Dynamics 365 logo, 'Field Service' text, a search bar, and a 'New look' toggle. The left sidebar contains navigation links for Home, Recent, Pinned, My Work, Get Started, Dashboards, Scheduling, Work Orders, Schedule Board, Bookings, Resource Requirements, Requirement Groups, Time Off Requests, Time Entries, Customers, Accounts, Contacts, Service Delivery, Cases, and Agreements. The main content area shows a 'Sample_WO13799 - Saved' Work Order (New) with tabs for General, Products and services, Tasks, Reference, Timeline, and Related. The 'Timeline' tab is active, displaying a list of activities. A 'Filter by' panel on the left allows filtering by Record type (Notes (1), Activities (2)), Activity type (Email (1), Phone Call (1)), Activity status, Activity status reason, and Modified date. The timeline shows three recent activities: an email from Sharon Smith (2/22/2024 7:07 PM) regarding a rescheduling confirmation, a note modified by Sharon Smith (2/17/2024 8:04 PM) about a rescheduling for Friday 1 March 2024 @ 9am, and a phone call from Alex Baker (2/17/2024 5:47 PM) regarding a rescheduled call. A 'Timeline' panel on the right provides additional filtering options and a search bar.

Timeline

Search timeline

Enter a note...

Filter by

Record type ^

- ☐ Notes (1)
- ☐ Activities (2)

Activity type ^

- ☐ Email (1)
- ☐ Phone Call (1)

Activity status ^

Activity status reason ^

Modified date ^

Recent

- Modified on: 2/22/2024 7:07 PM
Email from: Sharon Smith Active
Confirmation of Rescheduling of Diagnosis & Repair call
Hello Alex. Just a short email to confirm, as agreed during our telephone call on 17 February, that the diagnosis & repair call for your Cafe Duo mach
View more
- Modified on: 2/17/2024 8:04 PM
Note modified by Sharon Smith
Rescheduling of Diagnosis & Repair call
Call rescheduled for Friday 1 March 2024 @ 9am.
View more
- Modified on: 2/17/2024 5:47 PM
Phone Call from: Alex Baker Active
Reschedule of Diagnosis & Repair call
Booked call missed. Requested reschedule
View more

Timeline Count

Err... where?

Dynamics 365

Field Service

Search

New look

Home

Recent

Pinned

My Work

Get Started

Dashboards

Scheduling

Work Orders

Schedule Board

Bookings

Resource Require...

Requirement Grou...

Time Off Requests

Time Entries

Customers

Accounts

Contacts

Service Delivery

Cases

Agreements

Assets

Assets

Service

Sample_WO13799 - Saved

Work Order · Work Order (New)

General Products and services Tasks Reference Timeline Related

Timeline

Search timeline

Enter a note...

Recent

Modified on: 7:07 PM

Email from: Sharon Smith Active

Confirmation of Rescheduling of Diagnosis & Repair call

Hello Alex Just a short email to confirm, as agreed during our telephone call on 17 February, that the diagnosis & repair call for your Cafe Duo machine has been rescheduled for Friday 1 March 2024 @ 9am. If you have any queries...

View more

Modified on: 2/17/2024 8:04 PM

Note modified by Sharon Smith

Rescheduling of Diagnosis & Repair call

Call rescheduled for Friday 1 March 2024 @ 9am.

View more

Modified on: 2/17/2024 5:47 PM

Phone Call from: Alex Baker Active

Reschedule of Diagnosis & Repair call

Booked call missed. Requested reschedule

View more

←

📄

🗑️

💾 Save

💾 Save & Close

Sample_WO13799 - Saved

Work Order · Work Order (New)

General Products and services Tasks Re...

Timeline

Search timeline

Enter a note...

Filter by

Record type

Notes (1)

Activities (2)

Activity type


Email (1)

Phone Call (1)

Activity status

Activity status reason

Modified date

 D365PPUG UK

Document Classification: Public

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Timeline Count

Where? There! ↓↓

Timeline notes

1



Dynamics 365

Field Service

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New look

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My Work

Get Started

Dashboards

Scheduling

Work Orders

Schedule Board

Bookings

Resource Require...

Requirement Grou...

Time Off Requests

Time Entries

Customers

Accounts

Contacts

Service Delivery

Cases

Agreements

Assets

Assets

Service

←

↶

Save

Save & Close

+ New

Book

Rebook

Delete

Refresh

Share

Sample_WO13799 - Saved

Work Order · Work Order (New)

1/13/2024 4:25 PM

Fourth Coffee

General

Products and services

Tasks

Reference

Timeline

Related

Details

Status *

Scheduled

Priority

Urgent

Service account *

Fourth Coffee

Work order type *

Diagnosis and Repair

Incident type *

Water flow issues

Agreement

Sample_Agr00138

Summary

Assess the water flow in Cafe Duo machine. Clean machine. Conduct repairs as required.

Account instructions

Conduct required repairs under Sample Agr00138. Quote approval required if above auto-approval limit

Promised window

Time window

Timeline notes 1

Booking

JP

Jabez Parker

567-555-0164

jabez@contoso.com

Fri, Mar 1, 2024

9:00 AM - 12:26 PM

2h 55min

31min travel time

Scheduled

Rebook

Contacts

Reported By Contact

Alex Baker

Field Service Engineer

123-555-0180

207-555-0163

alex@contoso.com

Assets

Primary asset

Cafe Duo-Device Controller

D365PPUG UK

Document Classification: Public

15

Timeline Count

But why?

The top screenshot shows the Dynamics 365 Field Service interface for a work order named 'Sample_WO13799'. The 'General' tab is selected, and the 'Timeline' tab is highlighted in the left navigation pane. The 'Timeline' tab shows a list of recent notes and actions, including 'Modified on: 2/22/2024 7:07 PM' and 'Phone Call from: Alex Baker'. The bottom screenshot shows the same work order, but with the 'Timeline' tab selected, displaying a list of recent notes and actions, including 'Modified on: 2/22/2024 7:07 PM' and 'Phone Call from: Alex Baker'.

