

# Spring 2016 Wave Release Preview Guide

Microsoft Dynamics CRM





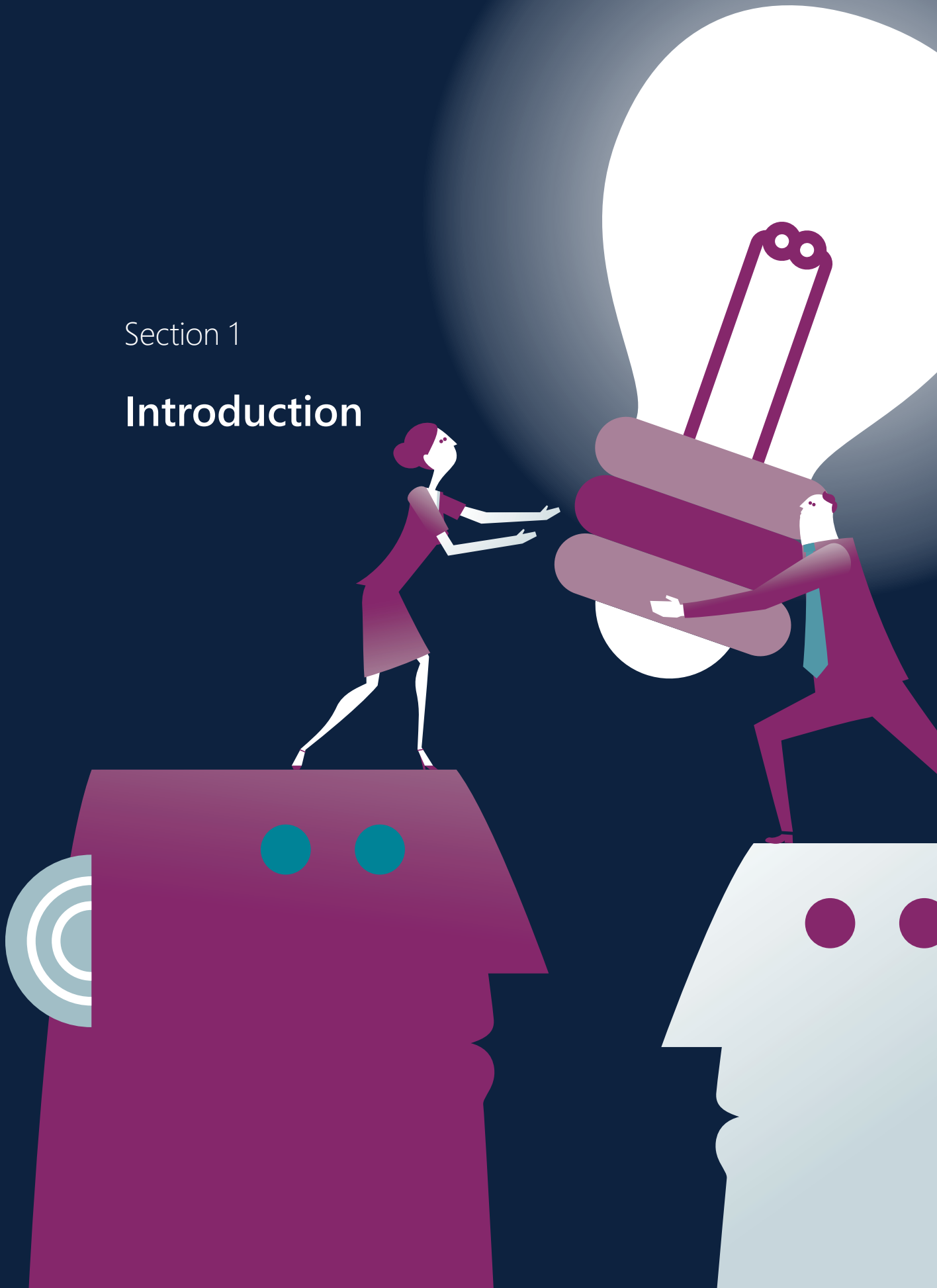
# Spring 2016 Wave Release Preview Guide

