



Microsoft Academyadi

la partecipazione che ti premia

msevent520ie



Gli Allenatori



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Demilani**



**Giorgio
Garcia-Agreda**



**Michele
Sensalari**



Giorgio Garcia-Agreda

- CEO @Crionet
- Microsoft MVP Business Solutions

 [giogarag](https://twitter.com/giogarag)

Crionet





Crionet

Le Squadre



Microsoft 365

Dynamics 365

Microsoft Azure



Microsoft 365 Academy: Edizione 2019

1. Manage Identity
2. Manage Device with Azure AD
3. M365 Modern Workplace
4. Information Protection
5. GDPR



Il percorso

Digital Transformation



Digital Disruption

Dynamics 365
Power Platform

I 5 elementi IT della Digital Transformation



1. L'IT è il mezzo per innovazione e collaborazione
2. Il "Modern IT" sconvolge assets e investimenti, integrando il potere e la flessibilità del cloud.
3. "Hybrid cloud" consente un data processing più veloce, così come lo sviluppo di applicazioni e la loro implementazione
4. Le aziende possono scalare molto più facilmente e in modo sicuro rispondendo così alle evoluzioni del business.
5. Gestione di tutte le Risorse da una unica piattaforma consente al business di sbloccare nuove opportunità e sfruttare tecnologie come AI, Machine Learning e Internet of Things (IoT)

Modern business in the cloud is the *"new normal"*

Oggi il mondo riflette una nuova realtà:
La tecnologia è onni-presente nel cloud,
offrendo accessi semplici ai Servizi digitali...

Capitalizing on this shift is
key for the organization's
innovation and growth

91% Dei business leaders vede la Digital Transformation come un modo di adottare l'innovazione e migliorare le efficienze

68% Afferma che la Digital Transformation sta aumentando i profitti

85% Afferma che si dovranno offrire solo Servizi digitali altrimenti le future offerte di Servizi diventeranno "irrilevanti"

64% Afferma che ci vorranno meno di 4 anni per avere una completa Digital Transformation, passato questo termine si sarà fuori dal Business

...ma il cambiamento è difficile. C'è un grande impatto su persone, cultura e può essere percepito come rischioso.

Richiede un pensiero
"disruptive"

Richiede che I leaders si adattino ai rischi e apprendano con facilità

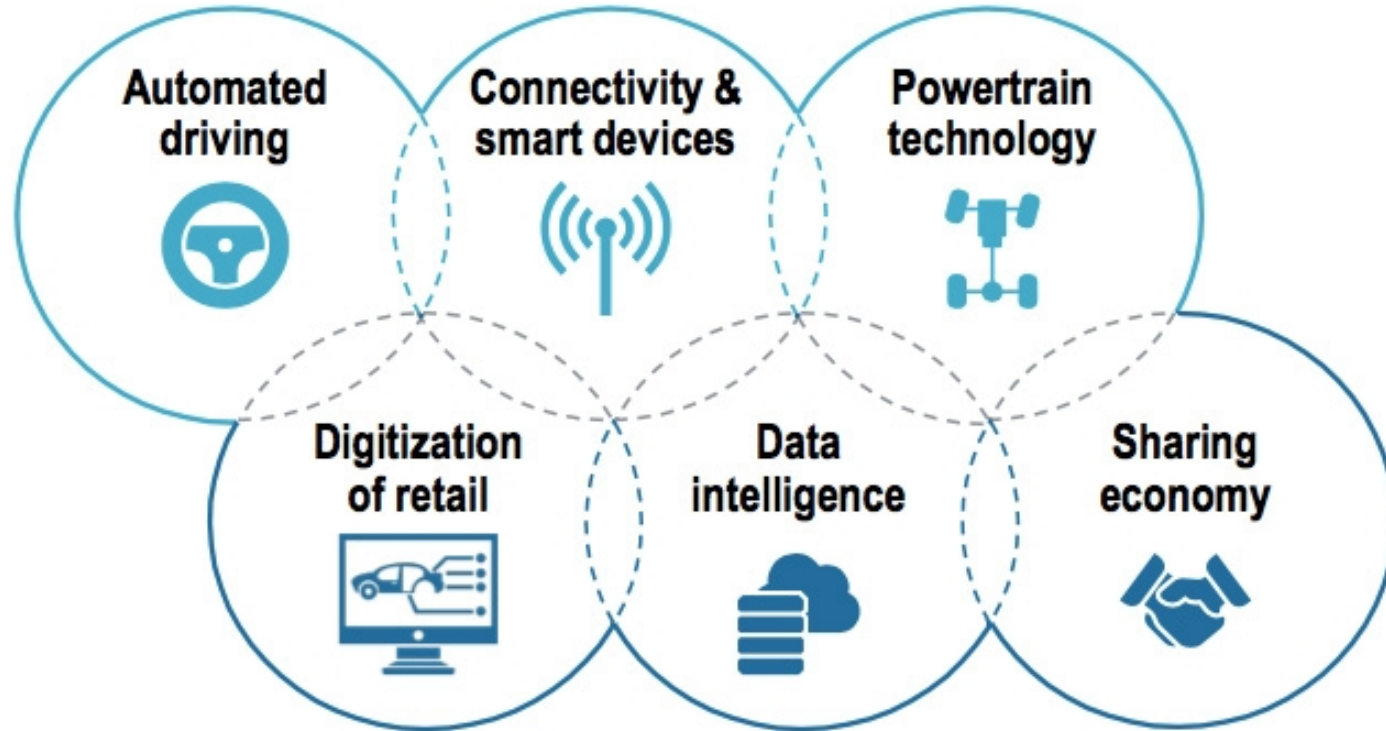
Richiede una cultura di facile adattamento all'interno dell'azienda

Key drivers for disruption in the mobility landscape

Major disruptions

- > Reprioritizing **customer expectations & buying criteria**
- > New and open **ecosystem**
- > Innovation in **business models**
- > Change in **value centers**
- > **Fast development cycles**

Technological innovation



Business model innovation



YOU KEEP USING THAT WORD

**I DO NOT THINK IT MEANS
WHAT YOU THINK IT MEANS**

*Come può un brand
sviluppare “business
disruption?”*

*Quale è il segreto della
disruptive innovation?*



DISRUPTION

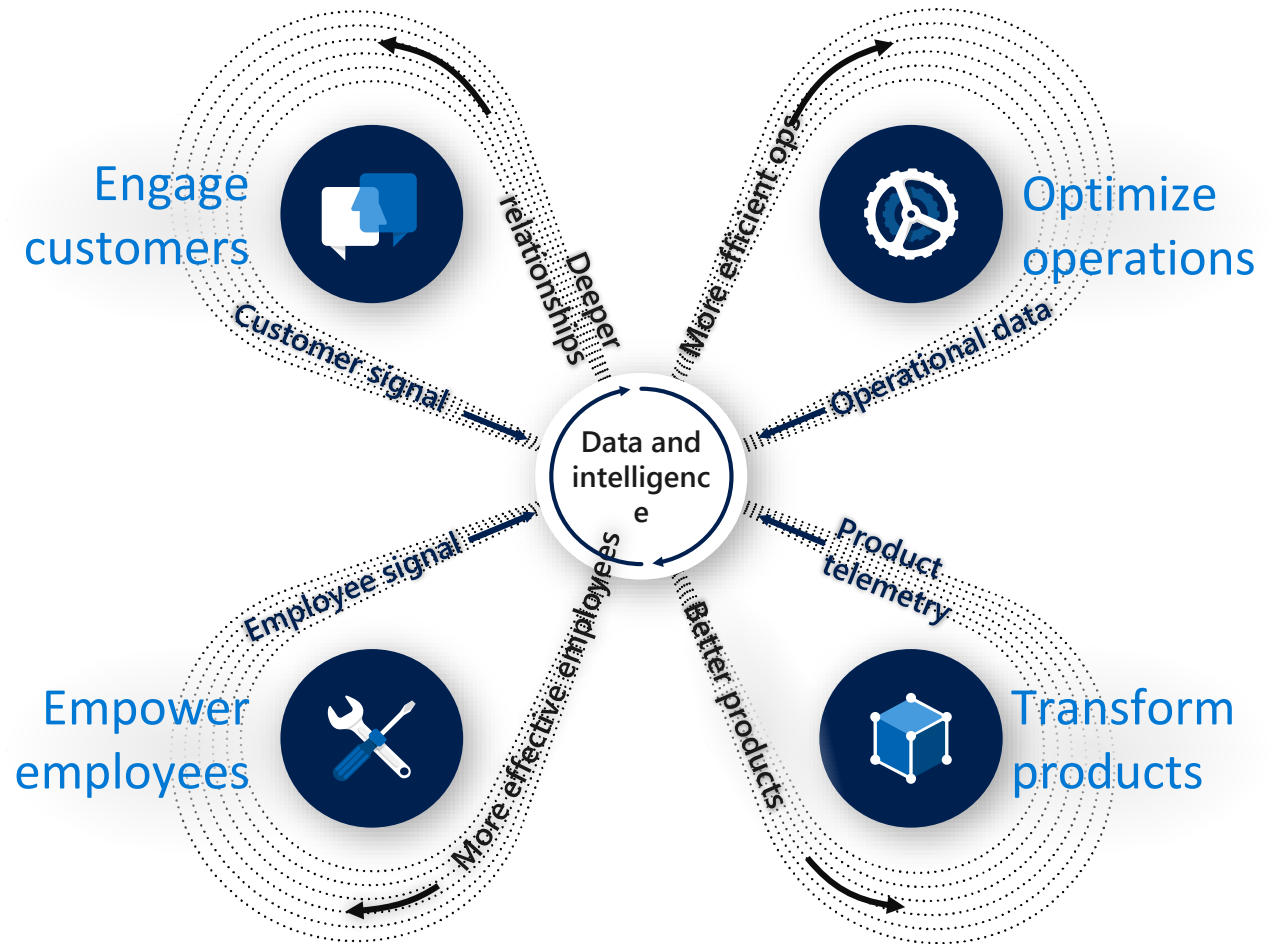
SO HOT RIGHT NOW

La parola “disrupt or be disrupted” è quasi un controsenso nel business

Un esempio sono Apple e Tesla Motors che hanno applicato il modello di Digital Disruption

L’obiettivo è aumentare la Customer Retention, non cercare di rendere i prodotti intelligentemente “disruptive”

Il loop digitale



- 1 Data**
Capture digital signal across business
- 2 Intelligence**
Connect and synthesize data
- 3 Action**
Improve business outcomes

▶ Microsoft CEO Satya Nadella's [Business Applications Vision](#) / [Analyst awards](#)

Dynamics 365

Microsoft Research AI (25+ Years)	Sales	Customer Service	Field Service & IoT	Talent	Finance & Operations	Retail	Project Service Automation	Marketing	Artificial Intelligence	Mixed Reality	Business Central
	▶ Overview	▶ Overview	▶ Overview	▶ Overview	▶ Overview	▶ Overview	▶ Overview	▶ Overview	▶ Overview	▶ Overview	▶ Overview
	Accounts, Customers, Contacts, Leads, Relationships	Cases, Knowledge, Portals , Virtual Agents, Surveys , Unified Service Desk	Technician scheduling, inventory management	Recruiting, Onboarding, Feedback, Learning,	ERP, Financials, Profitability, Asset Mgt	Unified Commerce, Omni Channel, Loyalty	Plan, Deliver, Utilize, Optimize, Forecast	Lead Gen, Nurture, Multichannel, Events & more	AI Sales AI Customer Service AI Market Insights	Remote Assist , Layout , ▶ Chevron demo	Financials, Supply Chain, Service, Projects

64K Partners	Office 365 120M Users	LinkedIn 500M Users	Power Platform	Common Data Service

Industry Solutions

Outlook	Sharepoint	OneNote	Teams	Excel	Word

Relationship Sales	Talent	Attract

[D365 Connector for LI Lead Gen Forms](#)

Power BI	PowerApps	Flow

[5M Users](#)

Common Data Model	Cloud Services	Data Store	Data API

Azure Services [54 Regions](#), [140 Countries](#), [100 Data Centers](#), [70,000 miles fiber](#), [130 Edge Sites](#)

Vision	Labs	Speech	Knowledge	Language	Search	Cognitive	Bot Framework	600 + Services

On Premise data

[231 Data Connectors](#)

(Adobe to Zendesk)

←----- 200 Microsoft Services -----→ [Security Response Center](#) ←----- 7 Trillion cyber events daily = Threat Intelligence -----→

● [Security](#) — [Privacy](#) — [Microsoft Trust Center](#) — [Compliance](#) — [Transparency](#) ●



Microsoft Power Platform

The low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications



Power BI

Business analytics



Power Apps

Application development



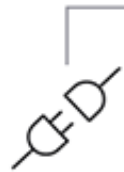
Power Automate

Process automation



Power Virtual Agents

Intelligent virtual agents



Data
connectors



AI Builder



Common
Data Service



Giorno 1: INTRODUZIONE A DYNAMICS 365

- Applicazioni
- Licensing Model
- Training e Certificazioni
- Microsoft365
- Power Platform



Giorno 2: Dynamics 365 Sales & Customer Service

- Introduzione a Sales
- Principali Caratteristiche e funzionalità
- Personalizzazioni
- Introduzione a Customer Service
- Principali Caratteristiche e funzionalità
- Personalizzazioni



Giorno 3: Field Service e Project Service Automation

- Un nuovo modo di concepire i Servizi, Introduzione
- Field Service Caratteristiche e funzionalità
- Estendere Field Service con IoT
- Project Service Automation Caratteristiche e funzionalità
- Mixed Reality & Dynamics 365
- Customizzazioni



Giorno 4: Power Platform

- Introduzione a Power Platform
- CDS
- Lavorare con PowerApps
- Estendere D365 con Canvas Apps
- Microsoft Power Automate



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Introduzione a Dynamics 365

Le Apps





Giorno 1: INTRODUZIONE A DYNAMICS 365

- Applicazioni
- Licensing Model
- Training e Certificazioni
- Microsoft365
- Power Platform



Obiettivi di oggi

- Capire i concetti fondamentali legati alla filosofia CRM
- Trasformare i concetti in software ed osservarne le evoluzioni
- Orientarsi nell'ecosistema Dynamics 365
- Perché oggi parliamo di Apps
- Comprendere al meglio il complesso Licensing Model
- Scegliere gli esami per i nuovi percorsi di certificazione
- Amministrazione di base di Microsoft 365
- Lavorare nel nuovo ambiente: Power Platform



Outline

- Cosa è Microsoft Dynamics 365
- Cosa era Microsoft Dynamics 365 (un po di storia)
- Customer Relationship Management (un po di storia)
- XRM: build or buy?
- Cosa è la Power Platform
- Le Apps

Cosa è Dynamics 365

- Software di Gestione Aziendale (Microsoft)
- E' una linea di prodotti di pianificazione delle risorse aziendali e applicazioni di gestione delle relazioni con i clienti annunciata da Microsoft a luglio 2016 e in versione generale il 1 ° novembre 2016, come parte della linea di prodotti Microsoft Dynamics
- Dynamics 365 unifies Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) capabilities by delivering new purpose-built applications to help manage specific business functions

La Famiglia Dynamics 365 cresce...