Chat **Compose**

Protected

Copilot

Your personal and company data are protected in this chat

The addition of the Timeline Notes control to the General tab of the New Work Order form in Dynamics 365 Field Service is part of Microsoft's efforts to enhance the user experience ⁽¹⁾ ⁽²⁾. The 2023 release wave 2 of Dynamics 365 Field Service introduced a refreshed user experience to manage work orders, aiming to simplify how users create, manage, and schedule work orders ⁽¹⁾.

The new experience provides more information at a glance and features visually appealing forms with fields that can be updated quickly ⁽¹⁾. The Timeline Notes control shows the number of notes in the timeline, and selecting the number takes the user to the timeline tab on the form ⁽²⁾. This control doesn't work on custom entities, even if they have the timeline control in them ⁽²⁾.

This enhancement is designed to improve efficiency and productivity by providing easy access to important information and actions. However, the specific reasons for adding the Timeline Notes control would be best answered by the Microsoft Product Owners, as they would have made this decision based on various factors such as user feedback, usability studies, and strategic product direction. It's always a good idea to check the latest updates or announcements from Microsoft for the most accurate and detailed information.

[Learn more](#)

Your personal and company data are protected in this chat

Ask me anything...

0/4000

Work Order Copilot Recap

Yes, this isn't my tenant...

The screenshot displays the 'Work Order Copilot Recap' interface. On the left, a sidebar shows filters for 'Products and services' (including 'Unscheduled', 'High', 'Contoso Ltd.', 'Diagnose and repair', 'HVAC full system diagnosis and repair', 'Electrical', and '3 year HVAC maintenance'), 'Tasks', 'Reference', 'Timeline', and 'Related'. The main area shows a 'Copilot recap' section with a 'Generate recap' button. Below this, 'Booking suggestions' are listed for three technicians: Kadji Bell, Maricel Bautista, and Renata Hall, each with a date, time, and travel time. A 'Find more availability' button is at the bottom right.

Technician	Date	Time	Travel Time
Kadji Bell HVAC Technician	Tue Aug 30, 2022	10:00 AM–12:00 PM	20min travel time
Maricel Bautista HVAC Technician	Tue Aug 30, 2022	3:00 PM–5:00 PM	25min travel time
Renata Hall HVAC Technician	Mon Sep 4, 2022	9:00 AM–11:00 AM	12min travel time

2h duration
Mon Aug 29, 2022 – Fri Sep 2, 2022
7:00 AM – 6:00 PM

Find more availability

Work Order Copilot Recap

Yes, this isn't my tenant...

The screenshot displays a software interface for managing work orders. At the top, there are status indicators: '80% Cost not-to-exceed', '85% Price not-to-exceed', '7/8/23 9:56 AM Created on', and 'Contoso Ltd. Service account'. Below these are tabs for 'Products and services', 'Tasks', 'Reference', 'Timeline', and 'Related'. The main content area is divided into two sections. On the left, a list of tasks is shown, including 'Unscheduled', 'High', 'Contoso Ltd.', 'Diagnose and repair', 'HVAC full system diagnosis and repair', 'Electrical', and '3 year HVAC maintenance'. On the right, a 'Copilot recap' preview box is open, displaying a summary of the work order. The recap text states: 'This work order was created on Tue Aug 27 when Mica Pereira reported unusual noise from the HVAC ductwork. Several notes have been added with photos from the customer showing where the problem is heard. There is also a note from Mona Kane that outlines the suspected cause as the recirculator fan and recommends diagnosis starts there. Please review before using to ensure this AI-generated content is accurate, complete, and appropriate. Learn more and review the terms.' Below the recap text is a 'Regenerate recap' button. At the bottom right, a 'Booking suggestions' section shows a suggestion for 'Kadji Bell HVAC Technician' on 'Tue Aug 30, 2022' from '10:00 AM-12:00 PM' with a '20min travel time'.

80% Cost not-to-exceed 85% Price not-to-exceed 7/8/23 9:56 AM Created on Contoso Ltd. Service account

Products and services Tasks Reference Timeline Related

Unscheduled High Contoso Ltd. Diagnose and repair HVAC full system diagnosis and repair Electrical 3 year HVAC maintenance

Assess the ductwork, air handler, coils, heat pump, and thermostats. Run all firmware upgrades. Replace filters over 6 months old.

Conduct repairs as needed and under NTE. Quote approval

Copilot recap PREVIEW

This work order was created on Tue Aug 27 when Mica Pereira reported unusual noise from the [HVAC ductwork](#).

Several notes have been added with photos from the customer showing where the problem is heard. There is also a note from Mona Kane that outlines the suspected cause as the recirculator fan and recommends diagnosis starts there.

Please review before using to ensure this AI-generated content is accurate, complete, and appropriate. [Learn more](#) and review the [terms](#).

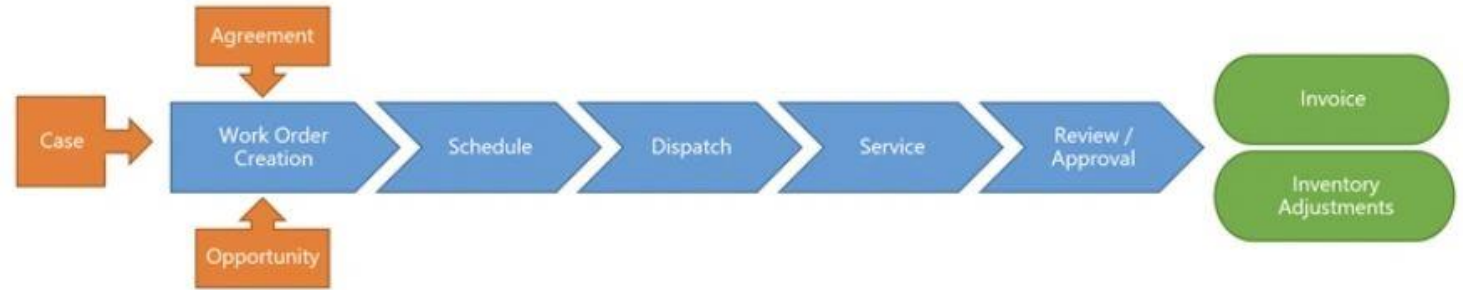
Regenerate recap

Booking suggestions

Kadji Bell HVAC Technician Tue Aug 30, 2022 10:00 AM-12:00 PM 20min travel time

BPFs v's DBCs

Replacement of Business Process Flow with Dynamic Booking Card



Work Order Business Process Flow

BPFs: an all-time Classic

Dynamics 365 | Field Service Search New look

Home Recent Pinned My Work Get Started Dashboards

Scheduling Work Orders Schedule Board Bookings Resource Require... Requirement Gro... Time Off Requests Time Entries