## Contents

1.	<b>Introduction</b> .....	4
2.	<b>Key investment overview</b> .....	6
3.	<b>Sales</b> .....	9
4.	<b>Service</b> .....	11
5.	<b>Marketing</b> .....	16
6.	<b>Mobile</b> .....	19
7.	<b>Application Platform</b> .....	21

Section 1

# Introduction



## Design guidelines

Positive customer experience is an increasingly important ingredient for companies to win and retain customers. Customer engagement from Microsoft Dynamics CRM helps companies deliver exceptional customer experiences, creating long-term relationships based on knowledge and trust.

Today, the process of engaging customers can't be one-size-fits-all. It needs to be adaptive across all touch points and within the context of who your customer is and what they are doing. Intelligent customer engagement enables your company to build customer trust, loyalty, and insight, while also enabling your sales, service, and marketing professionals to be as productive as possible. With customer engagement by Microsoft, we help your company deliver exceptional customer experiences. Companies can:

- **Personalise customer experiences** by engaging them at the right time, in the right place, in the right way throughout the journey.
- **Create proactive experiences** by determining the next best interaction with your customer based on insights.
- **Make customer engagement predictive** by leveraging internal and external data to identify patterns and trends. Apply information to make recommendations or suggestions for how to optimise.

This document highlights the capabilities of the Dynamics CRM Spring 2016 Wave, which includes updates to all online services, including Microsoft Dynamics CRM Online 2016 Update 1, \*Microsoft Dynamics Marketing 2016 Update, and \*Microsoft Social Engagement 2016 Update that will further our customers' abilities to deliver amazing customer experiences. Microsoft Dynamics CRM Online 2016 Update 1, Microsoft Dynamics Marketing 2016 Update, and Microsoft Social Engagement 2016 Update - will be delivered as a customer driven update.

\* Updates for Microsoft Social Engagement and Microsoft Dynamics Marketing 2016 are released on a monthly basis. For more information on the release status visit <https://www.microsoft.com/en-us/dynamics/crm-customer-center/get-ready-for-the-next-release.aspx>

## Section 2

# Key investment overview

Transformative service

Community engagement

Intelligence

Additional enhancements

# Key investment overview

With Microsoft Dynamics CRM Spring 2016 Wave, we're continuing on our journey to help companies deliver exceptional customer experiences.

This release is focused on the integration of two of our recent acquisitions (FieldOne and Adxstudio), providing our customers with market leading capabilities for field service and portal solutions for community engagement.

We are also extending our service capabilities with the introduction of project service, and we continue to invest in enhancing our intelligence capabilities.

The Dynamics CRM Spring 2016 Wave includes updates to all online services, including Microsoft Dynamics CRM Online 2016 Update 1, Microsoft Dynamics Marketing 2016 Update, and Microsoft Social Engagement 2016 Update. The release covers 3 major themes: Transformative Service, Community Engagement, and Intelligence.

## Transformative Service

Field service enhancements for this release maximise effectiveness and customer satisfaction. Our solution matches proficiency and competency requirements against available resources, for even more intelligent resource allocation. Additionally, full integration with CRM provides a consistent UI look and feel that spans case management through to work order completion.

- Project service is a new end-to-end solution that helps organisations deliver revenue-generating customer engagements on-time and on-budget. It extends Microsoft Dynamics CRM to provide a single system of engagement for project sales, delivery and billing that uses optimised resourcing and intelligent, skills-based assignments. Our solution supports back-office integrations to productivity and business applications, and offers a mobile experience for customer-facing resources. Field and Project service share a resource pool, and scheduled shared resources are surfaced in each application for enhanced visibility.
- Employee self-service and the ability to create an efficient and well-informed workforce is now available worldwide through CRM and our new portal capabilities. Employee self-service streamlines common tasks by empowering every employee with definitive knowledge.