- Dynamics CRM → Dynamics 365 CE
- Dynamics AX → Dynamics 365 Finance and Operations
- Dynamics NAV → Dynamics 365 Business Central



Chevron uses Dynamics
365 Remote Assist and
HoloLens

DYNAMICS 365 ECOSYSTEM

01 ERP Solutions

Product name	Dynamics 365 Finance Finance management for middle and big companies	Dynamics 365 Supply Chain Management Supply chain management for middle and big companies	Dynamics 365 Business Central Enterprise resource management for small and medium companies
Functionality	<ul style="list-style-type: none"> Revenue Recognition Credit management Treasury Organization Administration Accounts receivable Billing Audit workbook 	<ul style="list-style-type: none"> Accounting payable Cash and bank Self service Cost management General ledger Human management Expense management Payroll Tax 	<ul style="list-style-type: none"> Asset management Master planning Retail management Cost management Transportation Inventory management Vendor collaboration Production control Product information management Tax

02 CRM Solutions

Product name	Dynamics 365 Sales Enterprise Sales management for enterprise	Dynamics 365 Sales Professional Sales management for small business	Dynamics 365 Customer Service Customer service management
Functionality	<ul style="list-style-type: none"> Client management Contact management Marketing LinkedIn integration Sales Order management Proposal management Lead management 	<ul style="list-style-type: none"> Product information management Simplified opportunity-to-invoice process Microsoft Teams Integration Business process management 	<ul style="list-style-type: none"> Visual Insights Simplified opportunity-to-invoice process Customer 360 view Sales data Business process flow

03 Modular Solutions

Product name	Dynamics 365 Retail Retail management	Dynamics 365 Talent: Core HR Human resource management	Dynamics 365 Talent: Attract Hiring management	Dynamics 365 Talent: Onboard New hires management
Functionality	<ul style="list-style-type: none"> Pricing Sales channel management Stores Shift management Appointment Categories Employee management 	<ul style="list-style-type: none"> Retail server Call centers Loyalty management Cloud POS & mobile app Replenishment Online stores Retail POS 	<ul style="list-style-type: none"> People management Task management Organization Position management Task management Compendium Employee transfer management Performance management Service management Learning Employee self service Employee development 	<ul style="list-style-type: none"> Position management Vacancies templates Candidates management Task management Resource management Onboard process management Contact management Activity management Onboard templates

04 AI Solutions

Product name	Dynamics 365 Sales Insights AI-driven insights in sales	Dynamics 365 Customer Service Insights AI-driven insights and virtual agents in customer service	Dynamics 365 Market Insights AI-driven market insights	Dynamics 365 Customer Insights Power personalized engagement with customer insights
Functionality	<ul style="list-style-type: none"> Notes analysis Relationship support Analytics Talking points Business data dashboard 	<ul style="list-style-type: none"> Predictive lead/opportunity scoring Assistant service Predictive forecasting Sales Coaching & Call Intelligence dashboard 	<ul style="list-style-type: none"> Automated AI-driven cases grouping Customer satisfaction dashboard Intelligent workflow dashboard Topic details dashboard 	<ul style="list-style-type: none"> Case resolution dashboard Virtual agents Conversation dashboard Search rules dashboard Intelligent workflow dashboard Natural language support

05 Mixed Reality Solutions

Product name	Dynamics 365 Remote Assist Mixed reality remote presence tool	Dynamics 365 Layout Mixed reality design spaces tool	Dynamics 365 Product Visualize Place a 3D digital twin of product in real life	Dynamics 365 Guides Holographic instruction tool	Dynamics 365 Import tool Tool importing 3D models to HR solutions operations	
Functionality	<ul style="list-style-type: none"> Mobile-based AR File sharing Field service integration Microsoft stack with Teams 	<ul style="list-style-type: none"> Remote work support Virtual & Mixed reality support Visual sharing Import tool Work world testing 	<ul style="list-style-type: none"> Full physical design Import tool Revenue View product in real world Integration with sales details 	<ul style="list-style-type: none"> Predefined design support Notes capture Mobile for field service Predefined integration with Teams 	<ul style="list-style-type: none"> Capture work processes Guides for contractor Attachments Step by step instructions 	<ul style="list-style-type: none"> Send models to Microsoft Holdings support Upload to 3D Visualize Video attachments

06 Dynamics Services

Product name	Dynamics 365 Planning service External micro service for planning	Dynamics 365 Inventory on-hand service External micro service for inventory	Configurable business documents reporting in Word and Excel External micro service to setup documents	
Functionality	<ul style="list-style-type: none"> Multi-tenant What If analysis Hyper Scale 	<ul style="list-style-type: none"> External Signals support Real time 	<ul style="list-style-type: none"> Real time Improved performance Simple to share Simple to integrate 	<ul style="list-style-type: none"> Predefined templates Document lifecycle management Extended Data Model Rowing

Platform

Product name	Microsoft Flow Automated workflows solution	Power BI Business intelligence solution	Microsoft Office Office solutions	Microsoft Azure Cloud computing solution	Microsoft PowerApps Create business solutions fast	Lifecycle Services Collaboration portal to manage the application lifecycle	Microsoft Forms Pro Surveys solution
Functionality	<ul style="list-style-type: none"> Alerts, synchronization management Workflow processes between systems Predefined integration templates Mobile support AI-based automation Tasks automation 	<ul style="list-style-type: none"> Predefined dashboards Power BI Insights apps Big data connectors AI-based automation Customer Data Service for Analytics 	<ul style="list-style-type: none"> Document Client SharePoint Excel Word PowerPoint Teams Outlook Access 	<ul style="list-style-type: none"> Azure IoT Microsoft Learning Logic Apps IoT Edge Machine Learning Cognitive Services 	<ul style="list-style-type: none"> Process automation Workflow management Common Data Service for Apps 	<ul style="list-style-type: none"> Predefined lifecycle Business process lifecycle Service management Quality assurance Deployment process control User management System diagnostic 	<ul style="list-style-type: none"> Personalized surveys Predefined lifecycle Questionnaire builder Real-time chatbot management Survey management Survey analysis Insights management System diagnostic

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Microsoft Dynamics 365

Product naming evolution for CRM offerings

Before

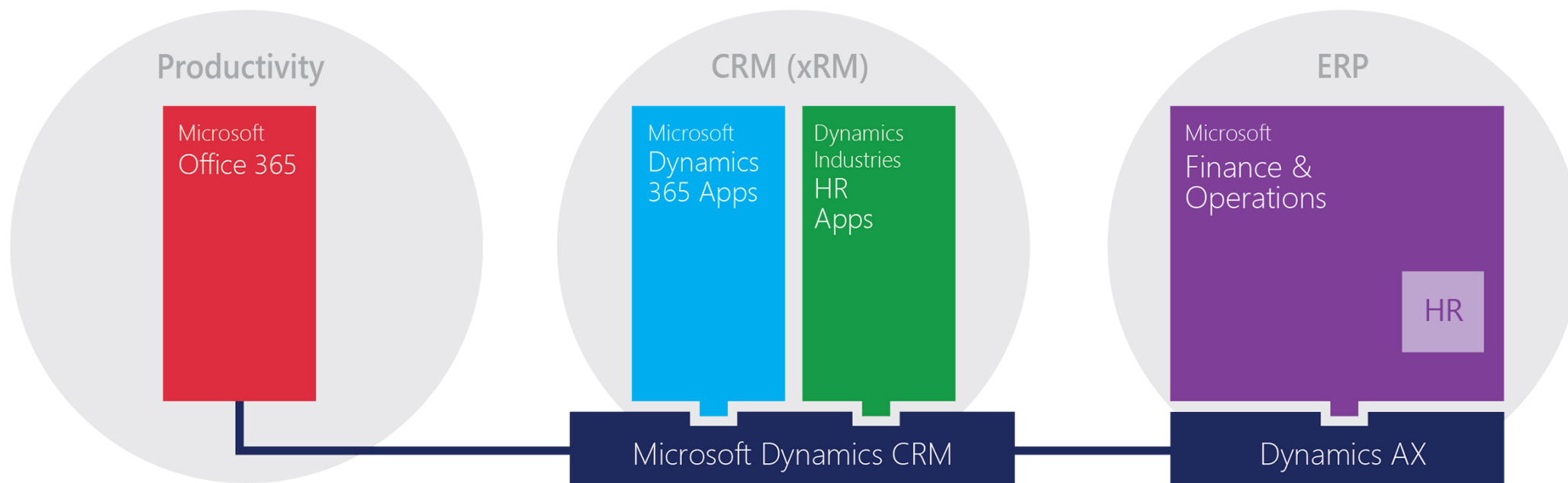
Dynamics CRM

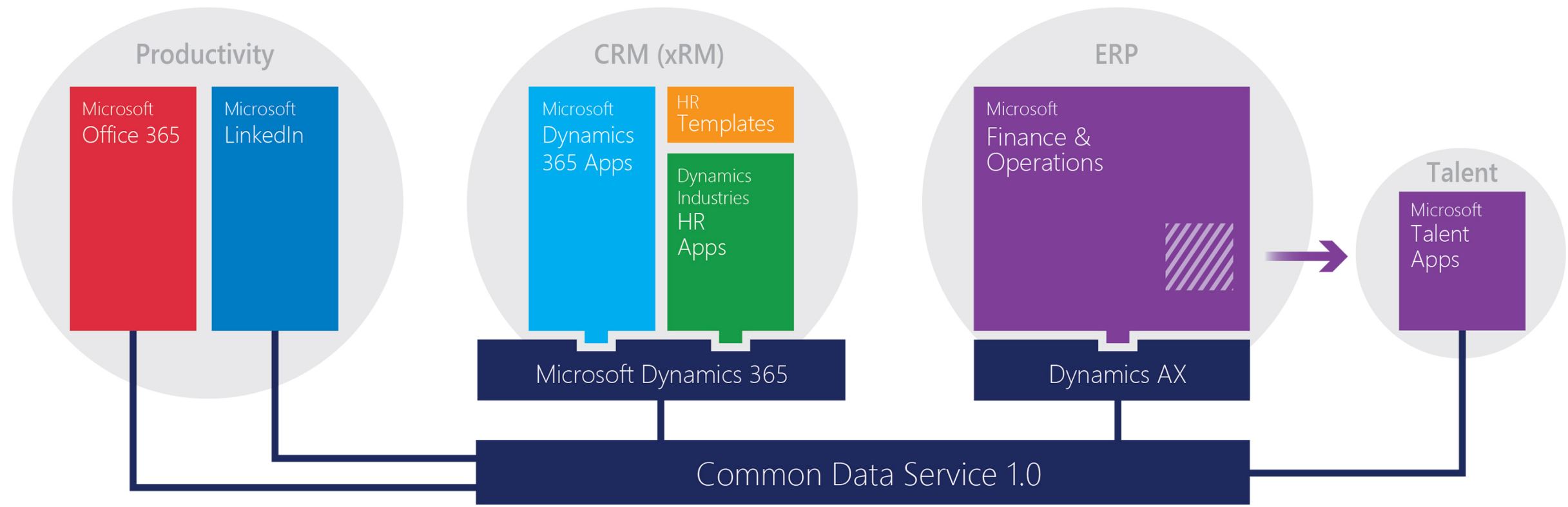
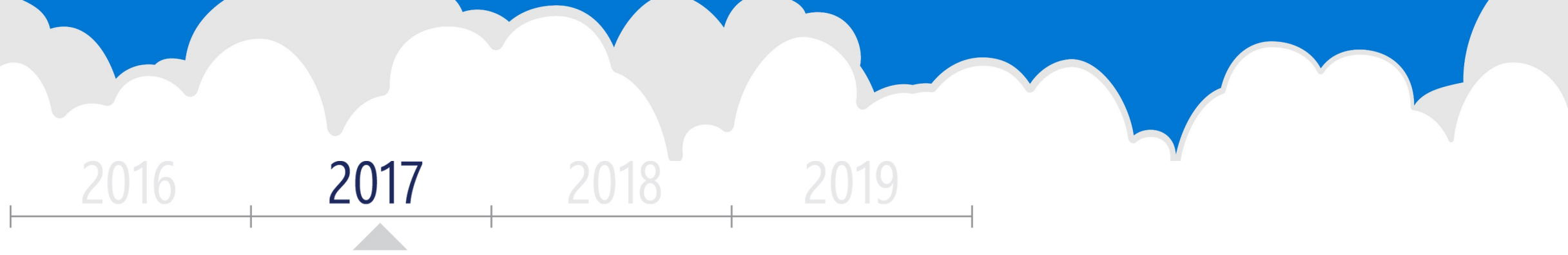
- Dynamics CRM on-line
 - (Sales, marketing & cases)
- Field Service
- Project Service Automation
- Parature



