

NODE4



**An Introduction
to the Dynamics 365 Application Suite**

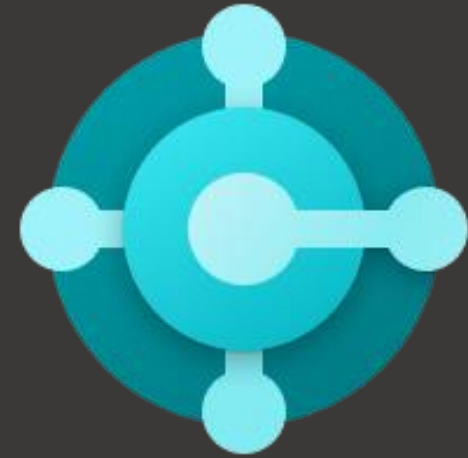


Welche Aspekte einer digitalen
Botschaft sind relevant für B2B
Dynamiken und Engagement?
Customer Engagement?



NAV had
always been
an island...

Business Central isn't



These days things are changing

Dynamics 365 Customer Engagement

Fabric and
Power BI 7

Field
Service 6

Customer
Service 5

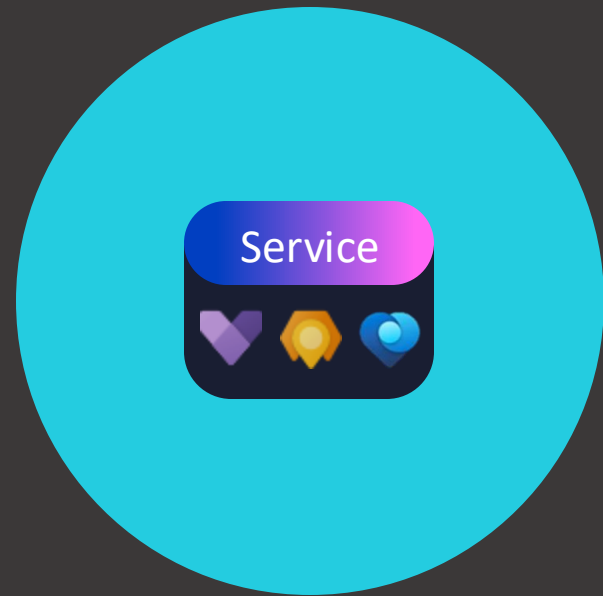


1 Customer
Insights

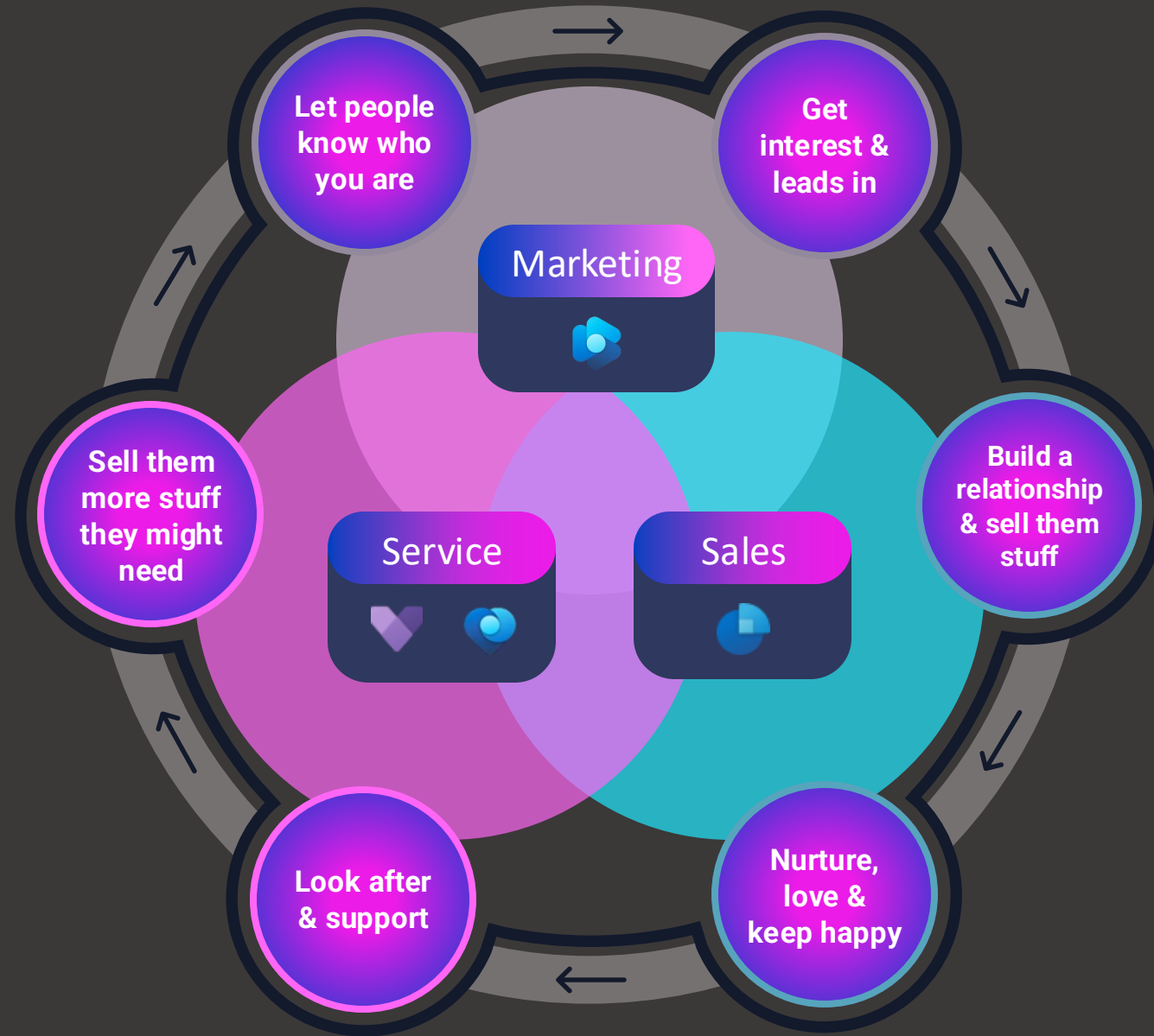
2 Sales

3 Project
Operations

4 Contact
Center



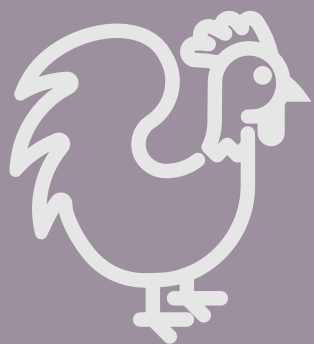
Session Later Today...



Marketing



365 Customer Insights



Sales



365 Sales







Customer Data Aggregations

Unify - Map, match, Merge, & dedupe

Spot Activities, like Transactions, Purchases or Returns



365 Customer Insights

Customer Insights - Data

Contoso Coffee

Unify accounts

Use enriched tables View last run Custom

Set up match rules and conditions

34.6K Unique source records 10.2K Matched and non-matched records 10.2K Matched records only

Order	Name	Source records	Unique records	Records matched	Include all records
1	Accounts : CRM	10,500	7,000		<input checked="" type="checkbox"/>
2	Accounts : Transactions	10,166	10,166	68.9% matched	<input checked="" type="checkbox"/>
1	Account Name - City - State			68.9%	
+ Add rule					
3	ProgramAccount : Registration	351	351	100.0% matched	<input checked="" type="checkbox"/>
1	Account ID			100.0%	
+ Add rule					
4	Accounts : ThirdParty	20,966	7,000	100.0% matched	<input checked="" type="checkbox"/>
1	Account Name - City - State			100.0%	
+ Add rule					
5	Orders : Transactions	117,283	10,131	100.0% matched	<input checked="" type="checkbox"/>
1	AccountOrders			100.0%	
+ Add rule					