## Community Engagement

With the recent acquisition of Adxstudio we will now have web portal functionality integrated into Microsoft Dynamics CRM Online as an add-on offering. Portals allow organisations to extend their Dynamics CRM engagement scenarios with self-service profile management capabilities, rich content publishing, secure access and permissions controls, configurable extensions, and many more features. Dynamics CRM portal capabilities are built with modern web standards in a responsive design for use on any desktop, tablet or mobile device.

We will be shipping several pre-configured portal solutions, including Customer Service Portal, Community Portal, Partner Portal and Employee Self Service Portal, and customers also have the option of creating a completely custom portal to meet their unique business needs.

## Intelligence

In this release, we will introduce guided navigation capabilities. Guided navigation provides context-sensitive interactive and scenario-based guided tasks and sidebars that are personalised to the user. Guided navigation helps on-board new application users quickly, facilitates user adoption of the application, and improves user productivity.

We will also introduce two new machine learning scenarios for Microsoft Social Engagement – Adaptive Learning and Automated Social Triage.

## Additional enhancements

We also continue to invest in Microsoft Social Engagement and Microsoft Dynamics Marketing. In addition to the new machine learning scenarios for Microsoft Social Engagement, we're introducing Azure Event Hubs, new social sources such as Instagram and additional boards/forums, additional language support, and new engagement capabilities. For Microsoft Dynamics Marketing, we're further enhancing email marketing, the SDK, and the lead management process.





# Sales

In the modern era of selling, it is even more critical for salespeople to find the time for building deeper customer relationships. For most sellers, it's always difficult to find more time.

Their jobs are highly complex, with internal demands consuming the majority of their time, leaving them with little for selling. Microsoft is committed to freeing up salespeople by providing seamless, familiar, easy-to-adopt Sales solutions that deliver maximum value with minimal ramp-up and training.

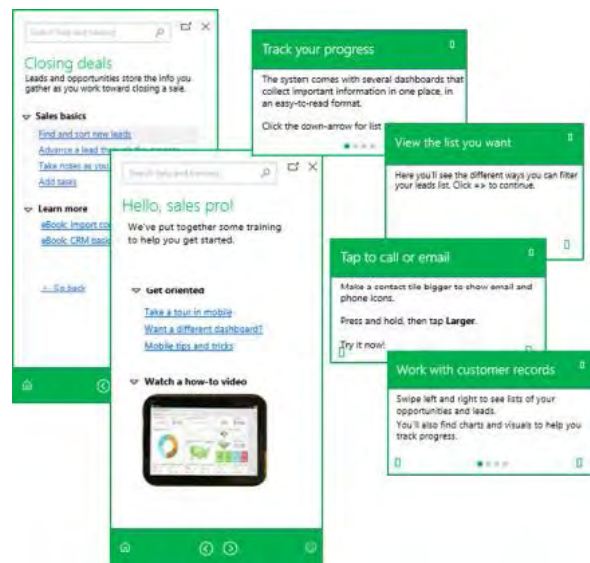
In order to help salespeople be more productive, we are pleased to deliver the following feature:

## Guided user navigation

Field service enhancements for this release maximise effectiveness and customer satisfaction.

An in-app experience that delivers live, interactive and scenario-based guided tasks and sidebars that are personalised to the user-context making on-boarding new users quick and easy to drive business user productivity.

Increase sales user adoption and productivity with rich, context-sensitive guidance for on-boarding, what's new, and frequent sales related tasks such as lead management embedded directly in the web and mobile apps.



## Section 4

# Service

Field service solution

Project service solution

Shared resources

Self-service portals

Guided user navigation

Windows Update support for Unified service desk

# Service

An increasingly connected digital world has changed the way customers engage with brands.

