

#ScottishSummit2024

The Shifting Landscapes of the D365 UI/UX



Thank You to our Sponsors...



Platinum Sponsor

Capgemini 

Gold Sponsors

resco

WGW

dox42[®]
automate your documents
integrate your data

kerv Digital

Thank You to our Sponsors...



With Thanks



Speaker Bio



- 8+ Years Experience with Dynamics 365 Apps
 - Working on both Global and National projects
 - Specialising in Customer Experience and Customer Service apps
 - Lead Architect on MSFT FastTrack Portfolio Program

“There’s no such thing as Normal”

#Squirrel Power



LinkedIn:
www.linkedin.com/in/heuristicdev

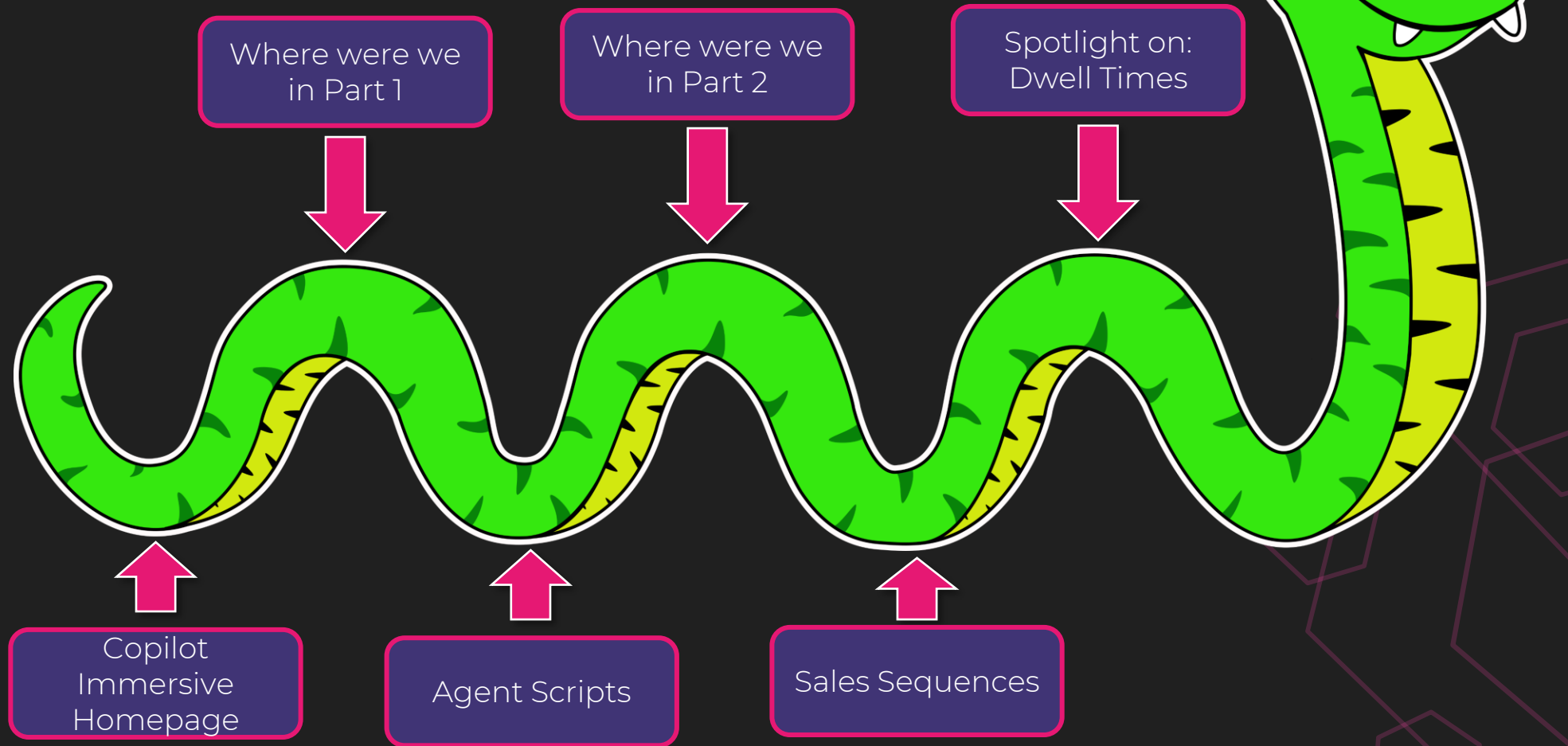


Website:
[www. Heuristicdev.co.uk](http://www.Heuristicdev.co.uk)

Sharon Smith
Solution Architect



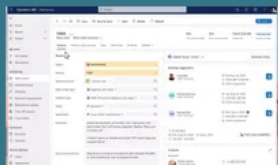
The Shifting (Nessie) Landscape Roadmap



Meet: The Shifting Landscapes



aka 'Relegated Timelines and Replaced Business Process Flows'



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](#)