Back Next Save and close Cancel

Customer Data Aggregations

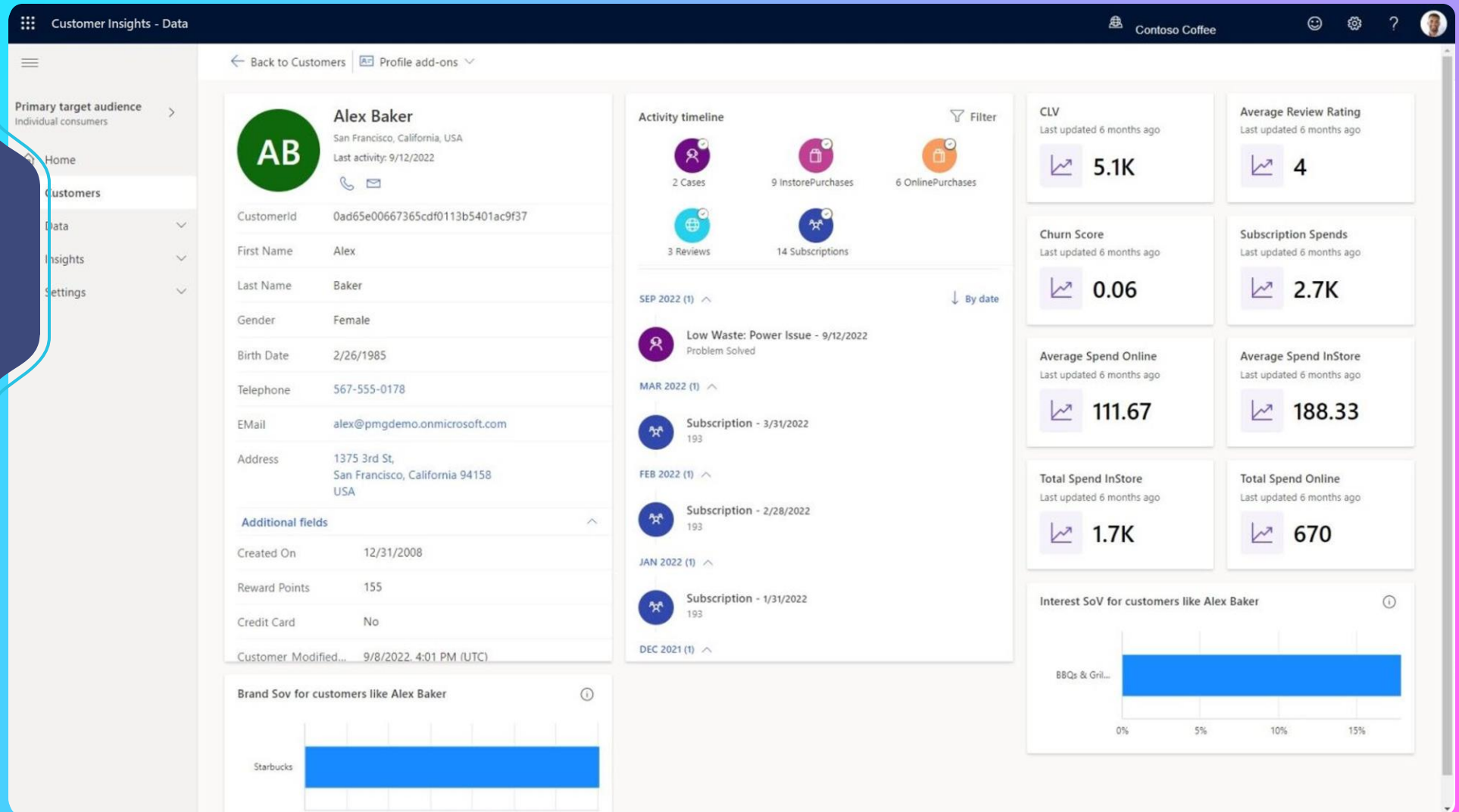
AI

Enrichment & predict intent

Customer churn prediction

Lifetime value

Recency, frequency, value



 Customer Data Aggregations

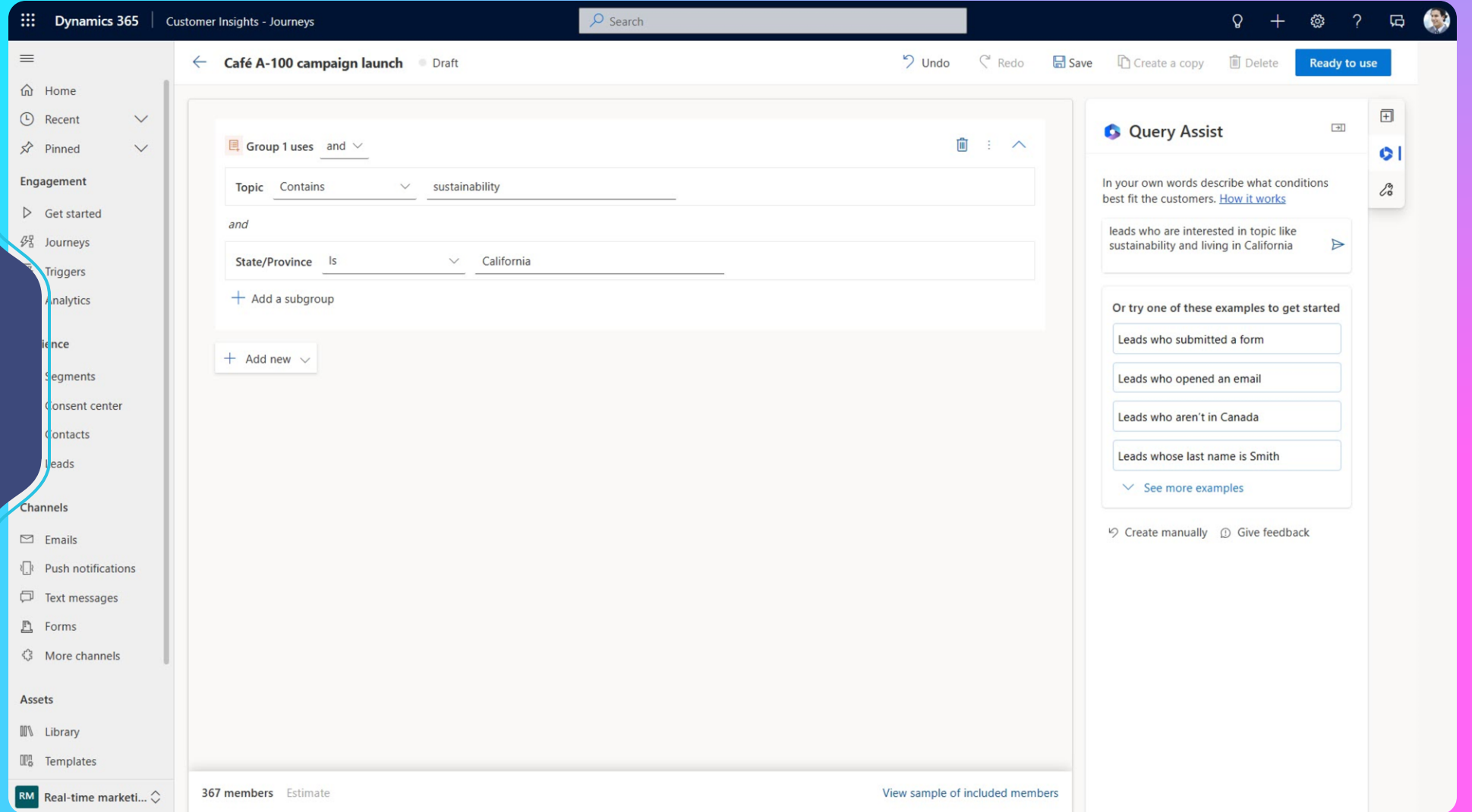
 AI

 Segmentation

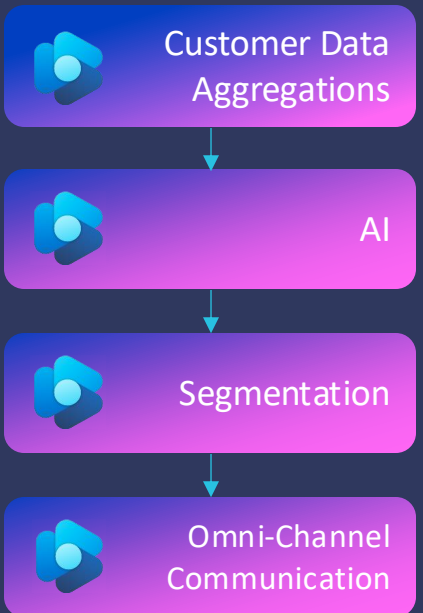
Create Measures

Create Segments based on
the available data

Demographic, Firmographic
& Behavioural



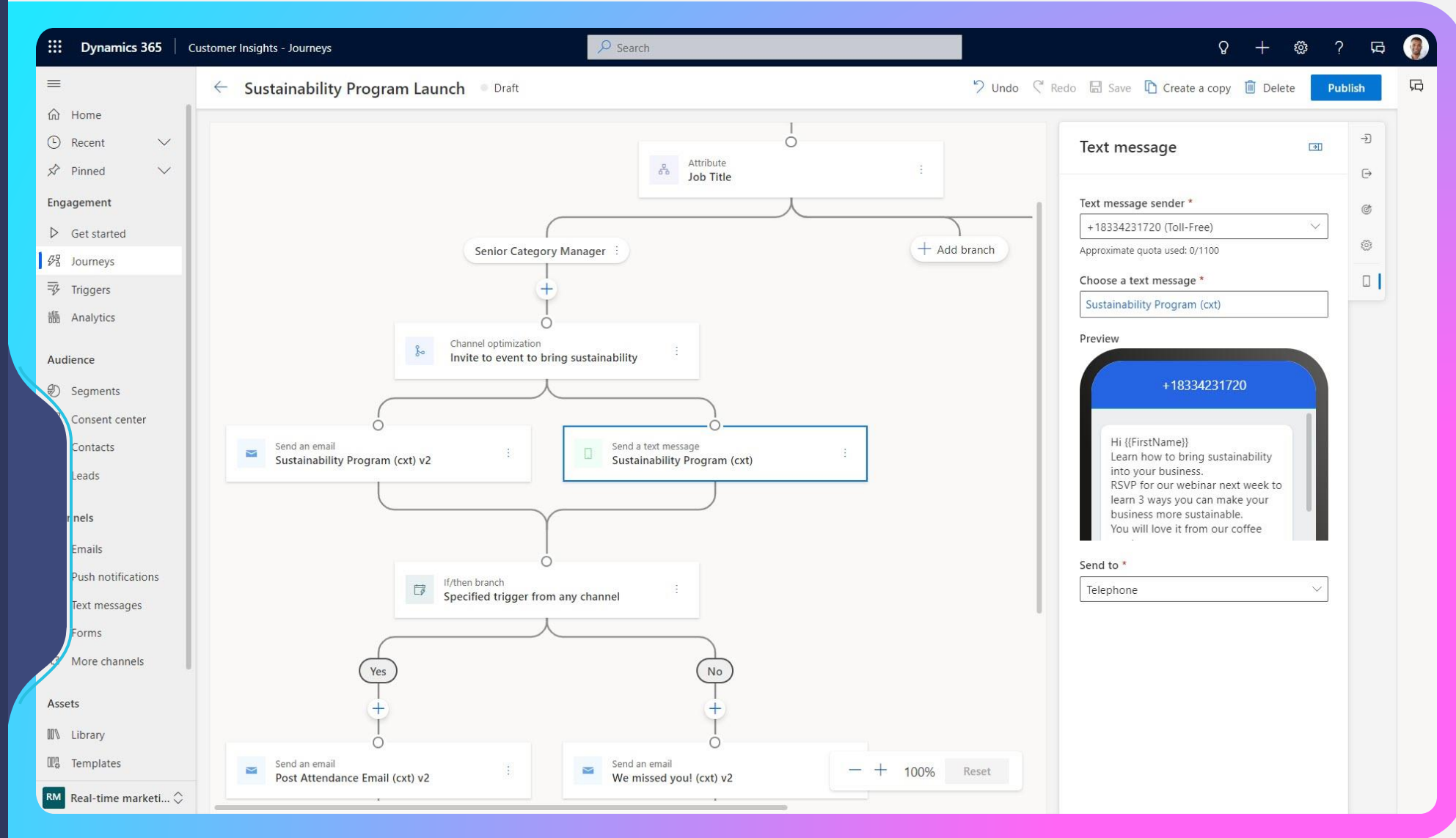
The screenshot displays the Dynamics 365 Customer Insights - Journeys interface. The top navigation bar includes the Dynamics 365 logo, the page title "Customer Insights - Journeys", a search bar, and various utility icons. The main content area is titled "Café A-100 campaign launch" and is in "Draft" status. It features a sidebar with navigation options: Home, Recent, Pinned, Engagement (with sub-items: Get started, Journeys, Triggers, Analytics, Intelligence, Segments, Consent center, Contacts, Leads), Channels (with sub-items: Emails, Push notifications, Text messages, Forms, More channels), and Assets (with sub-items: Library, Templates). The main workspace shows a configuration for "Group 1" using a logical operator "and". The first condition is "Topic Contains sustainability", and the second is "State/Province Is California". There are buttons to "Add a subgroup" and "Add new". The bottom status bar indicates "367 members" and an "Estimate" button, with a link to "View sample of included members". On the right, a "Query Assist" panel provides guidance on describing conditions and offers example queries like "Leads who submitted a form" and "Leads who opened an email".



Journeys :

SMS, WhatsApp, Email & other channels

AI - Optimise channel based on customer recent engagement



Customer Data Aggregations

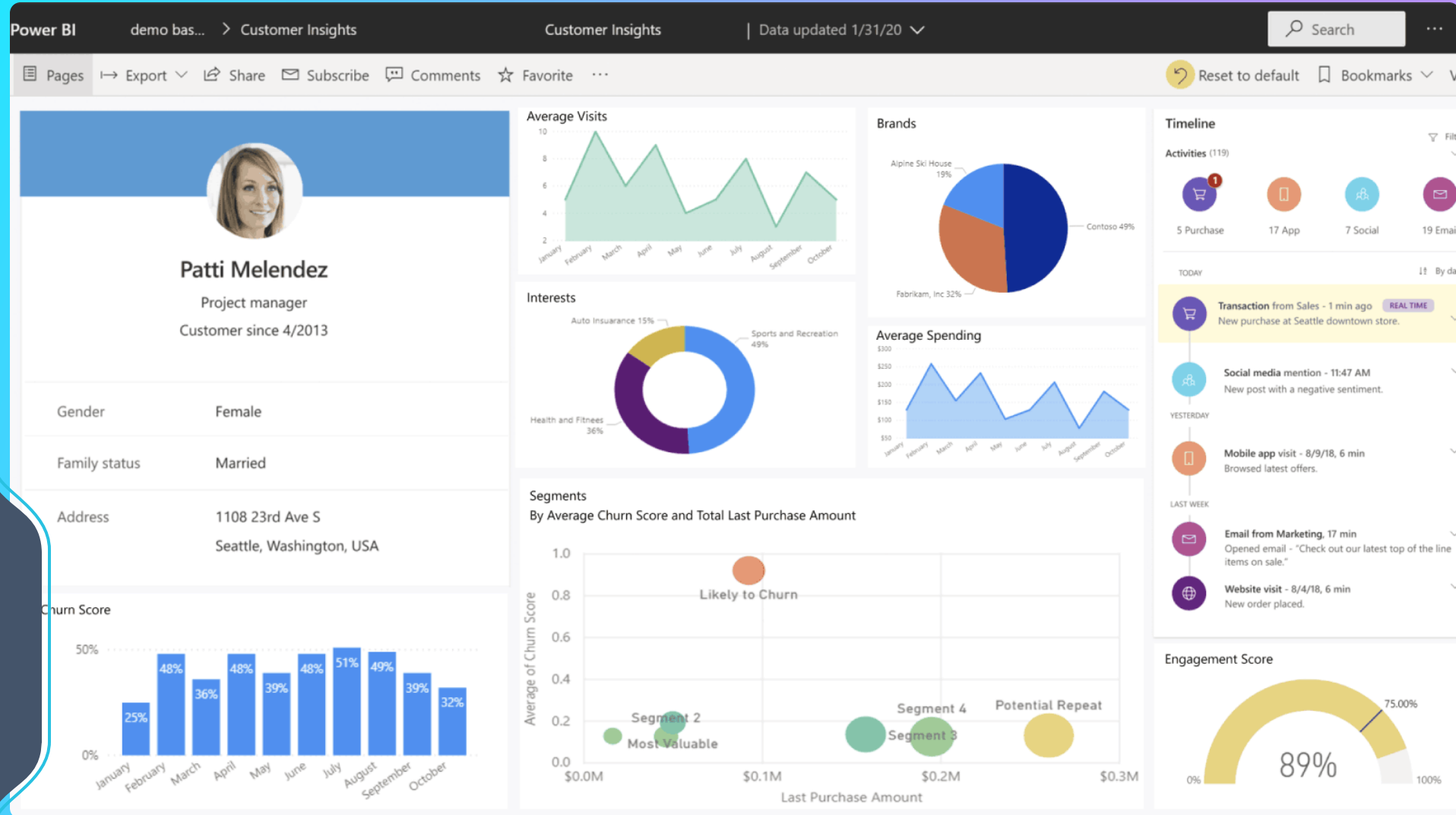
AI

Segmentation

Omni-Channel Communication

Interactions

Web visit Data
Completed Forms
Email Clicks
Email Opens
Surveys



Customer Data Aggregations

AI

Segmentation

Omni-Channel Communication

Interactions

Leads

Bought Data
Marketing Leads
Lead Scoring

Dynamics 365 | Customer Insights - Journeys

Search

New look

Default Lead Scoring Model • Live

Design Insights Scores

Engagement

- Journeys
- Analytics
- Triggers

Audience

- Segments
- Contacts
- Leads
- Consent center

Lead Management

- Scoring models
- Qualification

Channels

- Emails
- Forms
- Push notifications
- Text messages
- Real-time journeys

+3 points

Group 1

Budget Is May Buy

+3 points

Group 2

Decision Maker? Is mark complete

+2 points

Group 3

Rating Is Warm

Properties

General

Created on
12/03/2024, 17:12:17

Creator
D365 Lead Mgmt Prod

Used in qualification (1)

Marketing Qualified
Live Qualification stopped on 29/04/2024, 20:59:16

Dynamics 365 | Customer Insights - Journeys

Search

New look

AB **Alex Baker** - Saved
Lead

External Referral Lead Source Warm Rating New Status PN Peter Norman Owner

Lead-to-opportunity ma... Active for 2 minutes

Inquiry (2 Min) Automated Marketing Qualification Tele Prospecting Acceptance Tele Prospecting Qualification Sales Acceptance

Summary Insights Lead scores LinkedIn Lead Info Details Communication Related

Contact

Topic * 5 Café A-100 Automa...