Today

- Dynamics 365 for Sales
- Dynamics 365 for Customer Service
- Dynamics 365 for Field Service
- Dynamics 365 for Project Service Automation
- Dynamics 365 for Marketing



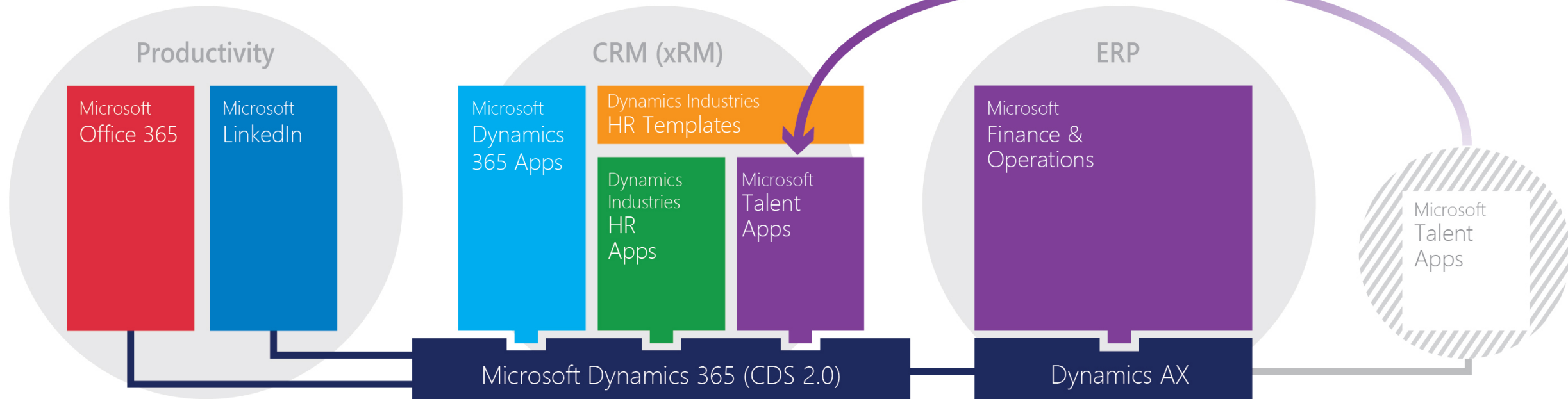


2016

2017

2018

2019



2016

2017

2018

2019

Productivity

Microsoft Office 365

Microsoft LinkedIn

CRM (xRM)

Microsoft Dynamics 365 Apps

Dynamics Industries HR Templates

Dynamics Industries HR Apps

Microsoft Talent Apps

ERP

Microsoft Finance & Operations

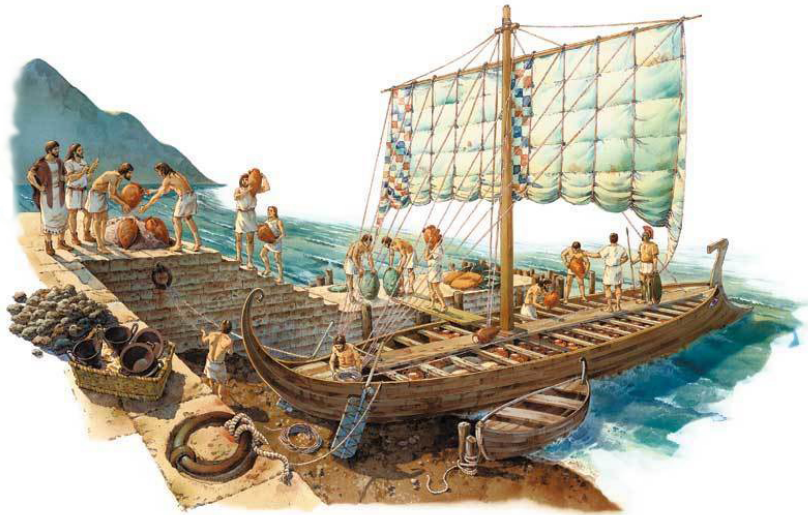
Microsoft Dynamics 365 (CDS 2.0)

Dynamics AX

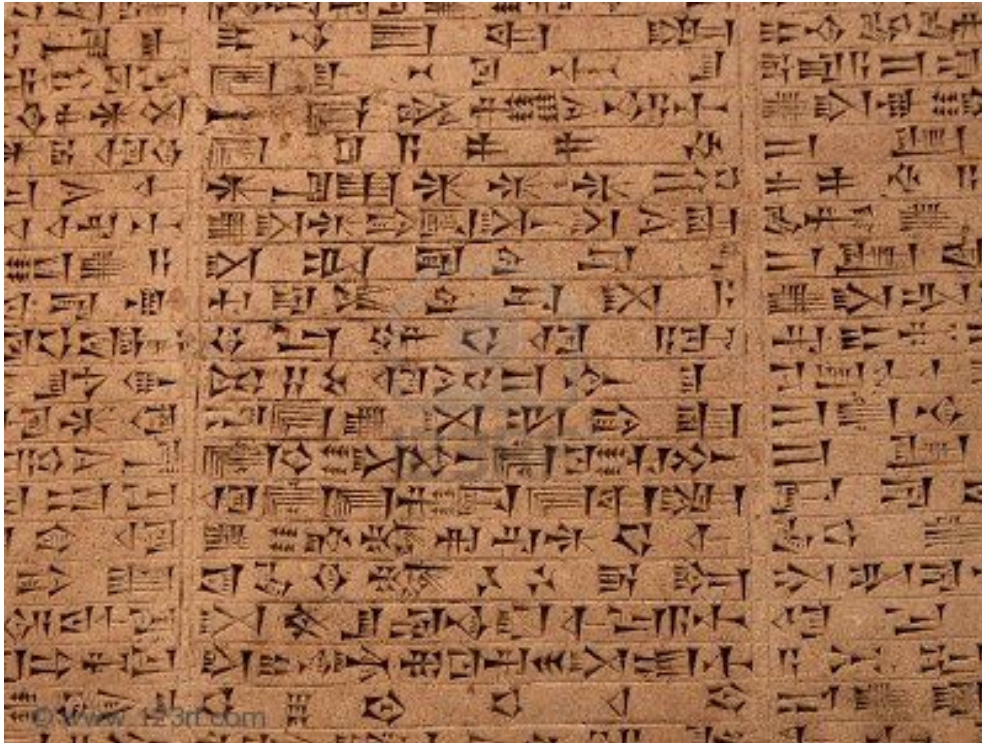
Ma quando è nato il CRM?



I Fenici



Il CRM dei Fenici



Mentre ai tempi moderni (ma non troppo...)

STRAORDINARIE OCCASIONI PER TUTTI I GIOVANI !!!!!

FUCILE L. 6.800 PISTOLA L. 5.400

FUCILE E PISTOLA IN BLOCCO SOLO L. 10.900

Perfetto FUCILE da caccia con canna pieghevole, acciaio ossidato, calcio leggio lucido. Funzionamento di precisione perfetta. Spara a 100 metri. Ottimo per sparare e fare contro bersaglio. Con 100 colpi per sole L. 6.800.

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Una coppia di « Ricetrasmittenti » giapponesi originali - con sensibilità antennae telescopiche a 10 sezioni - funzionano con una normale pila per transistor in vendita ovunque - completa di accessori e istruzioni - di facile funzionamento. Ricevono e trasmettono fino a 1500 metri. Garanzia 2 anni.

MANGIADISCHI

MANGIADISCHI Beng Bang - All'avanguardia della tecnica, unisce alla elevata qualità un basso costo, offre un ascolto perfetto e la massima protezione del disco. L. 8.400

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La più piccola radio del mondo incorporata in una penna. Microcircuiti recenti che consentono un perfetto ascolto personale. E' ideale per lo studio in ufficio, in campagna, in volo ecc. L. 8.900

AEREO

Meraviglioso AEREO, gioia dei bimbi e divertimento anche per gli adulti. Voli a 100-150 metri. Eseguisce acrobazie a più piani dolcemente compiendo perfetti atterraggi. Tecnica perfetta dell'aeromodellismo. L. 3.900

OCCHIALI PER RADIOSCOPIA

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Concedete un momento di tempo per vedere il vostro sogno.

La « vista » avviene attraverso una speciale « lente » a « visione » a infrarossi. L'immagine che vedete è nitida e chiara. L'immagine è in bianco e nero. L'immagine è in movimento. Vi sono innumerevoli altre particolarità.

MICRO MACCHINA FOTOGRAFICA

GIAPPONESE LA PIU' PICCOLA DEL MONDO USATA DAGLI AGENTI SEGRETI CON 2 RULLINI

« Mini » è una perfetta - Immagini nitide, vigorose, massima precisione della più recente tecnologia giapponese - L'apparecchio misura solo 20mm - Automatico al 100% - Niente diaframma. L. 4.900.

OROLOGIO SUB

L. 7.400

Con datario, indicatore di pressione, lunetta girevole per controllo di tempo di immersione, bracciale in acciaio inox.

TAGLIANDO

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SO

Desidero ricevere i sottoscritti articoli:

Pistola Fucile

Penna radio Ricetrasmittenti

Mangiadischi Micro macch. fotogr.

Aereo Orologio sub

Occhiali per radioscopia

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SONO TUTTE NOVITA'

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Questa rivoltella tira 6 colpi. Vendita libera senza formalità. Porto autorizzato in casa o in macchina. Nessun porto d'armi da richiedere. Nessuna dichiarazione da fare. Mette l'aggressore in fuga. Tiro automatico, 6 colpi autentici. Costa solo L. 3.900. - Tipo Jussò L. 4.900.

SEXY OCCHIALI

RIDERE RIDERE RIDERE!

Con i nostri straordinari « SEXY OCCHIALI » proverete l'inequagliabile illusione di vedere attraverso i vestiti. Per tutte le ragazze sarà un fuggi fuggi generale. Costano L. 2.500.

PENNA A GAS - L. 3.300

Ecco un'arma sorprendente che annienta qualsiasi aggressore, nel giro di qualche secondo. E' una minuscola ed elegante penna che spara capsule contenenti un gas capace di neutralizzare istantaneamente uomini o animali sino a 3 metri di distanza. Non procura lesioni ed è legalmente permesso a colpi di dilasa. Efficace in quanto inoffesa, è utilissima in casa o per strada. Costa L. 3.300.

SPYSCOPE SECRET

Strordinario strumento di minime dimensioni, che ingigantisce le visioni di 10 volte dal normale. Vi permetterà di osservare tutti agenti segreti e di vedere, nei minimi particolari, le più belle ragazze senza essere visti. L'immagine che osserverete vi sembrerà di poterle quasi toccare. Questo portentoso strumento costa solo L. 3.900.

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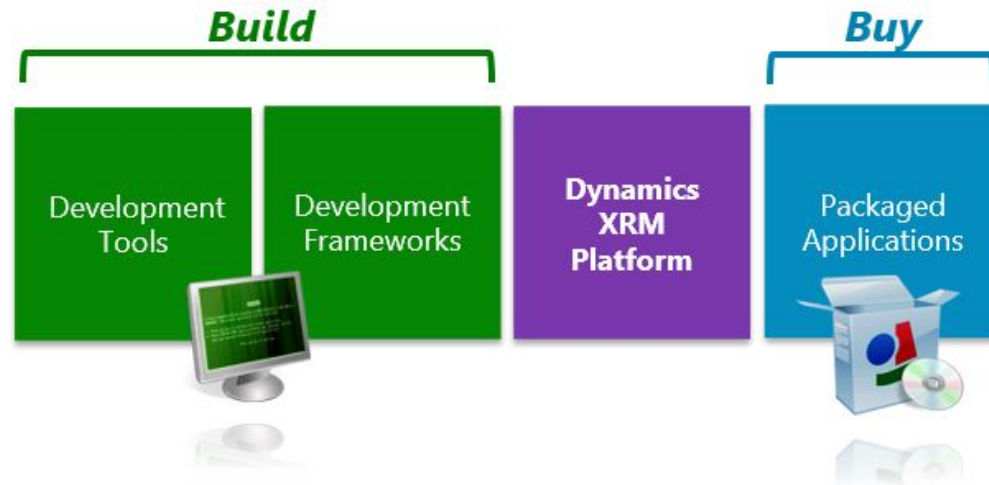
POSTAL MARKET
AUTUNNO-INVERNO '79-80