Part 1: 28 February 2024



Microsoft's London Offices
in Paddington



Dynamics 365 &
Power Platform
UK User Groups

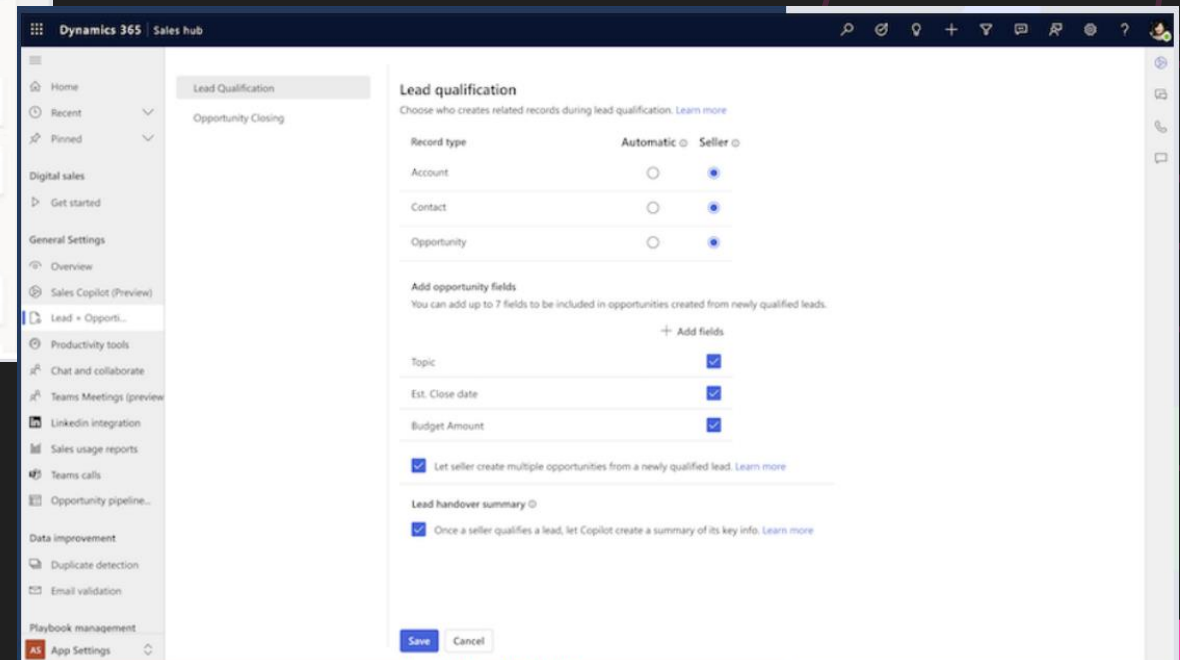
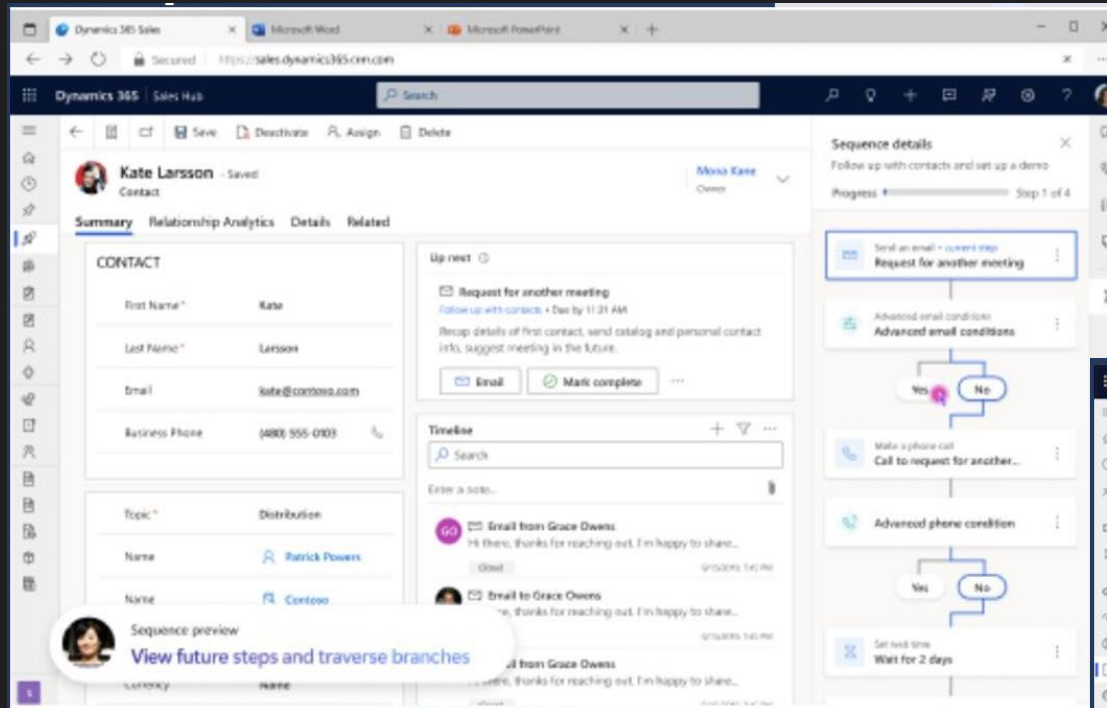


First Hints: 2023 Release Wave 2: Dynamics 365 Field Service



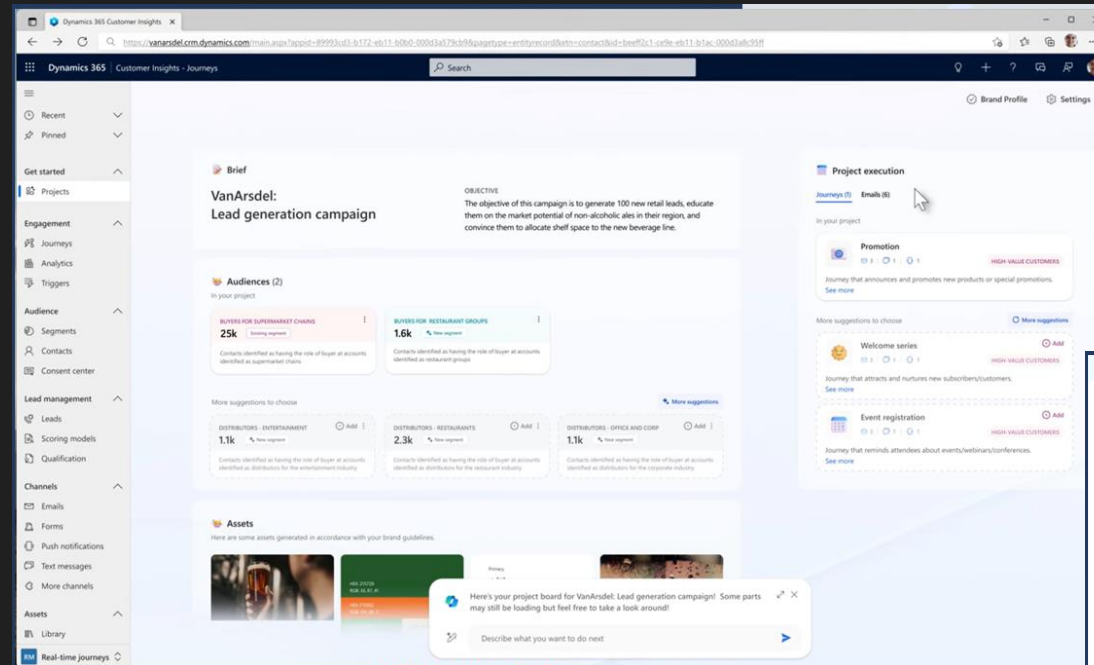
Everything's Important...
...until it isn't

2024 Release Wave 1: Dynamics 365 Sales

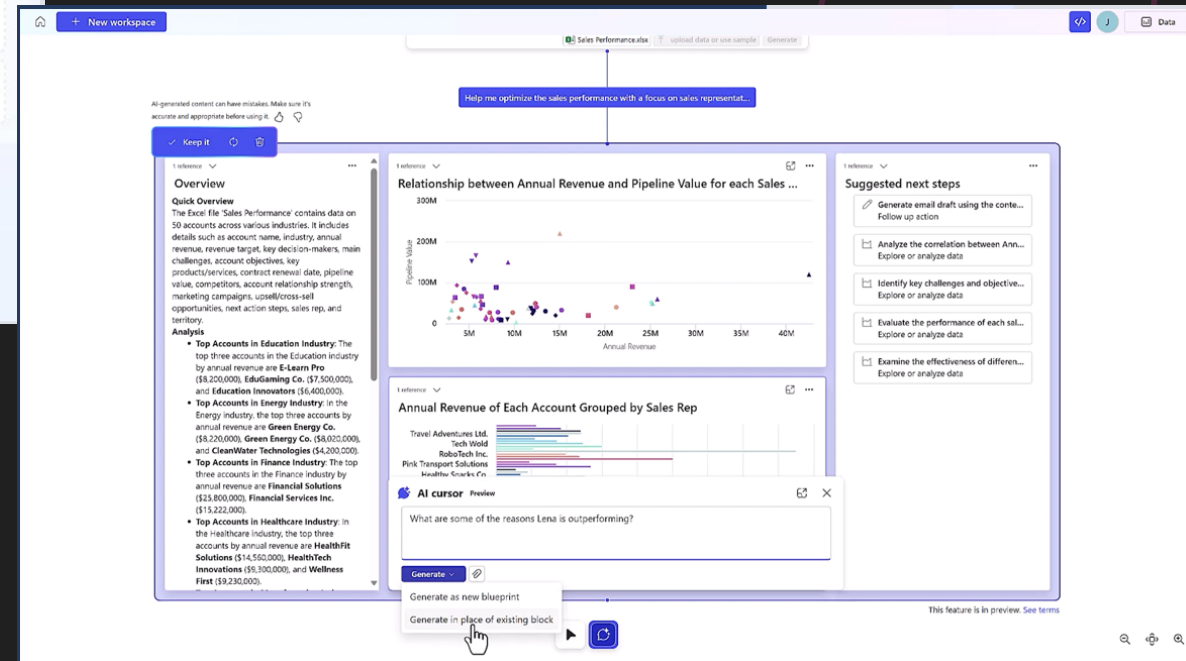


Multiple Sequence Steps
“Agile” Lead Qualification

Early Waves: Transformational combination technologies



Customer Insights: Project Board Project Sophia (spoiler alert!)