Customers Accounts Contacts

Service Delivery Cases Agreements

Sample_WO13799 - Saved
Work Order · Work Order

Work Order Business Pro... Active for 35 days

Summary Settings Products Services Ser

GENERAL

Work Order Number * Sample_WO13799

Service Account * Fourth Coffee

Billing Account Fourth Coffee

Functional Location ---

System Status * Scheduled

Substatus ---

Work Order Type * Diagnosis and Repair

Price List * Regular Price List

Work Hour Template ---

Work Order Summary Assess the water flow in Cafe Duo machine. Clean machine. Conduct repairs as required.

Work Order (35 D) Active for 35 days

Service Account * Fourth Coffee

Billing Account Fourth Coffee

Primary Incident * Water flow...

Priority Urgent

Work Order Type * Diagnosis...

Next Stage

Sharon Smith
is & Repair call
Can rescheduled for Monday 1 March 2024 @ 9am.

View more

Modified on: 5:47 PM
Phone Call from: Alex Baker Active
Reschedule of Diagnosis & Repair call
Booked call missed. Requested reschedule

View more

CUSTOMER DETAIL

Primary Contact

Email claudia@pmgdemo.onmicrosoft.com

Address Phone

INCIDENTS

Water flow issues
Cafe Duo-Device Controller
Sample_WO13799

1 - 1 of 1 Page 1

BOOKINGS

Sample_WO13799
Sample_WO13799
3/1/2024 9:00 AM

1 - 1 of 1 Page 1

Dynamic Booking Card: Unscheduled

Nope, still isn't my tenant

Work order (preview) ▾

Products and services Tasks Reference Timeline Related ▾

Unscheduled ▾

High ▾

Account * CL Contoso Ltd. ×

Order type * Diagnose and repair ×

Service type HVAC full system diagnosis and repair ×

Electrical ×

3 year HVAC maintenance ×

Assess the ductwork, air handler, coils, heat pump, and thermostats. Run all firmware upgrades. Replace filters over 6 months old.

Conduct repairs as needed and under NTE. Quote approval required above.

80% Cost not-to-exceed







85% Price not-to-exceed

7/8/23 9:56 AM Created on

Contoso Ltd. Service account

Copilot recap PREVIEW ⓘ


Booking suggestions

 Kadji Bell HVAC Technician	Tue Aug 30, 2022 10:00 AM–12:00 PM 20min travel time	
 MB Maricel Bautista HVAC Technician	Tue Aug 30, 2022 3:00 PM–5:00 PM 25min travel time	
 RH Renata Hall HVAC Technician	Mon Sep 4, 2022 ⓘ 9:00 AM–11:00 AM 12min travel time	

⌚ 2h duration

📅 Mon Aug 29, 2022 – Fri Sep 2, 2022

🕒 7:00 AM – 6:00 PM

 Find more availability

Dynamic Booking Card: Scheduled

Anybody from Microsoft out there?

Details

Status

Scheduled

Priority

High

Service account *

Contoso Ltd. X

Work order type *

Diagnose and repair X

Incident type

HVAC full system diagnosis and repair X

Trade

Electrical X

Agreement

3 year HVAC maintenance X

Summary

Assess the ductwork, air handler, coils, heat pump, and thermostats. Run all firmware upgrades. Replace filters over 6 months old.

Conduct repairs as needed and under NTE. Quote approval required above.

Account instructions

Maintenance entrance is located on alley between NE 80th St. and Cleveland St. Call via keypad to enter.

Copilot recap PREVIEW ⓘ

Booking

Kadji Bell
HVAC Technician

Tue Aug 30, 2022
10:00 AM – 12:00 PM

+1 310 555 0813
kadji.bell@adatum.com
Message

Scheduled

Rebook

More bookings

JW
Joanna Wozniak
HVAC Technician

Thu Sep 1, 2022
3:00 PM – 3:30 PM

Comitted

30min duration
25min travel time

Kadji Bell
HVAC Technician

Fri Aug 16, 2022
9:00 AM – 11:00 PM

Completed

2h duration

Show 2 more



Dynamic Booking Card: Completed

psst... make all new preview features available in the Trial licenses!

Details

StatusCompleted

PriorityHigh

Service account *Contoso Ltd. X

Work order type *Diagnose and repair X

Incident typeHVAC full system diagnosis and repair X

TradeElectrical X

Agreement3 year HVAC maintenance X

SummaryAssess the ductwork, air handler, coils, heat pump, and thermostats. Run all firmware upgrades. Replace filters over 6 months old.
Conduct repairs as needed and under NTE. Quote approval required above.

Account instructionsMaintenance entrance is located on alley between NE 80th St. and Cleveland St. Call via keypad to enter.

Copilot recapPREVIEWGenerate recap

Summary

Kadji BellHVAC Technician

Completed

Tue Aug 30, 2022

10:00 AM – 12:00 PM

Resolution

Replaced heat pump inductor

Line items

3 services performed

16 inventory products used

1 non-inventory product used

Service report

Total cost

Estimated\$3,300.00

Actual\$3,800.00

Total price

Estimated\$5,870.40

Actual\$6,370.40

Duration

Estimated2h

Actual1h 47min

Post

Contacts

Account

Robin CountsFacilities ManagerContoso Ltd.

