The Dynamics 365 launch takes Microsoft to a new level in enabling businesses to have intelligent customer engagements—empowering them to make the most out of data to increase productivity and deliver amazing experiences to their customers.

Select a topic from the navigation pane to see the questions addressed by our Subject Matter Experts (SMEs) during the Dynamics 365 Blitz event.

If you missed the Blitz, want to see the other tracks, or simply would like to rewatch topics of interest to you, please go to the Dynamics Learning Portal (DLP). This site offers all the training and resources to help you get ready for Microsoft Dynamics 365!
Microsoft Dynamics 365 Readiness

Question: Where can I find partner readiness for Microsoft Dynamics 365?
Answer: Find Dynamics 365 Readiness for Partners: DLP Sales / DLP Technical / PartnerSource; learning plans: Dynamics Learning Portal / MPN.

Question: Where can I find field readiness for Microsoft Dynamics 365?

Question: Where do I find the current Road Map presentation for Dynamics 365?
Answer: Partner Source

Question: Is there a Microsoft Dynamics 365 website kit or resources that partners can use to promote the launch on their websites? Something that would include logos or gifs, or recommended verbiage?
Answer: Visit the Microsoft Dynamics 365 PartnerSource site to find content for readiness, event in a box, and more.

Question: What is the DLP?
Answer: The DLP is the Dynamics Learning Portal. It offers an engaging way for Microsoft Dynamics partners to consume Microsoft Dynamics E-Learning content. Click here to watch a short video overview of the new format and functionalities and here to download a .PDF version.

Question: What is the cost of accessing the Dynamics Learning Portal (DLP)?
Answer: Access to the DLP requires an annual training pack purchase of $1,000 USD unless you have a support plan already in place. The DLP has hours and hours of training available to partners.

Question: What does Business Edition mean for Dynamics NAV/GP? What is the Road Map for NAV/GP “Online”?
Answer: We continue to update the on-premises versions of NAV and GP. The partners, customers and revenue in this area are critical. Business edition is the cloud option for those that prefer it.

Question: Will PinPoint continue to exist after the launch of Dynamics 365?
Answer: There is a planned transition from Pinpoint to AppSource and Partner Center.

Question: Where can we get clarification on what is included in the new GA country localizations?
Answer: We are planning to release our product availability guide shortly.

Question: What apps will be available in Business Edition starting in November?
Answer: Financials in US and Canada.

Question: How will NAV 2017 sell On-Premises after launch of Dynamics 365? Still through DPL only?
Answer: Via DPL, just as today.

Question: How do I get ready for Dynamics 365?
Answer: Microsoft Dynamics 365 offers many new and enhanced features for business applications in the cloud by taking a new approach to business applications. Microsoft’s current CRM and ERP cloud solutions will unite into one cloud service with new purpose-built apps to help manage specific business functions, including Field Service, Sales, Operations, Marketing, Project Service Automation, and Customer Service. Learn how to position and speak to the value proposition of Microsoft Dynamics 365 by viewing the Blitz Sales and Blitz Technical events from October.
In addition to the Blitz events, you can review the NEW Microsoft Dynamics 365 Licensing and Pricing videos! You can find these videos on the Dynamics Learning Portal on the Microsoft Dynamics 365 - Licensing, Pricing, and Support topic page. In addition, you can preview the latest software before general availability by signing up for Preview.

Question: How do I obtain training for my sales and technical teams?
Answer: Encourage your sales and technical professionals to view the Blitz Sales and Blitz Technical events. Event sessions are available on the Dynamics Learning Portal. Topic pages for the New Release assets and Learning Paths for each role will also be provided. Titles/Topics will include Blitz videos, new Level 100 videos, Level 200 eLearning, Dynamics 365 Accelerate and Level 300 Workshops.

Question: Where do I go to find more information about how to grow my capabilities across the different Dynamics 365 services, understanding which programs are in place and defining my starting point?
Answer:
- For non-Dynamics partners your starting point is the Microsoft Partner Learning Paths page.
- For existing Dynamics partners looking to expand their capabilities across Dynamics 365 your starting point is the Dynamics Learning Portal.
- For Dynamic partners seeking to expand and grow their capabilities across Power BI, Power Apps, IoT and data platforms, your starting point is the Microsoft Cloud and Enterprise Partner Resources page.
- To learn more about Dynamics 365 for Financials, visit the Project Madeira Preview page.

Question: Will there be one MPN competency path for Dynamics 365?
Answer: Currently, we will continue to rely on the MPN ERP and Cloud CRM requirements to validate performance, skills and compliance. We are planning to evolve the MPN competencies for Dynamics 365. As part of that we will launch a new competency focusing on cloud business applications in the January timeframe which will allow partners to transition into the new competencies. Partners will have a minimum of six months to meet the new requirements. We are planning to activate the cloud biz app competency that will focus on Enterprise business applications.

Question: What is the functionality matrix across Dynamics AX, NAV and Dynamics 365, both enterprise and business?
Answer: Dynamics NAV is a standalone offering and there are no changes. Dynamics 365 evolves both the ERP and CRM offerings. Nothing is lost - only gained with new functionality.

Question: Is Field Service and Project Services part of CRM therefore they are included in the non-for profit pricing?
Answer: Yes.

Question: Is the storage space for CRM increasing from the initial 5GB with D365?
Answer: Dynamics 365 subscriptions will come with 10GB to start.

Question: Can you clarify how AX Financials fits in the Dynamics 365 module? Is it part of the Operations module, or still part of Financials module?
Answer: The Financials module that is part of AX today will still be available as part of Dynamics 365 for Operations.

Question: Is there no more On-premise?
Answer: On-premises will still be an option, and is called Dynamics 365 (on-premises).

Question: Will Dynamics 365 be available in the Government Cloud at the same time as CRMOL, or will there be a lag? If so, will this include all the features?
Answer: Yes, Dynamics 365 will be available in the Government Cloud. There will be differences between services. Stay tuned for release dates.

Question: After Nov 1, what can be sold outside of US and Canada?

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Answer: Dynamics 365 will be available in multiple countries in the EMEA and ASIA regions.

Question: A customer of mine has just chosen CRM online, should I tell them about upcoming changes now?
Answer: Yes, this is suggested. Dynamics 365 will be available in FY17 Q2. If they want to deploy now, they can deploy CRM and then upgrade to Dynamics 365.

Question: Will Microsoft Dynamics NAV will be replaced by Madeira very soon?
Answer: No. these are separate products and both available in the market.

Question: What about current "CRM features" in AX as marketing campaign, project, etc.?
Answer: They will continue to be there.

Question: Does Dynamics 365 include Dynamics CRM?
Answer: Yes, Dynamics 365 includes the functionality we know from Dynamics CRM and many new features which will be announced today.

Question: Will a data migration tool be available for CRM too?
Answer: We will be offering a migration service from CRM on-premises to Dynamics 365.

Question: The CRM module which was available as part of AX, will be scrapped?
Answer: It will continue to be available in the product.

Question: Can you provide any examples of the limited functionality for CRM in the Business vs Enterprise Edition of Dynamics 365?
Answer: Business edition is coming in Spring wave, details on functionality will be available closer to that release.

Partner Readiness

Question: Regarding partner incentive examples, would individual apps (sales, service, field service) apply with these percentages? Sales App -> 26% CSA to partner who helped sell the deal?
Answer: Yes. The individual sales, field service, customer service, etc. apps will get the 26% (EA) and 25% discount and 8% rebate (CSP).

Question: https://partnercenter.microsoft.com/en-us/pcv/sales shows it’s not available now. Is this site not quite live yet?
Answer: It will be available after NDA Lift.

Question: Will partners continue to sell business apps from Microsoft?
Answer: Our partners have always played a key role in helping customers get the most from their technology investments. This does not change. In addition, with Dynamics 365 partners will have even more opportunity to focus on specific customer needs, build apps to differentiate themselves in the market and take advantage of new opportunities and revenue streams.

Question: I am already a Microsoft Dynamics NAV/GP Partner - what does this mean to me?
Answer: Our Dynamics NAV, Dynamics GP, and Dynamics SL product roadmaps and support remain intact, so partners selling/supporting these products should absolutely continue doing so. Dynamics 365 for Financials provides Dynamics NAV, Dynamics GP, and Dynamics SL partners an incremental opportunity to address prospects who might be a good fit for the new offering.

Question: What happens to on-premises options today and with Dynamics 365 and what is my role as a partner?
Answer: Dynamics 365 is a cloud service so it will not be available, as is, on-premises or in private clouds. We will, however, continue to offer, innovate in, and support, our great Dynamics CRM, Dynamics AX, NAV, GP and SL
solutions for customers that want an on-premises option. We will also offer customers connectors if they want to use a hybrid of on-premises and cloud solutions and a migration path when they are ready to move to the cloud. Customers who buy Dynamics on premises products prior to the launch of Dynamics 365 can stay on-premises as long as they continue to pay Software Assurance (SA). L&SA customers who are current on SA will have the option to move to Dynamics 365 from SA at anniversary or renewal and Cloud Add-on SKUs at any time. A special offer will also be available for customers who purchase on-premises licenses prior to November 1st and later opt to move to Dynamics 365. See customer transition offers on the PartnerSource Microsoft Dynamics 365 Pricing & Licensing page. New customers seeking on premises products after the launch of Dynamics 365 can leverage the Dynamics 365 dual-use rights by licensing Dynamics 365 SKUs and deploying on-premises versions.

Question: Do we have any strategic directions for AX and CRM Only Partners? CEO's are asking for Microsoft statement of direction.
Answer: Partners that want to sell only AX or CRM can easily continue to do so by selling only the Operations SKU replacing the old AX Online SKU, or selling either the customer engagement apps (Sales, field service, customer service, etc.) or Plan 1. We will have the statement of direction for the individual apps as well as the "all up" Plans.

Question: How does Dynamics 365 help partners become more relevant to customers?
Answer: It enables a partner to become a strategic business advisor to customers, increasing the strategic importance of the partner to both the prospects and their customer base, increasing their win rate and reducing customer churn.

Question: How do partners make money? What is the partner business model?
Answer: Partners can grow their revenue streams by offering customers a richer and more complete set of services and solutions that drive ongoing customer value expansion. In addition, the Cloud Solution Provider (CSP) program is a key platform for partners to own the end-to-end customer engagement by enabling partners to directly sell, bill and support Microsoft Cloud Services for their customers.

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Question: If a customer purchases through a Cloud Solution Provider (CSP) partner, what are the support options available to them?
Answer: Support for customers who purchase though a CSP Partner will be provided through the partner. More information on the support requirements as well as an overview for the Cloud Solution Provider Program can be found here: https://mspartner.microsoft.com/en/us/Pages/solutions/cloud-reseller-overview.aspx.

Question: If I'm still building capabilities across a set of solutions, what is the best way to network or connect to the diverse set of partners in your ecosystem to deliver complete solutions to my customers?
Answer: We are investing in and rebuilding tools where we match customers to partners and partners to partners. Microsoft Referrals will be made up of tools previously known as Pinpoint, C2PC, FastTrack and many others. To search for customers and partners, access https://partnercenter.microsoft.com/.

Question: Will Microsoft make IUR/Demo environments available for Dynamics 365 as part of MPN benefits?
Answer: Yes. Microsoft’s view continues to be that IUR and Demo benefits help partners increase productivity, business value, and savings along with providing an environment to demonstrate their solutions to customers. We are currently evaluating the specific details around these benefits, which will be shared soon as part of MPN competency updates.

Question: What if the customer already has a Microsoft Premier agreement within their organization and they purchase through a CSP Partner? Can they still get direct support from Microsoft?
Answer: Yes. If your customer has a Premier agreement, the customer may use their agreement to contact Microsoft directly for support. The CSP Partner is obligated to provide support to the customer for their IP.
**Question:** What's the partner opportunity (ISVs and VARs)?
**Answer:** Dynamics solutions are built on a consistent app platform and a common data framework – which can be leveraged by our partner ecosystem to easily integrate with Dynamics 365 or independently take advantage of the rich analytics, IoT, BI or productivity solutions to build third party offerings that work with other business apps. Partners can leverage AppSource to help business users easily find and try their apps - It gives them visibility, helps generate leads and build a repeatable business so they can be successful.

**Question:** Why is Dynamics 365 better for partners than individual product value props?
**Answer:** Dynamics 365 increases the partners’ ability to sell a more complete solution to the customer, helping them to increase win rates, deal sizes, customer retention, and the resulting profitability of the partners’ business. It also allows the partner to more fully leverage all of Microsoft’s R&D innovation, investments across business applications, cloud, business productivity and analytics.

**Question:** Will partners continue to sell business apps from Microsoft?
**Answer:** Our partners have always played a key role in helping customers get the most from their technology investments. This does not change. In addition, with Dynamics 365 partners will have even more opportunity to focus on specific customer needs, build apps to differentiate themselves in the market and take advantage of new opportunities and revenue streams.

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### Application Designer

**Question:** What is the CRM Connector?
**Answer:** It is a component for logic apps.

**Question:** Will it be possible to use/import sitemap xml for the app instead of using the designer?
**Answer:** Yes, solution import remains a supported way of creating site map.