Part 2: 24 June 2024



Kings College London
Strand Campus, Safrs 'Hall'



On the BIG stage!

Minding the Gaps: D365 Customer Service & Sales



Agent Scripts

Build out the steps for your Agent Script

Agent scripts

Case trial agent script

Greet Customer

Hi Maria Campbell (sample). Thank you for contacting Contoso Coffee Support. We will work together to find a solution that works for you.

Update case

Resolve case

Case trial agent script - Saved

Agent script

General

Name: Case trial agent script

Unique Name: msdyn_caseTrialAgentScript

Owner: Sharon Smith (Office)

Language: English (United States)

Description:

Agent script steps

Name	Order	Action type	Modified On
Greet Customer	1	Test	6/1/2024 5:28 PM
Update case	2	Memo	6/1/2024 5:28 PM
Resolve case	3	Memo	6/1/2024 5:28 PM

Text instructions: Hi {anchor_customerid_value@OData.Community.Display.V1.FormattedValue}, Thank you for contacting Contoso Coffee Support. We will work together to find a solution that works for you.

Customer Service Agent Scripts

Copilot Home Page

New Stops: Copilot Studio innovations & CCAS



Early Access Preview

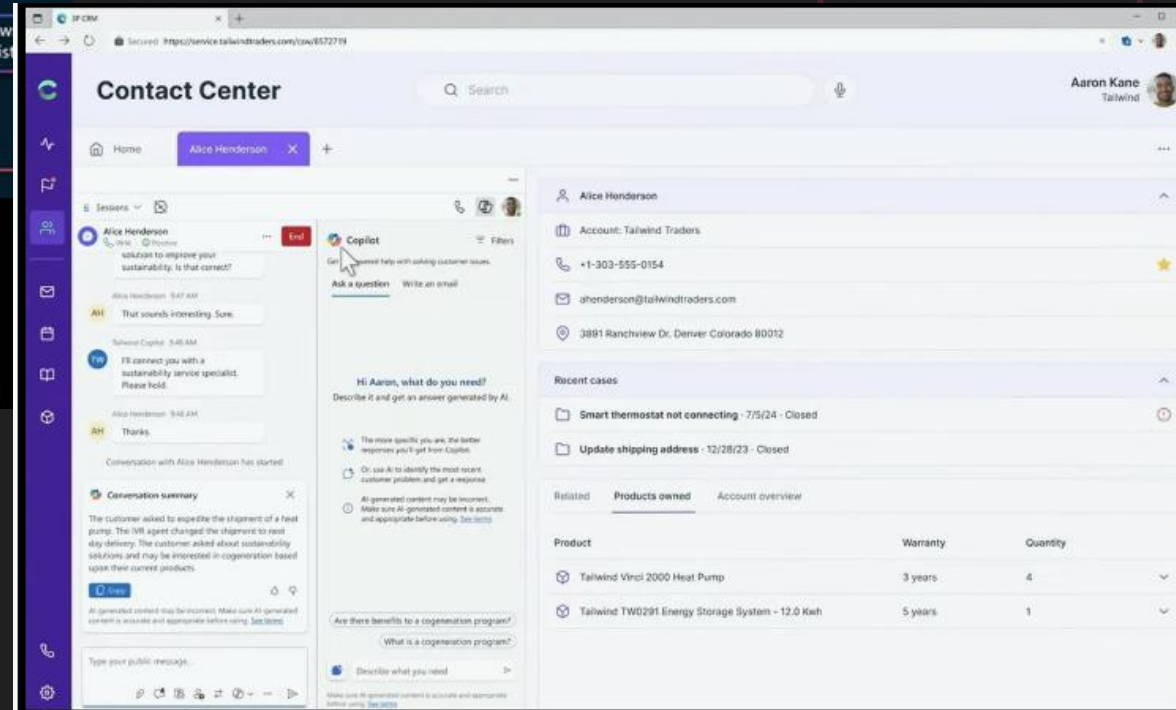
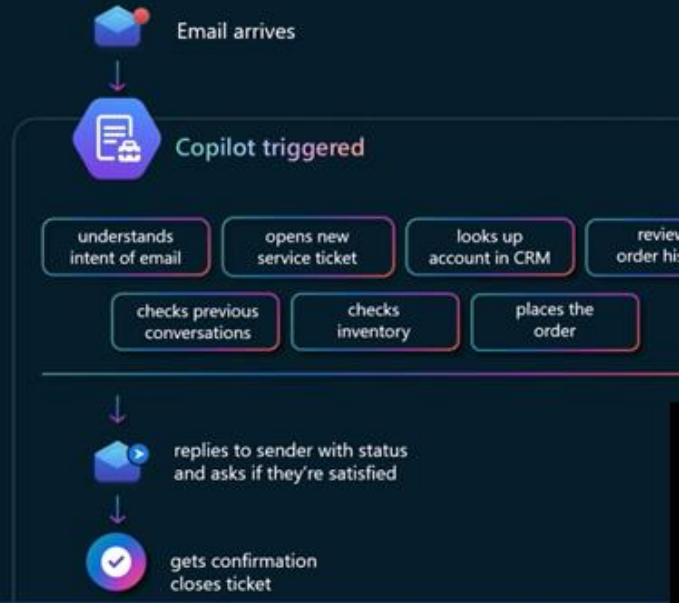
Copilots with agent capabilities

Can be triggered by events – not just conversation

Automates and orchestrates long running, asynchronous copilots

Follows human guardrails and asks for help

Monitor, learns and improves with each interaction



Copilots with Agent capabilities Contact Center as a Service

olutions: Certifying D365 Customer Experience Professionals



Retirement of the three Dynamics 365 Sales and Customer Insights certifications and exams



Three into one...
...does go? But where next?