First Name * Alex

Last Name * Baker

Job Title Cafeteria Manager

Business Phone 619-555-0127

Mobile Phone 619-555-0129

Email alex@treys...@treys...

Company

Company * Trey Research

Website http://www.treyr...

Street 1 789 3rd St

Street 2

Up next

Manage your activities

See upcoming activities by connecting the lead to a sequence or by creating an activity. [Learn more](#)

Connect sequence Create activity

Timeline

Search timeline

Enter a note...

Highlights

- An email was sent thanking Baker for visiting the website and informing that their request for additional information has been forwarded to Peter Norman, who will be contacting them shortly.
- Peter Norman will be reaching out to Baker shortly to provide further assistance and ensure a world-class experience.

Copy Refresh

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

Recent

PN Modified on: 26/04/2024 14:27

Email from: Peter Norman Overdue

Stakeholders

Name Role

No data available.

COMPETITORS

FC Fourth Coffee http://www.fourthcoffee.com/

Customer Data Aggregations

AI

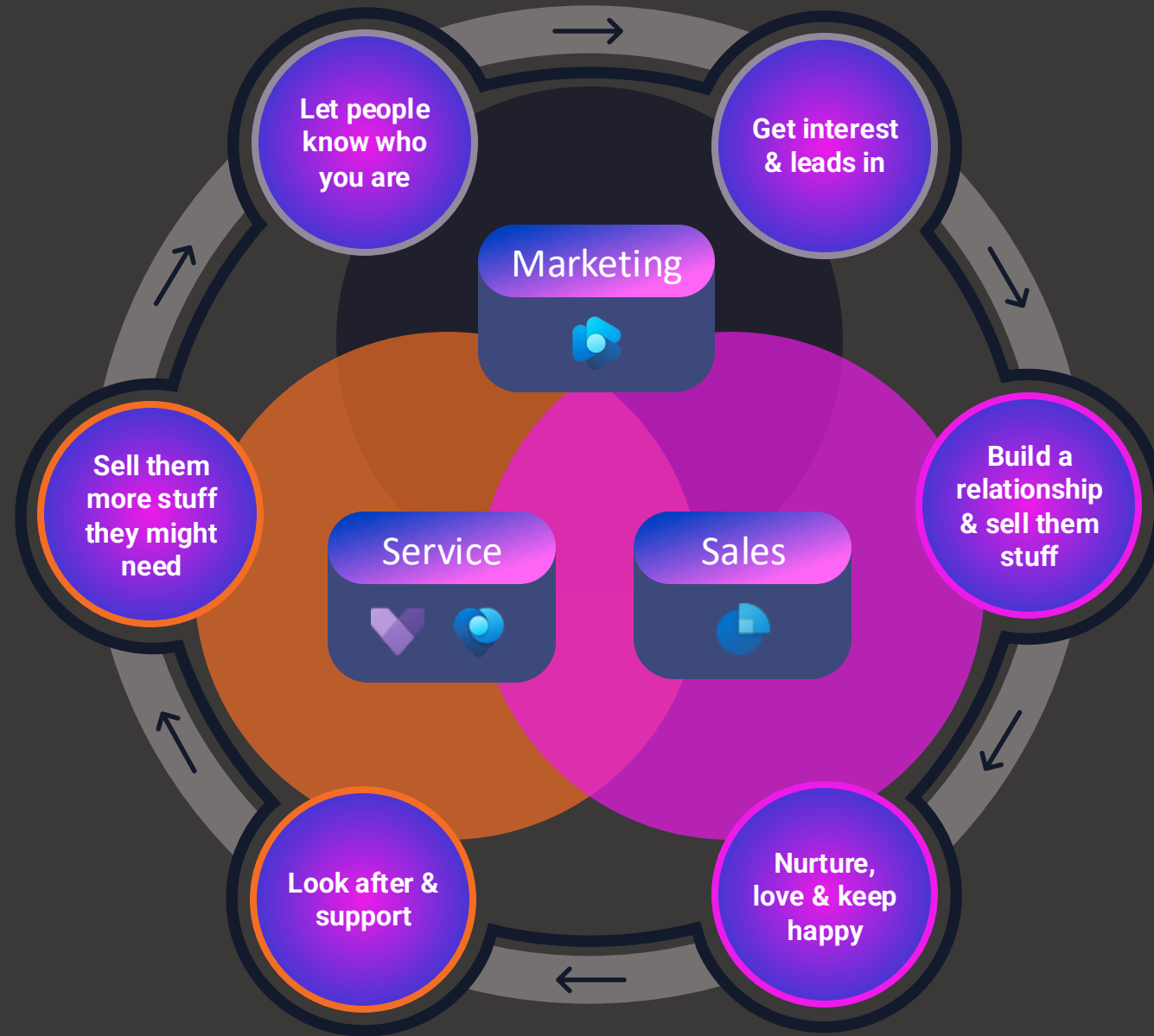
Segmentation

Omni-Channel Communication

Interactions

Leads

Bought Data
Marketing Leads
Lead Scoring

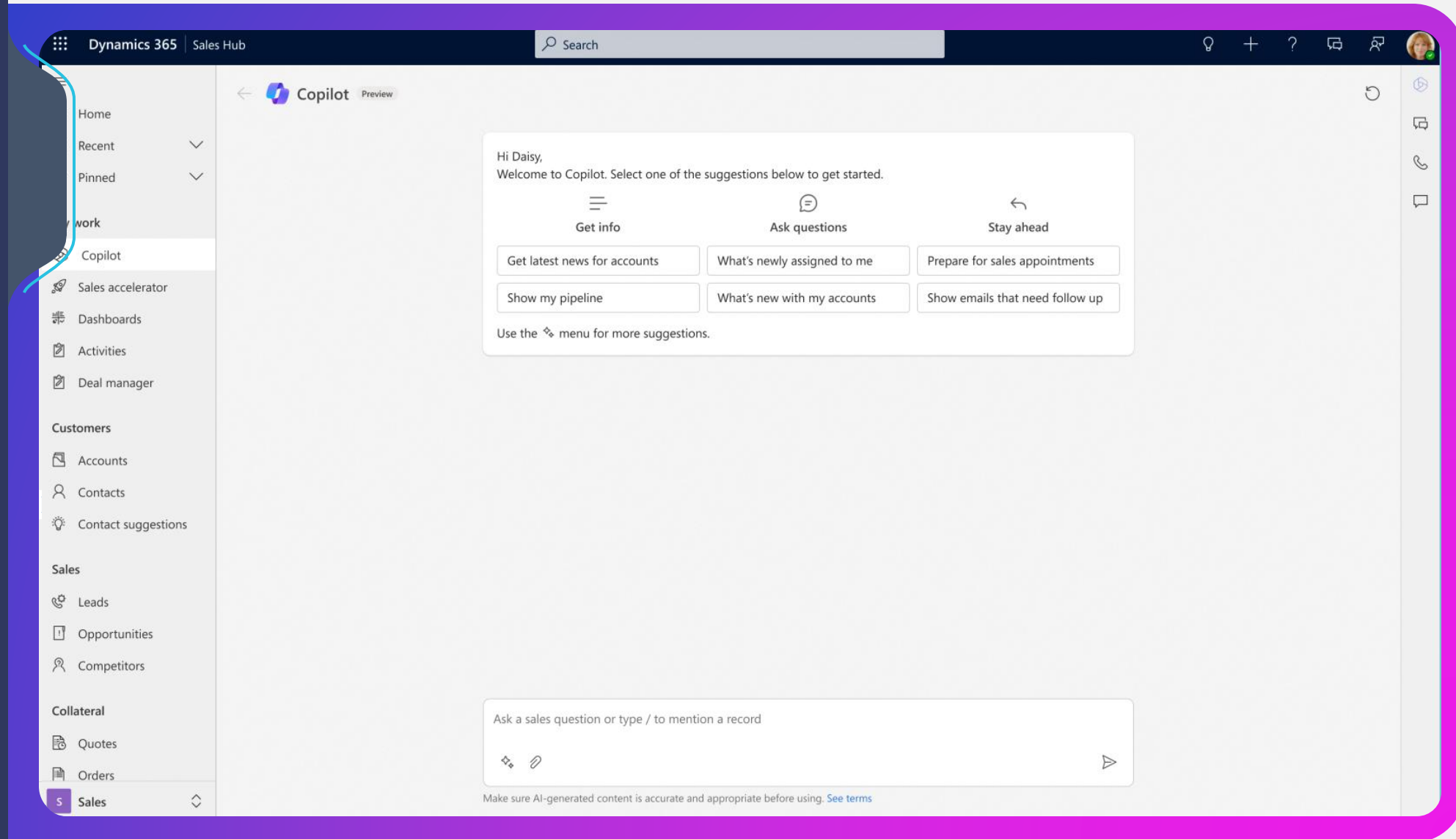






Qualify

Lead Scoring
Lead Qualification
Sales readiness with Copilot



The screenshot displays the Dynamics 365 Sales Hub interface. On the left, a sidebar contains navigation options: Home, Recent, Pinned, My work, Copilot (highlighted), Sales accelerator, Dashboards, Activities, Deal manager, Customers (Accounts, Contacts, Contact suggestions), Sales (Leads, Opportunities, Competitors), and Collateral (Quotes, Orders, Sales). The main content area is titled 'Copilot Preview' and features a welcome message: 'Hi Daisy, Welcome to Copilot. Select one of the suggestions below to get started.' Below this, there are three columns of suggestions: 'Get info' (Get latest news for accounts, Show my pipeline), 'Ask questions' (What's newly assigned to me, What's new with my accounts), and 'Stay ahead' (Prepare for sales appointments, Show emails that need follow up). At the bottom, there is a text input field with the placeholder 'Ask a sales question or type / to mention a record' and a 'See terms' link.



Qualify



Develop

Pipeline Management

Unified Activity Timeline

Relationship Sales

Real time communication

Forecasting

The screenshot displays the Dynamics 365 Sales Hub interface. On the left is a navigation pane with sections: Home, Recent, Pinned, My Work, Sales Accelerator, Activities, Dashboards, Customers, Accounts, Contacts, Leads, Opportunities, Competitors, Sales Analytics, Sales Acceleration..., Collateral (Quotes, Orders, Invoices, Products, Sales Literature), and Marketing (Sales). The main area features a Copilot welcome message with suggestions like 'Get latest news for accounts', 'What's newly assigned to me', 'Prepare for sales appointments', 'Show my pipeline', 'What's new with my sales records', and 'Show emails that need follow up'. Below this is a 'Deal tracker' visualization showing a sales funnel with bubbles representing deals at different stages (1-Qualify, 2-Develop, 3-Propose, 4-Close) over time. Two specific deals are highlighted: '5 Café A-100 Automatic' and 'Tailspin Toys - IoT Coffee Machines'. At the bottom, there is a text input field for asking questions about the data and a footer note about AI-generated content.