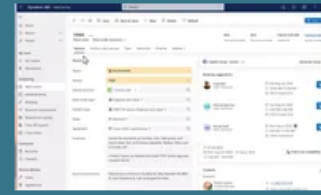
+1 260 555 0199

robin.counts@contoso.com

Message

Reported by





20 November 2023 | Dynamics 365 First Party Apps

Relegated Timelines and "replaced" Business Process Flows

Are these changes signposting a fundamental transformation in the way we work with the out-of-the-box Microsoft Dynamics 365 Business Applications? 🤖

[Continue Reading](#)

The next Wave

2024 Release Wave 1

Dynamics 365 Sales

Customer Insights - Journeys

https://www.linkedin.com/posts/heuristicdev_heuristics-timeline-bpf-activity-7132261306950115328-cjoQ?utm_source=share&utm_medium=member_desktop

Improve customer engagement with sequences

Linking the past to the future

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. The main view is the contact record for Kate Larsson, showing fields for First Name, Last Name, Email, Business Phone, and Topic. The 'Up next' section shows a task 'Request for another meeting' with a due date of 11:31 AM. The 'Timeline' section shows a recent email from Grace Owens. On the right, the 'Sequence details' pane shows a workflow for 'Follow up with contacts and set up a demo'. The workflow steps are: 'Send an email - current step', 'Request for another meeting', 'Advanced email conditions', 'Make a phone call', 'Call to confirm the meeting', 'Complete a task', 'Share meeting details', and 'Exit'. A 'Sequence preview' pop-up is visible at the bottom left, showing a preview of the sequence steps and a link to 'View future steps and traverse branches'.



Plan and perform assigned tasks with preview of sequence steps

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. The top navigation bar shows the 'Dynamics 365 Sales Hub' and a search bar. The main content area is divided into several sections:

- Contact Information:** A card for 'Kate Larsson' with fields for First Name, Last Name, Email, and Business Phone.
- Up next:** A section titled 'Request for another meeting' with a due date of 11:31 AM. It includes a description: 'Recap details of first contact, send catalog and personal contact info, suggest meeting in the future.' and buttons for 'Email' and 'Mark complete'.
- Timeline:** A section showing a list of activities, including 'Email from Grace Owens' and 'Email to Grace Owens'.
- Sequence details:** A panel on the right showing the sequence workflow. It includes a progress bar (Step 1 of 4) and a flowchart with steps: 'Send an email - current step', 'Request for another meeting', 'Advanced email condition', 'Make a phone call', 'Call to request for another...', 'Advanced phone condition', and 'Set next time'.

A 'Sequence preview' window is open at the bottom, showing a preview of the sequence steps and a button to 'View future steps and traverse branches'.



Transformation of D365 Sales Hub Home Page

Fully immersive Copilot Home Page

The screenshot displays the Dynamics 365 Sales Hub Home Page, featuring a fully immersive Copilot interface. The page is divided into several sections:

- My work list:** A sidebar on the left showing a list of tasks and activities, including "Follow-up call" and "Mark complete".
- Copilot:** A central panel with a "Your day" section showing tasks like "Discuss latest proposal", "Prepare marketing materials", "Review pricing information", and "Review installation details". It also includes a "Get latest news for accounts" section and a "What's newly assigned to me" section.
- Lead score:** A section showing a lead score of 72, with a "Decision maker is identified" status and a "Purchase timeframe is unknown" warning.
- Who Knows Whom:** A section showing a list of contacts, including Alan Steiner, Jeremy Johnson, and David Mulroy.
- Leads table:** A table at the bottom showing leads that showed interest in non-alcoholic beverages and visited the website in the last 30 days.

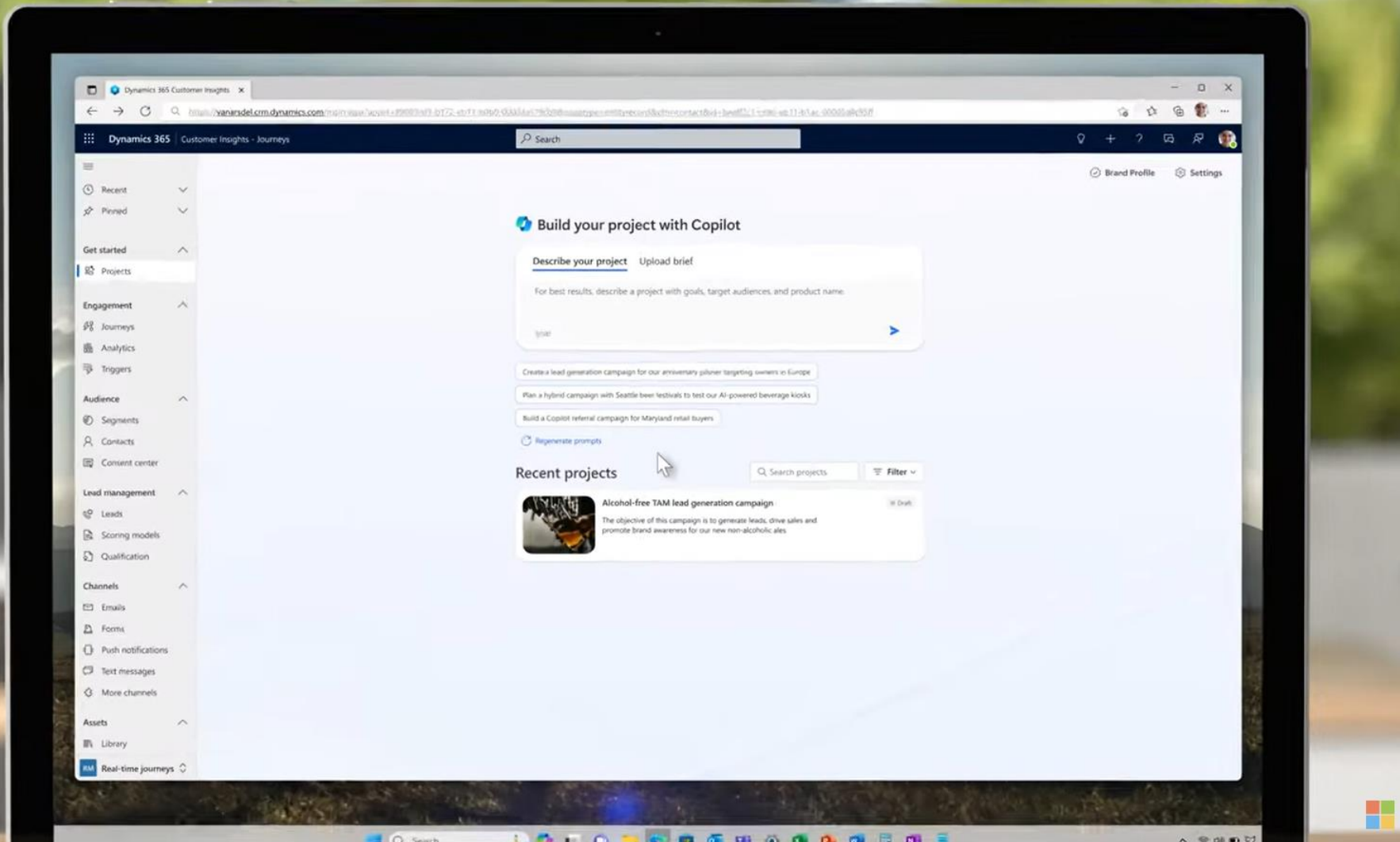
Name	Topic	Account	Lead Score	Creation date
Henry Brill	50 Crates of Refreshing B...	Adatum Corporation	98%	1/17/2024
Eric Ishida	2000 Racks Non-alcoholi...	Tailwind Traders	98%	1/17/2024
Danielle Booker	Mindful Sip Sampler Set		95%	1/16/2024
August Bergman	100 Crates of Temperate...	Alpine Ski House	94%	1/15/2024
Mikhail Kotov	165 Crates of Crisp and C...		94%	1/12/2024
Laurence Gilbertson	Guilt-Free Guzzler's Gift B...	Alpine Ski House	88%	1/09/2024
Sarah Perez	Series 9 Kiosk	Adatum Corporation	86%	12/31/2023