ASSOCIATE CERTIFICATION

Microsoft Certified:
Dynamics 365 Customer
Experience Analyst
Associate

Dwell Times: 2024 Release Wave 2

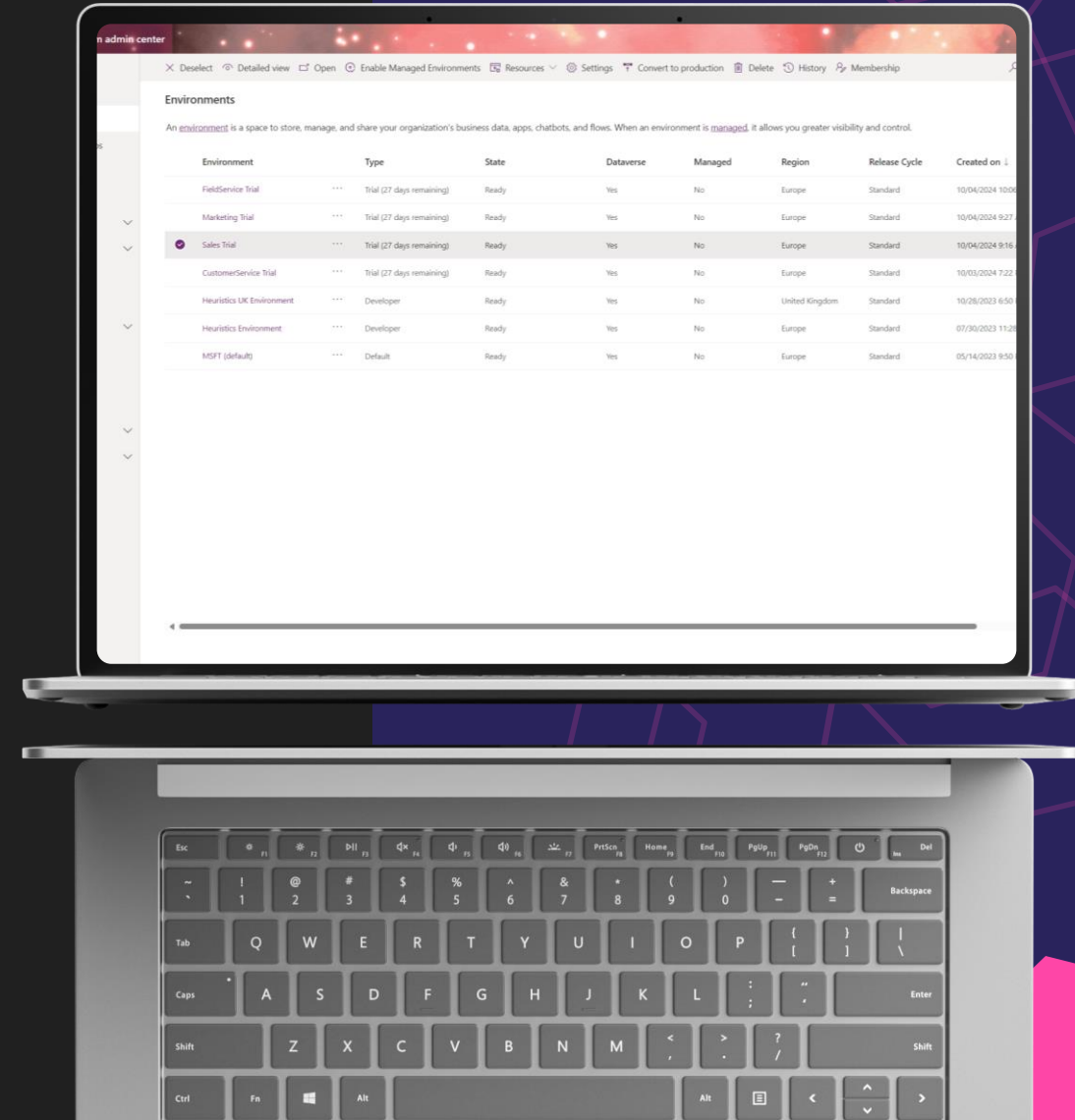
Deep Dives:

Customer Service and

Customer Experience

2024 RELEASE WAVE 2

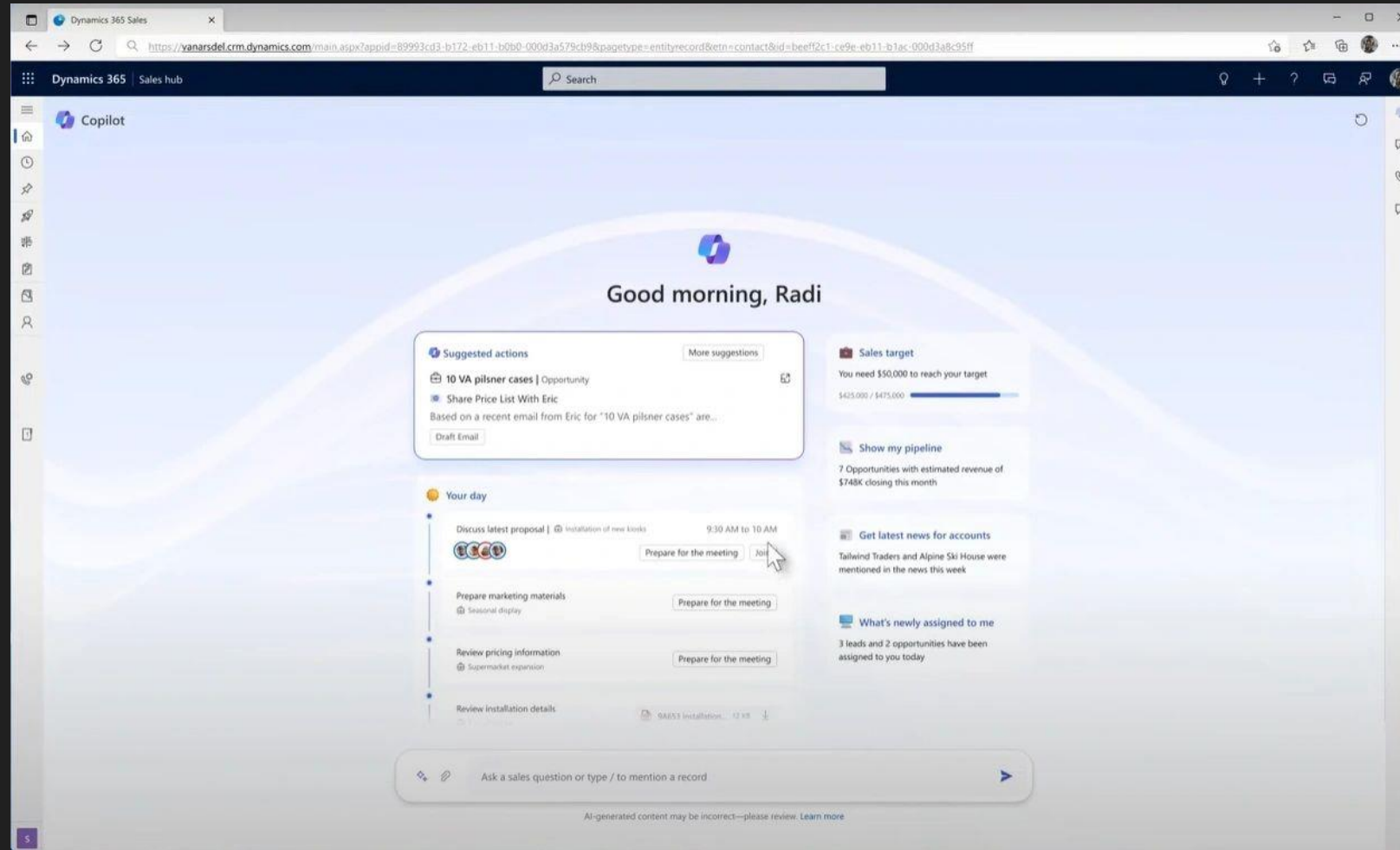
HeuristicDev
and the Shifting Landscape



#ScottishSummit2024



2024 Release Wave 2: Dynamics 365 Sales



From 'Wrapper' to Copilot Immersive Homepage

2024 Release Wave 2: Dynamics 365 Sales



The screenshot shows the Dynamics 365 Sales Hub interface. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Customers, Sales, Collateral, and Marketing. The main area displays a list of sales opportunities. A red box highlights a 'Summarize opportunity' button and the resulting summary text.