Customer expectations continue to rise with regards to the number and variety of channels and devices through which they expect to engage — and the speed and ease with which product and service related issues are solved. Already a key differentiator in an era of commoditisation, the role of customer service continues to evolve as organisations seek to sell services around their products in addition to providing break-fix support.

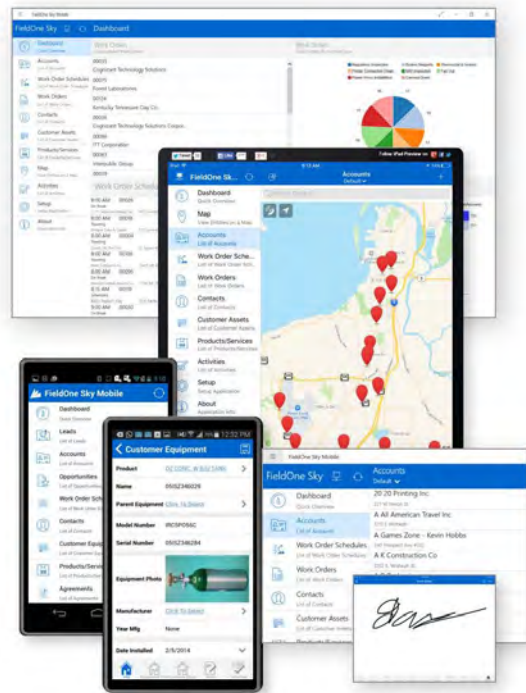
Providing personalised, contextual interactions throughout the customer service journey while still achieving business goals is a customer service imperative. We know that 91% of customers remain loyal to brands who offer low effort interactions. Businesses can achieve this when customers are empowered with their choice of self-service options; agents are empowered to deliver fast, informed and effective resolutions; and when on-site service is seamlessly incorporated.

The service capabilities for Microsoft Dynamics CRM empower companies to deliver end-to-end, self, assisted and on-site service across the omni-channel. Our industry leading technologies, including machine learning, IoT and analytics, give our purpose-built service solution the breadth and depth necessary for organisations to meet the challenges of an evolving customer service landscape.

## Field service solution

Field service is an end-to-end solution that delivers advanced scheduling, inventory tracking, and asset management for service depots and highly-mobile, in-field specialists fulfilling work orders and providing preventive maintenance across multiple sites under complex service agreements.

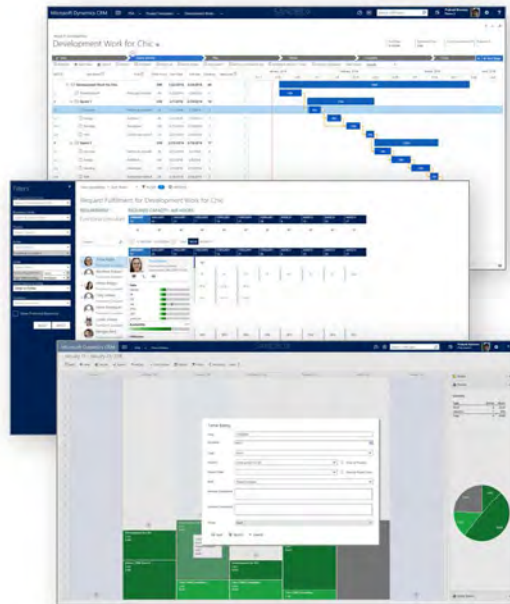
- **Characteristics and proficiency ratings:** You can define proficiency and competency levels and set them as requirements for a work order. Proficiency and competency levels are also part of the worker profile, so you can make an appropriate match when scheduling resources.
- **Detached schedule support:** Field Service now supports time allocation outside of a work order. For example, a field tech can schedule time for lunch or supply provisioning without having to associate that time with an empty work order.
- **Shared resources across Project Service and Field Service:** Field Service and Project Service share a resource pool, with resource schedules appearing in both.
- **Out-of-the-box business process:** A firm handshake between CRM incident management and work orders creates an alignment between these two processes, and if a field service work order originates from a case, the originating case is visually part of that workflow, which spans from case creation through the completion of the work order.
- **Mobile enhancements:** Drip scheduling enhances and de-clutters the user experience by displaying fewer upcoming work orders. It also improves dispatch control by limiting the number of declined work orders or change requests by field techs.