Ask a sales question or type / to mention a record

AI-generated content may be incorrect—please review. Learn more

Customer Insights – Journeys: Project Board

The 2024 Wave 1 Release that isn't a 2024 Wave 1 Release



Customer Insights – Journeys: Project Board

Transformational?

The screenshot displays the Dynamics 365 Customer Insights Journeys Project Board. The interface includes a left-hand navigation pane with categories such as Recent, Pinned, Get started, Projects, Engagement, Audience, Lead management, and Channels. The main content area is titled 'Build your project with Copilot' and features a text input field for describing a project. A sample prompt is provided: 'create a campaign to generate 100 new retail leads, educate them on the market potential of non-alcoholic ales in their region, and convince them to allocate shelf space to the new beverage line'. Below this, there are three suggested prompts: 'Create a lead generation campaign for our anniversary pilsner targeting owners in Europe', 'Plan a hybrid campaign with Seattle beer festivals to test our AI-powered beverage kiosks', and 'Build a Copilot referral campaign for Maryland retail buyers'. A 'Regenerate prompts' button is also visible. The 'Recent projects' section shows a project titled 'Alcohol-free TAM lead generation campaign' with a 'Draft' status. The interface is clean and modern, with a dark blue header and a light blue background.

Customer Insights – Journeys: Project Board

Target Audiences, Segments, Journeys, Content, Assets, Images, Branding...

The screenshot displays the Dynamics 365 Customer Insights Journeys interface. The left sidebar contains navigation options: Recent, Pinned, Get started, Projects (selected), Engagement, Journeys, Analytics, Triggers, Audience (Segments, Contacts, Consent center), Lead management (Leads, Scoring models, Qualification), Channels (Emails, Forms, Push notifications, Text messages, More channels), Assets (Library), and Real-time journeys.

The main content area is titled "VanArsdel: Lead generation campaign" under the "Brief" section. The objective is: "The objective of this campaign is to generate 100 new retail leads, educate them on the market potential of non-alcoholic ales in their region, and convince them to allocate shelf space to the new beverage line."

The "Audiences (2)" section shows two existing segments: "BUYERS FOR SUPERMARKET CHAINS" (25k) and "BUYERS FOR RESTAURANT GROUPS" (1.6k). Below these are "More suggestions to choose" including "DISTRIBUTORS - ENTERTAINMENT" (1.1k), "DISTRIBUTORS - RESTAURANTS" (2.3k), and "DISTRIBUTORS - OFFICE AND CORP" (1.1k).

The "Assets" section shows a gallery of assets generated in accordance with brand guidelines, including images of a beer glass and a restaurant interior.

The "Project execution" section shows "Journeys (1)" and "Emails (6)". It includes a "Promotion" journey and "More suggestions to choose" such as "Welcome series" and "Event registration", all labeled as "HIGH-VALUE CUSTOMERS".

A toast message at the bottom states: "Here's your project board for VanArsdel: Lead generation campaign! Some parts may still be loading but feel free to take a look around!" with a "Describe what you want to do next" button.

RIP BPFs?

Is this the death-knell for the
Business Process Flow

2024 Wave 1 Release: Lead Qualification

An “Agile” (™ Microsoft) customizable Lead Qualification process?

The screenshot shows the Dynamics 365 Sales hub interface. The left sidebar contains navigation options: Home, Recent, Pinned, Digital sales, Get started, General Settings, Overview, Sales Copilot (Preview), Lead + Opporti..., Productivity tools, Chat and collaborate, Teams Meetings (preview), LinkedIn integration, Sales usage reports, Teams calls, Opportunity pipeline..., Data improvement, Duplicate detection, Email validation, Playbook management, and App Settings. The main content area is titled 'Lead Qualification' and 'Opportunity Closing'. It features a 'Lead qualification' section with a description: 'Choose who creates related records during lead qualification. Learn more'. Below this is a table for 'Record type' with columns for 'Automatic' and 'Seller'. The table shows settings for Account, Contact, and Opportunity, all of which are set to 'Seller'. Below the table is a section for 'Add opportunity fields' with a description: 'You can add up to 7 fields to be included in opportunities created from newly qualified leads.' and a '+ Add fields' button. The fields listed are Topic, Est. Close date, and Budget Amount, all of which are checked. Below the fields are two checkboxes: 'Let seller create multiple opportunities from a newly qualified lead. Learn more' and 'Lead handover summary' (which is checked). At the bottom are 'Save' and 'Cancel' buttons.

Record type	Automatic	Seller
Account	<input type="radio"/>	<input checked="" type="radio"/>
Contact	<input type="radio"/>	<input checked="" type="radio"/>
Opportunity	<input type="radio"/>	<input checked="" type="radio"/>

Add opportunity fields
You can add up to 7 fields to be included in opportunities created from newly qualified leads.