Summarize opportunity "7 Café Corto Espresso Machines for Graphic Design Institute"

Here's the opportunity summary for 7 Café Corto Espresso Machines for Graphic Design Institute.

- The **Est. revenue** for the opportunity is €110,000.00, which helps in revenue forecasting.
- The **Customer Need** is that the customer wants to outfit their offices with automatic espresso machines.
- The **Proposed Solution** for the opportunity is Café Corto Espresso Machines meeting the customer's requirements.
- The expected **Est. close date** of the opportunity is 6/3/2024 for accurate revenue forecasts.
- The **Annual Revenue** for the account linked to this opportunity is \$120,000,000.00 under the Account entity.
- The **Primary Contact**, Aurora Badillo, from the Account entity serves as quick access to contact details.
- Aurora Badillo holds the job title of a Sales Manager under the Contact entity.

Ask a question about the data in the app. Use / to reference data.

0/100

22

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

Conversation with Copilot in the Immersive Workspace

#ScottishSummit2024

Classification: Confidential

2024 Release Wave 2: Dynamics 365 Sales



Dynamics 365 Sales Hub

7 Café Corto Espresso Machines for Graphic Design Institute - Saved

Graphic Design Institute Account | 6/3/2024 Est. close date | €110,000.00 Est. revenue | Sharon Smith Owner

Sales Process: Active for 12 days | Qualify (12 D) | Develop | Propose | Close

Summary | Relationship analytics | Quotes | Products | Related

Key details:

- Topic: 7 Café Corto Espresso Machines...
- Contact: Aurora Badillo
- Purchase timeframe: This Quarter
- Currency: Euro
- Budget amount: €110,000.00
- Purchase process: Committee
- Description: Buying new machines for their current offices.

Up next: Manage your activities. See upcoming activities by connecting the opportunity to a sequence or by creating an activity. Learn more.

Timeline: Search timeline. Enter a note.

Opportunity score: 89 Grade A Improving

- Estimated budget is \$110,000.00
- Purchase timeframe is this quarter
- Decision maker identified
- Purchase process is committee

Copilot Chat:

Summarize opportunity "7 Café Corto Espresso Machines for Graphic Design Institute"

Here's the opportunity summary for 7 Café Corto Espresso Machines for Graphic Design Institute.

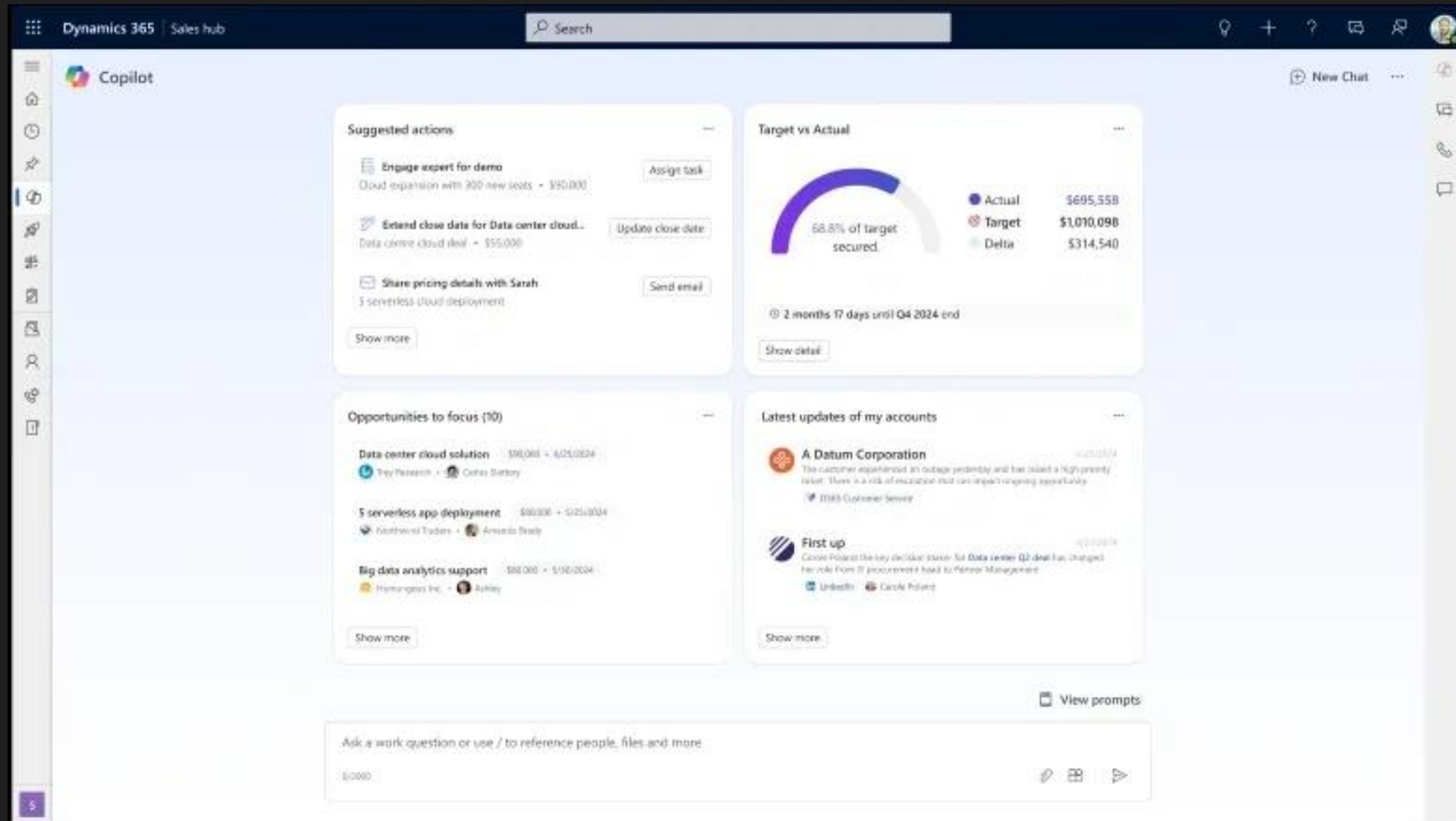
- The **Est. revenue** for the opportunity is €110,000.00, which helps in revenue forecasting.
- The **Customer Need** is that the customer wants to outfit their offices with automatic espresso machines.
- The **Proposed Solution** for the opportunity is Café Corto Espresso Machines meeting the customer's requirements.
- The expected **Est. close date** of the opportunity is 6/3/2024 to aid in accurate revenue forecasts.
- The **Annual Revenue** for the account associated with this opportunity is \$120,000,000.00 under Account.
- The **Primary Contact** for this account is Aurora Badillo who holds the job title of Sales Manager under Account.
- The product involved in this opportunity is named Café Corto under Opportunity Product.
- A notable strength identified includes Grinders overtaking market share due to their accuracy in grind size in B2B.

Ask a question about the data in the app. Use / to reference data.