# Project service solution

Project service capabilities for Microsoft Dynamics CRM offer an end-to-end solution that empowers organisations to deliver professional engagements on time and within budget. Project Service helps you:

- Estimate, quote, and contract work
- Plan and assign resources
- Enable team collaboration
- Capture time, expense, and progress data for real-time insights and accurate invoicing
- **Project-based contracts:** Project contracts relate quotes and orders to project plans, financial estimates, labour pricing, and billing arrangements, like time and materials or fixed price. The contract highlights key metrics, including profitability and feasibility.
- **Project planning:** Visual project planning and estimation includes predecessors, automatic task scheduling, and views of sales and cost information for time and expenses. You can use the resulting plan in quotes and project contracts.
- **Resource management:** Resource information includes the skills and proficiencies of your workforce. You can view and filter resources based on skills and availability, so you can assign the right people to the right projects. You can also track resource utilisation and forecasting metrics.
- **Time and expenses:** Team members can use the web or mobile apps to record time and expenses for multiple projects. Managers can easily approve new entries while understanding the financial implications of the newly-approved items.
- **Project billing:** Project invoices reflect the terms of the contract and the approved work and expenses. The financial impact of project work, including costs, unbilled revenue, and invoices, is recorded for use in analytics and integration into financial systems.



## Shared resources

Field Service and Project Service share a resource pool, and the time scheduled for shared resources appears in both. Project Service has the additional capability to schedule indeterminate blocks of time for resources, such as 30%.

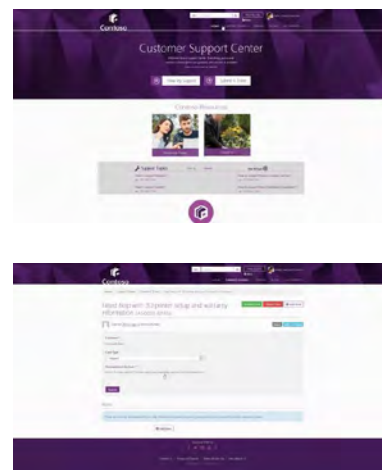
## Self-service portals

Portal capabilities for Microsoft Dynamics CRM Online as an add-on offering. Portals allows organisations to extend their Dynamics CRM Online engagement scenarios with self-service profile management capabilities and configurable design components. Portal capabilities are designed using modern web standards with a responsive design for use on any desktop, tablet, or mobile device.

Out-of-the-box portal solutions include:

- **Customer portal** enables customers to access self-service knowledge and support resources, increasing customer satisfaction, reducing call centre volumes, and ultimately allowing service agents to focus their efforts on issues of greatest impact.
- **Employee portal** creates an efficient and well-informed workforce by streamlining common tasks and empowering every employee with a definitive source of knowledge. Employee self-service is now available worldwide using CRM and portal capabilities, and is available in all CRM Online markets.
- **Community portal** leverages peer-to-peer interactions between experts in the community, subject matter experts within the organisation, and internal and external users. Communities organically grow the catalogue of available knowledge from knowledge base articles, forums and blogs. As well as providing feedback mechanisms on content through rating and comments features. Users also have the ability to receive alerts on content revisions and workflow updates.

Portal capabilities for Microsoft Dynamics CRM empower the 84% majority who prefer to find answers on their own through self-service and community options.



## Guided user navigation

An in-app experience that delivers live, interactive and scenario-based guided tasks and sidebars that are personalised to the user-context making on-boarding new users quick and easy to drive business user productivity.