Ornella Vanoni
sfila per la nostra boutique

ARTICOLO DESCRITTO NELLA PAGINA INTERNA

XRM Build or Buy

Dynamics is a COTS Platform



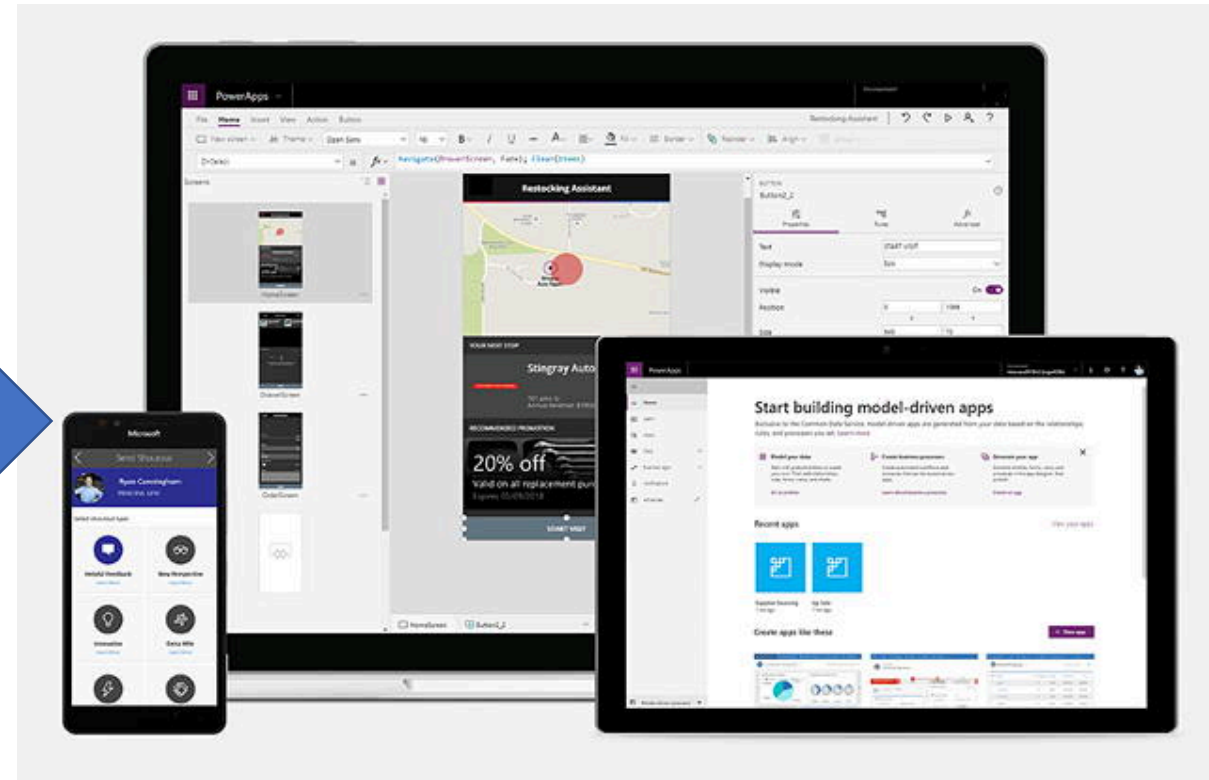
Reduce Total Cost - Mitigate Risks - Stay Relevant - Standard Platform
Deliver Applications 70% faster... at 50% less total cost

Gli Acceleratori, XRM e... PowerApps

Microsoft Dynamics CRM Accelerators

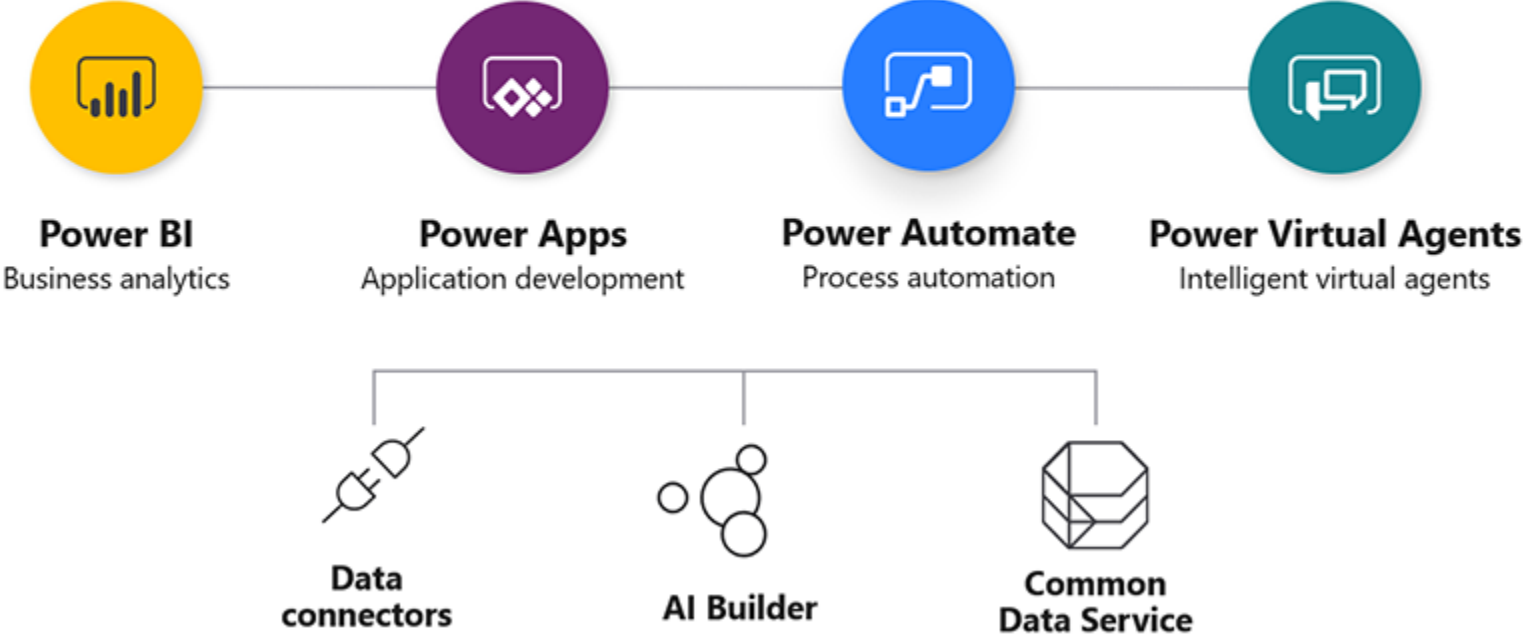
- | | |
|--|---|
|  Analytics |  Extended Sales Forecasting |
|  eService |  CRM Event Notifications |
|  Event Management |  Workflow Productivity |
|  Enterprise Search |  Partner Relationship Management (PRM) |
|  Sales Methodology |  Social Networking |

Accelerate Your People Accelerate Your Business Accelerate Your Environment



Microsoft Power Platform

The low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications



Power Apps è una suite di app, servizi, connettori e piattaforma dati che fornisce un ambiente di sviluppo di applicazioni rapido per creare app personalizzate



Power Apps e Dynamics 365

- Le applicazioni Dynamics 365: Dynamics 365 Sales, Dynamics 365 Customer Service, Dynamics 365 marketing usano **CDS** Common Data Service usato da Power Apps per archiviare e proteggere i dati
- Le app sono compilate usando Power Apps e Common Data Service direttamente con i dati aziendali di base già presenti all'interno di Dynamics 365 senza la necessità di ulteriore integrazione

Power Apps e Dynamics 365

- **Creazione di app con i dati di Dynamics 365** – Creare rapidamente app con i dati aziendali all'interno di Power Apps o utilizzando Pro Developer SDK
- **Gestione della logica e delle regole di business riutilizzabili** – La logica e le regole di business già definite nelle entità di Dynamics 365 vengono applicate a Power Apps per garantire la coerenza dei dati indipendentemente dalla modalità con cui gli utenti accedono ai dati o dall'app che utilizzano
- **Competenze riutilizzabili tra Dynamics 365 e Power Apps** – Gli utenti con competenze precedentemente in Power Apps o Dynamics 365 possono ora sfruttarle nella nuova piattaforma Common Data Service
- La creazione di soluzioni, entità, moduli, grafici e gli altri elementi di D365 è ora un'operazione comune e univoca tra le applicazioni



Le Apps

Dynamics 365 Sales

Dynamics 365 Marketing

Dynamics 365 Customer Service

Dynamics 365 Field Service

Dynamics 365 Project Service Automation

Dynamics 365 Finance

Dynamics 365 Supply Chain Management

Dynamics 365 Retail

Dynamics 365 Talent



DEMO

- Dynamics 365 Apps



Microsoft Academyadi

la partecipazione che ti premia

2. Licensing Model
Coming back at 2pm





Outline

- Perché è importante conoscere il Licensing
- Cosa c'è di nuovo nel Licensing per D365 (Update Jan20)
- Le licenze Team Members
- Estendere il modello con l'aggiunta di Power Platform

Una scarsa conoscenza del licensing

Unrealistic designs

- Disegnare una soluzione stupenda e poi rendersi conto che costa troppo o che non è sostenibile

Underutilized tools

- Pagare una singola applicazione invece di usare una piattaforma comune cross in tutta l'organizzazione

Limited access

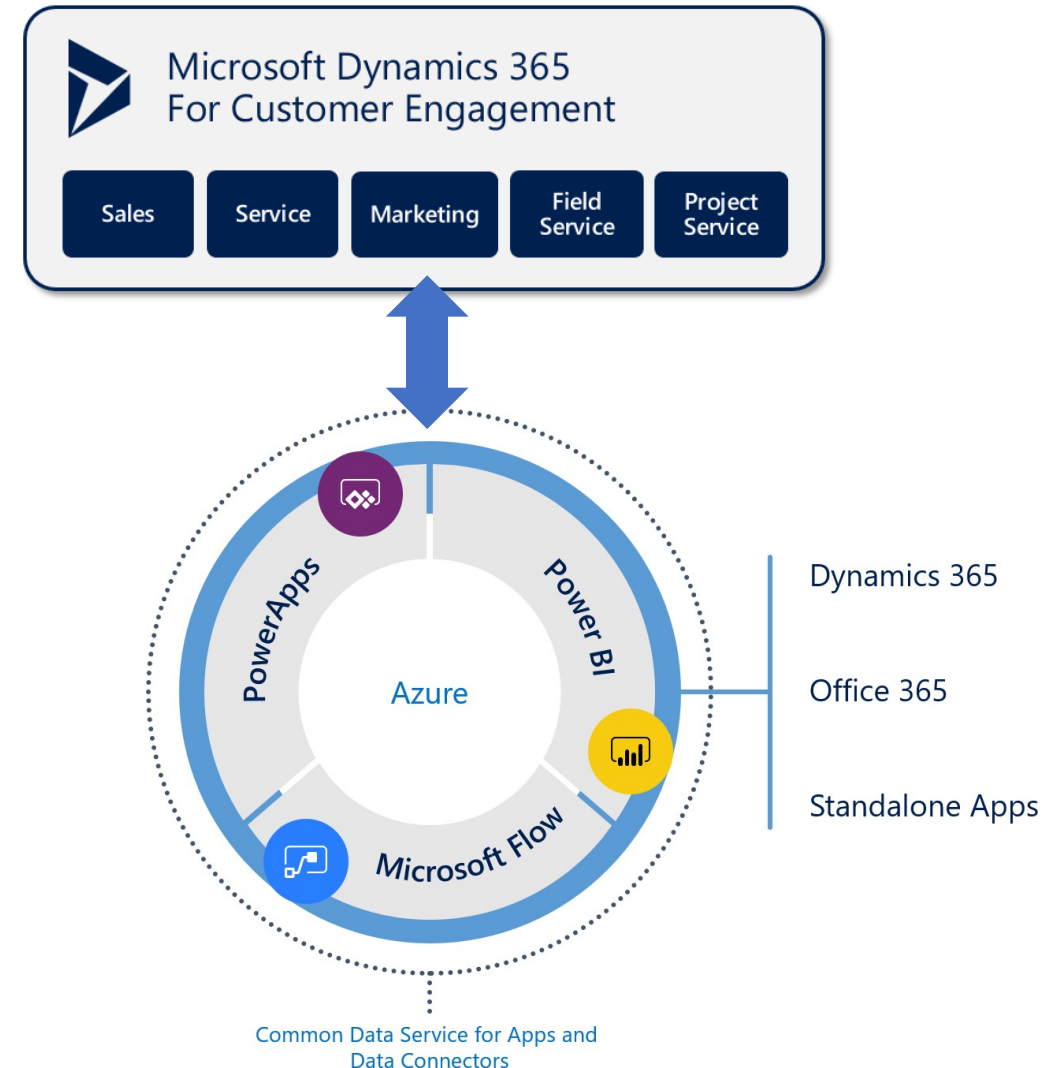
- Scarsa organizzazione nel distribuire agli utenti i giusti permessi abbassando la produttività

Alcuni concetti da sapere per capire il licensing di Dynamics 365

App	Plan	Enterprise	Professional	Team Member	Marketing contacts
AI App	Instances/ environments	Storage	Portals	External users	Model-driven PowerApps
Canvas PowerApps	Flow runs	Connectors	Business logic	Custom entities	App modules