1 reminder: Opportunity's close date has passed 7 Café Corto Espresso Machines for Graphic Design Institute

Conversation transferred to the Copilot Side Pane

2024 Release Wave 2: Dynamics 365 Sales



Copilot Immersive Homepage 'Dashboard'

The Future: Transmogrification with Project Sophia



The screenshot displays the Project Sophia AI interface within a workspace. At the top, a prompt bar contains the text "Help me optimize the sales performance with a focus on sales represent...". Below the prompt, the interface is divided into several sections:

- Overview:** A section titled "Quick Overview" providing a summary of the data. Below it, an "Analysis" section lists top accounts in various industries, such as E-Learn Pro, EduGaming Co., and Education Innovators in the Education industry.
- 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). The plot includes data points for various sales representatives.
- Annual Revenue of Each Account Grouped by Sales Rep:** A horizontal bar chart showing the annual revenue for different sales representatives, including Travel Adventures Ltd., Tech World, RoboTech Inc., Pink Transport Solutions, and Healthier Snacks Co.
- Suggested next steps:** A list of recommended actions, such as "Generate email draft using the conte...", "Analyze the correlation between Ann...", "Identify key challenges and objective...", "Evaluate the performance of each sal...", and "Examine the effectiveness of differen...".

At the bottom, an "AI cursor" preview window is visible, showing a prompt "What are some of the reasons Lena is outperforming?" and a "Generate" button. A dropdown menu below the "Generate" button offers options: "Generate as new blueprint" and "Generate in place of existing block".

2024 Release Wave 2: Dynamics 365 Customer Service

The screenshot displays the Dynamics 365 Omnichannel for Customer Service interface. On the left, a chat conversation with 'Clay Roddy' is shown, with messages from the customer and the agent. The main pane shows the 'Customer Summary' for 'Clay Roddy', including account details, contact information, and a list of recent cases. On the right, the 'Agent scripts' pane is visible, showing a list of scripts for the 'Home loan' category. The 'Welcome to conversation' script is highlighted with an orange border. This script includes a welcome message and a list of actions: 'Greet customer', 'Verify customer', 'Increase cash withdraw limit', 'Search and share article', and 'Take note'.

Dynamics 365 Omnichannel for Customer Service

omnichannel

Clay Roddy
02:32 Positive

You, 9:48 AM

Hi Clay! Hope your are doing good today. I've got your request. Just allow me sometime to access your account to process it.

David, 9:46 AM

Sure Kenny! How much time does it take?

You, 9:48 AM

Just 2 more mins. I'm almost there.

David, 9:46 AM

Great! Please ping me once done.

Customer has ended the conversation

Customer Summary

Knowledge article ...

Home loan address change

Conversation - Customer summary

Details

Search customer Clay Roddy

Account
Clay Roddy
Contoso Pvt Ltd
1425-882-8083

Search issue Home loan address change

Case
Home loan address change
Seattle
Normal
Active

Linked records Case

Timeline

Enter a note...

Auto-post on Demo ... 1/6/2020
Case: Created by Kenny for Contact ...

Agent scripts

Home loan

> update address online
> credit card transaction fee
> update address manually

Welcome to conversation

Welcome to Contoso. Thank you for contacting us. My name is Kenny Smith. How can i help you today?

> Greet customer
> Verify customer
> Increase cash withdraw limit
> Search and share article
> Take note

Conversation summary

Pre-chat survey Visitor details

No pre-chat survey found.

Conversation details

Engagement channel Live Chat
Waiting time 7 secs
Skills Home loan
Queue Users Q

Type your public message...

Public Internal

An Agent Script's 'Welcome to' component

Classification: Confidential

#ScottishSummit2024



Dynamics 365 | Customer Service admin center

Search

New look ☐ ? + ⚙️

Save Save & Close + New Deactivate Delete Refresh Check Access Assign Flow Word Templates Run Report Share

Chat session script - Saved

Agent script

General Related

Name * Chat session script

Unique Name * Contoso_script

Owner * Sharon Smith (Offline) x

Language * English (United States)

Description This agent script is used for chat sessions.

Agent script steps

+ New Agent script step

<input type="checkbox"/> Name	Order	Action type	Modified On
<input type="checkbox"/> Hi [customer]	1	Text	9/15/2024 9:30 PM
<input type="checkbox"/> Update description	2	Macro	9/15/2024 9:37 PM
<input type="checkbox"/> Resolve chat session	3	Macro	9/15/2024 9:38 PM

Rows: 3

Creating new Agent Script Steps for a new 'Chat session script'

#ScottishSummit2024

2024 Release Wave 2: Dynamics 365 Customer Service



The screenshot displays the Dynamics 365 Customer Service admin center interface. The left sidebar contains navigation options under "Customer support" (Overview, User management, Bots, Channels, Queues, Routing, Workstreams, Case settings, Customer settings) and "Agent experience" (Overview, Workspaces, Productivity, Knowledge, Collaboration). The main content area is titled "Macros" and includes fields for "Name" and "Description", a "View run history" link, and a "Search macro Trigger" input. Below these, there are tabs for "Predefined automation actions" and "Built-in". The "Predefined automation actions" tab is active, showing a "Productivity Automation" icon. A table below lists automation steps with columns for "Trigger" and "Action". The first row shows "Start macro execution" as the trigger and "Productivity automation" as the action. A feedback prompt at the bottom asks, "Don't see what you need? Let us know what you would like us to build next".

Creating all Macros with the Start macro execution step as the Trigger

#ScottishSummit2024

2024 Release Wave 2: Dynamics 365 Customer Service



The screenshot shows the Dynamics 365 Customer Service admin center interface. The main area displays the 'Chat session - default' session template with the 'Agent scripts' tab selected. A 'Lookup Records' dialog is open, showing a list of agent scripts. The dialog has a search bar and a list of records. The first record, 'Chat session script', is highlighted. The dialog also includes a 'New Agent script' button and an 'Advanced lookup' link.

Name	Created On
Chat session script	7/23/2024 9:13 AM
Case trial agent script	7/23/2024 9:13 AM
Chat trial agent script	7/23/2024 9:26 AM
Voice call trial agent script	7/23/2024 9:26 AM

Selecting the Agent Script to add to the Session Template

#ScottishSummit2024

2024 Release Wave 2: Dynamics 365 Customer Service



The image shows a screenshot of the Dynamics 365 Expression Builder interface. The main window is titled "If true" and contains a "Choose an action" dialog box. The dialog box has a search bar labeled "Search Action" and two tabs: "Built-in" and "Customer Service". The "Customer Service" tab is selected, and it shows a list of actions. The first action is "Agent script connector", which is highlighted. Below the list, there is a section titled "Action" with a sub-section "Set default agent script" and "Agent script connector". A tooltip is visible over the "Set default agent script" action, showing a dropdown menu with the following options: "Issue with credit card", "debit card", "Issue with credit card", and "printer issue". The "Issue with credit card" option is selected.