Qualify

Develop

Pipeline Management
Unified Activity Timeline
Relationship Sales
Real time communication
Forecasting

The screenshot displays the Dynamics 365 Sales Hub interface for an opportunity named "5 Café A-100 Automatic". The interface is divided into several sections:

- Header:** Includes the Dynamics 365 logo, "Sales Hub", a search bar, and a "New look" toggle. The top navigation bar shows "Save", "New", "Collaborate", "Close as won", "Close as lost", "Recalculate", "Sequences", "Word Templates", and a "Share" button.
- Opportunity Card:** Displays key information: "Trey Research Account", "6/28/2024 Est. close date", "\$79,500.00 Est. revenue", and "David Mallory Owner". Below this is a progress bar with stages: "Qualify" (active), "Develop (2 D)", "Propose", and "Close".
- Summary Tab:** The active tab, showing "Key details" (Topic, Contact, Purchase timeframe, Currency, Budget amount, Purchase process, Description) and "More info" (Current situation, Customer need).
- Up next:** A list of tasks to be completed, including "Accelerate Revenue Generation using Copilot", "Share product documents and request meeting", "Prepare for meeting using Copilot", "Call customer and transcribe with Copilot", "Analyze call with conversation intelligence", "Send a meeting summary", and "Confirm to close deal".
- Opportunity score:** A red-bordered box highlights the "Opportunity score" section, showing a score of "91" (Grade A) with a trend of "Improving". It lists four key factors: "Decision maker identified", "Estimated budget is \$80,000.00", "Purchase timeframe is this quarter", and "Purchase process is individual".
- Assistant:** A section for "Notifications" showing a "1 reminder" and a message: "Opportunity closing soon 5 Café A-100 Automatic".
- Relationship health:** A section for "Relationship health" with a status indicator.
- Copilot Chat:** A sidebar on the right for "Copilot" chat, showing a preview of an email and a list of related SharePoint files.

Qualify

Develop

Pipeline Management
Unified Activity Timeline
Relationship Sales
Real time communication
Forecasting

The screenshot displays the Dynamics 365 Sales Hub interface for a specific sales opportunity. The top navigation bar includes the Dynamics 365 logo, a search bar, and various utility icons. The left sidebar shows a navigation menu with categories like Home, Recent, Pinned, My Work, Sales accelerator, Activities, Dashboards, Forms, Accounts, Contacts, Leads, Opportunities, Competitors, Sales Analytics, Sales Acceleration..., Collateral, Quotes, Orders, Invoices, Products, Sales Literature, Marketing, and Sales.

The main content area is titled "5 Café A-100 Automatic" and is categorized as a "Sales Insights" opportunity. It shows a sales process timeline with stages: Qualify, Develop (24 Hrs), Propose, and Close. The "Develop" stage is currently active. Key metrics displayed include:

- Trey Research Account**: 6/28/2024 Est. close date, \$79,500.00 Est. revenue.
- Owner**: David Mallory.
- Sales Process**: Active for 8 months.

The "Relationship analytics" tab is selected, showing a summary of metrics and key performance indicators (KPIs) computed from activities of current and previous years. The summary includes:

- You have initiated 4 meetings lesser compared to the similar opportunities.
- You have invested 2.6 hours lesser compared to the similar opportunities.
- Customers are opening your emails 24% lesser compared to the similar opportunities.
- You take 6 hours more to respond to emails compared to the similar opportunities.

Below the summary, there are sections for "Relationship health" (Good, Improving) and "Customer interactions". The "Customer interactions" section includes a bar chart comparing interactions with similar won deals. The chart shows the following data:

Interaction Type	This opportunity	Similar won deals
Emails	12	13
Meetings	5	9
Phone calls	7	6

Other sections visible include "Trey Research contacts" (Last updated: 12/5/2023 4:39 PM) listing Alex Baker, Carla Yates, and Antonio Xitambul, and "Your hourly investment" and "Customer's hourly investment" sections (Last updated: 4/24/2024 5:09 AM).

On the right side, the "Copilot" chat interface is open, showing a chat window with a subject "5 Café A-100 Automatic Deal" and a date/time "Sun, Jun 23, 2024 from 07:00 PM to 07:00 PM". It also includes a "Prepare for '5 Café A-100 Automatic Deal'" button and a list of meeting invitees.



Qualify



Develop

Pipeline Management
Unified Activity Timeline
Relationship Sales
Real time communication
Forecasting

The screenshot displays the Dynamics 365 Sales Hub interface for a sales opportunity named "5 Café A-100 Automatic". The interface is divided into several sections:

- Header:** Shows the Dynamics 365 Sales Hub logo, a search bar, and navigation icons. The top bar includes buttons for Save, New, Collaborate, Close as won, Close as lost, Recalculate, Sequences, Word Templates, and Share.
- Opportunity Overview:** Displays the opportunity name, account (Trey Research), estimated close date (6/28/2024), estimated revenue (\$79,500.00), and owner (David Mallory).
- Sales Process:** A timeline showing the current stage as "Develop (3 D)" with previous stages "Qualify" and "Propose".
- Summary:** A tab showing key details:
 - Topic:** 5 Café A-100 Automatic
 - Contact:** Alex Baker
 - Purchase timeframe:** This Quarter
 - Currency:** US Dollar
 - Budget amount:** \$80,000.00
 - Purchase process:** Individual
 - Description:** Supply coffee machines for their new buildings.
- Up next:** A section highlighted with a red border, listing tasks:
 - Accelerate Revenue Generation using Copilot
 - Prepare for meeting using Copilot (Step 3, Due by 2:00 PM)
 - Call customer and transcribe with Copilot (Step 4)
 - Analyze call with conversation intelligence (Step 5)
 - Send a meeting summary (Step 6)
 - Confirm to close deal (Step 7)
- Opportunity score:** Shows a score of 91 (Grade A) with a trend of "Improving".
- Assistant:** A section for notifications, including a reminder and an opportunity closing soon.
- Relationship health:** A section for monitoring the relationship status.
- Chat:** A chat window on the right side, providing details for the upcoming meeting and meeting insights.



Qualify



Develop

Pipeline Management

Unified Activity Timeline

Relationship Sales

Real time communication

Forecasting

Share product documents and request meeting

Details Regarding Cafe A-100 Coffee Machine and Meeting Arrangement - Unsaved

Email · Email

Normal Priority 6/18/2024 3:49 PM Due Draft Status Reason David Mallory Owner

Email Related

Subject: Share product documents and request meeting

Subject: Details about Cafe A-100 and Request for Meeting

Hello,

I hope this email finds you well. I want to share details about our Cafe A-100 Automatic product and also request a meeting for a meeting to discuss further.

The Cafe A-100 Automatic presents a chance to explore this opportunity with you. I believe it aligns well with your interests. I would appreciate the chance to discuss the specifics of Cafe A-100? I look forward to hearing from you soon.

Could we schedule a meeting at your convenience?

Warm regards,

David Mallory

< 1 of 1 >

Add details to revise the draft

Keep it Start over Discard Adjust Translate

Length: Short, Medium (checked), Long

Tone: Friendly, Professional (checked), Formal

Update

Privacy policy

Email Engagement

- Recipient Activity will be followed (Do Not Follow)
- Schedule email to be sent at a later time. (Send Later)
- Set a reminder to follow up on this email. (Set a Reminder)

Sales Literature

Marketing

Sales

Customer need

The company is expanding operations with warehouses in different states, now including cafeterias for employees, requiring the installation of coffee machines at these locations.

Handle negotiations and customer concerns and close deal. Prepare agreement and documentation.

Previous steps

Opportunity closing soon 5 Café A-100 Automatic



Qualify



Develop

Pipeline Management

Unified Activity Timeline

Relationship Sales

Real time communication

Forecasting

Dynamics 365 Sales > Forecasts > FY2024 per quarter

See forecast grid history Last updated: 20 minutes ago Recalculate data

FY2024 per quarter

Grid Trend Flow

Drill down by: None

User	Quota	Prediction	Won	Committed	Best case	Pipeline	Omitted
Kenny Smith (group)	\$30,000,000.00	\$143,708.00	\$143,708.00 92%	\$143,708.00	\$143,708.00	\$143,708.00	\$143,708.00
Kenny Smith	\$12,715.14	\$12,715.14	\$12,715.14 92%	\$30,888.00	\$30,888.00	\$30,888.00	\$30,888.00
Cameron Evans (group)	\$12,715.14	\$12,715.14	\$12,715.14 92%	\$30,888.00	\$30,888.00	\$30,888.00	\$30,888.00
Cameron Evans	\$12,715.14	\$12,715.14	\$12,715.14 92%	\$30,888.00	\$30,888.00	\$30,888.00	\$30,888.00
Cecelia French	\$12,715.14	\$12,715.14	\$12,715.14 92%	\$30,888.00	\$30,888.00	\$30,888.00	\$30,888.00
Hilda Cavallari	\$12,715.14	\$12,715.14	\$12,715.14 92%	\$30,888.00	\$30,888.00	\$30,888.00	\$30,888.00
Jill Williams	\$12,715.14	\$12,715.14	\$12,715.14 92%	\$30,888.00	\$30,888.00	\$30,888.00	\$30,888.00
Malcolm Homer	\$12,715.14	\$12,715.14	\$12,715.14 92%	\$30,888.00	\$30,888.00	\$30,888.00	\$30,888.00
Millard Lamontagne	\$12,715.14	\$12,715.14	\$12,715.14 92%	\$30,888.00	\$30,888.00	\$30,888.00	\$30,888.00
Stan Hadden	\$12,715.14	\$12,715.14	\$12,715.14 92%	\$30,888.00	\$30,888.00	\$30,888.00	\$30,888.00
Vance Carrico	\$12,715.14	\$12,715.14	\$12,715.14 92%	\$30,888.00	\$30,888.00	\$30,888.00	\$30,888.00



Qualify



Develop



Propose

Product Catalogues
Product Pricing
Proposal/Quote

Dynamics 365 | Sales Hub Search New look TNP

Auto publish is enabled. Read More

← | | | Save | Save & Close | Preview | **Open in Business Cent...** | Choose Default Busine... | Clone | Revise | Retire | Delete | Refresh | Check Access | Share

Product: Café A-100 Automatic - Saved Active Status

Product Details | Product Properties | Additional Details | Notes | Field Service | Related

Name	Café A-100 Automatic	Unit Group	Default Unit
Product ID	CAA100AU	Default Unit	Primary Unit
Parent		Default Price List	Contoso Coffee Price List
Valid From	01/03/2024	Current Cost	\$15,380.00
Valid To	28/02/2027	Standard Cost	\$15,380.00
Description	The Café A-100 Automatic is the ideal machine for baristas looking for amazingly consistent coffee. This machine allows baristas to program desired volumes and consistently pull shots at that volume throughout the day. Because the barista no longer has to monitor each and every shot, they are given precious time to interact with customers or perhaps begin another order.	Decimals Supported	2
Quantity On Hand	100.00	Subject	---