+ Add fields

Topic	<input checked="" type="checkbox"/>
Est. Close date	<input checked="" type="checkbox"/>
Budget Amount	<input checked="" type="checkbox"/>

☒ Let seller create multiple opportunities from a newly qualified lead. [Learn more](#)

Lead handover summary ☒

☒ Once a seller qualifies a lead, let Copilot create a summary of its key info. [Learn more](#)

[Save](#) [Cancel](#)

2024 Wave 1 Release: Lead Qualification

Copilot generated Lead Qualification summary

Dynamics 365 Sales Hub

Search

Eric Ishida
Lead - Lead

Lead sales process
Active for 4 days

Qualify Develop Propose

Summary Details Files Related

Contact

Topic: 2000 Racks Non-alcoholic VanArsdale Amber

First name: Eric

Last name: Ishida

Job title: Director of Purchasing

City: Denver

Mobile phone: 303-555-8756

Email: erishida@tailwindtraders.com

Up next

Suggested actions

Qualify lead
Based on the email from Eric, he's interested in moving forward.

Qualify

Email from Eric

Lead score

98

Lead qualified

The following records have been added:

Account: Tailwind Traders

Contact: Eric Ishida

Opportunity: 2000 Racks Non-alcoholic VanArsdale Amber

Qualification summary

- Contact with the name of Eric Ishida is connected with the Lead
- Account with the name of Tailwind Traders is connected with the Lead
- Opportunity with the name of 2000 Racks Non-alcoholic VanArsdale Amber is connected with this Lead

☒ Add summary to opportunity timeline

202x Wave x Release: ???

The caveats



The image shows a screenshot of the Dynamics 365 Sales Hub interface. A purple rectangular overlay is positioned in the center, featuring a cartoon illustration of a computer monitor with the text "NET WWF" on its screen. To the right of the monitor, the text "PAST IT'S PRIME?" is displayed in a bold, white, sans-serif font. The background interface includes a top navigation bar with "Dynamics 365 | Sales Hub", a left sidebar with navigation icons, and a main content area showing a lead record for "Eric Ishida". The lead record includes a "Lead sales process" section with a "Qualify" button, a "Summary" tab, and a "Contact" section with fields for "Topic", "First name", "Last name", "Job title", "City", "Mobile phone", and "Email". A "Lead score" section is also visible at the bottom right. On the far right, a "Lead qualified" sidebar shows a list of records added, including "Account", "Contact", and "Opportunity", along with a "Qualification summary" section.

NET WWF

PAST IT'S PRIME?

Lead qualified
The following records have been added:

- Account: Tailwind Traders
- Contact: Eric Ishida
- Opportunity: 2000 Racks Non-alcoholic VanArndel Amber

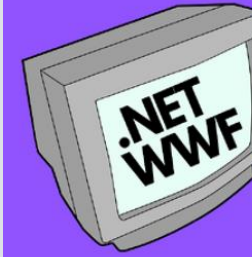
Qualification summary

- + Contact with the name of Eric Ishida is connected with the Lead
- + Account with the name of Tailwind Traders is connected with the Lead
- + Opportunity with the name of 2000 Racks Non-alcoholic VanArndel Amber is connected with this Lead

☒ Add summary to opportunity timeline

202x Wave x Release: ???

The caveats



PAST IT'S
PRIME?

Dynamics 365 | Sales Hub

Search

Eric Ishida
Lead - Lead

Lead sales process
Active for 4 days

Quality Develop Propose

Summary Details Files Related

Contact

Topic - 2000 Racks Non-alcoholic Van

First name - Eric

Last name - Ishida

Job title - Director of Pump

City - Denver

Mobile phone - 303-555-8756

Email - eric@ishida.com

When a record is selected

List records

* Environment BASDemo (basdemo1)

* Entity Name Quote Lines

Show advanced options

Initialize variable

Apply to each

* Select an output from previous steps value: x

Append to string variable

* Name Quote line summary

* Value

Quantity x Price Per Unit x ea. offered at \$ Extended Amount x with \$ Manual Discount x discount.

Add an action

Start and wait for an approval

Up next

Suggested actions

Qualify lead
Based on the email

Qualify

Email from Eric

Lead score

98

Lead qualified

The following records have been added:

Account Tailwind Traders

Contact Eric Ishida

Opportunity 2000 Racks Non-alcoholic Van

Qualification summary

- + Contact with the name of Eric Ishida is connected with the Lead
- + Account with the name of Tailwind Traders is connected with the Lead
- + Opportunity with the name of 2000 Racks Non-alcoholic Van is connected with this Lead

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics](#)

Type

Data Type * Currency

Field Type * Calculated

Precision * Simple

Minimum Value * Calculated

Maximum Value * Rollup

IME Mode * Calculated

auto

Calculated

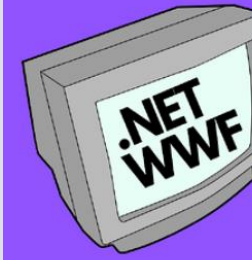
New



D365PPUG UK

202x Wave x Release: ???

The caveats



PAST IT'S
PRIME?

Dynamics 365 | Sales Hub

Search

Eric Ishida
Lead - Lead

Lead sales process
Active for 4 days

Quality Develop Propose

Summary Details Files Related

Contact

Topic - 2000 Racks Non-alcoholic VanArsdale Amber

First name - Eric

Last name - Ishida

Job title - Director of Purchasing

City - Denver

Mobile phone - 303-555-8756

Email - ericishida@salwindraders.com

Up next

Lead qualified

The following records have been added:

Account - Salwind Traders

Contact - Eric Ishida

Opportunity - 2000 Racks Non-alcoholic VanArsdale Amber

Qualification summary

- + Contact with the name of Eric Ishida is connected with the Lead
- + Account with the name of Salwind Traders is connected with the Lead
- + Opportunity with the name of 2000 Racks Non-alcoholic VanArsdale Amber is connected with this Lead

☒ Add summary to opportunity timeline

Account: New business rule

Condition New Condition

Show Error Message New Action

Field referenced in business rule exists in entity

Show Error Message New Action

Components Properties

Condition

Display Name
New Condition

Entity
Account

Rules + New

Rule 1

Source
Entity

Field
Account Name

Operator
Equals

Type

Business Rule (Text View)