**Question:** So, the entities are developed using traditional methods and the App designer allows the entities to be packaged more easily?
**Answer:** Yes, you’re still using the regular solution model, but using the app builder you can create a separate ‘view’ on CRM using select entities, views and forms.

**Question:** Is PowerApps specific for custom mobile apps? Or is it also intended for desktop applications?
**Answer:** Desktop and mobile apps

**Question:** It looks like Power APP solution to me. Getting data out of existing CRM/AX and exposing it as CDM. Right?
**Answer:** You can use PowerApp connectors for Dynamics AX and CRM available in the fall releases to sync data between these apps and your custom PowerApp.
Business Processes and Rules

**Question:** Are there any functionality changes in Task Flows in this release? Will they be available in the web client?
**Answer:** Yes, they are available on both online and on-premises orgs now, in addition to being solution aware (import/export) and supporting security roles. Task flows are a mobile application feature.

**Question:** Do we still have the same 30/30 limitations (30 steps, 30 stages)?
**Answer:** Yes, the same limits still are in place.

**Question:** Will the new designer allow editing workflows?
**Answer:** No, not at this time.

**Question:** Will you be able to use a lookup when setting a field value? For example, on an opportunity set the price list to match the price list set on the account record?
**Answer:** The behavior of the Business Rules infrastructure has not changed, so it should work as it did before.

**Question:** What is the workflow action in the designer? Is that the traditional workflows?
**Answer:** Yes, those are on-demand real-time workflows.

**Question:** What’s the difference between a Completed Process on an Opportunity vs Close as Won or Close as Lost?
**Answer:** A process running on an Opportunity is not necessarily associated with the sales cycle. To keep the system agnostic and avoid enforcing hard-coded business rules, we do not automatically close an opportunity as a process finishes. A Customizer could, however, easily associate a workflow with the process finish event and automatically close the Opportunity if that association makes sense in their specific business context.

**Question:** Will business rule actions still not trigger JavaScript on change events on the form?
**Answer:** The behavior of the Business Rules infrastructure has not changed, so it should work as it did before.

**Question:** Will developers be able to extend the Components section with custom ones?
**Answer:** No, not at this time.

**Question:** Will the Designer enable us to move the stages around? For example, if I realize too late that I should flip the order of stages 1 and 2?
**Answer:** While the first stage is fixed, all others can be moved and reordered with simple drag-and-drop.

**Question:** What about multilingual? For things like the recommendation message?
**Answer:** Business Recommendation action works similarly to the Show Error message and supports importing translations in the same way.

**Question:** What actions can I trigger via the completed process?
**Answer:** A process that goes from Active to Finish triggers an event that can be associated with a Workflow. From there, anything supported by the Workflow infrastructure can be executed.

**Question:** What is needed to convert a current Business Process Flow to the new ones?
**Answer:** Nothing. Conversion happens on upgrade and on first load.

**Question:** If there are multiple processes running, can it default load the correct process by role? i.e. - Sales rep sees sales process, Operations sees requisition process.
**Answer:** Process order continues to be defined globally. If one role does not have access to one of the processes, it gets skipped and the next one loads. Also, the last accessed process instance is stored in the user’s MRU list and will load automatically the next time the form loads.
**Question:** Is there a support for passing parameters to the called workflows/actions?
**Answer:** No. Actions cannot be called. Workflows are parameter-less.

**Question:** Now that BPFs are entities, are they still solution aware?
**Answer:** Yes. They get exported/imported just like a regular custom entity. The XAML process definition continues to get exported.

**Question:** Does "Abandon" set any statuscode or statecode on the record?
**Answer:** Active, Abandoned and Finished are statecodes on the process instance record. Setting these can trigger an event that also sets status or any other data to the participating data record.

**Question:** How are the new Business Process Flows exposed on the client side SDK, Xrm.Page.?
**Answer:** Xrm.Page works the same way, with few exceptions that are all additive functionality-wise. On the SDK, CRUD operations can be executed against a process definition entity to apply, navigate and abandon/finish/reactivate an instance.

**Question:** How is the logic handled if the values are removed? Fields get defaulted?
**Answer:** That was the default behavior on Business Rules and continues in the next release.

**Question:** How many BPFs can I have per CRM org?
**Answer:** Default limits have not changed.

**Question:** How many BPFs can I have per entity?
**Answer:** Default limits have not changed.

**Question:** Can I have attributes from more than one entity contained in a single stage in a BPF?
**Answer:** No. We still recommend using cross-entity BPFs to access data from related entities. Task Flows support multi-entity attributes on a same page, though.

**Question:** Can task flows be determined on other criteria? Such as position of user?
**Answer:** The only criteria used to filter Task Flows is user’s security role. The customizer can always create custom JavaScript code that hides the fields of Task Flow page and display a custom message for users depending on their role, position etc. This would roughly achieve the same effect, but is a more complex solution.

**Question:** Can Task Flows be launched from the context of a single record?
**Answer:** No. Task Flows continue to be launched from the global menu in the lower left corner.

**Question:** Can the behavior in one BPF influence or trigger something in a parallel BPF on the same record?
**Answer:** Yes. Events triggered by one BPF can coordinate a parallel BPF through Workflows as long a reference to the other BPF instance is held somewhere for context. Please keep in mind that no two instances of the same BPF definition can run concurrently against the same record; process concurrency only works on different process definitions or on the same process cross-entity definition when instances path converge to the same record.

**Question:** Can we create a new record automatically on next stage of multi-entity BPF if one doesn’t exist, rather than having to click the next stage and then select new, etc...?
**Answer:** No. The process prompts for the next record before triggering the event necessary.

**Question:** Can you branch to an existing parent record?
**Answer:** No.

**Question:** Can you get a preview of the finished flow on the form while designing it?
**Answer:** No. However, Active process definitions can be edited and changes apply to the organization and the form automatically on every save.
**Question:** Are workflow custom activities available from Business Rules now?
**Answer:** No. The only new functionality introduced for Business Rules is the Business Recommendation action, in addition to the new designer.

**Client & Office Integration**

**Question:** Will Portal SharePoint libraries (formerly ADX Studio) be available inside D365 Sales (CRM)?
**Answer** It is not part of this release; we are still tracking it as part of our backlog.

**Question:** What happens to the Outlook thick client?
**Answer** Focus moving ahead is App for Outlook, but we'll continue supporting the full client of course.

**Question:** Is Exchange online also a part of Plan 1.
**Answer** Exchange Online is part of Office 365, not Dynamics 365.

**Question:** Will there be an option to route the attachment to SharePoint?
**Answer** The new 'move to SharePoint' feature in OneDrive for Business will be the workaround.

**Customer Service**

**Question:** Any timeline for customer service app for SMBs?
**Answer** No, we do not currently have one at this time.

**Question:** If you are using Customer Service (and don't need all the capabilities of Enterprise) can you use Business Edition?
**Answer** We do not have a business edition version of Customer Service at launch.

**Customer Insights**

**Question:** Does Customer Insights provide any form of machine learning?
**Answer** Not today. The Spring release will add predictive analytics capabilities.

**Question:** What is the cost of Cortana Intelligence Customer Insights? Included in Plan1 / Plan 2?
**Answer** Customer Insights has a separate licensee structure and you will need to buy it separately. Customer Insights pricing is based on the profiles and interactions modeled. All storage, compute and hosting for applications leveraging this data is provisioned and included in the pricing. Customer Insights is currently in preview and the below pricing reflects a preview discount the Price is $250/month for 100,000 Customer Profiles 1,000,000 Interactions.

**Developer Experience**

**Question:** Is registering an application in the Azure AD a requirement?
**Answer** Registering an app in Azure AD is a requirement for OAuth authentication.

**Question:** Should you use the Web API in plugins?
**Answer** No, use the context passed to your plug-ins and workflows to get an Organization Service.
**Question:** Can you highlight what is targeted for on-premises against online please?
**Answer:** Global disco is online only; other API improvements are online and on-premises.

**Question:** Will you open the POST Method for the Web API queries based on FetchXML?
**Answer:** This is available as of 8.0.

**Question:** Could we get T4 template support for the crmsvctool?
**Answer:** That is not necessary, the standard oData4 T4 generator is adequate.

**Question:** Will Dynamics 365 be deployed as SaaS or IaaS?
**Answer:** Dynamics 365 is a SaaS service.

**Question:** Are any IOT simulators are available apart from code emulators.
**Answer:** There are several IOT hardware sensors out connected with Azure and can be used with CFS.

**Question:** What will the development platform for Dynamics 365 be?
**Answer:** All the existing techniques still are available, plus now you have additional tools such as PowerApps, Flow and the Common Data Model.

**Question:** Will Dynamics 365 support Multi-Factor Authentication through O365/Azure AD?
**Answer:** Yes. It will.

**Document Recommendations**

**Question:** Will it only be available on Dynamics 365 or will CRM 2016 Online have the functionality?
**Answer:** Dynamics CRM Online is becoming part of Dynamics 365, they are not two different things.

**Question:** Will Document Recommendations work for on-premises?
**Answer:** Doc Rec is for CRM Online only.

**Question:** Will it also use SharePoint document metadata as input for recommendations?
**Answer:** Hopefully in the future.

**Question:** Would you be able to use the OOB annotation attachments?
**Answer:** OOB notes attachments are not considered.

**Question:** Will the security of Dynamics 365 be synced with SharePoint?
**Answer:** There is a 3rd Party solution provided that provides the Security sync from CRM to SharePoint.

**Question:** What extensibility is there to add additional data stores from on-premises?
**Answer:** External search results in an iFrame

**Question:** Will AzureML integration also be available in EMEA region?
**Answer:** ML is for NAM only.

**Question:** What happens when a document is removed?
**Answer:** It will be removed from the recommendations.

**Question:** Is this using Elastic Search or Azure Search?
**Answer:** Azure Search
**Question:** Is the search instant? or even the search indexing?
**Answer:** Typically, there’s a small delay of a few minutes, however it is indexed and may take a little longer in some cases.

**Question:** Can you exclude documents from recommendations?
**Answer:** No

**Question:** Any offline support for Document Recommendations?
**Answer:** No

**Question:** Can you put more than one source of data?
**Answer:** Supports SP/ODB/Groups, and external results through iFrame.

**Question:** Does AzureML read the content of the documents that’s uploaded? and will file types like PDF files be supported?
**Answer:** Contents of documents are not processed for this release. However, we would like to do that in the future. PDF file types may be surfaced if it is deemed valuable. Not every document that’s associated to the record will be surfaced - e.g. duplicates or too similar to another.

**Question:** If the document is in your personal One Drive, does it "share" the document with other users?
**Answer:** No, document permissions are respected and no document is automatically shared.

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**Dynamics 365 App for Outlook**

**Question:** For those Exchange Insight Cards, does the client also need to upgrade the Exchange to use this feature?
**Answer:** It is available for all Exchange Online users in Enterprise SKUs (all O365).

**Question:** Will it allow contact sync between CRM and outlook and is it possible to sync a subset of contacts?
**Answer:** Yes. CRM currently supports contact sync from CRM to Outlook (please see documentation). Contact tracking from Outlook to CRM will be possible manually.

**Question:** Will Outlook app track calendar appointments and tasks as well? Will the experience be the same as the email experience?
**Answer:** Yes, for appointments, but not for tasks. In the Fall release we will support emails, appointments and contact tracking but not tasks. However, we have task tracking in our roadmap.

**Question:** Will the Email Engagement be possible within Outlook via the App for Outlook? Not many users send emails directly from CRM.
**Answer:** Yes.

**Question:** Which fields of the regarding record are displayed in the summary?
**Answer:** The same as in the summary header of the record.

**Question:** Will pressing phone number create a phone call?
**Answer:** Yes, but not directly. The default dialer will be launched.

**Question:** Will off-line support be added to the App for Outlook?
**Answer:** No.
Question: Will the follow feature be available for a user to activate when an email is created from Outlook? Or is this feature only available if you're sending from CRM?
Answer: Yes. The whole purpose of this feature is to work from Outlook.

Question: What's the level of Skype integration with the CRM App for Outlook?
Answer: Currently there is no integration. Clicking on a phone number will launch the default dialer of the machine.

Question: Is there any intention to support multiple organizations per mailbox?
Answer: No. This is currently not in the roadmap.

Question: People also use pop3 accounts on Outlook. How can they use the new CRM App for Outlook if they aren't using Exchange/O365?
Answer: This is not supported, as the app is Office app and Office app is only supported in Exchange.

Question: When is thick client Outlook Add-in going away?
Answer: We don't have a date for this.

Question: Which CRM versions will the CRM App for Outlook support?
Answer: CRM App is currently supported for CRM 8.0 and 8.1 The new app will be supported from version 8.2 and on.

Question: Does the regarding entity still have to be enabled for multi entity-search?
Answer: Yes.

Question: What are specific views to appear only in the Outlook app?
Answer: There are no specific views. We use quick create view, contact and leads sub grids (recent cases and opportunities for contacts, competitors and stakeholders for leads and the summary view for the regarding record).