Qualify

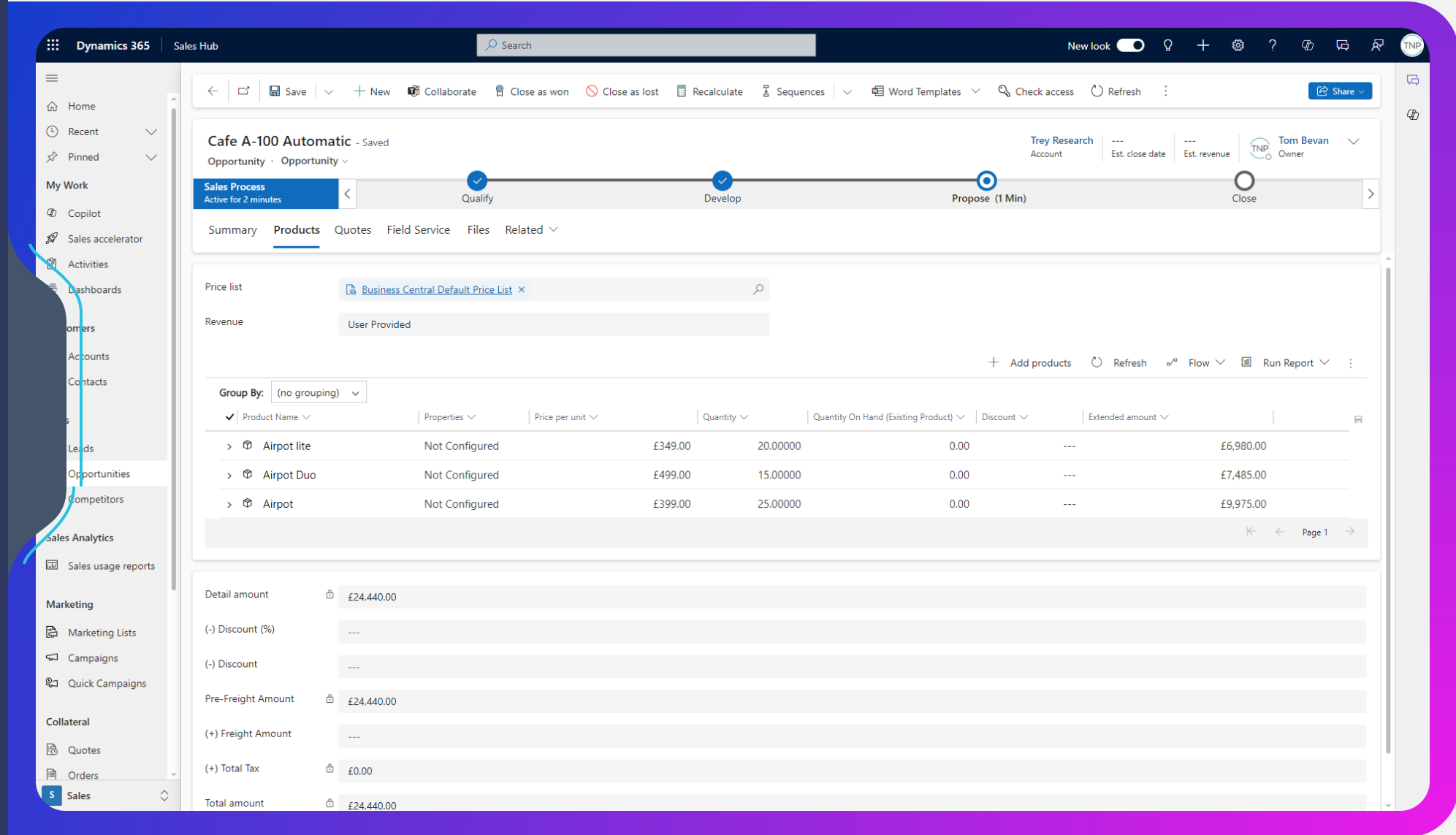
Develop

Propose

Product Catalogues

Product Pricing

Proposal/Quote



Dynamics 365 | Sales Hub

Search

New look ☐ ? + ⚙ ? ⌂ ⌕ TNP

Home Recent Pinned My Work Copilot Sales accelerator Activities Dashboards Customers Accounts Contacts Sales Leads Opportunities Competitors Sales Analytics Sales usage reports Marketing Marketing Lists Campaigns Quick Campaigns Collateral Quotes Orders **Sales**

Cafe A-100 Automatic - Saved
Opportunity · Opportunity

Trey Research Account --- Est. close date --- Est. revenue TNP Tom Bevan Owner

Sales Process Active for 2 minutes

Qualify Develop Propose (1 Min) Close

Summary **Products** Quotes Field Service Files Related

Price list [Business Central Default Price List](#)

Revenue User Provided

+ Add products Refresh Flow Run Report

Group By: (no grouping)

Product Name	Properties	Price per unit	Quantity	Quantity On Hand (Existing Product)	Discount	Extended amount
> Airpot lite	Not Configured	£349.00	20.00000		0.00	£6,980.00
> Airpot Duo	Not Configured	£499.00	15.00000		0.00	£7,485.00
> Airpot	Not Configured	£399.00	25.00000		0.00	£9,975.00

Page 1

Detail amount	£24,440.00
(-) Discount (%)	---
(-) Discount	---
Pre-Freight Amount	£24,440.00
(+) Freight Amount	---
(+) Total Tax	£0.00
Total amount	£24,440.00

Qualify

Develop

Propose

Product Catalogues
Product Pricing
Proposal/Quote

Dynamics 365
Sales Hub

Search

New look
Toggle
Lightbulb
Plus
Gear
Question mark
Refresh
Print
Share
TNP

Try form fill assistance Suggestions will not be saved until you accept them. Review AI-generated entries for accuracy. See terms
Accept all suggestions

Save
Save & Close
New
Delete
Refresh
Check Access
Export to PDF
Collaborate
Look Up Address
Activate Quote
Get Products
Share

Cafe A-100 Automatic - Saved
Quote
£24,440.00

In Progress
Status

Summary
Details
Related

Quote ID *
QUO-01032-Y0T1M9
Revision ID *
0
Owner *
TNP Tom Bevan (Offline)
Name *
Cafe A-100 Automatic
Currency *
British Pound
Price List *
Business Central Default Price List
Company *

SHIPPING INFORMATION
Shipping Method
DHL
Payment Terms
14 DAYS
Freight Terms

PRODUCTS
Add products

Group By: (no grouping)						
Product	Proper...	Price Per...	Quantity	Quantity On Hand (E...	Disco...	Extended A...
> Airpot lite	Not C...	£349.00	20.00000	0.00	---	£6,980.00
> Airpot D...	Not C...	£499.00	15.00000	0.00	---	£7,485.00
> Airpot	Not C...	£399.00	25.00000	0.00	---	£9,975.00

Detail Amount
£24,440.00
(-) Discount (%)

(-) Discount

Pre-Freight Amount
£24,440.00
(+) Freight Amount

(+) Total Tax
£0.00
Total amount
£24,440.00

SALES INFORMATION
Opportunity
Cafe A-100 Aut...
Potential Customer
Trey Research

DESCRIPTION

RECENT QUOTES
New stuff Draft £0.00
Cafe A-100 Automatic Draft £24,440.00
Headsets Won



Qualify



Develop

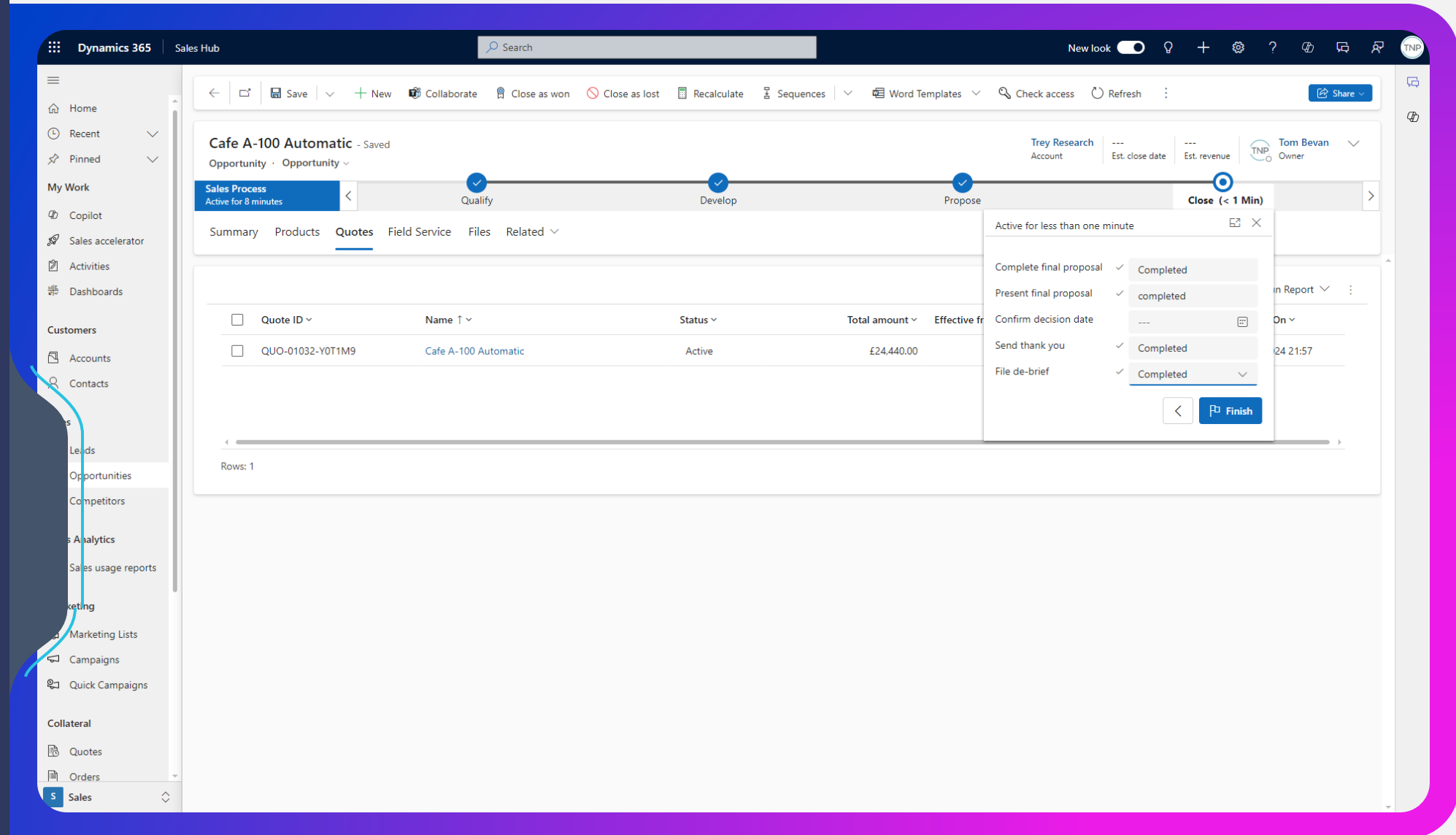


Propose



Close

Final Proposal
Order



The screenshot displays the Dynamics 365 Sales interface for the 'Cafe A-100 Automatic' opportunity. The left sidebar shows the navigation pane with sections like 'My Work', 'Customers', and 'Collateral'. The main area shows the opportunity details, including the sales process stages: Qualify, Develop, Propose, and Close (< 1 Min). A dropdown menu is open for the 'Close' stage, showing a list of tasks with their completion status.

Quote ID	Name	Status	Total amount	Effective from
QUO-01032-Y0T1M9	Cafe A-100 Automatic	Active	£24,440.00	

Rows: 1

Close dropdown menu items:

- Active for less than one minute
- Complete final proposal
- Present final proposal
- Confirm decision date
- Send thank you
- File de-brief

Completion status for dropdown items:

- Completed
- completed
-
- Completed
- Completed

Buttons: < Finish

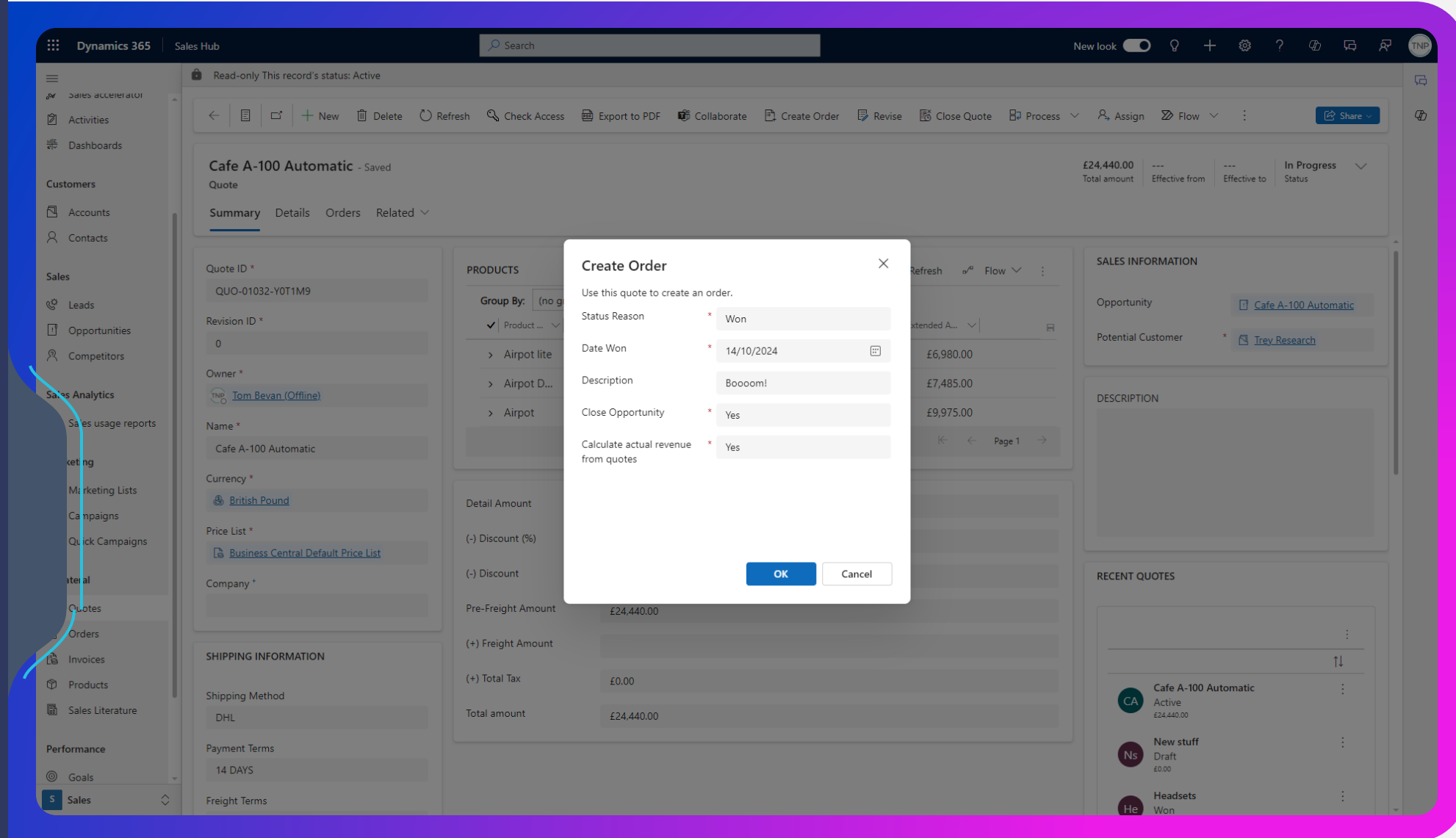
Qualify

Develop

Propose

Close

Final Proposal
Order



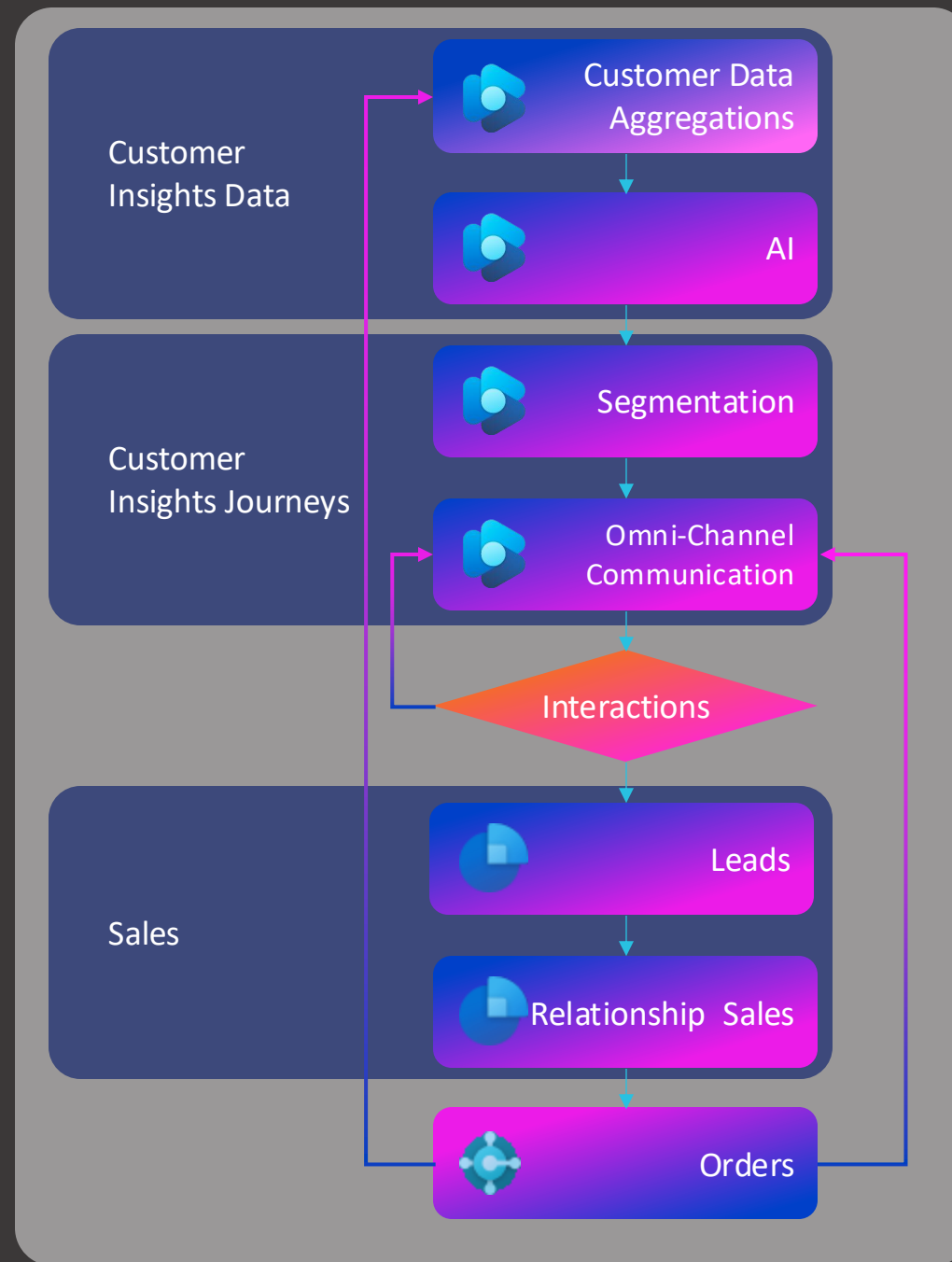
The screenshot displays the Dynamics 365 Sales interface. The main view shows a quote for 'Cafe A-100 Automatic' with a total amount of £24,440.00. The quote is in the 'In Progress' status. A 'Create Order' dialog box is open, prompting the user to use the quote to create an order. The dialog box contains the following fields:

- Status Reason: Won
- Date Won: 14/10/2024
- Description: Booom!
- Close Opportunity: Yes
- Calculate actual revenue from quotes: Yes

The background interface shows the quote details, including the quote ID (QUO-01032-Y0T1M9), revision ID (0), owner (Tom Bevan), and currency (British Pound). The quote is for a 'Cafe A-100 Automatic' and includes a list of products (Airpot lite, Airpot D..., Airpot) and a table of amounts (Detail Amount, (-) Discount (%), (-) Discount, Pre-Freight Amount, (+) Freight Amount, (+) Total Tax, Total amount).

Auto Order Creation & Order Processing

פד 25





Service



365 Customer Service



365 Contact Center



Omni-Channel Engagement

Any inbound communication
(Customer, Partner, Vendor or Staff)

Channels Including Voice,
Chat, Email, SMS and Social
Media

Smart Agents (AI) to assist
with understanding caller
intent – Including IVR to
route calls and chats
intelligently




Dynamics 365 | Copilot Service admin center

Search

SANDBOX

Customer support overview

Provide cross-channel support to customers on issues with user management, workstreams, queues, routing, case settings and customer settings.




User management

Manage customer service representatives and their skills, capacity, and roles.

Users
1372

Skills
7

Capacity profile
5



Channels


Adding channels to your support offering is a powerful way to provide personalized service to customers on the channels of their choice.

Record

Chat

Messaging

Voice




Queues

Organize, prioritize, and monitor the progress of your work.

Advanced queues
22

Basic queues
1653




Routing

Use routing rules to route work items to the right representatives at the right time, without any manual intervention.

Record routing
3

Routing diagnostics
3

Basic routing rule sets
0



Workstreams

A collection of settings, including channel setup, routing rules, work distribution, and bots.

Record

Chat

Messaging

Voice

Get started

Home

Search admin setti...

Guided channel se...

Customer support

- Overview
- User management
- AI Agents
- Channels
- Intent
- Queues
- Routing
- Workstreams
- Case settings
- Customer settings

Support experience

- Overview
- Workspaces
- Productivity
- Knowledge
- Collaboration

Operations

- Overview
- Insights
- Calendar



Omni-Channel
Engagement



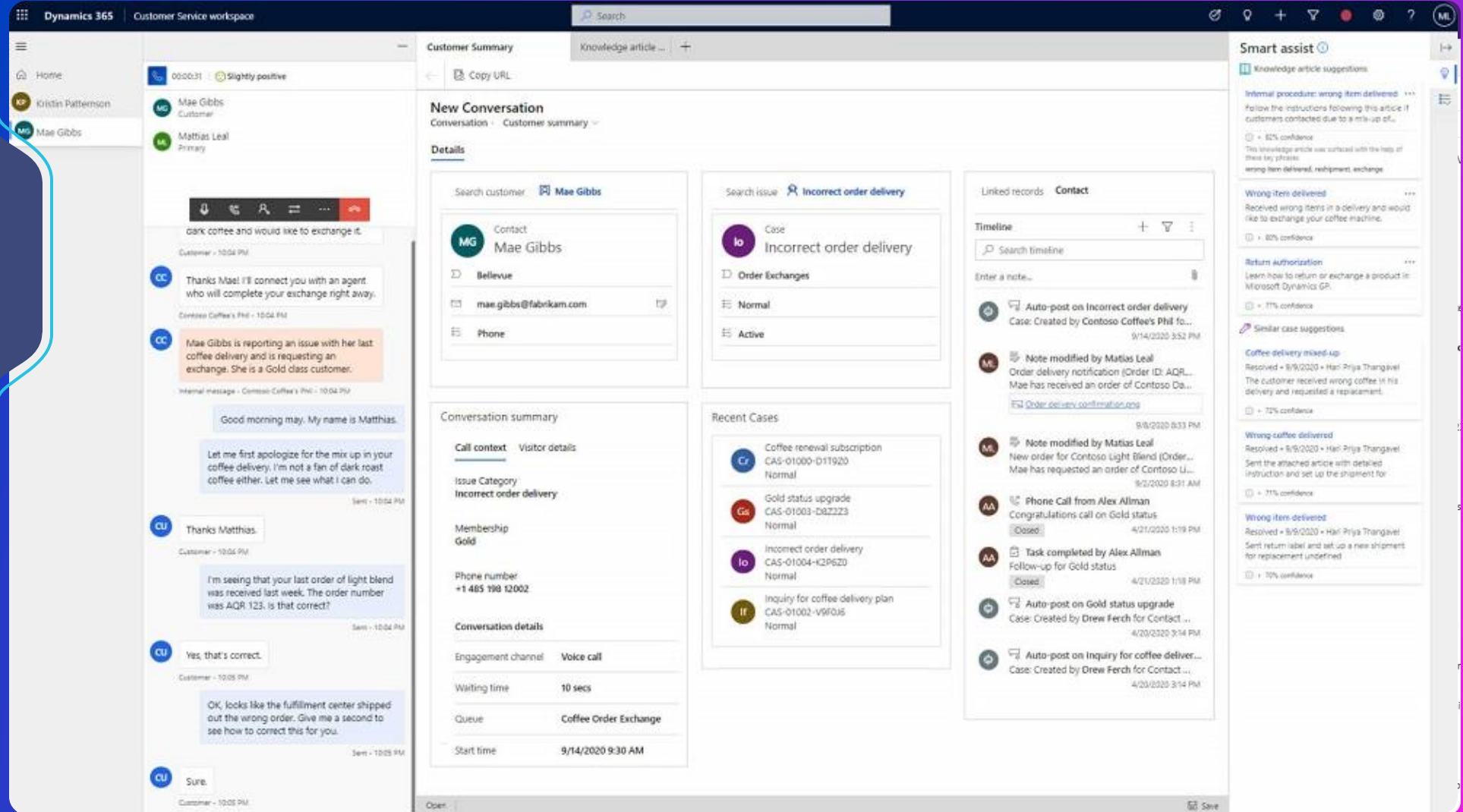
Multi-Session
Management

Screen popping to the
relevant contact

Manage Multiple Enquiries
at once

Easy Access to Related
Information

One Central Application



The screenshot displays the Dynamics 365 Customer Service workspace. The interface is divided into several sections:

- Left Panel:** Shows a list of contacts, including Mae Gibbs (Customer) and Matthias Leal (Primary). Below this is a chat window with Mae Gibbs, showing a conversation about a coffee delivery issue. The chat history includes messages from the customer and the agent, with timestamps and status indicators.
- Center Panel:** Displays the 'New Conversation' screen for Mae Gibbs. It includes a 'Details' section with contact information (Believe, mae.gibbs@fabrikam.com, Phone) and a 'Conversation summary' section. The summary includes 'Call context' (Visitor details), 'Issue Category' (Incorrect order delivery), 'Membership' (Gold), 'Phone number' (+1 485 198 12002), and 'Conversation details' (Engagement channel: Voice call, Waiting time: 10 secs, Queue: Coffee Order Exchange, Start time: 9/14/2020 9:30 AM).
- Right Panel:** Features a 'Smart assist' section with knowledge article suggestions, a 'Timeline' section showing a sequence of events (Auto-post on Incorrect order delivery, Note modified by Matias Leal, Phone Call from Alex Allman, Task completed by Alex Allman, Auto-post on Inquiry for coffee deliver...), and a 'Recent Cases' section listing various cases (Coffee renewal subscription, Gold status upgrade, Incorrect order delivery, Inquiry for coffee delivery plan).