Increase service user adoption and productivity with rich, context-sensitive guidance for on-boarding, what's new, and frequent customer service related tasks such as resolving a case embedded directly in the web and mobile apps.



## Windows Update support for Unified Service Desk

In this release, we're offering Windows Update support for the Unified Service Desk client. Windows Update is an easy, free way to help keep Microsoft applications, like the Unified Service Desk client, safer and running smoothly. All you have to do is turn it on, and you'll get the latest security and other important updates from Microsoft automatically, or you can choose to apply them manually.

## Section 5

# Marketing

Digital asset management, publishing and security

Email marketing editor enhancements

Create marketing segments based on email behaviour

Expanded OData feeds and activity log for marketing analytics

Marketing services SDK enhancements



# Marketing

In a socially connected world, engagement with your customers can happen anytime or anywhere.

Microsoft Social Engagement puts powerful social tools in the hands of your sales, marketing, and service teams - helping them connect on social media with your customers, prospects, and partners right within Microsoft Dynamics CRM or with a stand-alone app.

**Discover social insights about your brand, products, and services. Analyse sentiment and identify customer intentions with the power of Azure Machine Learning. Also, automatically create records for cases and leads in Dynamics CRM based on these intentions, all with the power of Microsoft Social Engagement.**

With Microsoft Social Engagement, you can listen, analyse, and drive engagement all within Microsoft Dynamics CRM, Microsoft Dynamics Marketing, or standalone. Jump in and engage with your customers, reaching them in ways never before possible.

## Forums, Instagram, and blogs extension in Microsoft Social Engagement

Microsoft Social Engagement will be adding support for the following sources:

- **Forums/Discussion Boards:** Listen for posts and comments from forums and discussion boards.
- **Instagram:** listen to posts and comments from Instagram, and monitor specific Instagram accounts.
- **Extending blog coverage:** Extended coverage on blogs in all available languages beyond the currently available blogs from Tumblr and WordPress.

**Facebook pages posts:** faster acquisition of posts due to reduced latency through the new data acquisition of publicly available Facebook page posts and comments.

Social Engagement will be adding geolocation support for the following sources, in addition to the location data already available for Twitter and News sources:

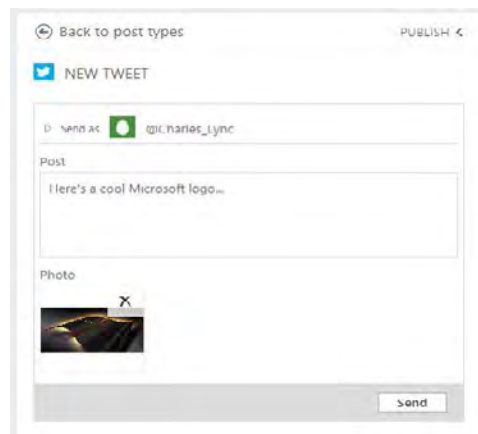
- **Forums/Discussion Boards:** Geolocation of authors will be displayed in Analytics widgets, post lists and activity maps.
- **Instagram & Facebook:** Geolocation of authors will be displayed in Analytics widgets, post lists and activity maps.

## Publish and engage/reply with photo and share posts in Microsoft Social Engagement

**Insert images in Social Center posts:** You will be able to reply with a photo when posting to Facebook and Twitter.

**Share any post:** You can share any public post in Microsoft Social Engagement as a link on your social profiles.

**Other improvements:** Layout of posts list is now easier to read on bigger screens. Load times for posts in Analytics and Post details have been reduced significantly.