Question: Is the updated CRM App for Outlook also available for CRMOL? Or is it only available on the new Dynamics 365 ecosystem?
Answer: It is available for CRM Online and CRM premise version 8.2 (Fall release).

Question: Can I use e-mail templates with the CRM App for Outlook?
Answer: Yes.

Question: Can you set regarding to customer entities?
Answer: Yes.

Question: Can you customize the quick view card for the recipient? (Title, Phone Number, etc.)
Answer: No.

Question: Can a user now use both Outlook web app a well as the full fat Outlook plug in? Does Server Side Sync allow the set up for this scenario?
Answer: Technically it is possible. However, this configuration is not supported.
Editable Grids

Question: Are there any limitations on the entities editable grids can be enabled for?
Answer: In general, CRM refreshed entities support editable grid. However, there are some system used entities like Business Unit, Contract Template, Discount, Goal, KB Article etc. that aren’t supported.

Question: When a field is changed in an editable grid when does the save occur?
Answer: When focus moves to the next record, the system will auto-save changes for previous record. There is also a SAVE button on the top right of grid, where a user can click to trigger save.

Question: Will the Editable Grid be available for On-premises CRM deployments?
Answer: Yes.

Question: Any plans for on-premise Editable Grids?
Answer: Yes!

Question: Will this work with the product sub grids on opportunity, quotes and orders?
Answer: No, product sub-grid has its in-line editing and built in logic that, although not customizable, can’t be replaced by editable grid for the fall release, but user can add a new product sub-grid enable editable grid instead of replace existing one

Question: Will the editable grid honor field level security?
Answer: Yes.

Question: If a row in an editable grid is saved, do calculated/rollup fields get updated immediately?
Answer: For calculated field, once the record is saved (auto-save by move to next record or manually click save button), the calculated field will be updated, same experience as the form for rollup field, on form level, user can either manually click REFRESH button or wait for system job to update. On editable grid, we don’t have manual REFRESH button for now, the value will be updated once system job triggers.

Question: Are Editable Grids available for custom entities?
Answer: Yes.

Question: Can we specify particular columns as" read only" (e.g. status) for editable grid?
Answer: Editable Grid respect field level security, and user can also apply entity level business rule which can lock unlock field as well. If you are asking some configuration like form level attribute property, does not support that yet.

Question: Is the Editable Grid available for custom entities?
Answer: Yes.

Question: Will Editable Grids have the possibility to grab a lot of info for example of 10 different excel columns and row an excel and copy+paste into multiple fields?
Answer: Not possible at this moment.

Question: Can editable grids be restricted by column bases?
Answer: Yes, you can use Field Level Security to restrict which fields are editable.

Question: Can you still CTRL-Click to sort by multiple columns?
Answer: User can configure system view sort by two columns, then editable grid will honor that configuration, at run time, user can click any other columns to sort, but not by multiple columns.
Question: Can you toggle between editable and r/o grid in Windows Mobile Client App too?
Answer: Yes.

Question: Does the editable grid support multiselect in sub grid mode?
Answer: On web, yes.

Question: Can you also make a multiple lines of text field editable on the grid?
Answer: Yes.

Question: Can you mix the editable grid with the autocomplete functionality?
Answer: For option set, lookup type of fields within editable grid, auto-complete function is working.

Question: Can you add records in grid?
Answer: We don't have in-line creation for now, but user can leverage ribbon button or quick create feature to create a new record then keep in-line editing.

Question: Can we add a new row inline?
Answer: We don't have in-line creation for now, but user can leverage ribbon button or quick create feature to create a new record then keep in-line editing.

Question: Can we undo an edit if an entry is made by mistake?
Answer: No undo feature, but if save not automatically triggered for editing row, user click refresh button on the top right, system will wipe out the changes for that specific row.

Question: Can we bulk edit?
Answer: If this refers to select multiple rows then edit with the same value, CRM read-only grid has such capability already, for editable grid, need to edit line by line.

Question: Can you have multiple editable grids with different types of entities?
Answer: Yes, user can enable multiple editable grid for the same entity with different configurations.

Question: Can other lookup fields other than customer be edited in the grid or are all lookup fields locked?
Answer: Standard lookup (single entity lookup) able to be edited.

Question: Where is the record count button that used to be located at the bottom of the screen?
Answer: Jump bars and record count are not supported for the fall release.

Question: Is there a performance impact when loading an editable grid VS. a non-editable grid and has this been quantified?
Answer: We have been testing performance testing and it is slightly slower compare to read-only grid because we retrieve metadata for editing and checking security model etc. which is expected to be a little bit slower, however it still it met overall performance bar based on our testing.

Question: Is there a way to easily convert existing sub-grids to editable grids?
Answer: Yes, open form editor -> that sub-grid's property -> Control tab. The user can easily enable Editable Grid for specific sub grid.

Question: What about personal views, are they editable?
Answer: Yes, personal view is editable as well since Editable Grid is reusing the system view's metadata and settings (columns, sorting etc.).
**Question:** Is there a SDK to attach the editable grid events, or is the Customizing the only way?
**Answer:** Editable Grid supports some xRM APIs, which will be documented and published in developer documents.

**Question:** Is auto-save optional?
**Answer:** Auto save for the grids is not configurable.

**Question:** Does the Editable Grid honor the Views sorting configuration?
**Answer:** Yes, it will honor system view's default sorting configuration, user can sort by other columns on current view at run time.

**Question:** Can an editable grid be grouped by multiple fields?
**Answer:** No, we only support one level group by any columns on current view.

**Question:** Can you enable Editable Grids for only certain views of the data?
**Answer:** No, it's entity level, once Editable Grid enables, all system views will be editable unless user toggles to Read-Only Grid at run time.

**Question:** How do server side errors e.g. plug-in or workflows show with editable grids?
**Answer:** It depends how custom code is written, in general, Editable Grid will show an error icon for an errored cell and an error message on top of grid for both client side and server side. If preferred, they can write a plugin to show error as a pop up dialog with similar experiences as form level.

**Question:** Does the "Export to Excel" maintain the groupings?
**Answer:** There are no changes for CRM OOB export to excel feature, it follows the same format as of today

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**Email Interaction Analytics**

**Question:** Are there specific requirements on the email recipient side to make sure we can get the analytics?
**Answer:** We use industry standard pixel tracking to get the email analytics. This should work for all email recipients regardless of their email provider. For some users, they may see a prompt to allow images in the email. This is a common prompt and if your email already has images in your signature for example, then there would be no additional prompt.

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**Event Management**

**Question:** Is Event Management part of Microsoft Dynamics portal or something else?
**Answer:** Microsoft Dynamics Portals.

**Question:** Is this based on the event management solution from legacy ADX?
**Answer:** No, it is a brand-new product with its own schema. The Event Portal uses this schema and pulls data from the org with the Event management solution.

**Question:** Will this replace campaigns?
**Answer:** No, in the next release, it’s part of Campaigns (under Marketing).

**Question:** Is this a separate solution purchase?
**Answer:** Event Management is available for Private Preview this Fall.
**Question:** Would event management fall into the "marketing" app in the future?  
**Answer:** Yes.

**Question:** Is this MDM event management incorporated within CRM?  
**Answer:** No, this Event management is not the one in MDM.

**Question:** Is there a Report for Printing out attendee Badges?  
**Answer:** There is no template but this can be easily customized using Word template.

**Question:** Is this an Add-On like Portals or a natural extension of CRM?  
**Answer:** For Private Preview, it’s its own App but come Spring, it will be part of CRM through Marketing.

**Question:** When will event management be available on-premises?  
**Answer:** It is currently only available Online. There are no investments to make it available on premises.

**Question:** Is this leveraging OOB survey?  
**Answer:** Yes.

**Question:** Would you be able to add for example a twitter feed when the event starts and not allow registration while the event is running?  
**Answer:** I believe this is for Portal and while we don’t have that Twitter feature in the template, it’s possible to add it via own customization. There is no restriction on Event registration even when the Event is running.

**Question:** Would the event module work for training center scenario which runs different training programs and have 20 - 50 classes a week?  
**Answer:** The features are available, and you can customize for your training center scenario.

**Question:** Are there any apps that can handle quick attendance taking or registration?  
**Answer:** Any phone app with a QR code reader can be helpful.

**Question:** Could these events be held using Skype?  
**Answer:** Yes, but customers need to implement their own integration at this point. The current solution only provides integration with On24 (A webinar provider) out of box. There are plans to bring Skype in future releases.

**Question:** Also, what about the current event functionality under Campaigns? Not sure how all this interacts.  
**Answer:** There is no dependency on Campaigns for now, but in Spring, it will be part of Campaigns (part of Marketing).

**Question:** Is the Event Mgmt. Business Process flow just a normal BPF and therefore customizable?  
**Answer:** It is totally customizable.

**Question:** Can Event Management handle series of events?  
**Answer:** Yes.

**Question:** Are session times presented in the time zone of the venue? or the current user's time zone?  
**Answer:** Current user's time zone.

**Question:** How many Event Mgmt. portal templates are there?  
**Answer:** We currently have one.

**Question:** Is Event Management a separate Portal like Community Portal, or can I add to an existing Portal?  
**Answer:** Event Portal is part of the Event Management solution and uses the customized schema and data from the solution.
**Field Service and Resource Scheduling**

**Question:** Will we be able to connect to multiple customer Azure environments for IoT scenarios?  
**Answer:** Yes.

**Question:** What does it mean to IoT enable an entity?  
**Answer:** https://youtu.be/DY7Je8RUP4Q -- perhaps a good example of what we are doing with IoT.

**Question:** It was mentioned that we’re disabling Azure event hub for CRM data streams - will this also include MSE data which will need to stream into another Azure service?  
**Answer:** This is only related to the Connected Field Service scenario.

**Question:** Is security and privacy around IoT messages handled in CRM through the security roles?  
**Answer:** For all incoming IoT events and outgoing commands the CRM security model and roles are used. For the Azure side the Azure security is used additionally.

**Question:** Is in-the field service some financial aspects included?  
**Answer:** Yes - Field Service can integrate with Operations, but also has basic functionality built in for smaller companies.

**Question:** Does field service connect to Operations for inventory, purchase order, etc.?  
**Answer:** Yes, that is one of the features.

**Question:** Can Field Service be used for manufacturers who are doing own machine maintenance?  
**Answer:** Yes, Field Service can be used for maintenance appointments.

**Question:** Where do we find the add-in?  
**Answer:** Trial version is available through Dynamics Marketplace->AppSource.

**Question:** What about Field Service integration with Azure Machine Learning?  
**Answer:** This can be done on the Azure side of the house.

**Question:** For Field Service appointments, will scheduling notify user through Outlook?  
**Answer:** If integration with Exchange will be used, booking will appear in Outlook as appointments.

**Question:** What is RSO?  
**Answer:** RSO- Resource Schedule Optimization.

**Question:** Is there any capacity planning during resource scheduling?  
**Answer:** Yes, there is. When right click on resource booking and choosing "Show Availability".
**Question:** Is the Resco client going away?
**Answer:** No.

**Question:** How can you book resources at a location which has hours of operation and a specific time zone?
**Answer:** Time window start and end fields on Resource requirement can be used for those locations.

**Question:** Does the scheduling engine look in exchange for availability?
**Answer:** No.

**Question:** Can you schedule multiple resource constraints? Ex. instructor, room, and projector.
**Answer:** Yes.

**Question:** Can I add custom entities to scheduler?
**Answer:** Yes.

**Question:** Can I use the scheduler for things beyond field service/project service needs?
**Answer:** Yes, it can be used beyond field and project service.

**Question:** Any way to show the resources current location?
**Answer:** No, not now.

**Question:** Field Service Mobile consumed a large amount of data for normal sync of new records, is there something that we have benchmarked about the amount of data transited on mobile applications?
**Answer:** The amount of data synchronized to the mobile device will vary based around the synchronization filters and number of records a user owns. Lot of considerations and variables to weigh when determining configuring the filters.

**Question:** Will the Field Service module will replace the CRM Service module?
**Answer:** No, we will offer both Field Service and Customer Service apps.

**Question:** Is Microsoft going to launch new app for CRMOL & Field Service (in iOS AppStore) or we will keep on using existing apps?
**Answer:** The app has received many updates in this version. No new app will occur in this release.

**Question:** How can I connect Field Service to AX 2012?
**Answer:** A possible way for this would be to use Flow and the new CDM.

**Question:** Is it possible to use the mobile App to capture the license plate number of trucks when receiving products?
**Answer:** The upcoming mobile app capabilities allows to capture pictures/images.
General Dynamics 365

**Question:** Currently AX7 is only available online. Will AX7 now be Dynamics 365 Operations and available on-premises?

**Answer:** AX7 is now Dynamics 365 for Operations. This is a public cloud offering. AX2012 R3 is the current on-premises offer.

**Question:** Will we get invitations to the post-blitz learning series?

**Answer:** The post-Blitz series will give deeper dive into various topics. These are the registration links that will hold the series - internal and external.