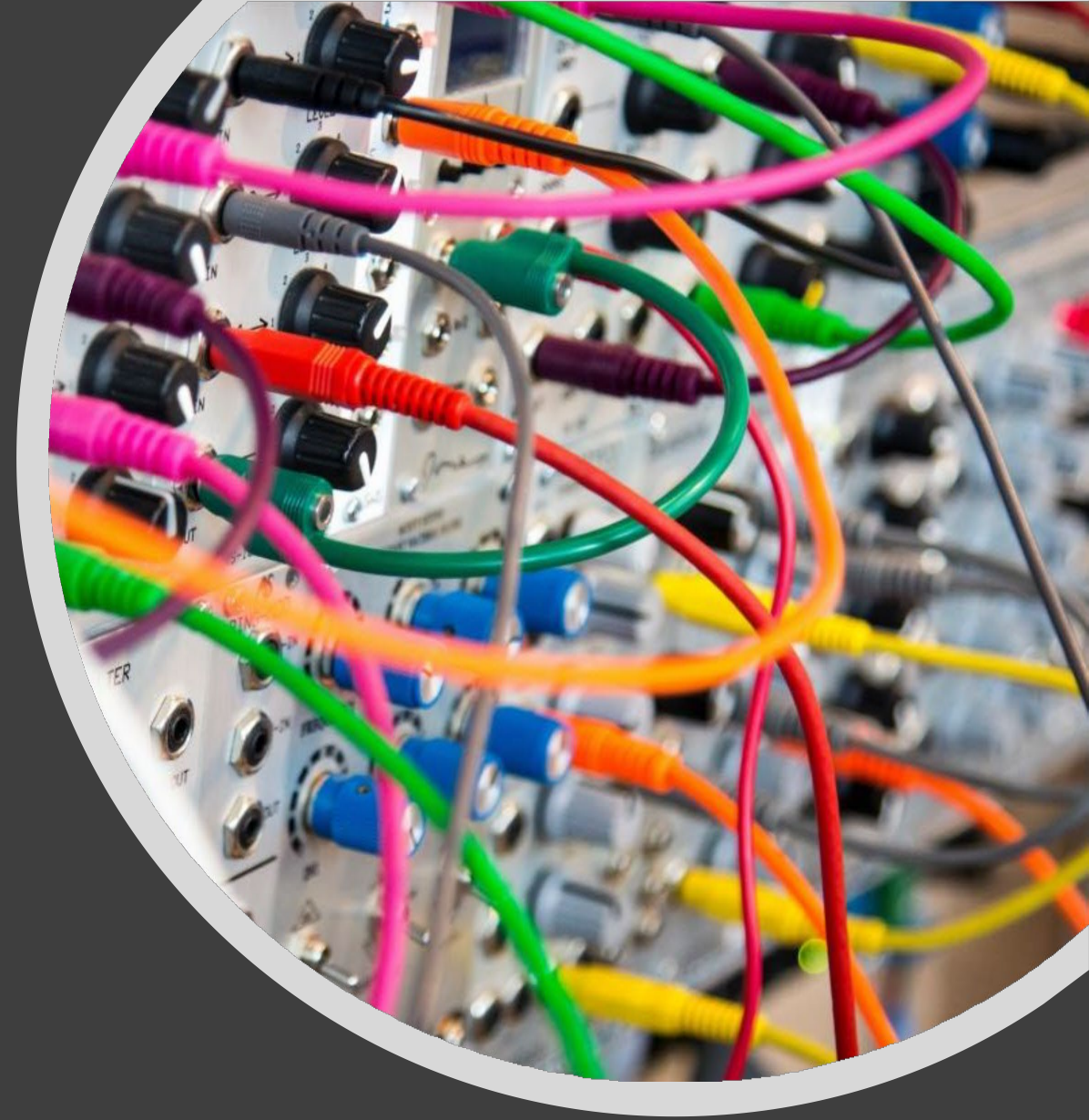
Bigger platform = more licensing options

- XRM è ora una piattaforma modulare
- Power Platform è alla base di tutte le customizzazioni di D365
- Office 365 ecosystem è integrato con le business apps attraverso OoB features
- Connectors integrano business data con oltre 200 altre apps



Tante complessità

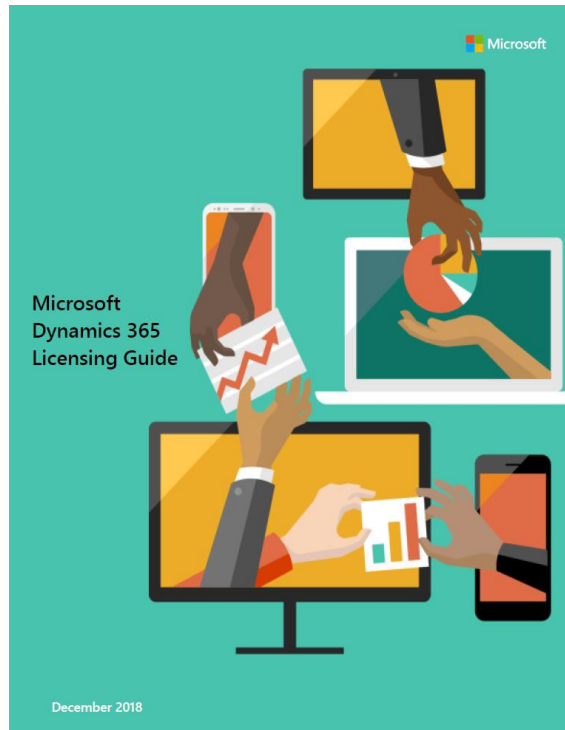
- Non c'è un singolo SKU Powerapps
- L'accesso a PowerApps e PowerAutomate può avvenire con diversi tipi di licenze
- Lo stesso database CDS database può essere usato con differenti licenze
- I requisiti di licenza sono basati sulle features utilizzate e dalla complessità della App



Come recuperare informazioni sul licensing

Dynamics 365

- PDF (ultima release Gennaio 2020)



PowerApps


- Marketing and documentation

The image is a screenshot of the Microsoft PowerApps website, specifically the "Licensing overview" page. The page has a purple header with the text "Choose the right plans for your team" and a currency selector set to "Euro (€)". Below the header, there are four plan cards: "PowerApps for Office 365", "PowerApps Plan 1", "PowerApps Plan 2" (priced at €33.70 per user), and "PowerApps for Dynamics 365" (labeled as "Included"). The main content area is titled "Licensing overview" and includes a table of contents on the left and a list of articles on the right. The table of contents lists sections like "Administer PowerApps", "Getting started", "Licensing", "Pricing", and "License requirements for entities". The "License requirements for entities" section is highlighted, and its content is visible on the right side of the screenshot, including a table with columns for "Entity", "Description", and "Requirement".

Entity	Description	Requirement
Complex entities and licensing	These are entities that use complex server-side business logic. For example, any entity that uses a real-time workflow or code plug-in.	PowerApps Plan 2 or Flow Plan 2

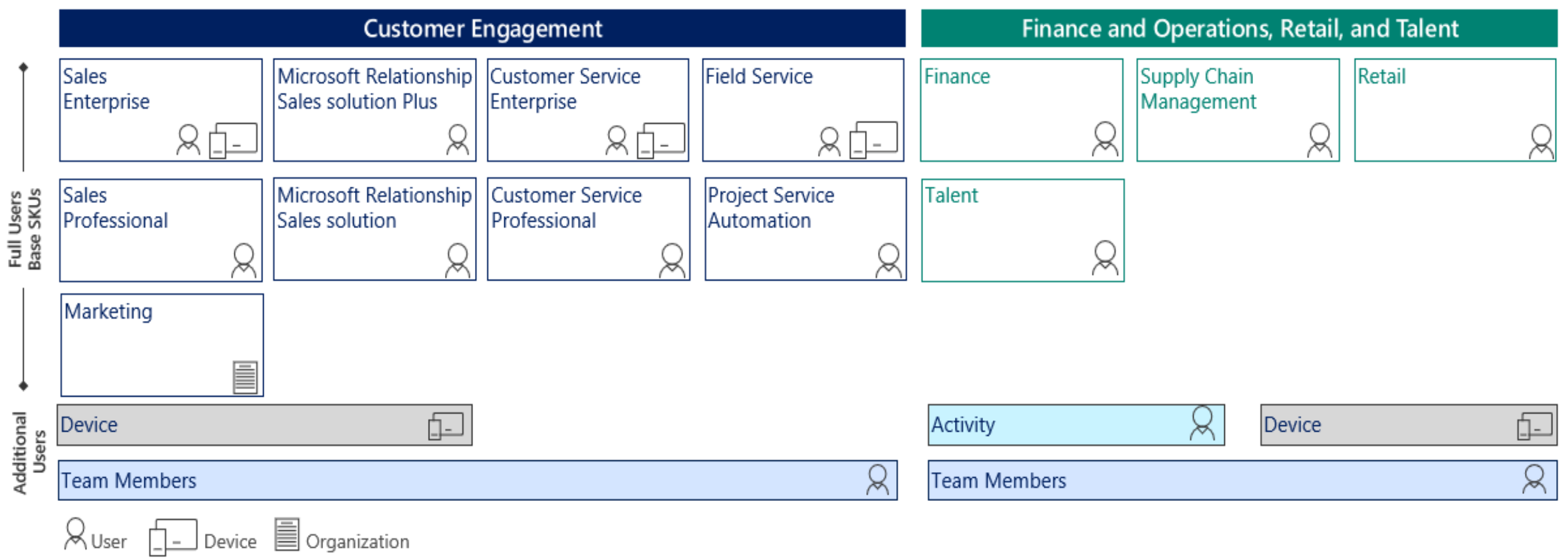
Ultimi
cambiamenti
nel licensing
Dynamics 365





Dynamics 365 Licenze

- Sales
- Marketing
- Customer Service
- Field Service
- Project Service Automation
- Finance
- Supply Chain Management
- Retail
- Talent