IF
Account Name equals "Jones"

THEN


#TeamANS

Thank you, Phil



Windows Workflow Foundation and the Power Platform -
(philcole.org)

Windows Workflow Foundation and the Power Platform

 Phil Cole  2021-06-24  Solutions



About Phil Cole

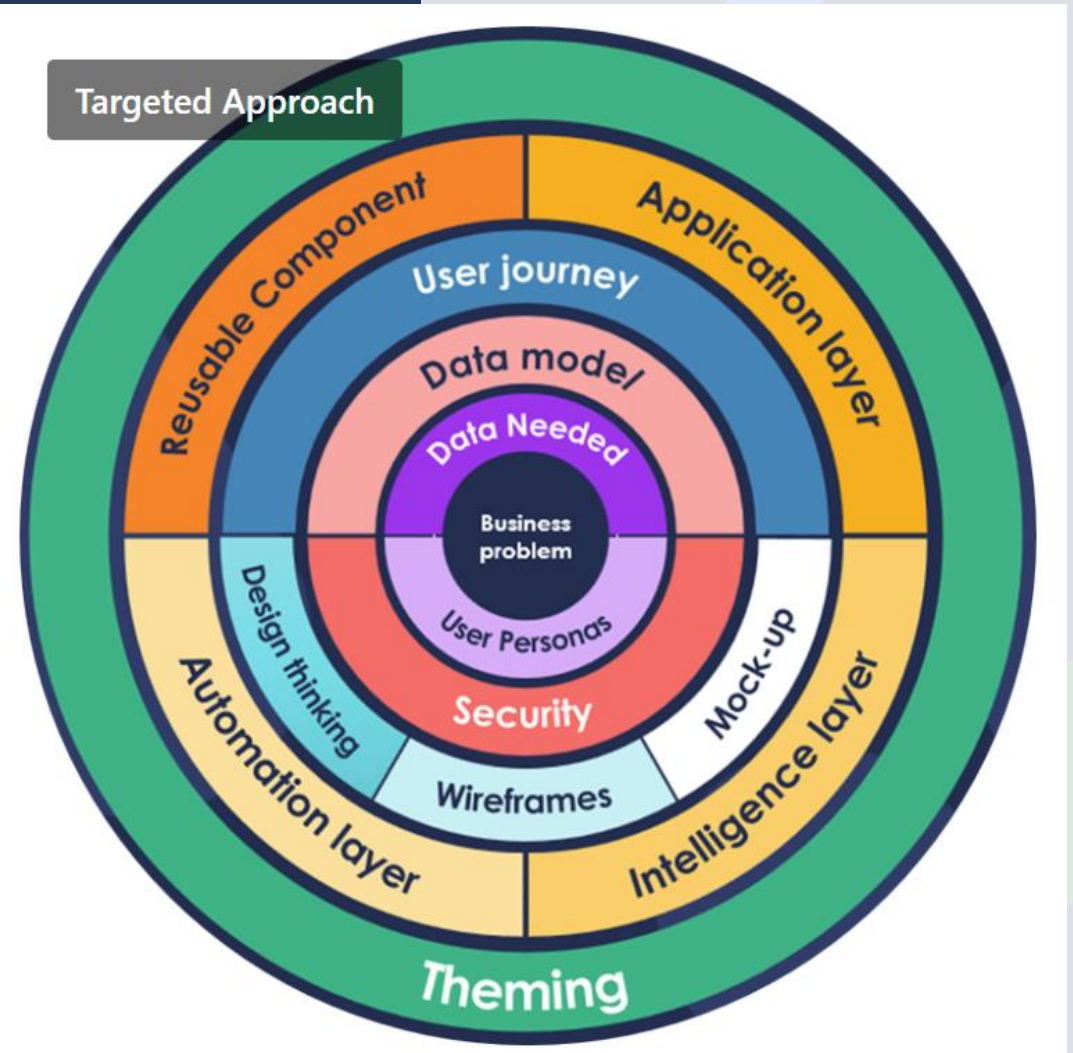
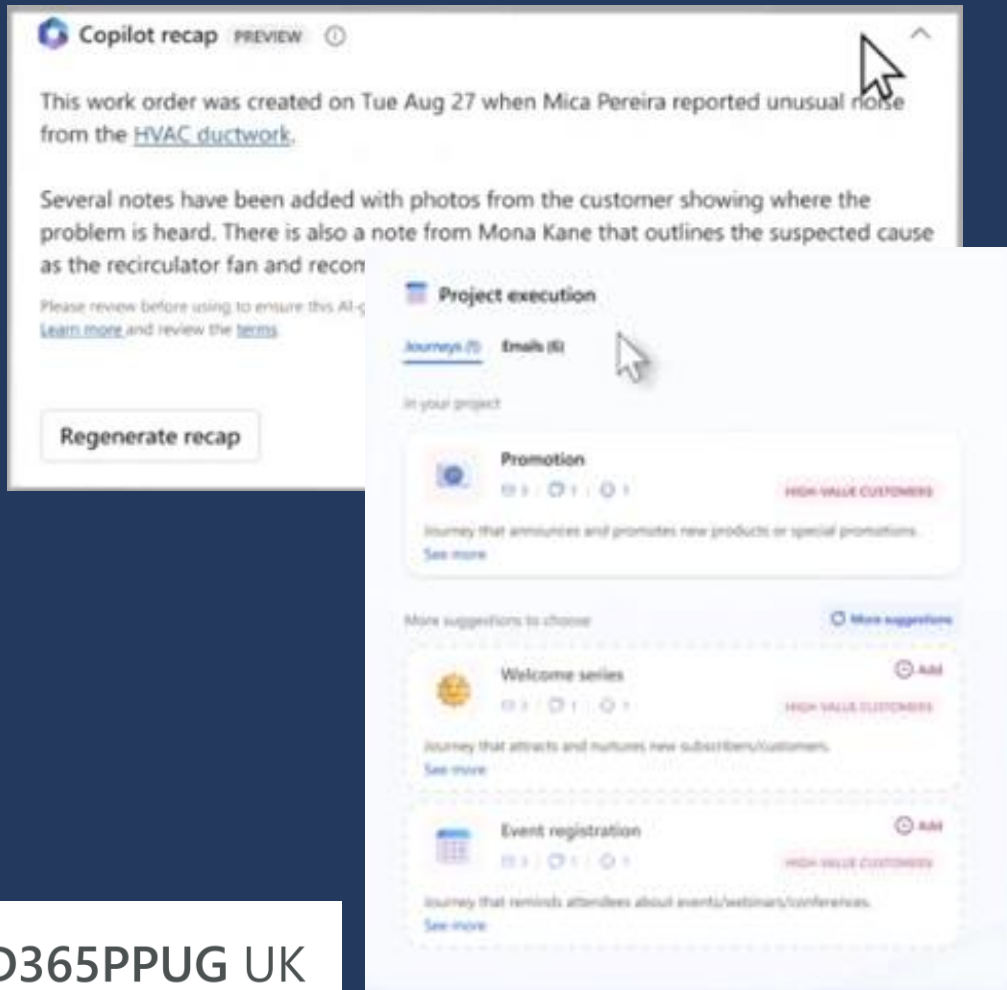
Phil Cole is a Dynamics 365 and Power Platform consultant with an interest in tech, spaceflight and electric cars.