- Internal Listing Page: https://aka.ms/postblitz-internal
- Partner Listing Page: https://aka.ms/postblitz-partner

Please note that all events should be posted for registration by end of the week. We will also communicate these links in the follow-up you receive on today's event as well as throughout various communications and Yammer.

**Question:** Will the CRM database be natively integrated to the Common Data Model or will it be running off it right away or will this happen over time categorized by apps?

**Answer:** Stay tuned for more on this, but Common Data Model will be great for integration scenarios having already defined a common schema, CRM will still be using its own data store.

**Question:** What version is Centaurus going to be called? 8.2?

**Answer:** Yes, the upcoming release for Sales, Service, Field Service and Project Service version number is planned to be 8.2.

**Question:** What is the Dynamics 365 support to create custom applications?

**Answer:** The core extensibility technologies (e.g. xRM) underlying our workloads like Sales, Field Service, Customer Service, Operations, etc. will continue to be available and Microsoft will continue to invest in and innovate in these technologies.

**Question:** Is there industry focus being put on the development of the sales app? For example, Retail industry will analyze segments more than individual "leads" or "opportunities".

**Answer:** Any industry focus will come from AppSource.

**Question:** Are we doing some enhancements in our Forecasting module? (goals/targets).

**Answer:** There are no dedicated enhancements to our forecasting capability in Dynamics 365 for Sales. The Engagement analytics capabilities of Relationship Insights will provide visual insight for accounts and opportunities.

**Question:** Will there be no more AX 7/Microsoft Dynamics AX/New Microsoft Dynamics AX name when Dynamics 365 GA announcement?

**Answer:** With the launch of Microsoft Dynamics 365 it will be the Operations business application.

**Question:** Is Financial part of AX not Navision?

**Answer:** Financial capabilities in the enterprise edition are based on Dynamics AX; Financial capabilities in the business edition will be based on Madeira.

**Question:** Any update to Dynamics Insights?

**Answer:** The InsideView solution was just updated recently. There is also a new Insights app from Verisium coming soon.

**Question:** Any news around Office 365 Groups and Dynamics 365?

**Answer:** The CRM Office Groups solution will be updated to work with Dynamics 365.

**Question:** Any idea when NAV 2017 SAAS version will be available?

**Answer:** Dynamics NAV 2017 will be released in the coming months.
**Question:** Is the upcoming Dynamics 365 release different than the upcoming Dynamics CRM Fall Release?

**Answer:** In these terms the Dynamics 365 release contain the CRM fall release (and more).

**Question:** Is Dynamics 365 new name given to AX7 or is it a another product built from scratch?

**Answer:** Dynamics 365 for Operations-new name and enhancements will come over time.

**Question:** Does Cortana Intelligence work in languages other than English?

**Answer:** Currently English only.

**Question:** Is Office 365 mandatory for integration or will desktop Outlook will also work?

**Answer:** We support hybrid scenarios.

**Question:** What will be data structure used for Dynamics 365? Is it the same as AX 7 or is it Common data model?

**Answer:** Data models for the apps stay the same. The Common Data Model is part of PowerApps. We will use the CDM for integration scenarios between our Dynamics apps.

**Question:** How do we control security roles across the different apps?

**Answer:** This is a combination of Office 365, Azure AD and the Dynamics 365 Apps.

**Question:** How about the data integration between CRM apps and AX apps like Customer as in AX (as Account Entity in CRM)?

**Answer:** Dynamics 365 will offer business process integration between traditional CRM and AX scenarios.

**Question:** Does the base Dynamics 365 with no "Apps" include Contacts and Accounts as we know them in CRM now or do you have to get the base Sales App?

**Answer:** No you are required to have at least one app.

**Question:** What does Dynamics 365 offer for Small and Midsize Businesses?

**Answer:** At launch, Dynamics 365 will include Dynamics 365 Financials for Business, a comprehensive accounting and business management solution for SMBs. That offering is currently in preview in the US and Canada today as Microsoft Project “Madeira.” In the months following general availability of Dynamics 365, we plan to rapidly expand the number of countries where Dynamics 365 for Financials is available.

**Question:** What are the development paths for “LOCALIZATION” partners? If I have NAV solution, how does get impacted with Dynamics 365?

**Answer:** At GA, the Financials capability within the Business edition will only be available in North America. Several countries in Europe will follow during FY17. Partners in these areas should continue to localize the NAV product and license based on DPL – perpetual or Subscription.

**Question:** What is the CRM/AX Product Roadmap for Common Data Model?

**Answer:** We are not migrating any of the current workloads to the Common Data Model (CDM). CDM is a key capability of PowerApps that will enable customers and partners to build more powerful application more quickly. In the future, we will replicate data from Dynamics 365 directly in CDM to make it easier to build Apps. We foresee that 3rd party ISVs can build a similar data replication to represent their key data in CDM as well.

**Question:** What about an on-premises product?

**Answer:** CRM on-premises is changing to Dynamics 365 on premises and no AX on-premises (will stay AX 2012).

**Question:** Where do I get more information on Dynamics 365 for Financials if I’m interested in reselling or building extensions?

**Answer:** If you are interested in selling you should become familiar with Project "Madeira" and contact your local Microsoft representative (US & Canada) to get more information. Visit our ISV Hub If you are an ISV and looking to build Extensions for Dynamics 365 Financials.
**Question:** What level of SLA will apply to Dynamics 365 and to Dynamics 365 Business Application for Operations? What is Microsoft’s guaranteed uptime and does Microsoft Azure services credit policy apply?

**Answer:** The service level agreements (SLAs) for the current Dynamics online product can be found here: https://www.microsoft.com/en-us/licensing/product-licensing/products.aspx?lc=1033

We expect the SLAs for Dynamics 365 products to be consistent with these agreements, but are subject to adjustment with the alignment of the services.

**Question:** Will partner and customer solutions built on xRM today have to migrate to the new Common Data Model?

**Answer:** No, the core extensibility technologies (e.g. xRM) underlying our workloads like Sales, Field Service, Customer Service, Operations, etc. will continue to be available and Microsoft will continue to invest in and innovate in these technologies to support our related Dynamics 365 workloads.

**Question:** Being an evangelist, what is the recommended hashtag? #Dynamics365 or #Dyn365?

**Answer:** It’s #MSDyn365.

**Question:** How can we advise our customers if we only have pricing on the day of release?

**Answer:** Pricing is available now and under NDA for customers to discuss renewals.

**ISV**

**Question:** Are you going to cover how ISVs can build or migrate their Dynamics solutions on Dynamics 365?

**Answer:** From an application platform point of view, we are offering enhancements and new features however the platform of "CRM" and "AX" remain intact. The exciting net new possibility for ISVs are PowerApps and Flow. Additionally, don’t forget AppSource

**Question:** Will PinPoint be deprecated?

**Answer:** PinPoint is already deprecated, only Partners, not any solutions can be found.

**Question:** How can Partners learn more about additional licensing options for ISVs?

**Answer:** Partners should contact their local subsidiary partner lead who can engage with the Cloud and Enterprise business planning and channel marketing team on next steps.

**Question:** How does ISV pricing replace, or not, some of the basic SKUs for both CRM and AX?

**Answer:** Dynamics 365 delivers a new licensing model. We recommend that you not compare, contrast old SKU’s and the new ones. They aren’t interchangeable. “Power Users” should be licensed by application or role. Everyone else should be covered with team members.

**Question:** What are the pricing structures for ISV agreements based on new packaging and licensing?

**Answer:** Please check Pricing & Licensing FAQ for detailed information.

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Question: As an existing Dynamics ISV, what guidance to you have for me in submitting my solutions for validation and can Microsoft help me promote them?
Answer: To get started Dynamics ISV can submit their solution to AppSource evaluation and validation by submitting their app profile information through AppSource – List the App section on the navigation bar. Based on the related product info, the ISV will hear back from the Microsoft validation team of the next appropriate actions throughout the validation process. Once the solution has been validated the ISV can push the solution to be published at AppSource, where Business Decisions Makers can learn more about the ISV solution and request to be contact or even gain access to trial.

Learning Path

Question: When I complete a learning path, do I get a badge?
Answer: We do not yet have the features for tracking milestones and awarding badges.

Question: Will the Learning Path have context of the application record? e.g. like where in the business process a record is?
Answer: Learning Path is not aware of the status of a record or of a business process. It is aware of page in application and elements on the pages.

Question: Is it possible to pack the Learning Path content and provide to a customer at a different tenant, or will it only work at the same tenant and its orgs?
Answer: The content can be exported as zip files and imported back on an Org in another tenant.

Question: The Learning Path also work for Web Resources on a form?
Answer: The guided task bubble can be pinned to periphery of the web resource container on a form. With trial and error, the user may check whether a bubble can be pinned on elements inside the web resource area.

Question: Can you deploy the Learning Path content using a Dynamics 365 Solution between orgs?
Answer: Learning Path content is not portable as CRM solution. Help content is tagged to the published orgs and is kept in Azure.

Question: Does Learning Path functionality allow for us to create an interactive page walk-thru?
Answer: You can make user click a button and if that leads to a different page in app, the guided task flow can resume with next steps on that new page.

Question: Can Learning Paths be driven by security role? For example: A sales rep role walks that user thru filling out specific form fields, where a Service rep role would identify different fields on that same form?
Answer: Absolutely. Different security roles can have different experience on same page.

Question: Can I define my own milestones and badges for learning paths?
Answer: We do not yet have the features for tracking milestones and awarding badges.

Question: Can I configure learning paths for my custom entities?
Answer: Yes. Custom entities, custom views, forms and dashboards can be used. Custom Learning Path content can be created tailored to these.
Question: Can I customize the system learning paths?
Answer: No. System Learning Paths are not available for customization or for 'source copy'. While creating custom Learning Paths, you’ll have to start from scratch. You may manually copy-paste content from Microsoft created Learning Paths. If you do not have custom content on a given page, Microsoft content can be configured to show up as default.

Licensing

Question: Do Team Member seats count toward the min and max seat counts?
Answer: No, Team Members are not full users and do not count towards min.

Question: For flex licensing, with light service role, does another user have-to-have full service role for it to be activated?
Answer: Yes.

Question: What is the time frame when referring to "at renewal?" In CSP, is it monthly?
Answer: At renewal is referring to the EA 3-year term.

Question: When this launches and I am on CRM Online with a renewal the following month - Do I need to move with 1-month notice?
Answer: We have transition pricing that is available for those existing CRM Online customers when they come up for renewal. This will be less than the $95 price point.

Question: Who is the SMB competitor that charges $100-150?
Answer: Our SMB prices will be in the $40-$50 range. However, our current CRMOL product is positioned as Enterprise product. We recognize the gap with SMB, but the plan for that long term is to solve with offerings tailored to SMB, at a price point and product experience that makes sense, rather than trying to solve for Enterprise and SMB in one offer.

Question: Where do I find detailed information about functionality licensed via Applications, Plans, and Team Members subscriptions?
Answer: Specific licensing details are available in the pricing and licensing recording now and in the licensing guide when it becomes available in Q4CY16. Additional technical documents will provide functionality specifics.

Question: How long that 40% will be active after a customer changed?
Answer: The 40% will be separate SKUs on the pricelist, we have not yet announced an end date.

Question: In which licensing programs, will the Dynamics 365, Enterprise edition be available?
Answer: The Dynamics 365, Enterprise edition will be available via Enterprise Agreement (EA), MPSA and the Cloud Solution Provider (CSP) Program. Plan 1 and Plan 1 applications will also be available through the Direct (MOSP) channel. Dynamics 365, Enterprise edition will not be available in Open or Select. Customers purchasing in those channels should work with their partners to purchase via the CSP Program. Guidance on moving from Open to the CSP program is available for Partners here: http://aka.ms/prepaidtocspguidance

Question: In which licensing programs, will the Dynamics 365, Business edition be available?
Answer: The Dynamics 365, Business edition will only be available in the Cloud Solution Provider (CSP) Program.

Question: Will there be pricing bundles with O365?
Answer: There will not be O365 pricing.

Question: What is the minimum number of licenses that the Customer can purchase?
Answer: Plan 1 Business Apps, Plan 1, Team Members SKUs have no minimums. Plan 2 and Operations have a 20-user minimum.
**Question:** When will the new pricing take effect?
**Answer:** 11/1.

**Question:** Do we anticipate having a tier for larger enterprises with 5000+ Plan licenses?
**Answer:** Not at this time, most of these deals go to the business desk anyway.

**Question:** What are the rules for customer eligibility of the business edition? Is it based on CRM user #'s or total employees, or other?
**Answer:** No eligibility - no mins, just a max of 300 seats.

**Question:** Will the storage for Dynamics CRM remain 5gb storage like before?
**Answer:** There are some changes coming to the storage policies for Dynamics 365. I encourage you to go to: [https://mbspartner.microsoft.com/secure/videoresources/AX/standalone/Microsoft_Dynamics_365_August_Pricing_and_Licensing_Recording_8_26_16.pptx](https://mbspartner.microsoft.com/secure/videoresources/AX/standalone/Microsoft_Dynamics_365_August_Pricing_and_Licensing_Recording_8_26_16.pptx)

**Question:** Will Flow be a separate license, and not included in Operations or other licenses?
**Answer:** PowerApps that is included in Apps/Plans also includes Flow.