Setting the default agent script in the Expression Builder

2024 Release Wave 2: Dynamics 365 Sales



Dynamics 365 | Sales Hub

Search

New look

Home Recent Pinned Sales Insights Global settings

Overview

Sales accelerator

Workspace

Sequences

Work assignment

Assistant studio

Home

Insight cards

Productivity

Conversation intelligence

Insights (preview)

Auto capture

Email engagement

Notes analysis

Relationship insights

Overview

Analytics and health

Who knows whom

Sequences

Create timed sequences of activities to optimize the sales cadence for your team. Each step in the sequence generates a work item in the sales accelerator work list for the seller to whom it's assigned. [Learn more](#)

> Learn about sequences

+ New sequence Tag manager Settings Edit columns Search

Name	Status	Record type	Max. steps	Owner	Last modified	Modified by	Tags
New lead nurturing Nurture outreach series for...	Active	Lead	0	Sharon Smith	9/6/2024 2:00 PM	SYSTEM	
Opportunity nurturing Nurture outreach series for...	Active	Opportunity	0	Sharon Smith	9/6/2024 2:00 PM	SYSTEM	


Automatically created Lead and Opportunity nurturing Sequences


#ScottishSummit2024

2024 Release Wave 2: Dynamics 365 Sales



Create a sequence

Search 

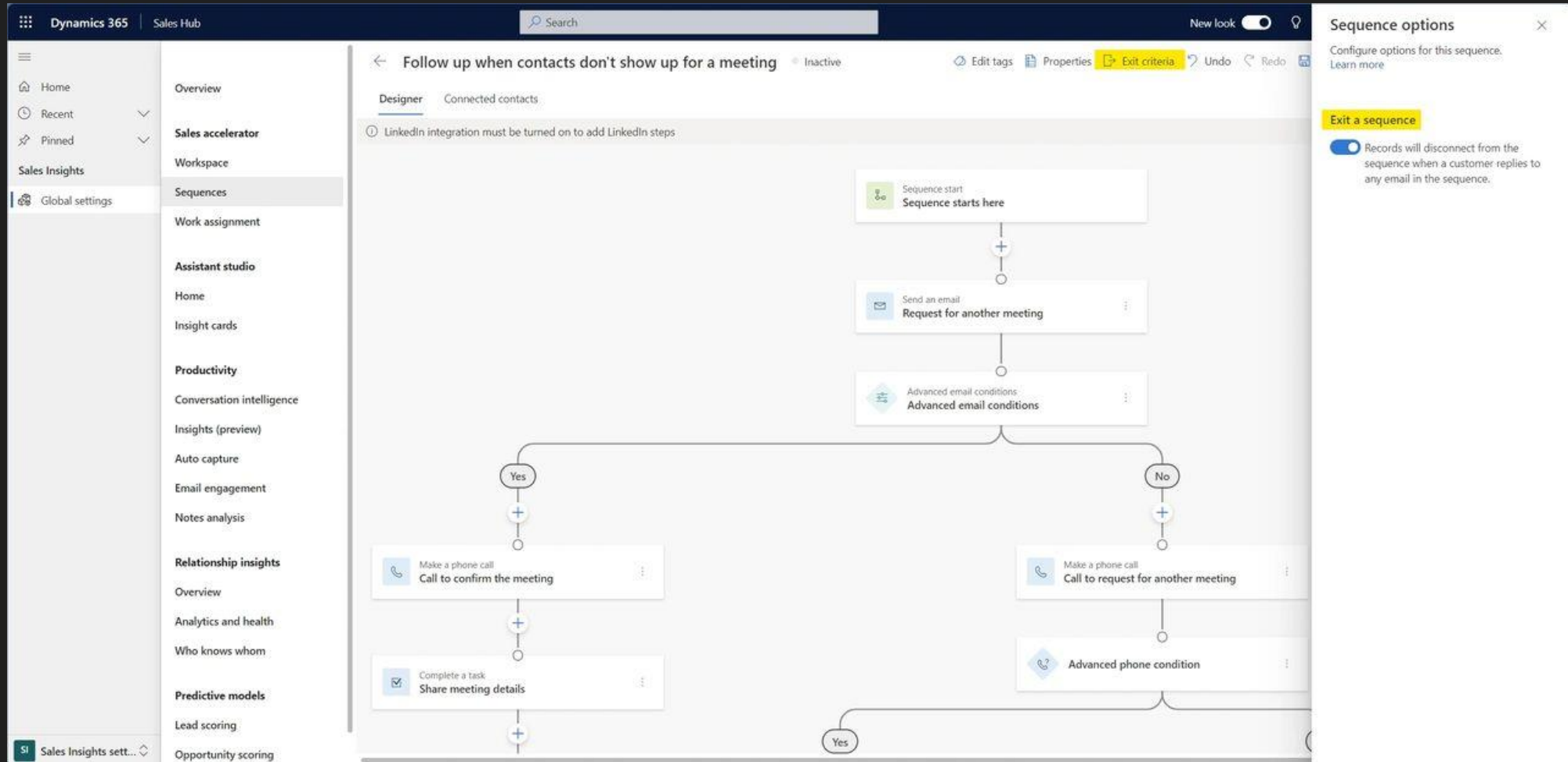
 Filter

<input checked="" type="checkbox"/>	Follow up when contacts don't show up	Details
	High volume outbound prospecting	Name Follow up when contacts don't show up
	Invite to an upcoming event	Description Use this sequence to follow up with a customer when they don't show up for a meeting. You can customize the templates and steps to secure another meeting.
	Meeting for product demo requests	Language English - United States
	Upcoming account renewal	Maximum steps 7
	Webinar follow up	Maximum completion days 5 days
		Record type Contact

[Start from blank](#) [Use a template](#) [Cancel](#)