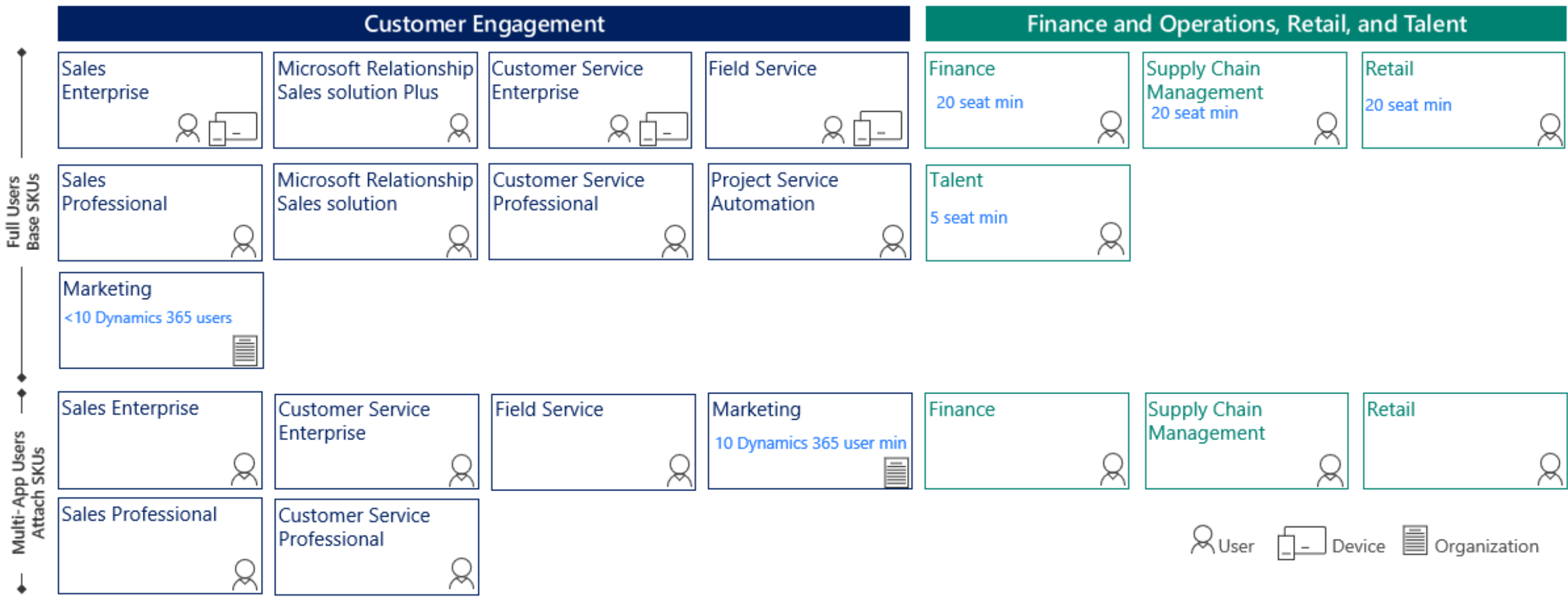


Tipi di Licenze

ATTACH
LICENSE

ATTACH
LICENSE

BASE
LICENSE



 User  Device  Organization

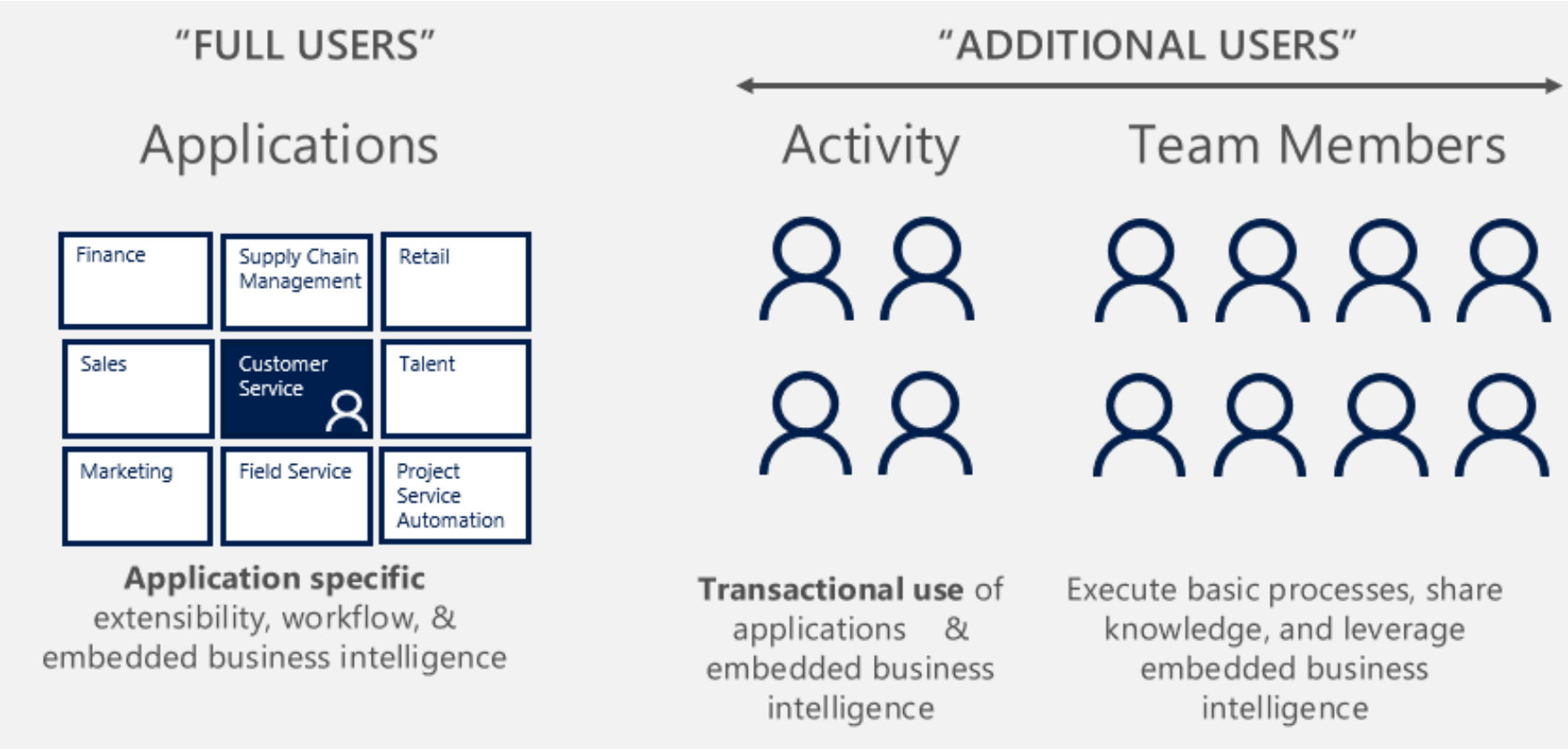
Dynamics 365 SKU placemat: October 2019



	Customer Engagement (CE)				Unified Operations (UO)		
Full Users Base License	Sales Enterprise User Device \$95	Customer Service Enterprise User Device \$95	Field Service User Device \$95	Marketing* New Customers Org \$1500	Supply Chain Management User 20 seat min \$180	Finance User 20 seat min \$180	Retail User 20 seat min \$180
	Sales Professional User \$65	Customer Service Professional User \$50	Project Service Automation User \$95		Talent User 5 seat min \$40		
Multi-App Users Attach License	Sales Enterprise User \$20	Customer Service Enterprise User \$20	Field Service User \$20	Marketing* Existing Customers Org 10 seat min \$750	Supply Chain Management User \$30	Finance User \$30	Retail User \$30
	Sales Professional User \$20	Customer Service Professional User \$20					
Additional Users	Device Device \$145				Activity User \$50	Device Device \$75	
	Team Members User \$8				Team Members User \$8		

*The Marketing application is a tenant-based license, therefore the per user Attach license model does not apply.

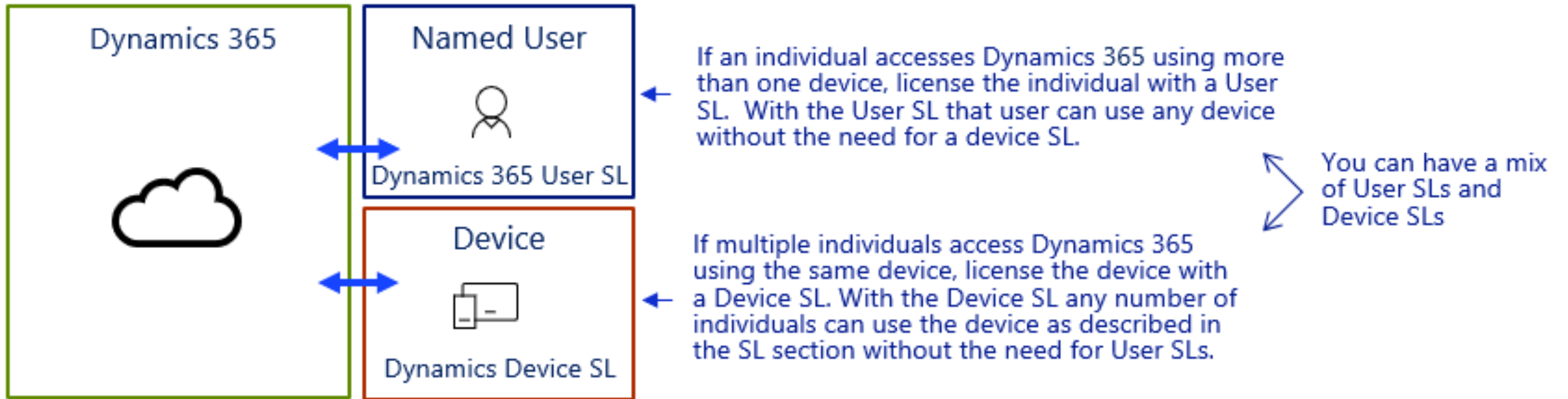
Full e Additional Users



Full USERS: Professional vs. Enterprise

- 2 tiers differenti sono disponibili per le Sales & Customer Service apps
 - Sales: Enterprise - Professional
 - Service: Enterprise - Professional
- Alcune features non sono presenti nel tier Professional
- Importanti restrizioni sulle possibilità di customizzazione:
 - Oggi: massimo 15 custom entities
 - Restrizioni non più presenti nella attuale licensing guide:
 - Max 5 Business Process Flows
 - Max 15 custom workflows
 - Max 10 3rd party application installs
 - Max 2 forms per entity

User SLs e Device SLs





Numeri minimi, limitazioni, varie

- Ci sono poi delle limitazioni e dei “percorsi” da seguire nel caso di voglia costruire una subscription ad hoc
- Ulteriori caratteristiche come: External Users, Multiplexing, Dual Use Rights
- Utilizzare la guida al licensing

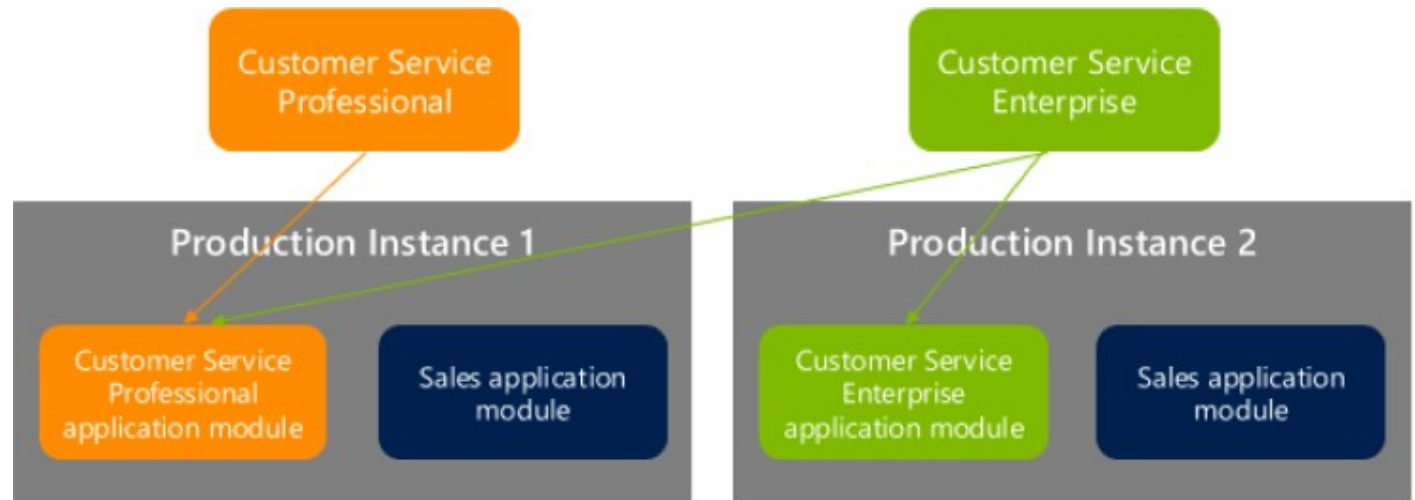


URL Pricing License

- <https://dynamics.microsoft.com/it-it/pricing/>

Instances & App Modules

- Enterprise e Professional Applications devono essere installate su istanze differenti
- Utenti con licenza Enterprise possono accedere ad un tenant con licenze professional, non è permesso il contrario
- E' possibile estendere la App "Professional" fino a 15 entities custom



"Mix and Match"

Customer Scenario – user level	Instances Restriction	Users may
Sales Enterprise + Sales Professional	Separate	Sales Enterprise users may access both instances, however the Sales Professional users may not access Sales Enterprise
Microsoft Relationship Sales solution + Sales Professional	Separate	Because Relationship Sales includes Sales Enterprise the same restrictions apply as stated above
Sales Enterprise + Customer Service Professional	None	Each user needs to be licensed with both application to access the two workloads
Customer Service Enterprise + Customer Service Professional	Separate	Customer Service Enterprise users may access both instances, however the Customer Service Professional users may not access Customer Service Enterprise
Customer Service Professional + Sales Professional	None	Each user needs to be licensed with both application to access the two workloads
Sales Professional + Team Members	None	Professional application users may access both; however, Team Members users have read and limited edit access to Professional applications (see Appendix C)
Customer Service Professional + Team Members	None	

Enterprise features not in Professional apps

1 non-production instance	1 Portal instance	(Social Engagement)	Voice of the Customer 	Unified Service Desk	Gamification
PowerApps P2	Mail Merge, Word Templates	Export to Excel	Activity Feeds	Embedded Intelligence	Connections
	Advanced Find	Goals, Sales literature, Territories	Admin of SLA, KB, contracts, resources	Activity to Case/Lead to Opportunity	

A top-down view of several hands in white dress shirts stacked together in a circle, symbolizing teamwork and collaboration. The hands are of various skin tones. One hand on the left has a silver watch. The background is a light, neutral color.

Team Members



Team Members

- Create, view, update, and delete contacts, activities, tasks, and notes access to contacts, activities, tasks and notes
- Record time and expense for Project Service Automation, and apply for projects
- Update personal employee information
- User reporting and dashboards
- Participate as an end-consumer of Dynamics 365 services such as responding to surveys
- A Team Members application module may not be customized with more than 15 custom entities available to the Team Members license*

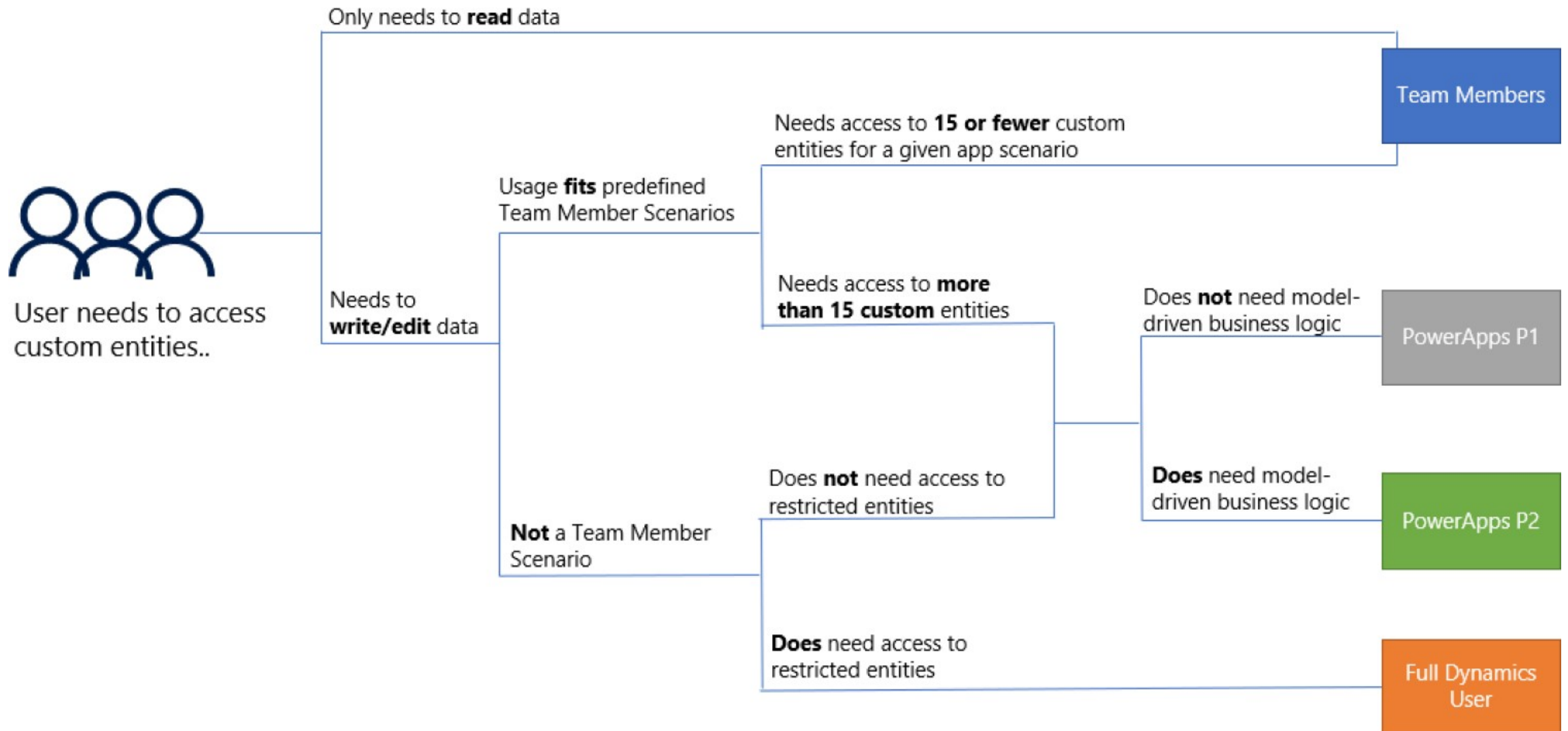
*Customization is only allowable if it does not result in a change to core purpose of the specified scenario

Use Rights	Description	Customer Engagement	Finance, SCM, Retail, Talent
	Service		
Access			
	Access Anywhere: Web App, Mobile App, Tablet App, via Outlook	•	
Read			
	Dynamics 365 Applications: full read across	•	•
General System Use			
Common across Customer Engagement Applications	Activities: create, view, update, and delete	•	
	Announcements: create, view, update, and delete	•	
	Contacts: create, view, update, and delete	•	
	Dynamics 365 Mobile Client Application: use (for iPad, Windows) except for Field Service	•	
	Gamification: access as a fan and spectator	•	
	Microsoft excel: export data and access user reports, charts and dashboard	•	
	Notes: create, view, update, and delete	•	
	Forms Pro: respond to surveys	•	
	Yammer: collaboration (needs Yammer license)	•	
Edit/Actions			
Customer Engagement	Custom Entities*	15 max	
Customer Service	Employee Self Serve: start personal support chat and cases and view knowledge articles (Portal or API access only)	•	
Project Service Automation	Apply for Project, report Time & Expense for Projects, update Project Tasks, Update Own Resource Competencies for Project	•	

Use Rights	Team	Sales	
	Members	Pro	Ent
Entities: Create, Update, Delete			
Custom entities	15 max ^	15 max ^	● ^
Dynamics 365 Unified Operations Plan functionality: Time and Expense	●		●
Dynamics 365 Unified Operations Plan functionality: Requisitions	●		●
Dynamics 365 Unified Operations Plan functionality: Quality Control	●		●
Dynamics 365 Unified Operations Plan functionality: Service Orders			●
Contacts	●	●	●
Accounts		●	●
Activities and Notes	●	●	●
Personal Views; Saved Views	●	●	●
Shared azure	●	●	●
Announcements	●	●	●
Active Segments			
Agent Service/Case Management			
Cases for Sales		●	●
Competitors		●	●
Contracts			
Customer Assets			
Dispatch			
Email Marketing			
Embedded Intelligence			●
Entitlements			
Event Management			
Facilities/Equipment			
Inventory Management			
Leasing		●	●

NO ACCOUNTS!!!