**Question:** Is the Essential License goes away?
**Answer:** Yes, Essentials is going away - please review the required pricing and licensing training

**Question:** In CSP Module 25% discount is only in 1st Year or it is Year on Year?
**Answer:** Year over year.

**Question:** If you transition to plan 2 with 40% from ax OP, and your Agreement renews within the next 3 yrs., will you get same price for SKU at renewal?
**Answer:** Yes, the transition pricing will be available for 3 years, so in this scenario, the customer can renew into the transition pricing and lock in for the next 3 years (if EA).

**Question:** If a customer transits today entirely its existing CALs to Dyn365, taking advantage of the 40% discount, next month/next year he may want to extend Dynamics 365 to one of its newly acquired branches, may he still take advantage of the -40% discounted pricing?
**Answer:** The discounted transition offer is only available at the time of transition, for those users who have been paying BREP/SA. All new users must transact the full price USL. (If speaking about transition from On-Premises to Dynamics 365. If a customer transits today entirely its existing CALs to Dyn365, taking advantage of the 40% discount, next month/next year he may want to extend Dynamics 365 to one of its newly acquired branches, may he still take advantage of the -40% discounted pricing?)

**Question:** Can a customer have a mix of Plans?
**Answer:** Yes, the customer can mix and match user types as is optimal for them.

**Question:** Will EA price level will be activated on GA of pricing?
**Answer:** Yes.

**Question:** Are there guidance on customer-ready template we can use to inform customers under NDA on the new SKU/pricing. Impact on RFP and deals in Nov -Feb timeframe?
**Answer:** Price list preview became available on October 1st, you can utilize that for quoting.

**Question:** Will prices be based on user licenses or move to a consumption pricing model?
**Answer:** Dynamics 365 provides dual use rights (use of on premises product or cloud). A customer can opt to use on premises but transact via buying Dynamics 365.
**Question:** Where can I get more information about Dynamics 365 licensing?
**Answer:** Use these links for more details and assistance.

**Question:** Has the 5 min licenses been removed?
**Answer:** Yes, for Dynamics 365 licenses (Enterprise edition specifically).

**Question:** Will tiered pricing be publicly shared with customers? Or something for partners to just know about?
**Answer:** This will be shared with end customers.

**Question:** What’s the partner opportunity (ISVs and VARs)?
**Answer:** Dynamics solutions are built on a consistent app platform and a common data framework – which can be leveraged by our partner ecosystem to easily integrate with Dynamics 365 or independently take advantage of the rich analytics, IoT, BI or productivity solutions to build third party offerings that work with other business apps. Partners can leverage App Source to help business users easily find and try their apps - It gives them visibility, helps generate leads and build a repeatable business so they can be successful.

**Question:** Why is Dynamics 365 better for partners than individual product value props?
**Answer:** Dynamics 365 increases the partners’ ability to sell a more complete solution to the customer, helping them to increase win rates, deal sizes, customer retention, and the resulting profitability of the partners’ business. It also allows the partner to more fully leverage all of Microsoft’s R&D innovation, investments across business applications, cloud, business productivity and analytics.

**Question:** How does Dynamics 365 help partners become more relevant to customers?
**Answer:** It enables a partner to become a strategic business advisor to customers, increasing the strategic importance of the partner to both the prospects and their customer base, increasing their win rate and reducing customer churn.

**Question:** How do partners make money? What is the partner business model?
**Answer:** Partners have opportunity to grow their revenue streams by offering customers a richer and more complete set of services and solutions that drive ongoing customer value expansion. In addition, the Cloud Solution Provides (CSP) program is a key platform for partners to own the end-to-end customer engagement by enabling partners to directly sell, bill and support Microsoft Cloud Services for their customers.

**Question:** How does ISV pricing replace, or not, some of the basic SKUs for both CRM and AX?
**Answer:** Dynamics 365 delivers a new licensing model. We recommend that you not compare, contrast old SKU’s and the new one’s They aren’t interchangeable. “Power Users” should be licensed by application or role. Everyone else should be covered with team members.

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**Question:** In which of the licensing programs will the Dynamics 365, Enterprise edition be available?
**Answer:** The Dynamics 365, Enterprise edition will be available via Enterprise Agreement (EA), MPSA and the Cloud Solution Provider (CSP) Program. Plan 1 and Plan 1 applications will also be available through the Direct (MOSP) channel. Dynamics 365, Enterprise edition will not be available in Open or Select. Customers purchasing in those channels should work with
their partners to purchase via the CSP Program. Guidance on moving from Open to the CSP program is available for Partners here: [http://aka.ms/prepaidtocspguidance](http://aka.ms/prepaidtocspguidance)

**Question:** In which of the licensing programs will the Dynamics 365, Business edition be available?
**Answer:** The Dynamics 365, Business edition will only be available in the Cloud Solution Provider (CSP) Program.

**Question:** If a customer purchases through a Cloud Solution Provider (CSP) partner, what are the support options available to them?
**Answer:** Support for customers who purchase through a CSP Partner will be provided through the partner. More information on the support requirements as well as an overview for the Cloud Solution Provider Program can be found here.

**Question:** What if the customer already has a Microsoft Premier agreement within their organization and they purchase through a CSP Partner? Can they still get direct support from Microsoft?
**Answer:** Yes. If your customer has a Premier agreement, the customer may use their agreement to contact Microsoft directly for support. The CSP Partner is obligated to provide support to the customer for their IP.

**Question:** What does Dynamics 365 offer for Small and Midsize Businesses?
**Answer:** At launch, Dynamics 365 will include Dynamics 365 Financials for Business, a comprehensive accounting and business management solution for SMBs. That offering is currently in preview in the US and Canada today as Microsoft Project “Madeira.” In the months following general availability of Dynamics 365, we plan to rapidly expand the number of countries where Dynamics 365 for Financials is available.

**Question:** What level of SLA will apply to Dynamics 365 and to Dynamics 365 Business Application for Operations? What is Microsoft’s guaranteed uptime and does Microsoft Azure services credit policy apply?
**Answer:** The service level agreements (SLAs) for the current Dynamics online product can be found here. We expect the SLAs for Dynamics 365 products to be consistent with these agreements, but are subject to adjustment with the alignment of the services.

**Question:** What is the role of PowerApps and Microsoft Flow in our Dynamics 365 extensibility strategy?
**Answer:** Partners and customers should use Power BI, PowerApps, Microsoft Flow and Microsoft Azure to create composite business applications which span the data and processes of Dynamics 365, Office 365 and, via a large and growing family of connectors, third-party databases and applications. For composite application and business process orchestration spanning these systems, this is the preferred platform. Each individual Dynamics 365 app will also permit native extensibility and extension. Users extending the functionality of Dynamics 365 for Sales may choose to use its native platform (xRM), those extending or building atop the functionality of Dynamics 365 for Operations may use its native platform (the Dynamics AX platform).

**Question:** Will Microsoft make IUR/Demo environments available for Dynamics 365 as part of MPN benefits?
**Answer:** Yes. Microsoft’s view continues to be that IUR and Demo benefits help partners increase productivity, business value, and savings along with providing an environment to demonstrate their solutions to customers. We are currently evaluating the specific details around these benefits, which will be shared soon as part of MPN competency updates.

**Question:** How do I obtain training for my sales and technical teams?
**Answer:** Encourage your sales and technical professionals to view the Blitz Sales and Blitz Technical events. Event sessions will be available on the Dynamics Learning Portal on October 10th. Topic pages for the New Release assets and Learning Paths for each role will also be provided. Titles/Topics will include Blitz videos, new Level 100 videos, Level 200 eLearning, Dynamics 365 Accelerate and Level 300 Workshops.

**Question:** Are NAV and AX included in Dynamics 365? Can we buy NAV or AX parts separately?
**Answer:** Yes, AX in the Enterprise Edition and Madeira in the business edition. You can buy apps separately or combined in plans.
**Question:** Are all modules in Dynamics AX available, as with AX7? If yes, what will happen to AX7?
**Answer:** Yes, all modules that exist today in Dynamics AX will be a part of Dynamics 365 for Operations.

**Question:** Any upgrade path from AX on-premises to Dynamics 365 ops?
**Answer:** Existing on-premises customers can use either a Cloud add-on or From SA SKU to move to Dynamics 365. Customers of record as of October 31, 2016 are eligible to transition via a discounted rate of at least 40% off the Cloud add-on and From SA SKU. Eligible customers have until October 31, 2019 to transition to the cloud via these discounted offers. The 40% discount is applicable for the remainder of their agreement. For more details please check out term sheets on PartnerSource: [https://mbs.microsoft.com/partnersource/northamerica/pricing-ordering/licensing-policies/Dyn365PricingandLicensing](https://mbs.microsoft.com/partnersource/northamerica/pricing-ordering/licensing-policies/Dyn365PricingandLicensing).

**Question:** Any special offer to migrate SMB CRM on-premises customers to online?

**Question:** Any NGO (Charity) Price offer for Dynamics 365?
**Answer:** Charity pricing is available on Web-Direct for Plan 1 and the Plan 1 Business Apps. It is not available for Operations or Plan 2. Discount will be 75% from list for user licenses, and 30% from list for add-ons.

**Question:** After November 1st, how can we sell AX 2012 OP?
**Answer:** All on-premises licenses will continue to be sold.

**Question:** What is the transition about Licensing On-Premises AX 2009 and AX 2012 to Dynamics 365?
**Answer:** We have two options. Cloud Add-on and "From SA" SKU.

**Question:** Is PowerBI licensing included or not included in the Dynamics 365?
**Answer:** Not included, you have to buy the licensing separately.

**Question:** What licensing will be used for 'Not for Profit' organizations wanting to take advantage of Dynamics 365?
**Answer:** You will follow the current lifecycle procedure. Upgrade on sandbox and test prior to moving production to D365.

**Question:** If someone gets Dynamics 365 will dual use rights give access to old versions of Dynamics CRM On-premise?
**Answer:** All dual user rights are for the same version.

**Question:** Is Microsoft Dynamics 365 for Operations to be licensed differently to Dynamics AX?
**Answer:** Microsoft Dynamics for Operations is the Dynamics 365 SKU that includes the functionality in AX7 Enterprise. The functionality from Self-Serve and Task licenses will be licensed as Team Members.

**Question:** What happens to existing CRM online customers? Do they get access to Dynamics 365?
**Answer:** Yes.

**Question:** If customers are currently running AX 2009 or AX 2012 that doesn’t reach the 20 users required for Dynamics 365 Enterprise, what are the recommended options for customers that want to move to the Cloud? 20 users are still the minimum number of users for Dynamics 365 for Operations.
**Answer:** No, they cannot, they must add new users under the appropriate Dynamics 365 SKUs, which can co-exist on their current CRMOL tenant. At renewal time, they must move over to Dynamics 365 SKUs.
**Question:** What features are going to be available on the Business Edition Apps?

**Answer:** This info is not yet available.

**Question:** How are migrations from Enterprise Edition to Business Edition and vice-versa going to work? If a customer accepts the $40 offer to get the Enterprise Edition Sales App now, will they be able to move to the Business Edition when available and add the other Business Edition Apps?

**Answer:** This information is not yet available.

**Question:** What happens when a Business Edition instance reaches more than 300 seats? R

**Answer:** They would need to move to the enterprise edition.

**Question:** Will the customers that migrate on the transition price pay the full price on the next renewal after this first year?

**Answer:** Transition SKUs are available until Oct 31, 2019. If when the customer renews and these SKUs are still available, they may add them for another term.

**Question:** Will customers that migrate on the transition price and have new seats added during this year get the same transition price or the full price?

**Answer:** See the specific transition term sheets on the Infopedia hub because this may vary.

**Question:** Can you confirm that customers can purchase up to 25 seats of Enterprise Sales at the special $40 / month, and buy Enterprise Customer Service, Field Service or Project Service users at the standard price?

**Answer:** Yes

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**Marketing**

**Question:** What are Microsoft and Adobe announcing?

**Answer:** Adobe and Microsoft Corp. announced a strategic partnership to help businesses transform their customer engagement. Together, the two companies will enable businesses to dramatically strengthen their brands with integrated solutions delivered from Microsoft Azure, including the Adobe Marketing Cloud, Microsoft Dynamics 365. Adobe will make Microsoft Azure its preferred cloud platform for the Adobe Marketing Cloud, the Adobe Creative Cloud and Adobe Document Cloud. Microsoft will make Adobe Marketing Cloud its preferred marketing service for Dynamics 365 Enterprise edition, Microsoft’s next generation of intelligent business apps for the enterprise.

**Question:** How will Microsoft benefit from this partnership?

**Answer:** By making the Adobe Marketing Cloud its marketing service for Dynamics 365 Enterprise edition, Microsoft will give enterprise customers a powerful, comprehensive marketing solution.

**Question:** How will Adobe benefit from this partnership?

**Answer:** By bringing Marketing, Creative and Document Cloud to Azure, Adobe will be able to more efficiently and reliably deliver its services to customers from a trusted, enterprise-grade, global platform.