The Future

Where next...?

Data is Key!

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Foundational Prompt Engineering

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The Future

Where next... Project Sophia?



AI driving the UI/UX revolution –
Project Sophia – Data Science
Frontiers

Microsoft Project Sophia (in preview)

<http://aka.ms/projectsophia>

The screenshot displays the Microsoft Project Sophia interface, which is designed for data exploration and analysis. The interface features a dark theme with a sidebar on the left containing navigation options like 'Exploratory', 'GUIDES', 'Account planning', 'Finance | Coming soon', and 'Supply chain | Coming soon'. The main area is titled 'Microsoft Project Sophia' and includes a prompt to 'Explore solutions to complex business problems with Project Sophia's infinite, AI powered canvas. Build Exploratory Journeys discovering suggested insights and actions over any business data or allow Business Process Guides to aid you through the process of gathering relevant data to tackle specific business tasks.'

A central input field contains the text 'Help me optimize the sales performance with a focus on sales representatives.' Below this, there is a button to 'upload data or use sample' and a 'Generate' button. A hand cursor is shown clicking the 'Generate' button. Below the input field, there is a section for 'Preview with sample data' with a 'Sales.csv' download link.

The dashboard is divided into several panels:

- Overview SAMPLE**: A text panel providing a 'Quick Overview' of the data (CSV file with 50 rows and 14 columns) and an 'Analysis' section. The analysis notes that the data covers a diverse range of industries and provides a comprehensive view of accounts and their respective industries, challenges, objectives, and opportunities for growth.
- Distribution of Relat... SAMPLE**: A pie chart showing the distribution of relationships, with segments labeled 'Strong', 'Limited', and 'Moderate'.
- Trend of sales pipeli... SAMPLE**: A line chart showing the trend of sales pipeline value over time, with a y-axis ranging from 0 to 4M. The x-axis lists various industries: Acme Corpor..., Financial Ser..., ABC Corpora..., Global Hosp..., Green Living..., MedTech Media, Fintech Solu..., EdTech Innov..., Green Transp..., and Healthtech I...
- Annual Revenue by Industry SAMPLE**: A horizontal bar chart showing the annual revenue for various industries, including Travel and Tourism, Technology, Robotics, Real Estate, Mental Health Services, IT Consulting, and Healthcare Services.
- Suggested next steps SAMPLE**: A list of suggested actions, including 'Generate email draft using the conte...', 'Identify trends in Annual Revenue by ...', 'Examine Relationship Strength and S...', 'Evaluate Marketing Campaign effecti...', and 'Analyze Upsell/Cross-sell Opportuniti...'.

Microsoft Project Sophia (in preview)

adoption.microsoft.com/files/project-sophia/Microsoft-Project-Sophia-demo.mp4

The screenshot displays the Microsoft Project Sophia interface, which is a workspace for analyzing data. At the top, there's a header with a home icon, a '+ New workspace' button, and a 'Data' tab. Below the header, a prompt asks to 'Help me optimize the sales performance with a focus on sales representat...'. The main workspace is divided into three panels:

- Overview:** Contains a 'Quick Overview' section stating that the 'Sales Performance' Excel file contains data on 50 accounts across various industries. It also includes an 'Analysis' section with bullet points listing top accounts in the Education, Energy, Finance, and Healthcare industries.
- Relationship between Annual Revenue and Pipeline Value for each Sales ...:** A scatter plot showing the relationship between Annual Revenue (x-axis, 0 to 40M) and Pipeline Value (y-axis, 0 to 300M). Data points are represented by various colored shapes.
- Annual Revenue of Each Account Grouped by Sales Rep:** A horizontal bar chart showing the annual revenue for different sales representatives. The representatives listed are Travel Adventures Ltd., Tech World, RoboTech Inc., Pink Transport Solutions, and Health Snacks Co.

On the right side, there's a 'Suggested next steps' panel with five actions: 'Generate email draft using the conte... Follow up action', 'Analyze the correlation between Ann... Explore or analyze data', 'Identify key challenges and objective... Explore or analyze data', 'Evaluate the performance of each sal... Explore or analyze data', and 'Examine the effectiveness of differen... Explore or analyze data'.

At the bottom, there's an 'AI cursor' preview window with the question 'What are some of the reasons Lena is outperforming?'. Below this, there are two buttons: 'Generate' and 'Generate as new blueprint'. A hand cursor is hovering over the 'Generate as new blueprint' button.

At the bottom right, there's a note: 'This feature is in preview. See terms'.

Call to Action

1. Learn how to use Copilot within the Dynamics apps
2. Teach others how to use Copilot
3. Learn how to Prompt
4. Teach others how to Prompt
5. Learn more about Project Sophia
6. Provide feedback on your progress and impact at our next UK D365PPUG London meeting.

THANK YOU

Looking forward to connecting!



www.linkedin.com/in/heuristicdev



<https://heuristicdev.co.uk>