Team Members & custom entities



Team Members per clienti esistenti

Team Members License for Existing Customers

Customers with Team Members licenses acquired prior to October 1, 2018, may use their Team Members licenses in accordance with the description below through the duration of their term and any subsequent term begun prior to July 1, 2020, or through June 30, 2023, whichever is earlier.

Team Members use rights are unchanged for existing customers subscribing to Dynamics 365 Team Members as of October 1, 2018, including commercial, government, education and non-profit, and Team Members licenses acquired under the SMB promotion.

Existing Team Member customers and their licensed users may continue to exercise their use rights for the following workloads:

Customer Engagement

- Dynamics 365 for Sales: non-employees may create and update opportunities via a portal or API
- Dynamics 365 for Customer Service:
 - Interactive Service Hub
 - Knowledgebase Management
 - User interface integration for Dynamics 365
- Dynamics 365 for Field Service: non-employees may update work order via a portal or API
- Across workloads:
 - Create, update, and delete Accounts
 - Create, update, and delete records against unlimited number of custom entities

Unified Operations

- Dynamics 365 Finance and Operations:
 - Field service security roles
 - Field service technician
 - Service dispatcher

Professional vs. Team Member

- Create/read/update/delete Marketing Lists
 - Sales Pro: SI. Team Member: No.
- Associate a Marketing List with an Account or Contact
 - Sales Pro: SI. Team Member: SI.
- Add or remove a Connection (stakeholder, sales team) for an Account or Contact
 - Sales Pro: No. Team Member: SI.

Apps per Professional e Team Users

The screenshot displays the Dynamics 365 Home page with three pinned apps. The first two apps, Sales Hub and Customer Service Hub, are highlighted with green borders and green checkmarks, indicating they are supported for Professional and Team users. The third app, Custom App 1, is highlighted with a red border and a red X, indicating it is not supported. The entities available for each app are listed below:

App	Account	Opportunity	Case	Custom entity 1	Custom entity 15
Sales Hub Contoso	Available	Available	Not Available	Available	Available
Customer Service Hub Contoso	Available	Not Available	Available	Available	Available
Custom App 1 Contoso	Not Available	Not Available	Not Available	Not Available	Not Available

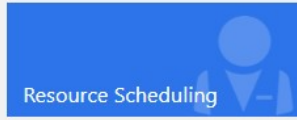
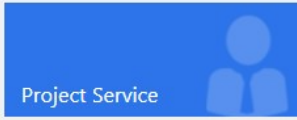
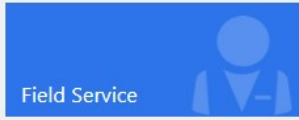
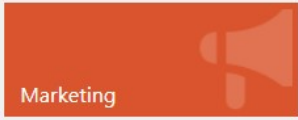
Dynamics 365 for Marketing

- Per tenant, not per user
 - Can request free Marketing app access license for users who don't have other Dynamics 365 user specific license
- Priced per marketing contacts in the database
 - Marketing activity includes any contact or engagement via Marketing emails, landing pages, forms, LinkedIn integration, events, surveys or custom channel
- Bundled into Dynamics 365 Plans
 - 10 Plan users = 2k contacts included
 - Less = paid Attach plan of 10k contacts available
- Additional contacts available for purchase (5k & 50k)
- Requires 1 unconfigured Portal for installation (free or paid)



**L'Unione
fa la
Forza**





Business

- Business Managem...
- Templates
- Product Catalog
- Service Management

Customization

- Customizations
- Solutions
- Microsoft AppSource
- Plug-In Trace Log

System

- Administration
- Security
- Data Management
- System Jobs
- Document Manage...
- Auditing

Process Center

- Email Configuration
- Activity Feeds Confi...
- Activity Feeds Rules
- Dynamics 365 App f...
- Sales AI

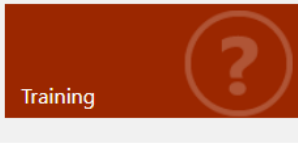
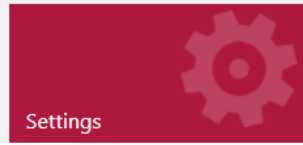
Application

- My Apps

Upgrade Logs

- Upgrade Runs

Dynamics 365 CE instance



Business

- Business Managem...
- Templates

Customization

- Customizations
- Solutions
- Microsoft AppSource
- Plug-In Trace Log

System

- Administration
- Security
- Data Management
- System Jobs
- Auditing
- Email Configuration

Process Center

- Processes
- Microsoft Flows

Application

- My Apps

CDS for Apps environment



Microsoft Power Platform

- **Power Apps:** Extend and customize applications o Power Apps Portals add-on
 - AI Builder capacity add-on
 - Power Apps and Power Automate capacity add-on
- **Power Automate:** Automate business processes and workflow
- **Power BI:** Deliver business intelligence

	Dynamics 365 Apps ¹	Dynamics 365 Enterprise Apps ²
Customization / Extension of licensed Dynamics 365 application		
Customize licensed Dynamics 365 application	Yes <i>(limited to 15 custom entities)</i>	Yes <i>(no limits on custom entities)</i>
Run custom applications	-	Yes - unlimited <i>(within the same environment as licensed Dynamics 365 application)</i>
Access custom portals	-	Yes - unlimited <i>(within the same environment as licensed Dynamics 365 application)</i>
Connector use rights		
Standard connectors	•	•
Premium connectors	•	•
On-premises data gateway	•	•
Custom connectors	•	•
Common Data Service use rights		
Number of custom entities per licensed Dynamics 365 application	15	Unlimited
Restricted entities (within licensed Dynamics 365 application)	•	•
Power Automate use rights		
Run flows that extend licensed Dynamics 365 application	•	•
Run standalone flows that do not map to licensed Dynamics 365 application	-	-
Business process flows	•	•

¹Sales Professional, Customer Service Professional, Talent: Onboard, Team Members, Operations - Activity, Business Central Team Members

²Sales Enterprise, Customer Service Enterprise, Field Service, Project Service Automation, Finance, Supply Chain Management, Retail, Talent, Business Central

Storage

Dynamics 365 CE

- Default 10 GB per tenant, shared across all instances
- Additional 5 GB per every 20 full users (i.e. not Team Member)
- Additional database storage add-on available in 1 GB increments

PowerApps

- Default 10 GB per tenant, shared across all CDS environments
- Additional storage per each user: P1 = 20 MB, P2 = 200 MB
- Add-ons for data storage & file storage(?)

Storage Capacity Information Missing #70

 Open jemsjose opened this issue on Oct 1, 2018 — with docs.microsoft.com · 0 comments



jemsjose commented on Oct 1, 2018 — with docs.microsoft.com



The "PowerApps pricing page" refers to this page for Storage Capacity Information and this page refers back. So currently it is a bit hard to get those details. The additional storage cost details are equally hard to find. For Enterprises, this information is key for adoption.

Instances / environments

Dynamics 365 CE

- Default: 1 production instance & 1 sandbox (Enterprise only) per tenant
- No relation to licensed user count
- Paid add-ons available for additional production & non-production instances

• PowerApps

- Default: 1 environment created per tenant
- Every PowerApps P2 licensed user grants an entitlement to provision 2 environments into the tenant
 - Example: 100 users with PowerApps P2 license = 200 production environments!
- Also available: free Community Plan
 - For individual development, includes CDS
- Environment administration requires P2

PowerApps Plans included with Dynamics 365 licenses

Plan purpose	<ul style="list-style-type: none">Extend and run Dynamics 365 applications within the context of application use rights	<ul style="list-style-type: none">Extend and run Dynamics 365 applications within the context of application use rightsAdditionally, run standalone applications
Number of custom entities	<ul style="list-style-type: none">15 (per application)	<ul style="list-style-type: none">Unlimited
Included flow capacity (pooled across tenant)	<ul style="list-style-type: none">2,000 Flow runs per user per month	<ul style="list-style-type: none">15,000 Flow runs per user per month
Limitations on use rights	<ul style="list-style-type: none">Cannot run standalone canvas or model driven applicationsCan run customized Dynamics 365 applications that contain a maximum of 15 custom entities per appCustomizations should be within the context of the application intent	<ul style="list-style-type: none">N/A
Included within	<ul style="list-style-type: none">Dynamics 365 for Sales Professional,Dynamics 365 for Customer Service Professional,Dynamics 365 for Talent: Attract,Dynamics 365 for Talent: OnboardDynamics 365 for Team Members	<ul style="list-style-type: none">Dynamics 365 for Sales EnterpriseDynamics 365 for Customer ServiceDynamics 365 for Field ServiceDynamics 365 for TalentDynamics 365 for Project Service AutomationDynamics 365 for RetailDynamics 365 Customer Engagement PlanDynamics 365 Unified Operations PlanDynamics 365 Plan

Embedded vs. Standalone canvas app

Available to all Dynamics
365 licensed users

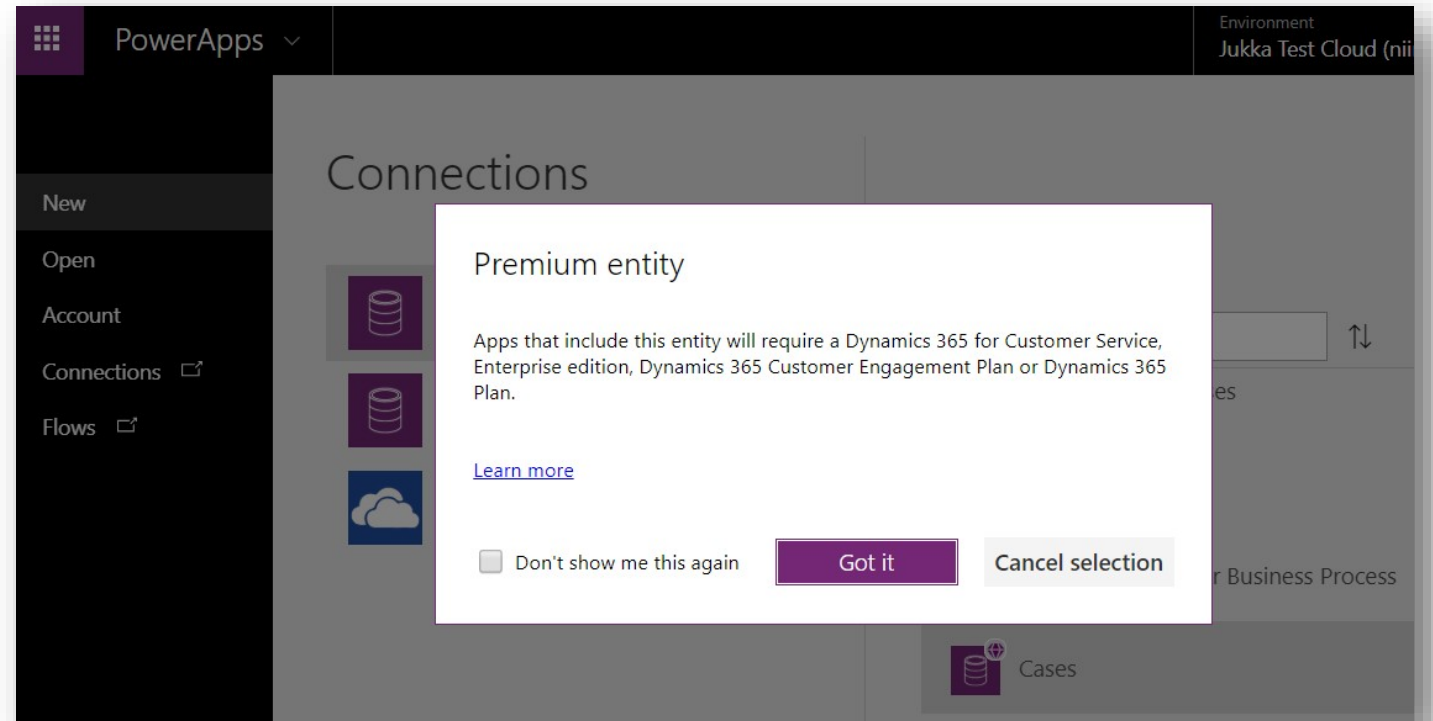
Not available to Professional &
Team Member licenses

The screenshot shows an embedded Dynamics 365 canvas app interface. The top navigation bar includes options like 'New', 'Deactivate', 'Connect', 'Assign', 'Delete', 'Refresh', 'Process', and 'Share'. The main content area is divided into several sections: 'ACCOUNT INFORMATION' with fields for Account Name, Phone, Fax, Website, Parent Account, and Ticker Symbol; 'ADDRESS' with fields for Address 1: Street 1 and Address 1: Street 2; 'Timeline' with a note field; and 'CONTACTS' which displays a profile card for Nancy Anderson (sample) and a row of three smaller profile pictures below it.