**Question:** When will Adobe’s, services move to Azure? When will Adobe Marketing Cloud be offered with Dynamics 365?

**Answer:** Work is already underway. We will share more details in the coming months.

**Question:** Microsoft and Adobe announced a partnership last year. How is this different?

**Answer:** Adobe and Microsoft announced a partnership last year to integrate Adobe Marketing Cloud Solutions with Microsoft Dynamics CRM. Today’s news deepens the partnership by bringing the Adobe Marketing Cloud to the Microsoft Azure cloud platform and by making Adobe Marketing Cloud the preferred marketing service for Dynamics 365 Enterprise edition. Both companies are making deep investments in product integration and go to market.
Question: Is this an exclusive deal? What does “preferred” mean?

Answer: This is not an exclusive deal. Adobe will make Azure its preferred, strategic cloud platform for its cloud services. Microsoft will make Adobe Marketing Cloud its preferred marketing service for Dynamics 365 Enterprise edition, Microsoft’s next generation of intelligent business apps for the enterprise.

Question: Does this mean Adobe plans to migrate off AWS?

Answer: Azure will be Adobe’s preferred, strategic cloud platform and will deliver Adobe Marketing Cloud and other cloud services on Azure.

Question: How much will these solutions cost? How will they be sold?

Answer: Microsoft and Adobe sellers will co-sell Adobe Marketing Cloud. Both parties will close deals for their own products on their own paper. Pricing information will be available at a later date.

Question: Will Dynamics Marketing functionalities be included in other Plan 1 Apps?

Answer: Microsoft Dynamics Marketing solution will be removed from the pricelist for new customers per November 1, 2016, and will not be included in Dynamics 365.

Question: When will details of Adobe Marketing be announced?

Answer: Details of co-sell including compensation are being defined and will become available early H2. Deals will be closed on Adobe paper.

Question: CRM Online Enterprise customers are offered the option to upgrade to Dynamics 365 Enterprise Plan 1. That plan does not include Dynamics Marketing. How will a CRM Online Enterprise customer who’s moving to the Dynamics 365 Enterprise Plan 1 continue to have access to Dynamics Marketing rights?

Answer: The CRM Online Enterprise offer will be retired on November 1st, 2016. On renewal, these customers will need to select from the Dynamics 365 Enterprise Plan 1 or Plan 1 business apps for their previously CRM-based functionality. Additionally, those users will need to separately obtain the appropriate Dynamics Marketing offer to get other CRM Online Enterprise use rights: Parature Enterprise, Microsoft Dynamics Marketing Enterprise or Microsoft Dynamics Marketing Sales Collaboration, depending on their requirement.

Question: How can Microsoft Dynamics Marketing customers transition to the new Marketing app?

Answer: The new Marketing app will include features and benefits that Dynamics Marketing customers will find very appealing including functionality to model and manage customer journeys across marketing and sales, lead scoring and management across marketing and sales, and sharing the same Dynamics 365 platform as the Sales app. Transition from Dynamics Marketing to the new Marketing app will however require effort and should be considered a re-implementation from a technical viewpoint. Migration tools will be available but will be limited in scope and will focus on migrating master data including customer, contact and lists but will not include campaigns and email templates. Migration options for Dynamics Marketing customer using Marketing Resource Management functionality are limited. The new Marketing app will not include equivalent Marketing Resource Management functionality. Customers should evaluate if Dynamics 365 for Project Service Automation, Dynamics 365 for Finance, and third party solutions to meet their MRM requirements.

Question: How long can current customers continue to use Microsoft Dynamics Marketing?

Answer: Microsoft Dynamics Marketing will no longer be sold to new customers starting November 1, 2016. Existing customers in an Enterprise agreement or in MOSP (web-direct) will be able to renew their existing agreements through June 30, 2017 (EA agreements are for 3 years, Web-Direct agreements are for 1 year). Existing customers will also be able to continue to use Microsoft Dynamics Marketing for the duration of their agreement. The goal of allowing customers to renew their agreements is to allow time for migration of their current solution to the new Marketing solution. Customers will be able to renew by working through their SSP, or by contacting support. Customers can continue to add seats and buy Dynamics Marketing add-on capabilities such as additional email messages or data storage for the duration of their agreement.
**Question:** What functionality will be included in the Spring 2017 release of the new Marketing app for Dynamics 365?
**Answer:** The Marketing app in the Spring 2017 Dynamics 365 will include email marketing, customer journey management, event management, landing pages, and lead management and scoring.

**Question:** What Marketing solution can we sell between November 1 and the new Marketing app in Spring 2017?
**Answer:** Microsoft recommends customers to consider their Dynamics 365 deployment across all the Dynamics apps and create an implementation plan based on the availability of the Marketing app for Dynamics 365 in Spring 2017. Customers who need to implement a marketing solution before Spring 2017 are encouraged to evaluate partner solutions.

**Question:** What will be announced about Microsoft Dynamics Marketing?
**Answer:** Microsoft will make the following announcements related to Microsoft Dynamics Marketing:
1. Microsoft Dynamics Marketing solution will be removed from the pricelist for new customers per November 1, 2016, and will not be included in Dynamics 365
2. Microsoft will be releasing a new Dynamics 365 Marketing app in the Spring of 2017
3. Microsoft Dynamics Marketing functionality will transition to the Dynamics 365 Marketing app and will be discontinued as a separate product
4. Microsoft will continue to support Microsoft Dynamics Marketing for existing customers for the duration of their agreements including the release of bug fixes

**Question:** When can Microsoft Dynamics Marketing customers transition to the new Marketing app?
**Answer:** Microsoft Dynamics Marketing customers should evaluate the new Marketing app in Spring 2017 and plan their transition in the following 6 to 12 months.

**Question:** When will we make public announcements about Marketing solutions in Dynamics 365?
**Answer:** Customer facing announcements will be aligned with the Dynamics 365 moment and the Autumn wave product release.

**Question:** Will the new Marketing app integrate to Dynamics 365 for Sales, Enterprise edition?
**Answer:** The new Marketing app will be built on the same platform as Dynamics 365 for Sales, Enterprise edition and will be integrated.

**Question:** Will the pricing for the new Marketing app in Spring 2017 be different than the existing Dynamics Marketing solution?
**Answer:** Pricing of the new Marketing app will be announced in Spring 2017.

**Question:** Will Microsoft continue to support Microsoft Dynamics Marketing?
**Answer:** Microsoft will continue to deliver product releases including break fixes and bug fixes. New releases will no longer include new features.

**Question:** What is the direction for Microsoft Dynamics Marketing?
**Answer:** Microsoft Dynamics Marketing solution will be removed from the pricelist for new customers per November 1, 2016, and will not be included in Dynamics 365. Microsoft will be releasing a new Marketing app in the Spring of 2017 for SMB (Business edition). Microsoft Dynamics Marketing functionality will transition to the Dynamics 365 Marketing app and will be discontinued as a separate product.

**Question:** What if I have a current Dynamics Marketing deal in the pipeline?
**Answer:** Dynamics Marketing will continue to be available until November 1st. Existing customers will have the opportunity to migrate from Dynamics Marketing to the new SMB app after the product release in Spring 2017. For Enterprise customers, you should consider if Adobe can be the right solution.
**Question:** What functionality will be included in the Spring 2017 SMB release of the new Marketing app for Dynamics 365, Business edition?

**Answer:** The Marketing app in the Spring 2017 Dynamics 365 will include email marketing, customer journey management, event management, landing pages, and lead management and scoring.

**Question:** How long can current customers continue to use Microsoft Dynamics Marketing?

**Answer:** Microsoft Dynamics Marketing will no longer be sold to new customers starting November 1, 2016. Existing customers in an Enterprise agreement or in MOSP (web-direct) will be able to renew their existing agreements through June 30, 2017 (EA agreements are for 3 years, Direct customers for 1 year). Microsoft Dynamics Product support will continue through the end of that renewed subscription period. Microsoft will continue to deliver product releases including break fixes and bug fixes. New releases will no longer include new features.

**Question:** What does this mean for customers?

**Answer:** The outcomes of this strategic partnership will help enterprise companies around the world and across industries deliver compelling, personalized experiences through every phase of their customer relationships. Companies will be able to better harness their data for critical insights and predictions, connect customer touchpoints across their business, bolster relationships, and drive brand loyalty and growth.

**Question:** What are the companies doing to create a standardized semantic data model for digital marketing?

**Answer:** Building on both companies’ strong track record in data science and machine learning, Adobe and Microsoft will collaborate to create an industry standard semantic data model (SDM) for understanding and driving real-time customer engagement. This SDM will be an industry first; it will universally standardize how data is structured and vastly speed up gaining insights from massive amounts of data.

## Mobile

**Question:** When will we support the certificate based authentication for mobile of Dynamics 365?

**Answer:** This is available with the upcoming release.

**Question:** What will the Mobile App look like if we sell for example simply the Sales App for Dynamics 365, which doesn't include Service. Will the form be different? Will there be blank spaces where the service info such as cases is displayed?

**Answer:** The mobile app will continue to show just what the user has access to, based on Security Roles and entities that are enabled for mobile access.

**Question:** Does the Dynamics 365 app for Outlook also work with Outlook Web Access?

**Answer:** Yes

**Question:** Any plan to connect the mobile app with OfficeLens app?

**Answer:** Not in the upcoming release, but it would be great to add to the ideas site - [http://crmideas.dynamics.com/ideas/dynamics-crm](http://crmideas.dynamics.com/ideas/dynamics-crm)

**Question:** Are there any push notification support for mobile?

**Answer:** Not currently.

**Question:** Are we going to have a pre-built user interface with cards? Or we will need to use Power Apps to present the data?

**Answer:** These cards are all pre-built.
**Question:** For Dynamics 365 Mobile support- will it be available for all devices/all OS?
**Answer:** It will be available for Windows, Android and IOS.

**Question:** Any restrictions on the Editable Grids for mobile?
**Answer:** None specifically related to mobile.

**Question:** If I am on a limited data mobile plan, I don't want to use data to view photos, can you control what is displayed?
**Answer:** There no differences in display based on connection type.

**Question:** Is there support business rules that occur on the form?
**Answer:** Yes, Business Rules are fully supported by mobile.

**Question:** Does the barcode scanner also work on any custom entity that has this control specified on the field?
**Answer:** Yes, it is an allowed custom control on all text and numeric fields on both system and custom entities.

**Question:** How will the current mobile forms that have been configured be impacted in this release with the stacked components?
**Answer:** All items in the same section will be stacked so if you don't need stacking to put them in different sections.

**Question:** Is the mobile app still using the HTML file storage?
**Answer:** Yes, local device storage is used by the application.

**Question:** Does this release allow multiple forms to be switched on mobile?
**Answer:** No changes in this release, use the form set order to make sure the desired form is shown on mobile.

**Question:** Is there a way to limit storage used by uploading images from the mobile application?
**Answer:** Attachment sizes can be limited on the server, but it is not specific to only limiting the mobile application.

**Question:** Will background sync apply to published changes to solutions also?
**Answer:** Background sync only handles data. You can optimize the impact of solution changes by using Prepare Client button in the Solutions area after publishing.

**Question:** Will camera support also link to entity images or just note attached file format?
**Answer:** Yes, you can use the camera or upload an image from the local device to change the entity image.

**Question:** Are there any improvements in performance in Mobility when we have forms with a lot of fields?
**Answer:** There have been a few performance improvements in Mobility. If there are specific issues, they can be addressed as part of the preview program.

**Question:** Is the Editable Grid also available in the Web UI?
**Answer:** Yes.

**Question:** Can web resources also be used in the mobile app?
**Answer:** Yes, this is available in Tablet 2016.1.

**Question:** Will the tablet app remain?
**Answer:** Yes, the tablet and phone applications will still be available for iOS, Android and Windows.

**Question:** While on mobile, do you have access to customer and sales data offline?
**Answer:** Yes, Offline data access is available on Mobile. We will detail more mobile enhancements later.
**Question:** How about Mobile offline capability?
**Answer:** Mobile offline can be enabled, and new in this release will be the ability to do background synchronization.

**Question:** If the mobile applications support all three platforms plus the web client, how about minimum specification to three platforms?
**Answer:** As we have always done in the past we will supply details of this information on tech net.

**Question:** Is the mobile device integrated with Intune and MDM?
**Answer:** Yes, there is MDM support for both Intune and Good for Dynamics.

**Question:** Is there any data encryption feature in the new release of mobile app for Dynamics 365?
**Answer:** Data on the phones can be secured with any commercially available solution for phones. Microsoft phones can be secured with BitLocker, iPhones are encrypted by default, Android can be enabled via settings, etc.

**Operations**

**Question:** Will there be any updated functionalities in Operations compared to the new AX?
**Answer:** We will have it shortly; we are going to release a roadmap tool within the next couple of weeks.

**Question:** When will HR module ready to sell standalone in Dynamics 365?
**Answer:** We have no standalone HR offer at this time.