Omni-Channel
Engagement



Multi-Session
Management

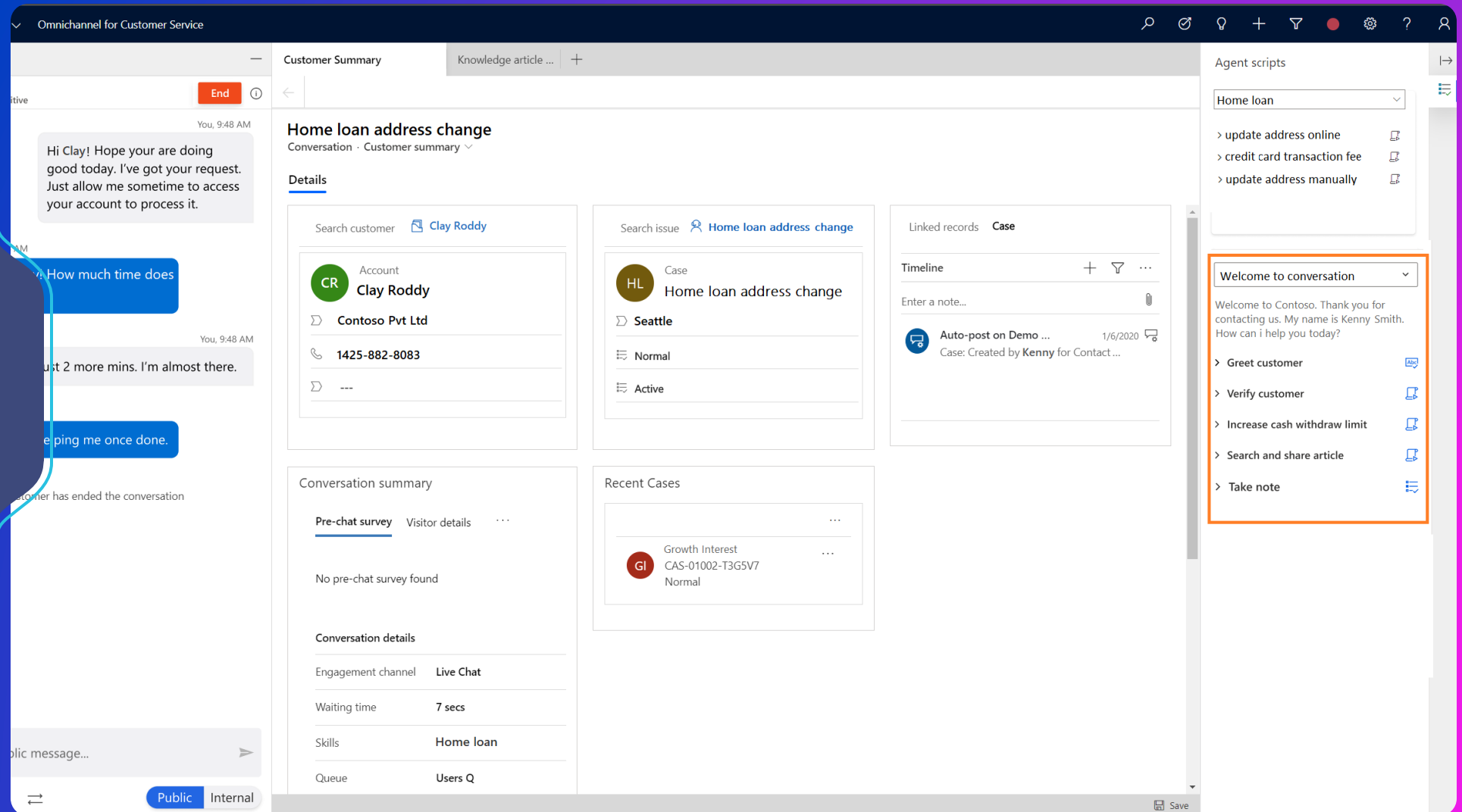


Scripts & Actions

Follow Simple Scripts for
consistency of service

Action Workflows and
Automations

Threaded Scripts allowing
multiple queries/customer
journeys in one interaction



The screenshot displays the 365 Contact Center interface for an "Omni-channel for Customer Service" session. The main chat window shows a conversation with a customer named Clay Roddy. The agent's response is: "Hi Clay! Hope your are doing good today. I've got your request. Just allow me sometime to access your account to process it." The customer's response is: "How much time does it take? Just 2 more mins. I'm almost there." The agent's final response is: "Helping me once done." The chat window includes an "End" button and a "Public message..." input field.

The interface is divided into several panels:

- Customer Summary:** Displays the customer's name (Clay Roddy), account (Contoso Pvt Ltd), and phone number (1425-882-8083).
- Search issue:** Shows the issue being tracked (Home loan address change) and its status (Normal, Active).
- Linked records:** Displays a timeline of events, including an "Auto-post on Demo ..." case created by Kenny for Contact ... on 1/6/2020.
- Conversation summary:** Provides a pre-chat survey result (No pre-chat survey found) and conversation details (Engagement channel: Live Chat, Waiting time: 7 secs, Skills: Home loan, Queue: Users Q).
- Agent scripts:** Lists available scripts for the "Home loan" category, including "update address online", "credit card transaction fee", and "update address manually".
- Welcome to conversation:** A script that greets the customer and provides a welcome message.

Omni-Channel
Engagement

Multi-Session
Management

All Scripts & Actions

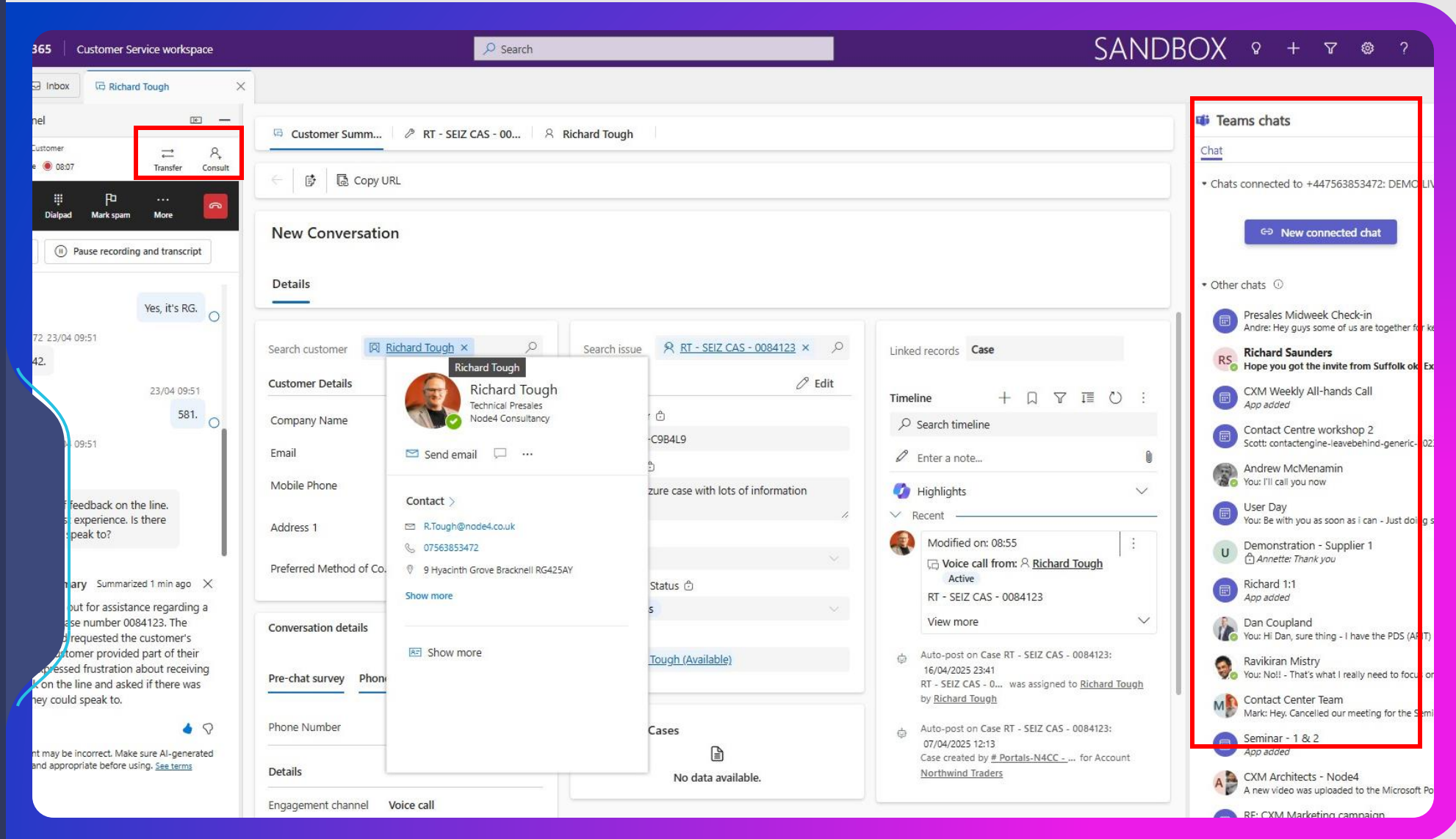
Collaboration &
Knowledge

Embedded Chat using
Microsoft Teams

Customer Support
Swarming

Agent Transfers & Agent
Consult Facilities

Knowledge Articles for quick
query/complaint resolution



The screenshot displays the 365 Contact Center interface within a 'Sandbox' environment. The main workspace is titled 'Customer Service workspace' and includes a search bar. The interface is divided into several sections:

- Left Panel:** Contains a chat window for 'Richard Tough' with a 'Transfer' button highlighted in a red box. Below the chat is a 'New Conversation' section with a 'Details' tab.
- Center Panel:** Displays 'Customer Details' for 'Richard Tough', including company name, email, mobile phone, address, and preferred method of contact. A 'Contact' dropdown menu is open, showing options like 'Send email' and 'Show more'.
- Right Panel:** Features a 'Timeline' section with a search bar and a list of recent events, including a voice call from 'Richard Tough' and auto-posts. Below the timeline is a 'Cases' section with a 'No data available' message.
- Far Right Panel:** Shows a 'Teams chats' sidebar with a list of connected chats, including 'Presales Midweek Check-in', 'Richard Saunders', 'CXM Weekly All-hands Call', 'Contact Centre workshop 2', 'Andrew McMenamin', 'User Day', 'Demonstration - Supplier 1', 'Richard 1:1', 'Dan Coupland', 'Ravikiran Mistry', 'Contact Center Team', 'Seminar - 1 & 2', 'CXM Architects - Node4', and 'RE: CXM Marketing campaign'.