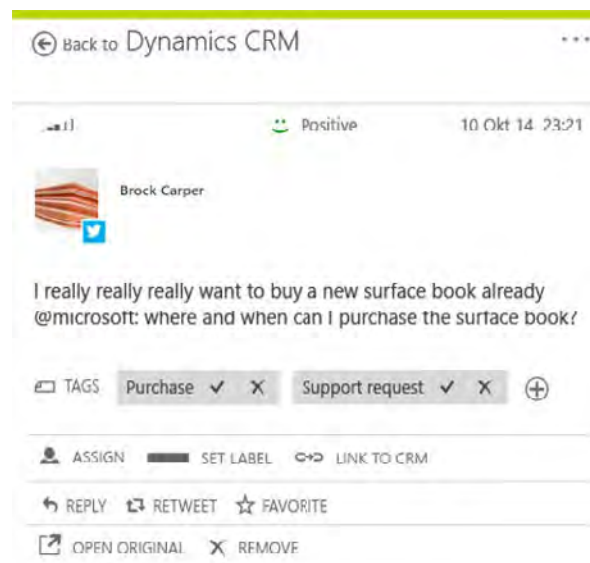


## Intelligent social: tags, intentions, sentiment, languages

**Intention analysis:** To increase team efficiency for sales and service organisations, Microsoft Social Engagement automatically detects intentions in social posts (ex. "Information Request" or "Service Incident").

**Adaptive learning for intentions and tags:** To refine the automated detection of intentions and tags we offer adaptive algorithms to our users. This allows for customisation of tagging and intention detection based on business requirements. With more and more data points, machine learning will be able to continuously improve its identification of intentions defined by the business.

**Additional supported sentiment languages:** Arabic, Chinese, Japanese



## Social CRM: automation and enhancement

**Automation Rules:** Automatically link posts matching your filter criteria to CRM entities such as cases and leads. Combine this with intention analysis to set up an automated triage process. For example, automatically identify and route customer issues on social media to your service department as cases.

**Social CRM Enhancements:** Linking social posts to CRM entities is smoother without authentication pop-ups. Intentions and custom tags are now included in the additional parameters of the Social Activity entity for building more powerful record creation and update rules. Error handling is improved with clearer and more precise messaging.

## Section 6

# Mobile

Mobile offline enhancements

Mobile management enhancements

Company news timeline for mobile

# Intelligence

CRM Online is a world class, global SaaS service delivered and managed by Microsoft.

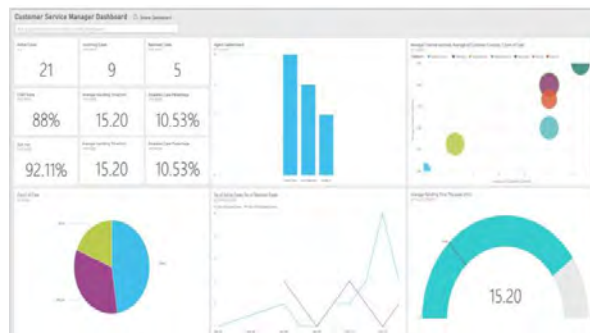
In order to meet the business requirements of our customers around the globe, we continually make investments in our core service infrastructure and platform. These investments often focus on security, compliance, performance and management and global expansion.

## Power BI Sales Manager content pack enhancements

This release includes an improved out-of-the-box Sales Analytics Power BI Content Pack for Sales Managers. Analyse sales performance, sales pipeline, team activities, and lead pipeline with detailed metrics and charts. See key metrics at a glance on a dashboard, such as Won Revenue, Win Rate, Average Deal Size, Open Revenue, New Leads, Conversion Rate, and top performers. Drill into reports to slice data by dimensions such as region, territory, industry, owner, and so on. Data refresh performance is also improved with new Web APIs based on OData v4 in Dynamics CRM 2016.

## Power BI Service Manager content pack

This release includes an out-of-the-box Power BI Content Pack for Customer Service Managers (CSMs). Analyse service performance, incoming cases, and team activities with detailed metrics and charts. See key metrics and charts at a glance in a dashboard, such as Average Handling Time, CSAT Score, % of SLA met, Resolved Cases, Active Cases, Escalated Cases, and top performers. Drill into reports to slice data by time, owner, or subject area.