**Question:** What does seamless mean? What changes compared to available CRM - AX Integration? No connector needed anymore?
**Answer:** Microsoft will introduce first party integration scenarios - more to come on the scenarios that will be shipped. Custom or third party application integration scenarios will continue to be supported by ISV solutions or via custom code.

**Question:** Do we have Roadmap of vertical AX solutions such as Dynamics AX for Retail?
**Answer:** Not yet. All the AX functionality is part of Dynamics 365 for Operations at this point.

**Question:** What is Microsoft Dynamics 365 for Operations?
**Answer:** It is our awesome new online ERP service that is part of the enterprise edition (formerly known as Dynamics AX).

**Question:** Is Flow integrated with Operations in Dynamics 365?
**Answer:** Yes, it is.

**Question:** What are the mobile apps available for "Operations?"
**Answer:** Dynamics 365 for Operations will have the option to "publish" specific business processes (e.g. Create sales orders) and through a mobile app we will make available at the time of the release users will be able to access the published process.
**Parature**

**Question:** Parature - EOL?
**Answer:** Microsoft will continue to deliver product releases including break fixes and bug fixes. New releases will no longer include new features. (Around critical and security related issues). Existing customers will be able to use their Parature service through the end of their agreement. They will also be able to add additional quantities of any user SKU, such as Parature Enterprise, or add-on capabilities such as additional departments or additional storage, for the length of their agreement, if that SKU is already on their subscription as of 11/1/2016. Existing customers will also have the option to renew their Parature subscription via Enterprise Agreement or Web-Direct through an exception process until June 30, 2017.

**Question:** What are my purchase options for Parature?
**Answer:** On November 1, 2016, Parature, as well as Microsoft Dynamics CRM Online Enterprise which included Parature, will no longer be available for sale for new customers. It will not appear on any price lists.

**Question:** When can Parature customers transition to the new Dynamics 365 for Customer Service?
**Answer:** Dynamics 365 for Customer Service will be available on November 1, 2016 via Enterprise Agreement, MPSA, the Cloud Solution Provider program (CSP) and via Web-Direct (MOSP). From a licensing perspective, customers may add this service to their agreement at any time, once they are technically ready. However, it would be advantageous to time a transition for one’s anniversary or renewal date to avoid the need to continue to maintain Parature licenses in parallel. Licenses may only be cancelled at anniversary or renewal. The transition experience will be identical to purchasing a new service, as there is no automated transition to move from Parature to Dynamics 365 for Customer Service, Enterprise edition, or Dynamics 365 Enterprise Plan 1 licenses.

**Question:** Will there be incentives (e.g. licensing transition credit and/or other) to transition to Customer Service before expiration of their Parature subscription?
**Answer:** There is no incentive to cancel Parature service mid-subscription. Customers concerned about maintaining Customer Service and Parature subscriptions can wait to transition until their anniversary.

**Question:** Will the pricing for the new Customer Service in Spring 2017 be different than the existing Parature solution?
**Answer:** Pricing of the new Customer Service will be announced in Spring 2017.

**Question:** Will Microsoft continue to support Parature?
**Answer:** Microsoft will continue to deliver product releases including break fixes and bug fixes. New releases will no longer include new features. (Around critical and security related issues).

**Question:** How long can current customers continue to use Parature?
**Answer:** Existing customers will be able to use their Parature service through the end of their agreement. They will also be able to add additional quantities of any user SKU, such as Parature Enterprise, or add-on capabilities such as additional departments or additional storage, for the length of their agreement, as long as that SKU is already on their subscription as of 11/1/2016. Existing customers will also have the option to renew their Parature subscription via Enterprise Agreement or Web-Direct through an exception process until June 30, 2017. Existing prices on Parature Enterprise or Parature add-ons will not change from current pricing. Microsoft Dynamics Product support will continue through the end of that renewed subscription period.

CRM Online Enterprise customers have the option to upgrade to Dynamics 365 Enterprise Plan 1, which does not include Parature.

**Question:** How will a CRM Online Enterprise customer who’s moving to the Dynamics 365 Enterprise Plan 1 continue to have access to Parature Enterprise rights?
**Answer:** The CRM Online Enterprise offer will be retired on November 1st, 2016. After this point, on renewal, these customers will need to select from the Dynamics 365 Enterprise Plan 1 or Plan 1 business apps for their previously CRM-
based functionality. Additionally, those users will need to separately obtain the Parature Enterprise license through the renewal process.

**Question:** What is the impact to my price when I transition from Parature to Dynamics 365?
**Answer:** Moving from Parature Enterprise to Dynamics 365 for Customer Service will result in a price decrease from $125 per user for Parature Enterprise, to $95 to Dynamics 365 for Customer Service. In addition to the lower per-user price, the Dynamics 365 for Customer Service comes with a more generous initial database storage allocation at 10GB per tenant, as well as a lower price to add additional storage at $5 per GB for Dynamics 365 vs. $20 per GB for additional Parature file storage. Both services come with the customer-facing portal included and a similar charge for page views.

**Question:** How can Parature customers transition to Dynamics 365 for Customer Service app?
**Answer:** The new Customer Service app will include features and benefits that Parature customers will find very appealing including functionality to model and manage customer journeys across marketing and sales, lead scoring and management across marketing and sales, and sharing the same Dynamics 365 platform as the Sales app. Transition from Parature, from Microsoft to the new Customer Service will however require effort and should be considered a re-implementation from a technical viewpoint. Migration tools will be available but will be limited in scope and will focus on migrating master data including customer, contact and lists but will not include campaigns and email templates. Migration options for Dynamics Marketing customer using Marketing Resource Management functionality are limited. The new Customer Service will not include equivalent Marketing Resource Management functionality. Customers should evaluate if Dynamics 365 for Project Service Automation, Dynamics 365 for Finance, and third party solutions to meet their MRM requirements.

**Platform**

**Question:** With Common Data Model and light users, is it fair to assume that xRM will go away? What is our equivalent of Force.com?
**Answer:** The core extensibility technologies (e.g., xRM) underlying our workloads like Sales, Field Service, Customer Service, Operations, etc. will continue to be available. And Microsoft will continue to invest in and innovate in these technologies to support our related Dynamics 365 workloads.

**Question:** What should partner’s use to build solutions today?
**Answer:** Partners should use Power BI, PowerApps, Microsoft Flow and Microsoft Azure to create composite business applications which span the data and processes of Dynamics 365, Office 365 and, via a large and growing family of connectors, third-party databases and applications. For composite application and business process orchestration spanning these systems, this is the preferred platform. Each individual Dynamics 365 app will also permit native extensibility and extension. Users extending the functionality of Dynamics 365 for Sales may choose to use its native platform (XRM), those extending or building atop the functionality of Dynamics 365 for Operations may use its native platform (the Dynamics AX platform).

**Question:** How does App Designer relate to Powerapps? When do you use which tool?
**Answer:** App Designer is used if CRM Only, Power App is used if other back ends are required.

**Question:** How are sitemap conflicts handled with multiple installed apps?
**Answer:** Each app has its own sitemap.

**Question:** Can an ISV develop an App and distribute to clients? And send them a Solution that imports their App into another Org?
**Answer:** The apps are basically solutions that can be imported and exported.
**Question:** Can these apps be deployed to the mobile?
**Answer:** The app designer experience is not supported for tablets and mobile form factors.

**Question:** Can you please provide some information on the migration from Salesforce to Dynamics CRM online?
**Answer:** The SFDC to CRM is also available as a service in LCS. you can reach out to me / Simon Matthews for more details.

**Question:** Will you be able to only migrate selected entities to only or should it be a complete database restore?
**Answer:** The current version supports exporting of selective entities and migrate them over.

**Question:** Is there any information about security, and who will have access and what access to the database while busy with the upgrade?
**Answer:** The access would be based on the credentials with which the customer signs up which typically would be their onmicrosoft.com sign in and all the upgrade process happens in the customer’s Azure subscription.

**Question:** When selected, entities are migrated does it migrate the Audit history for the records as well?
**Answer:** No, it does not migrate the audit history.

**Question:** Can this be used if we only want to migrate data...not the application? And does it handle attachments, activities (parties, attachments, etc.) and inactive AD users?
**Answer:** For migrating only, the data you can go through the Data Loader rather than this service.

**Question:** Can you point LCS to existing azure servers?
**Answer:** Yes, you can point LCS to existing Azure servers.

**Question:** What about on-premises SSRS reports?
**Answer:** The validation service catches any of the ssrs reports. our recommendation is to convert them into fetchxml based reports.

**Question:** Any plans to release on-premises version of Dynamics AX?
**Answer:** For customers who have an immediate need for On-Premises solution Dynamics AX2012 R3 is the recommended solution. The updated version of AX or Dynamics 365 for Operations is currently only available for the cloud. The On-premises version of 'AX7' has a dependency on the Azure Stack. The Azure Stack is currently planned to be released in mid-2017. At this time, we do not have a timeframe for On-premises for 'AX 7'.

**Question:** Is there data sync function between Dynamics 365 Sales (CRMOL) & CDM?
**Answer:** Tech data sync is set by how often you sent the refresh. It is not instant, but you can select a very short time, in some cases < 5 seconds, thus the reason we say info is "near real time."

**Question:** Is User Interface for Dynamics 365 based on HTML 5 just as Dynamics 365 for operations?
**Answer:** Yes, HTML 5.

**Question:** Will the limit of fetchxml will be addressed? And how to access SQL Server with tools like Management studio?
**Answer:** There will be replication to Azure SQL to support more advanced enterprise reporting.

**Question:** Does Dynamics 365 business also include XRM as we know it today?
**Answer:** Yes.

**Question:** What about details about the CRM-integration with CDM and which entities are synced with the Operations-app?
**Answer:** We will start with the prospect to cash scenario syncing data including accounts, order, products.

**Question:** Is the validation done on plugins and on JavaScript?
**Answer:** Yes, both plugins and JavaScript.
**Question:** So, you would be able to go from on-premises to online but will you be able to go from online to on-premises?
**Answer:** For online to on premises you can work with the DSE to get a copy of the database and restore it locally in On Premises.

**Question:** This will be for Dynamics to Dynamics only? No Salesforce, Sugar, etc.
**Answer:** There is also a Migration service for moving customers from Salesforce to Dynamics CRM Online.

**Question:** Is there a limit on the database size that can be uploaded?
**Answer:** Currently we support up to 1 TB.

**Question:** If a CRM on-premises org complies to the CRM online validation, how long should this process take? Can a customer go from on-premises to online in a few hours (taking the database size in account, of course)?
**Answer:** Currently the service supports moving the data to CRM online through the Dataloader. The duration would depend on how big the database is and assuming all the checks have passed and the database is in a supported state.

**Question:** How do customers and partners access Dynamics 365 data for usage in PowerApps and Microsoft Flow?
**Answer:** PowerApps and Flow can connect to a wide variety of cloud data sources to create composite business apps and workflows. Access your Dynamics 365 data for usage in PowerApps and Flow through a common set of connectors. Connector for Dynamics 365 is available today and the connector for Dynamics 365 for Operations is planned to be available at GA of Dynamics 365.

**Question:** Will partner and customer solutions built on xRM today have to migrate to the new Common Data Model?
**Answer:** No, the core extensibility technologies (e.g. xRM) underlying our workloads like Sales, Field Service, Customer Service, Operations, etc. will continue to be available and Microsoft will continue to invest in and innovate in these technologies to support our related Dynamics 365 workloads.

**Question:** What platform should partners be using to build solutions today?
**Answer:** Partners should use Power BI, PowerApps, Microsoft Flow and Microsoft Azure to create composite business applications which span the data and processes of Dynamics 365, Office 365 and, via a large and growing family of connectors, third-party databases and applications. For composite application and business process orchestration spanning these systems, this is the preferred platform. Each individual Dynamics 365 app will also permit native extensibility and extension. Users extending the functionality of Dynamics 365 for Sales may choose to use its native platform (XRM), those extending or building atop the functionality of Dynamics 365 for Operations may use its native platform (the Dynamics AX platform).

**Question:** Dynamics 365 will be on cloud only?
**Answer:** Microsoft Dynamics 365 will have an online and an on-premises option.

**Question:** Dynamics NAV will be then available as On-premises and through Subscription model as today. Within Dynamics 365 there will be only Madeira?
**Answer:** Yes, correct.

**Question:** How can we integrate our applications along with the Dynamics 365 built on AX or CRM existing platforms?
**Answer:** Through our integration services - we have these available for both biz apps.

**Question:** What platform is Dynamics 365 running on? Android, IOS or only Windows Phone?
**Answer:** The mobile applications support all three platforms plus the web client.
Question: Will CRM Portal be included in all plans?
Answer: One portal is included.

Question: In our CRM Admin site, under applications we see three apps name "Preview - Portal". Are these the current preview? Can we configure one?
Answer: Those are the old ones; they will be cleaned up soon before we come to new version.

Question: Is there SharePoint support for the V8 Portals?
Answer: It is not part of this release; we are still tracking it as part of our backlog.

Question: Do you know of any partner who has enabled legacy ADX portal for the new KB articles in CRM, right now it uses the old KB entity.
Answer: Yes, the legacy product still uses the old KB article, but it can be modified to use the new knowledge article with custom code. I have seen an implementation by Adoxio - feel free to reach out to them for the details.