Omni-Channel
Engagement

Multi-Session
Management

All Scripts & Actions

Collaboration &
Knowledge

Reporting

Call / Chat Session
Summarisation

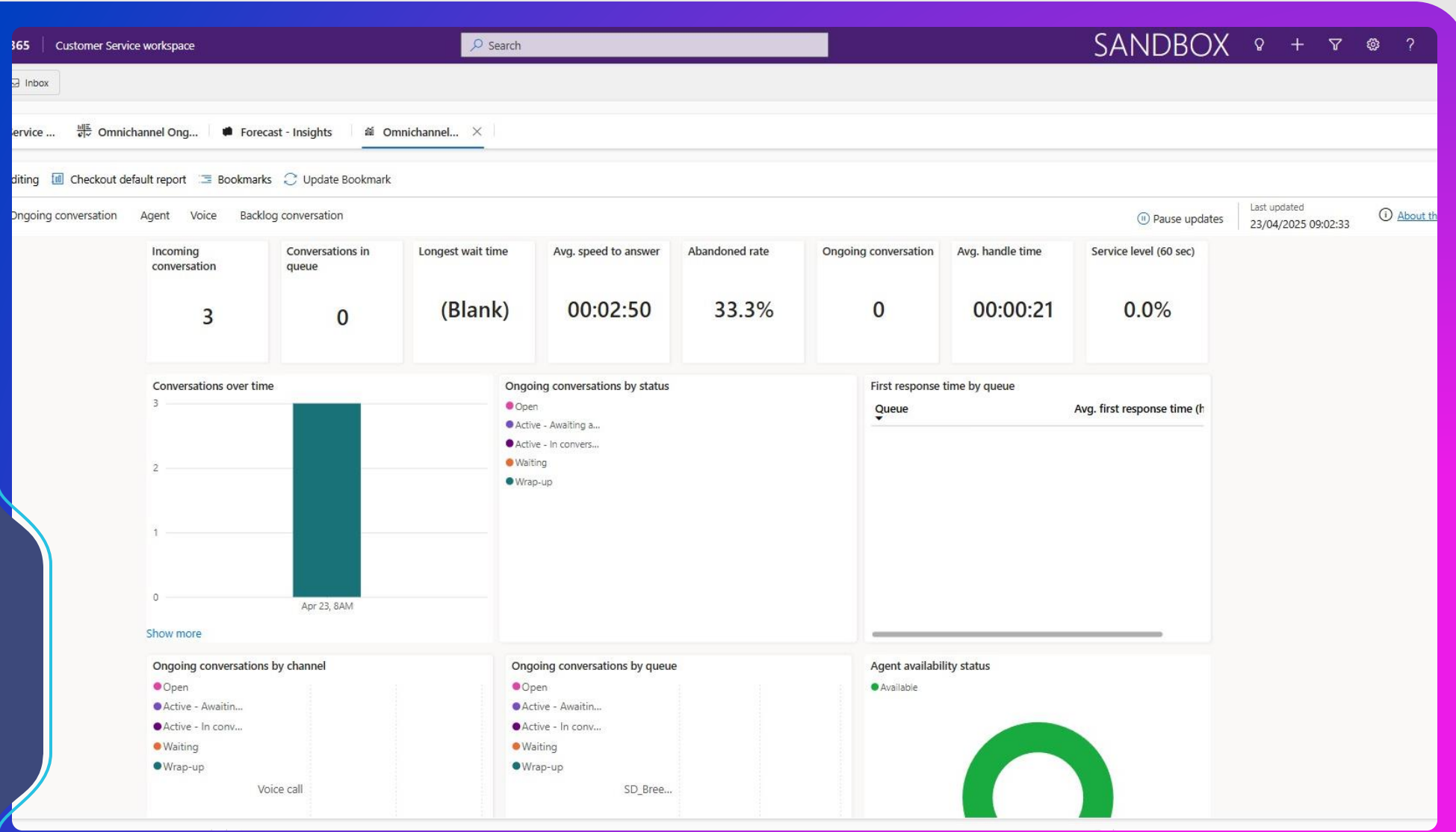
Call Transcripts

Sentiment Analysis

Agent Productivity

Contact Center Statistics

AI Agent Query Handling &
Accuracy Reporting



Service



365 Contact Center



365 Customer Service



Contact Record Management

Centralised Views of
Contacts, Enquiries & Cases

360 View of Records &
Interactions



365 Customer Service

Customer Service Hub

Search

SANDBOX

My Cases*

Show As Show Chart + New Case Delete Refresh Edit columns Edit filters

Ask about data in table. Use / to reference other data. Owner: Me

<input type="checkbox"/>	Case Title	Case Number	(Case) Subject	Priority	Status	Modified On
<input type="checkbox"/>	SS - FORF CAS - 8987868	CAS-01023-W6X3S0	Simon Smith	High	Active	17/04/2025 00:46
<input type="checkbox"/>	CM - TAX CAS - 3405666	CAS-01046-B3G1L5	Chyanne Mwangi	Normal	Active	17/04/2025 00:45
<input type="checkbox"/>	RT - SEIZ CAS - 0084123	CAS-01024-C9B4L9	Northwind Traders	Normal	Active	17/04/2025 00:31
<input type="checkbox"/>	JG - SEIZ CAS - 20250412	CAS-01049-Q0Q1P0	Jon Gashi		Active	16/04/2025 23:41
<input type="checkbox"/>	KR - CONF CAS - 473495	CAS-01042-R5T6W6	Kim Rocha	Normal	Active	16/04/2025 23:41
<input type="checkbox"/>	KM - CONF CAS - 58747	CAS-01054-N7Q1D8	Kevin Martin	Normal	Active	16/04/2025 23:41
<input type="checkbox"/>		CAS-01086-N1P3Y8	Avery Howard		Active	16/04/2025 23:41
<input type="checkbox"/>	DW - CIVIL CAS - 4578499	CAS-01044-Y1K1T8	Daniel Weightman	Normal	Active	16/04/2025 23:41
<input type="checkbox"/>	CV - FORF CAS - 2452252	CAS-01041-M8V5P4	Cacilia Viera		Active	16/04/2025 23:41
<input type="checkbox"/>	Akram Test 32	CAS-01081-J2Z1G2	Trey Research		Active	16/04/2025 23:41
<input type="checkbox"/>	ASH - SEIZ CAS - 24328	CAS-01029-R6T5Y2	Alpine Ski House	Normal	Active	16/04/2025 23:41
<input type="checkbox"/>	FC - CONF CAS - 1300897	CAS-01050-X6G3M9	Fourth Coffee	High	Active	16/04/2025 23:41
<input type="checkbox"/>	JSmith-CONF-002433	CAS-01006-R2M7X5	Jane Smith	High	Active	16/04/2025 23:23
<input type="checkbox"/>	RV-SEIZ-012345	CAS-203949-123	Jon Gashi	High	Active	16/04/2025 16:28
<input type="checkbox"/>	JS - CONF CAS - 002949	CAS-01006-R2M7X5	Jane Smith	High	Active	16/04/2025 15:07
<input type="checkbox"/>	4 tonnes	CAS-01019-W1T6H3	Scott Daley G		Resolved	10/04/2025 11:49
<input type="checkbox"/>	20 tonnes please	CAS-01010-J6Q3Y9	Scott Daley G		Resolved	10/04/2025 11:49
<input type="checkbox"/>	10000 bricks please	CAS-01013-H9B2X8	Scott Daley G		Resolved	10/04/2025 11:49

Rows: 1 - 18 of 18

Contact Record Management

Case Processing

Standardised Business Process

SLAs and Case Timers

Escalations

365

ARIT Case Management

Search

SANDBOX

←

📄

🔍

💾

Save

💾

Save & Close

➡

Save & Route

🔄

Refresh

+

New

📄

Convert to Work Order

🔍

Resolve Case

🗑️

Cancel Case

👤

Assign

📁

Add to Queue

📄

Queue Item Details

⋮

J-

JG - SEIZ CAS - 2049860 - Unsaved

Case · ARIT Case ▾

HMRC

In Progress

Owner

Status Reason

General

Case Type Detail

Investigation(s)

Timeline/Calendar

Assets

Notes and Article

Evidence (Documents)

Related ▾

Overview

Case Title

JG - SEIZ CAS - 20...

Case Type

Seizure / Forfeiture

Subject Type

Person

Main Subject

Jon Gashi

Criminality Level

NIM Level 2

Case Referral Date

15/04/2025

Start of investigation

31/03/2025

Date of Arrest

Case Subject Bankrupt

No

Referred to Civil Recovery

No

Concurrent Civil Action

No

Case Number

CAS-01104-H6N8J6

Sensitive Case

Yes

MOU in place

No

Agency & Authority Stakeholders

Connected To

Role (To)

Description

No data available.

External Agency Information

LEA Archive Ref No.

LEA-ARC-012554

Parent Case

Responsible Contact

Case Type (Original)

Case Subject(s) - Organisations & Contacts

Add Existing Contact

Full Name

Email

Company Name

Contact Record Management

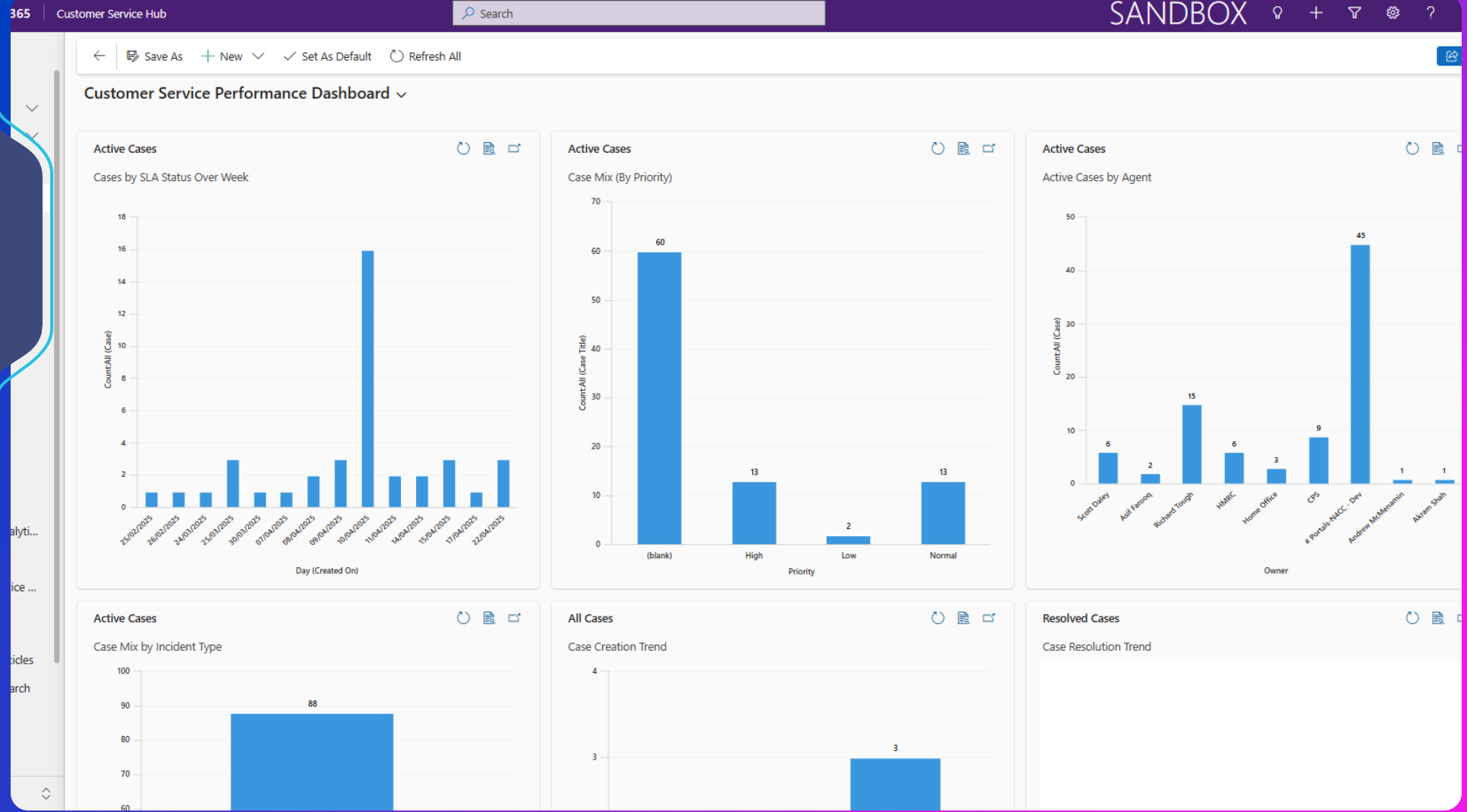
Case Processing

Service Reporting

Personalised Dashboards & Activity Management

Strategic Reporting

Identifying Critical Issues & Common Topics





Many Options - Comprehensive Solutions

Dynamics 365 Customer Engagement

Fabric and
Power BI 7

Field
Service 6

Customer
Service 5



1 Customer
Insights

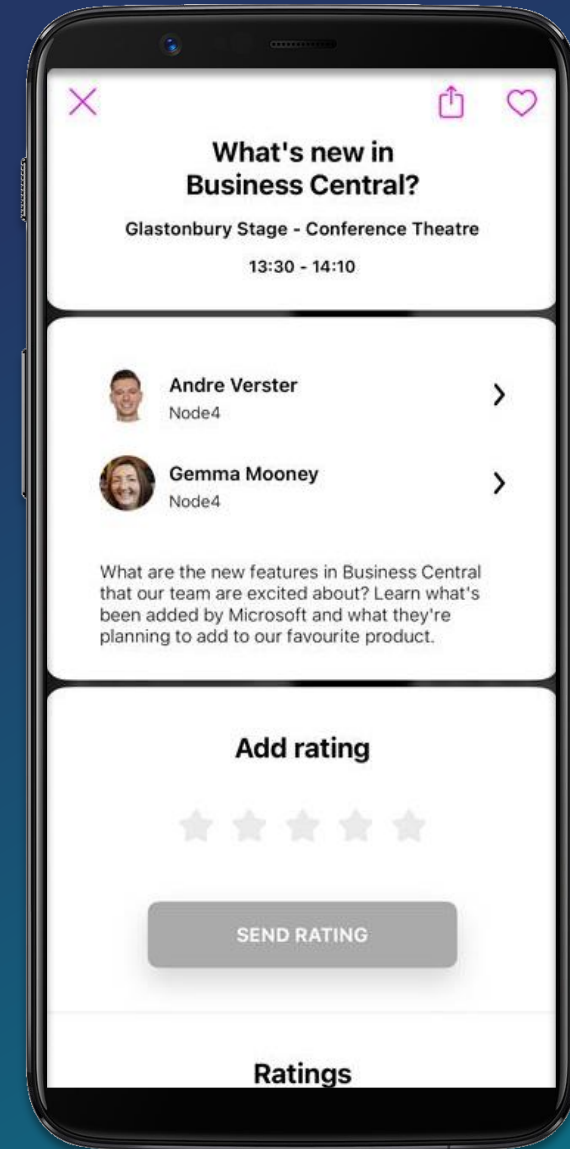
2 Sales

3 Project
Operations

4 Contact
Center

Please rate all sessions

let us know how we did



UD 25



Richard Tough
Microsoft Evangelist



Ravikiran Mistry
Solution Architect

NODE4