The screenshot shows a standalone Dynamics 365 canvas app interface for a 'Contacts' list. The top navigation bar includes 'Refresh', 'Sort', and 'Add' icons. Below the navigation bar is a search bar labeled 'Search items'. The main content area displays a list of contact cards, each with a profile picture, name, and email address. The contacts listed are: Florine Wilkerson (florine_wilkerson@fabrikam.com), Maryanne Wilcox (maryanne_wilcox@fabrikam.com), Martina Welch (martina_welch@fabrikam.com), Catalina Weeks (425-555-9199), Marianne Watson (marianne_watson@fabrikam.com), and Thiti Wang-Aryattawanich (thiti@litware.com, 123-879-9952). Each card has a right-pointing arrow indicating further details.

Restricted (premium) entities in PowerApps

- CDS Connector flags the restricted entities with a "diamond" and instructs on the required license for accessing them



The complexity trap

- Users licensed based on PowerApps P1
- Data is managed in CDS
- Uses a CDM entity like Contact that is leveraged across many apps
- License requirement for all app users goes up from P1 to P2 if:
 - Power users creates/modifies XRM workflow to run in real time
 - Developer creates a plugin
 - Admin installs a 3rd party app that includes either of these



Editing accounts

The screenshot shows a mobile application interface for account management. At the top, there is a navigation bar with icons for home, search, refresh, and help. Below this, the account name 'Elisa Oyj' is displayed under the account 'AI for Sales'. The interface is divided into three tabs: 'Summary', 'Details', and 'Related'. The 'Summary' tab is active, showing key metrics: Annual Revenue of \$1,787,000,000.00, Number of Employees of 4,700, and Owner Antti Administrator. Below the summary is a section titled 'ACCOUNT INFORMATION' with fields for Account Name, Phone, Fax, Website, Parent Account, and Ticker Symbol.

Summary	
Annual Revenue	\$1,787,000,000.00
Number of Employees	4,700
Owner	* Antti Administrator

ACCOUNT INFORMATION	
Account Name	* Elisa Oyj
Phone	09 12345
Fax	---
Website	https://www.elisa.fi
Parent Account	---
Ticker Symbol	---

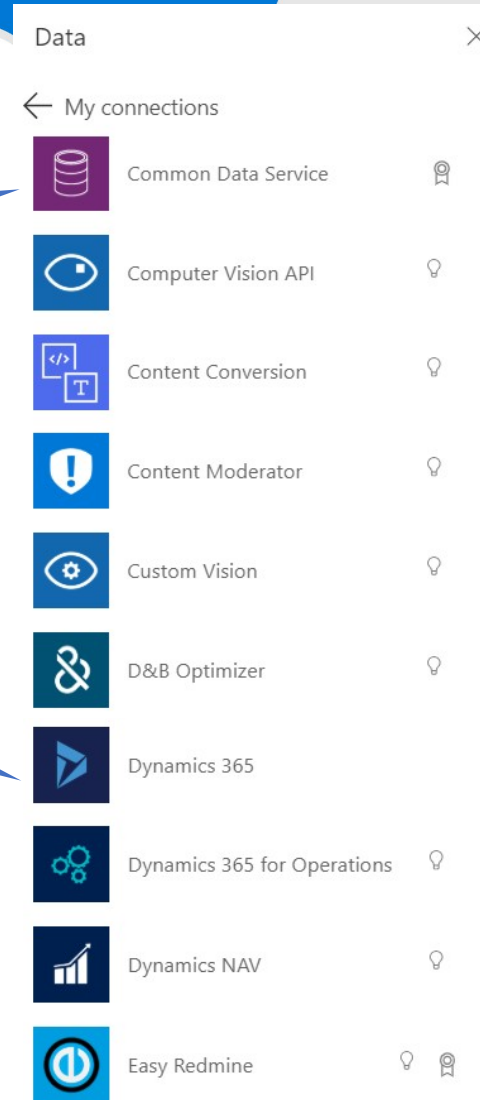
- As we know, Team Members can now only view accounts
- How about PowerApps P1 users?
- Yes! They have CRUD rights to account via canvas app, since it's not a restricted entity
- Oh, but there are plugins registered for account entity by default...
- Don't worry: plugins added by MS solutions (Activity Feeds etc.) do NOT make the entity complex

Connector types

- Standard: available to all PowerApps & Flow users
- Premium: require paid license
 - Office 365 not sufficient
- List of premium connectors accessible via Power Automate website:
 - <https://flow.microsoft.com/en-us/connectors/?filter=&category=premium>

Premium connector

Standard connector



A photograph of a person's feet wearing orange sneakers with white soles, standing on a blue metal staircase. The person is wearing black leggings. The staircase has a blue metal railing and a chain-link fence in the background. The image is overlaid with a semi-transparent blue filter.

Moving your PowerApps up to a higher Platform

CDS usage: effect on license cost per user

- Scenario:
 - 1000 users with Office 365 E3 (~€20,000/month)
 - PowerApps for Office 365 available to everyone
- License cost of PowerApps canvas apps within Office 365: €0/month
- First canvas app using CDS: ~€6/user/month
 - 100 named app users in the organization = €600/month
 - 100 unnamed potential users in the organization (all users) = €6000/month
- Price per each organization wide canvas app in use:
 - 1st app: €6000/month
 - 10th app: €600/month

Model-driven app usage: effect on license cost

- Same scenario, but now moving from CDS based canvas apps to model-driven apps
- 1000 users for N canvas apps using CDS: €6,000/month
- 1000 users for the 1st model-driven app: €34,000/month
- Price difference in moving from PowerApps P1 to P2 = 5.7x
- However, if the organization would be using Dynamics 365 Enterprise apps or plans, the marginal cost in licenses would be zero

Posso costruire la mia Sales App solo con CDS?

- Prima:
 - “Non è possibile replicare standard features di Dynamics 365 senza comprare una licenza standard”
- Oggi:
 - “Go ahead!”

Licensing Guide, May 2018:

Custom Entities

Microsoft Dynamics 365 for Team Members and higher provide the right to use custom entities. Custom entities may only be created or replicated by a partner or user licensed for full Application or Plan use. Rights to create or replicate new custom entities are not included with Dynamics 365 for Team Members and Dynamics 365 for Operations Activity licenses. Custom entities may be based on entities included in Dynamics 365 or created by a customer or partner. **If the custom entity is based on or replicates the functionality of entities included in Microsoft Dynamics 365, or if the entity links to entities included in Microsoft Dynamics 365, then users accessing the custom entity must also be licensed to access the included or replicated entity.** For example, users creating an entity that replicates the cases entity for a ticketing system would still require the user to be licensed for cases. In other words, customizations may only be performed against entities users are licensed to access.

Licensing Guide, November 2018:

Custom Entity Overview:

An entity defines information that you want to track in the form of records, which typically include properties such as company name, location, products, email, and phone.

Dynamics 365 applications and plans offer "out-of-the-box" entities to cover typical scenarios. However, there may be times when customers and partners need to create entities to store data that is specific to your organization – namely custom entities. Note, adding a field to existing standard entities does not make it a custom entity.

Custom entities may be created by a customer or partner. These custom entities can either map to existing Dynamics 365 entities (directly change Dynamics 365 entities) or they can create brand new entities.



References

- Appendix B Customer Engagement Application Use Rights

Non dimentichiamo lo Storage



Considerazioni finali

- Conoscere ogni licenza non è necessario ma guida alla scelta della giusta soluzione (soprattutto economica)
- Ci saranno di certo futuri miglioramenti e/o cambiamenti nel modello di licenza dal momento che PowerApps e Dynamics365 convergono sempre più



DIFFICULT
ROADS
LEAD TO
BEAUTIFUL
DESTINATIONS



Microsoft Academyadi

la partecipazione che ti premia

3. Training e Certificazioni





Outline

- Gli esami
- Le Certificazioni
- I percorsi

Apple has "air". Amazon has "fire".
Google has "earth"...

MICROSOFT HAS



WINDOWS

I think I need
to get certified!

Dumbass! To
the cloud...



Gli Esami

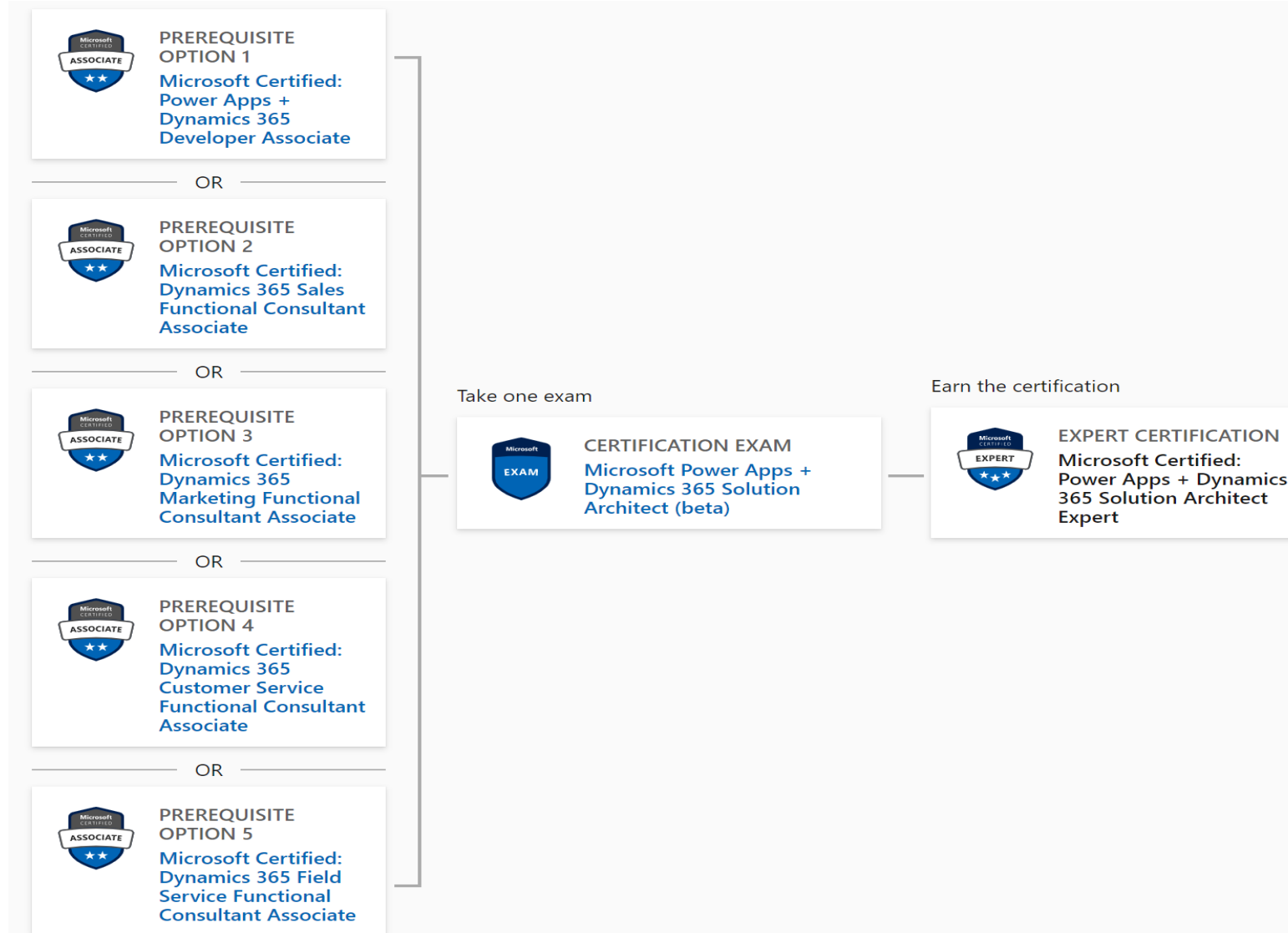
- **Exam MB-200: Microsoft Power Platform + Dynamics 365 Core**
- **Exam MB-210: Microsoft Dynamics 365 Sales**
- **Exam MB-220: Microsoft Dynamics 365 Marketing**
- **Exam MB-230: Microsoft Dynamics 365 Customer Service**
- **Exam MB-400: Microsoft Power Apps + Dynamics 365 Developer (beta)***
- **Exam MB-600: Microsoft Power Apps + Dynamics 365 Solution Architect (beta)***
- **Exam MB-901: Microsoft Dynamics 365 Fundamentals (beta)***

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- **Exam MB-220: Microsoft Dynamics 365 Marketing**
- **Exam MB-230: Microsoft Dynamics 365 Customer Service**
- **Exam MB-400: Microsoft Power Apps + Dynamics 365 Developer (beta)***
- **Exam MB-600: Microsoft Power Apps + Dynamics 365 Solution Architect (beta)***
- **Exam MB-901: Microsoft Dynamics 365 Fundamentals (beta)***

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- <https://www.microsoft.com/en-us/learning/browse-all-certifications.aspx>