Create a sequence using templates

2024 Release Wave 2: Dynamics 365 Sales

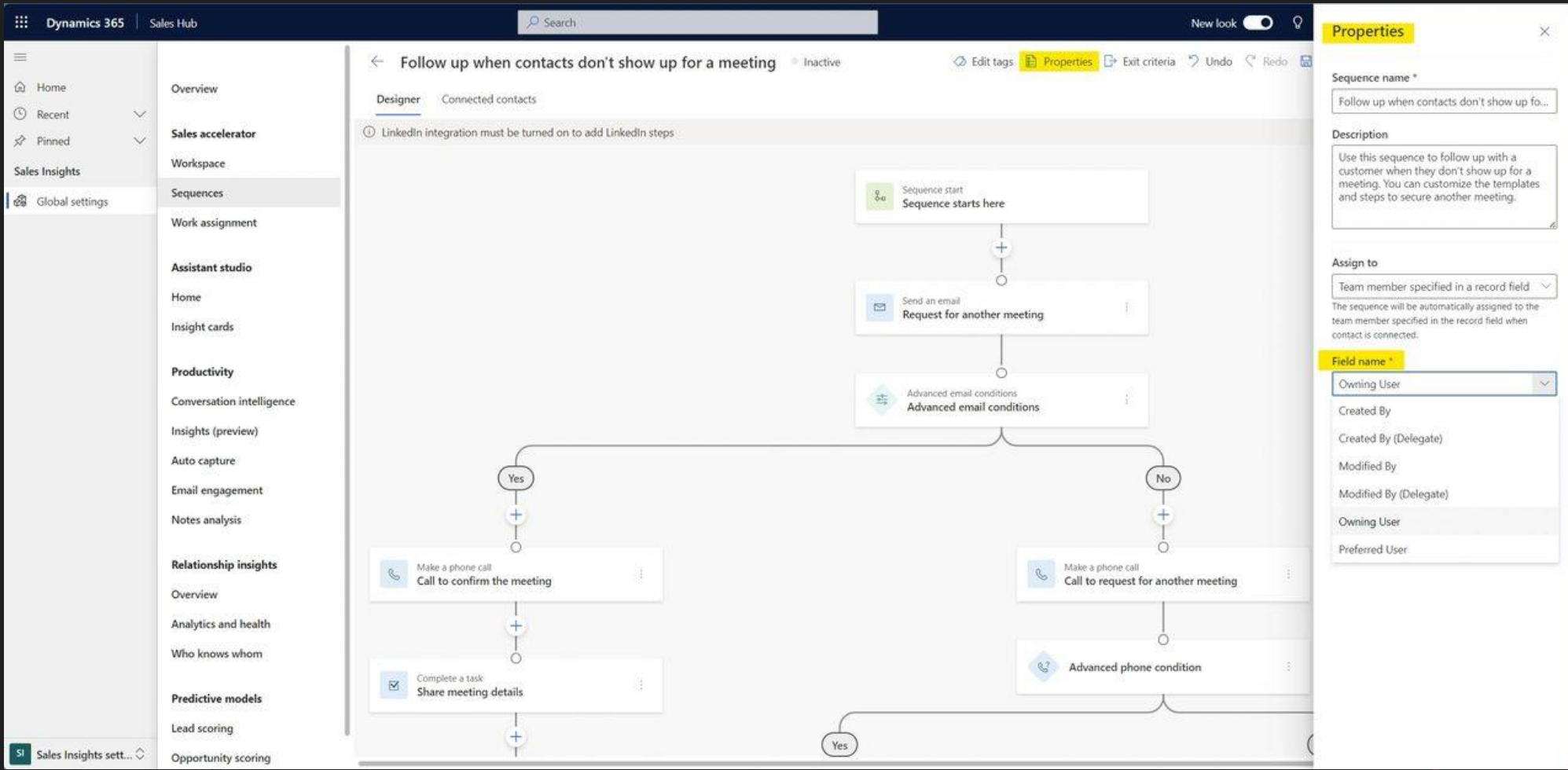


Adding an Exit criteria to the sequence

Classification: Confidential

#ScottishSummit2024

2024 Release Wave 2: Dynamics 365 Sales



Selecting the field to identify the team member assigned the Lead

#ScottishSummit2024

2024 Release Wave 2: Dynamics 365 Sales



Dynamics 365 Sales Hub

Follow up when contacts don't show up for a meeting • Active

Designer Connected contacts

Connected segments (0)

Connect segments

Connect segments so that contacts in the segment automatically begin the sequence. [Learn more](#)

Connected contacts (24)

The progress of the contact within the sequence

Name	Progress	Current Step	Days Elaps...	Connected On	Owner	Segment	Version
Zoltán Szabó	0/7	Request for another meeting	0	9/8/2024 9:29 PM	Sharon Smi...	--	1
Yvonne McKay (sample)	0/7	Request for another meeting	0	9/8/2024 9:29 PM	Sharon Smi...	--	1
Susanna Stubberod (sample)	0/7	Request for another meeting	0	9/8/2024 9:29 PM	Sharon Smi...	--	1
Thomas Andersen (sample)	0/7	Request for another meeting	0	9/8/2024 9:29 PM	Sharon Smi...	--	1
Sidney Higa (sample)	0/7	Request for another meeting	0	9/8/2024 9:29 PM	Sharon Smi...	--	1
Susan Burk (sample)	0/7	Request for another meeting	0	9/8/2024 9:29 PM	Sharon Smi...	--	1

Connected contacts, showing Progress through the sequence

#ScottishSummit2024

Classification: Confidential

2024 Release Wave 2: Dynamics 365 Sales



Dynamics 365 | Sales Hub

Search

New look

Save Save & Close + New Open org chart Deactivate Connect Add to Marketing List Assign Email a Link Delete Refresh Check Access Share

Zoltán Szabó - Saved
Contact - Contact

Sharon Smith Owner

Summary Details Files Related

CONTACT INFORMATION

First Name	* Zoltán
Last Name	* Szabó
Job Title	Sales Manager
Account Name	Fabrikam, Inc. x
Email	zoltan@fabrikaminc.com
Business Phone	423-555-0120
Mobile Phone	423-555-0121
Fax	423-555-0104
Preferred Method of Contact	Any
Address 1: Street 1	6789 Edwards Ave.
Address 1: Street 2	---
Address 1: Street 3	---
Address 1: City	Lynnwood
Address 1: State/Province	Tennessee

Timeline

Search timeline

Enter a note...

Highlights

Recent

- Modified on: 9:29 PM
Email from: Sharon Smith Overdue
We're sorry we missed you! Hi Zoltán, It looks like you were unable to attend our meeting today. No problem, we know ho...
View more
- Modified on: 8/2/2024 6:56 PM
Meeting from: Jeremy Johnson Closed
Review the final quotation
View more
Opportunity: 10 Café A-100 Automatic Espresso Machines for Fabrikam
- Modified on: 8/2/2024 6:56 PM
Meeting from: Jeremy Johnson Closed
Review the final quotation
View more
Opportunity: 12 Café A-100 Automatic Espresso Machines for Fabrikam
- Modified on: 8/2/2024 6:56 PM
Meeting from: Jeremy Johnson Closed

Who Knows Whom

No connections found
Start by creating a manual activity with Zoltán Szabó. [Learn More](#)

Assistant

Notifications

No notifications or suggestions
Check back later to see what's new and stay up to date.

Company

Fabrikam, Inc. x

RECENT OPPORTUNITIES

- 2 Café Duo Espresso Machines for Fabrikam
€25,800.00
8/29/2024

Actions from the Sequence appear in the Contact's Timeline

#ScottishSummit2024

Classification: Confidential

2024 Release Wave 2: Dynamics 365 Sales



Dynamics 365 | Sales Hub

Search

New look

Save Save & Close + New Open org chart Deactivate Connect Add to Marketing List Assign Email a Link Delete Refresh Check Access Share

Home Recent Pinned My Work Copilot Sales accelerator Activities Dashboards Customers Accounts Contacts Sales Leads Opportunities Competitors Collateral Quotes Orders Invoices Products Sales Literature Marketing Sales

CONTACT

First Name Last Name Job Title Account Number Email Business Phone Mobile Phone Fax Preferred Method of Contact Address 1: Street 3 Address 1: City Address 1: State/Province

Summary

Sequences Connected sequences

Select the sequence that you want to connect to the contact.

Refresh Search

Name	Progress	Current Step	Days elapsed...	Connected On	Assign to	Version
Follow up when contacts don't s...	0/7	Request for another meeting	0	9/8/2024 9:29 PM	Sharon Smith	1

Disconnect Cancel

View more

Opportunity: 12 Café A-100 Automatic Espresso Machines for Fabrikam

Modified on: 8/2/2024 6:56 PM

Meeting from: Jeremy Johnson Closed

2 Café Duo Espresso Machines for Fabrikam €25,800.00 8/29/2024

Sequences connected to the contact record using the same view
#ScottishSummit2024

Classification: Confidential

Thank You to our Sponsors...



Platinum Sponsor

Capgemini 

Gold Sponsors

resco

WGW

dox42[®]
automate your documents
integrate your data

kerv Digital

Thank You to our Sponsors...



With Thanks



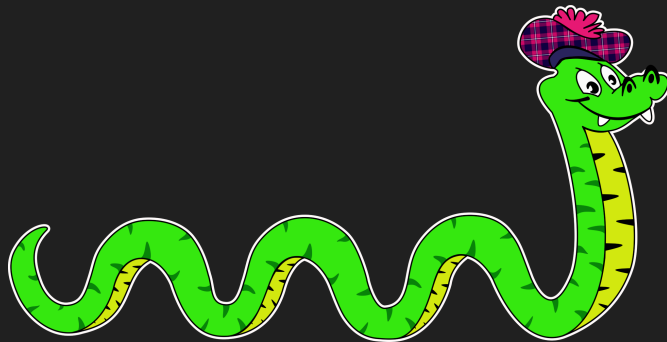
Thank you!



LinkedIn:
www.linkedin.com/in/heuristicdev



Website:
[www. HeuristicDev.co.uk](http://www.HeuristicDev.co.uk)



For your time
For being you