## Section 7

# Application Platform

Azure service bus integration enhancements

Portal framework

Server-side synchronisation

Customer field on any entity

Compliance and data protection

# Application Platform

Powerful tools allow you to tailor Microsoft Dynamics CRM to meet your unique business requirements. Microsoft Dynamics CRM facilitates the delivery of rapid business value with an agile solution framework that can be easily tailored and configured.

The Microsoft Dynamics CRM application platform provides a declarative paradigm that ranges from defining the data model to providing integrated persistence, security, API access, user experience and programming paradigms based on a modern open architecture. The following investments in our platform capabilities further our commitment to an open, customisable and extensible product and online service.

## Azure service bus integration enhancements

Simplify the setup of the integration with Dynamics Service Bus and enable cross platform integration and Azure Logic Apps scenarios. Enhance Dynamics CRM's capability to integrate with Azure Service Bus:

- To use SAS-based authentication (instead of legacy Azure Access Control Service [ACS])
- To allow queue and topic message bodies to be formatted as JSON and XML (in addition to the current .NET Binary format)
- To enable use against Service Bus within sovereign cloud environments like US Govt.

## Portal framework

This release will introduce the first Microsoft-published\* version of portal capabilities for CRM. We will extend CRM to the web to engage an external non-CRM audience by leveraging:

- Profile management capabilities
- Configurable business components
- Rich web content configuration capabilities
- Responsive design for desktop, tablet, and mobile

Customers will purchase portal instances as a CRM add-on in the Office 365 admin centre. These portal slots can then be configured to work with their CRM Online instances. The provisioning system will automatically deploy the portal solution to Azure.

*\*integrating the acquisition of Adxstudio Portals*

## Server-side Synchronisation

Stay productive and up to date no matter where you are or what device you're on. With server-side synchronisation, administrators can easily manage the synchronisation of email, tasks, appointments and contacts between CRM and Exchange.

With this release, you can connect CRM on-premises with Microsoft Exchange Online. You can also manually track emails by using CRM App for Outlook, folder tracking, or CRM for Outlook.

## Customer field on any entity

Several-out-of-the-box entities in Dynamics CRM (including Case, Lead, and Opportunity) contain a field that represents a customer, which can either be an Account or a Contact. In CRM, these fields have the Customer data type, which is a special kind of lookup field for these two specific entities.

Previously, system customisers couldn't add a Customer field to their own entities. As part of this feature, Customer is available as a custom field data type that can be added to any entity, system or custom.

## Compliance and data protection

Continuing with our effort to be transparent, we have established the CRM Trust Centre as a single location for you to access all information regarding our approach to security and compliance. Each time we receive a new certification information will be posted at this location. We have achieved a number of industry certifications which ensure that we are meeting the appropriate regulatory and country requirements.





## Contact Us

Technology Management helps Manufacturing and Distribution companies 'drive peak performance' with Microsoft Dynamics NAV, Dynamics CRM and Office 365 as well as the supporting infrastructure. Having delivered over 2,000 successful projects, we've plenty of experience implementing business systems, Microsoft Dynamics solutions and the technical infrastructure to support them.

We are a Microsoft Gold Certified Partner for ERP & CRM and can deliver Microsoft Dynamics solutions on your own IT infrastructure, hosted in our UK data centre or in the Microsoft Cloud. Based in the Midlands, we support clients across the UK and further afield.

Talk to us today for a jargon free discussion on how Technology Management can help your organisation 'drive peak performance':

**Call:** 01902 578 300  
**Email:** [hello@tecman.co.uk](mailto:hello@tecman.co.uk)  
**Visit:** [www.tecman.co.uk](http://www.tecman.co.uk)

### Technology Management

St Mark's Church  
St Mark's Road  
Chapel Ash  
Wolverhampton WV3 0QH.