Question: Can Multilanguage feature be added to an existing portal (need to update CRM to 8.2 first?)
Answer: You need to upgrade your Portal Solutions. At this time, there is no dependency on CRM 8.2.

Question: Is there a way on when you receive an error on the portal "Something Went Wrong" page comes up that we can turn on the error messages like we had in V7?
Answer: We will be enabling that functionality where you can get these logs or turn on custom errors soon.

Question: Will e-comm be enabled for event registration (paying online)?
Answer: There should be a way to broker the payment for events on an external payment system, but it will not be done within the portal.

Question: What about multi-user registration, e.g. need to register my staff?
Answer: Use the invitation system as it can handle single or multi use activations.

Question: Is the Chart and Dashboard only for the Partner portal or can we use in other portals such as customer, custom, or others?
Answer: You can embed them on any portal. We just ship examples of them in the partner portal as that portal has a requirement for dashboards and the others do not.

Question: How can I get portals on EMEA using my internal user rights licenses?
Answer: IUR rights are included with the new cloud competencies.

Question: Are the KB articles ratable on the portal or just within CRM?
Answer: Yes, they are ratable on the portal.

Question: Any word on updates to On-premises portal environments?
Answer: This is still on the backlog but is not included in the fall release.
PowerApps

**Question:** How do customers and partners access Dynamics 365 data for usage in PowerApps and Microsoft Flow?

**Answer:** PowerApps and Flow can connect to a wide variety of cloud data sources to create composite business apps and workflows. Access your Dynamics 365 data for usage in PowerApps and Flow through a common set of connectors. Connector for Dynamics 365 is available today and the connector for Dynamics 365 for Operations is planned to be available at GA of Dynamics 365.

**Question:** How do I gain skills and capability in PowerApps and PowerBI?

**Answer:** PowerApps and PowerBI will be part of the Sales and Technical Blitz. PowerApps is a service that transforms and accelerates how organizations build custom business applications. It connects to cloud services and data sources that businesses use, and gives analysts and specialists the ability to quickly build apps that suit their needs — without having to write code or deal with integration issues. Apps can be published instantly to co-workers across the Web, tablets and mobile devices without waiting for app stores. Learn more at Microsoft’s PowerApps page. New Level 200 courses will be available in early December on DLP. Microsoft Dynamics 365 Platform Licensing includes discussion of the common business application platform delivered via PowerApps and Microsoft Flow and this blog post, Introduction to PowerApps will provide you with a general tutorial to help you get started. Current PowerBI training include:

- Office 365 and Power BI for Microsoft Dynamics CRM 2016 Update 1
- Customer Service in Microsoft Dynamics CRM 2016 Update 1: module PowerBI Dashboards
- Sales Management in Microsoft Dynamics CRM 2016 Update 1: Module PowerBI Dashboards

**Question:** What is the role of PowerApps and Microsoft Flow in our Dynamics 365 extensibility strategy?

**Answer:** Partners and customers should use Power BI, PowerApps, Microsoft Flow and Microsoft Azure to create composite business applications which span the data and processes of Dynamics 365, Office 365 and, via a large and growing family of connectors, third-party databases and applications. For composite application and business process orchestration spanning these systems, this is the preferred platform. Each individual Dynamics 365 app will also permit native extensibility and extension. Users extending the functionality of Dynamics 365 for Sales may choose to use its native platform (xRM), those extending or building atop the functionality of Dynamics 365 for Operations may use its native platform (the Dynamics AX platform).

**Power BI**

**Question:** Are all functionalities already built up or do we need to customize Power BI and/or something else, before we can use them?

**Answer:** This will be delivered with the Dynamics 365 for Enterprise release.

**Question:** Can Dynamics 365 through accessing to CRM record from integrated Power BI component on CRM form, like a drill down?

**Answer:** Analyze with Power BI in this release includes the following (but not limited to) set of services; UI Integration Power BI dashboards can be pinned in Dynamics "CRM" Apps Power BI tiles and reports can be pinned in Dynamics "CRM" Apps Power BI tiles and reports are launched from Grids and Forms with filter context from Dynamics "CRM" Apps Drill through to Dynamics "CRM" Apps Forms and Grids with filter context from Power BI report Model Authoring & Content Packs Further enhancements to Sales and Service Content Packs Support for Option set labels and Lookup names in Power Query Multi-language OOB content packs OOB Content pack extensibility with Power BI Desktop Support for currency conversion Rolling Time window filter for
Project Service Automation

**Question:** Regarding PSA. Please clarify- it’s integration with MS Project (e.g. Server, Client, both?)
**Answer:** Integration is enabled by a client Add-In, there is no direct integration between Dynamics 365 and Project Server directly on the next release.

**Question:** How is Dynamics 365 PSA positioned vs Dynamics 365 Operations Project functionality?
**Answer:** Mainly if the customer is looking for consolidating the resource management with the financial module and potentially have different legal entities (organizations) defined but still having the need of managing resources inter-company then Dynamics 365 for operations could be a better fit.

**Question:** Are there any plans to integrate PSA to Project Server or only desktop?
**Answer:** The integration between Microsoft Dynamics CRM and Microsoft Exchange started with an Add in in Microsoft Outlook that worked as a bridge to allow the two servers to communicate, that eventually became what we have today, Server Side Sync with the servers communicating directly and no add in needed. This PSA Add In represents the first iteration of the integration between the two products, so we can only hope to see an equivalent to Server Side Sync in the future.

**Question:** Is Project Service integrated with Operations in Dynamics 365? For example, will time records flow into billing and invoicing?
**Answer:** Yes.

**Question:** Is integration between PSA and Project Online and/or Planner on the road-map?
**Answer:** Yes, the team will continue to grow and improve the integration between PSA and Project Server.

**Question:** Is the project add-in include License Cost?
**Answer:** The add-in is free, but they will need to purchase MS Project Pro to use it.

**Question:** Can we create the PSA templates from Project rather than in PSA?
**Answer:** Yes, once you import into PSA, you can mark as a template or create a template based on any existing project.

**Question:** Will the Project add-in work with Project Standard, or is professional mandatory?
**Answer:** Currently the add-in requires Project Professional 2016.

**Question:** Will PSA also be available for on-premises?
**Answer:** Not for this Fall release.
Relationship Health & Connection Network

Question: Is Relationship Health applicable to custom activities?
Answer: Not currently.

Question: Does Relationship Health come for free?
Answer: This capability will be released as a public preview. Once we enter general availability this feature may introduce additional costs.

Relationship Intelligence

Question: With customers’ behavior being tracked with Emails, meetings, calls.... etc. Will Skype be integrated so that we can schedule Skype meetings through D365?
Answer: This capability is on our roadmap as we continue to invest in improving our Skype integration.

Question: Will we be able to prevent auto capture for emails that may be restricted in nature?
Answer: Auto Capture may be disabled at the organizational level as well as the user level. Concerning sensitive emails, I would like to reinforce the fact that email data is never copied into Dynamics (until the user explicitly clicks on Track). The web browser is directly asking Exchange for emails to show just like if the user was using Outlook Web Access. So, all the emails shown in Auto Capture always and only exist in Exchange and are never inherently shared with anyone in Dynamics.

Question: Will we be able to know whether the customer opened the email that we sent to them through CRM?
Answer: Yes! This will be one of the features!

Question: Will these appointments and calls need to be "tracked in CRM" to show up in these KPI's? Or will it automatically pull from our calendars or calls?
Answer: The vision is to automatically pull activity data directly from Dynamics, Exchange and Skype for Business. The release timeline for each of these data sources is yet to be determined.

Question: Are there any plans for the tracking to be available for emails created in Outlook?
Answer: It will be through CRM app for Outlook. Outlook desktop will also have the app that you could use to do a follow or tracking of email for email engagement.

Question: Will there be any kind of insight from the ERP system, regarding the customer being a solid customer who always pays invoices on time, no disputes etc.?
Answer: ERP signals are not considered at this time. We will look into a greater level of customizability to suit your organizations needs later.

Question: Will the new chart controls be available in other areas of CRM?
Answer: New chart type (bubble chart) will be available for opportunity only and is not customizable.

Question: Will the follow feature be available for a user to activate when an email is created from Outlook? Or is this feature only available if you’re sending from CRM?
Answer: Allowing users to ‘follow’ emails from the App for Outlook is coming up next in our roadmap.

Question: will the "sent" items from the exchange/outlook which is a reply to a CRM tracked email chain get tracked in CRM?
Answer: This is an existing capability. Yes, the entire chain is tracked.
**Question:** Will Sentiment Analysis be added to Relationship Analytics, or will we focus on email and calendar counts as our "insights"?
**Answer:** There is certainly a great opportunity to expand the sources for signals incoming. For this release, the signals will only come from Microsoft Exchange.

**Question:** Will it search and index this across all mailboxes?
**Answer:** When we have full support for Exchange, it will index across all CRM user's mailboxes.

**Question:** Will Exchange On-Premises be supported for relationship insights?
**Answer:** Relationship Insights will be available for Dynamics 365 and Exchange Online only.

**Question:** Will a customer be prompted that the sender is requesting email tracking as it does in Outlook today? "Read Receipts"
**Answer:** No, the customer will not get any such prompt. The only additional message that may get shown is to allow images to show in this email. We are using industry standard pixel tracking for logging these analytics.

**Question:** Where will all the email data land? Azure / exchange / CRM? How will we manage storage?
**Answer:** Thanks for the clarification - Into Cortana Intelligence Customer Insights database, which is a pre-req service for this feature.

**Question:** What other telemetry data sources will be available in addition to Exchange? Gmail? LinkedIn, etc.?
**Answer:** Right now, signals are just from Exchange and CRM, but keep the ideas coming.

**Question:** What languages will be available for Machine Learning at launch time?
**Answer:** Currently only available in English in North America.

**Question:** What are the plans to incorporate BI to the email "delay" feature? Like with the example of a contact reading the email at 1 pm always, can we automate the email to be sent at 1 pm?
**Answer:** This capability is on our roadmap.

**Question:** What are examples of the Exchange signals you're referring to, please?
**Answer:** E-mails sent/received is the primary signal.

**Question:** Relationship Assistant isn't a new app, is it?
**Answer:** Relationship Assistant will be a feature of the existing mobile app and be available in the web client.

**Question:** So, is this Exchange and Skype integration?
**Answer:** Currently it is Exchange and CRM signals.

**Question:** Relationship Analytics Suite is an add-on service of Dynamics 365 or free function in Sales APP?
**Answer:** Final pricing has not been finalized. Relationship Insights, including Relationship Analytics, will be free during the preview period.

**Question:** Will there be Multi language support?
**Answer:** Only English during the preview period.

**Question:** Is it on the roadmap to leverage something like teaching Cortana your interests to render cards?
**Answer:** Yes, this is on the roadmap.

**Question:** Is Dynamics 365 online a requirement for these Relationship KPIs to be available/possible?
**Answer:** Relationship Insights is available in Online only.
**Question:** How is email security and privacy handled when it comes to relationship insights?
**Answer:** We will show aggregated KPIs but will not expose any private information if the logged in user does not have access to the activity.

**Question:** If we send an email internally (between the sales team) and we set its regarding to an opportunity, would that be included in the KPIs?
**Answer:** Internal activity between the sales team will not be included in KPIs, even if set regarding is set for the opportunity.

**Question:** If relationship assistant supports IOS or Android?
**Answer:** Yes, the Relationship Assistant is on all supported devices that runs our Dynamics app.

**Question:** I assume that these rollups, overviews and KPIs will respect the security in CRM? Different users might see different stats on the same opportunity?
**Answer:** Stats will be the same since aggregated data doesn’t violate privacy. Security for the activity itself is still respected for next and last activity, we will show time/date only if user doesn’t have access to the activity, if the user has access, we’ll show date/time/subject.

**Question:** We will not show who or what? How is "Health" determined/calculated? Is the Health algorithm configurable? In addition to the out of the box entities, can custom entities be added via configuration?
**Answer:** Health is determined by analyzing activities between Dynamics 365 users and customers. The algorithm allows for adjustments in the value of activity types to suit your organization as well as the level of expected communications. Support for custom entities is planned.

**Question:** How does the signals feature work with a queue mailbox? Can a queue based KPIs be generated?
**Answer:** There is no queue specific KPIs in this release.

**Question:** For the phone call, does it look at Skype for Business dialing out? Or is that only recorded if we manually enter a call on the opportunity, account or contact?
**Answer:** It’ll need to be manually recorded. We are always looking at additional automation for the future.

**Question:** For existing customers with a lot of existing data in CRM and Exchange, how will Relationship Insights work out of the gates. Will it calculate all the historical stats for the existing data?
**Answer:** For the initial setup, CRM data will be considered. Exchange data for a historical time-period will be ingested. We’re trying to make the analytics useful from day one instead of requiring an incubation time.

**Question:** For Auto Capture is Server Side Synch a must?
**Answer:** Yes. Also, the Email Router is being deprecated on the next release.

**Question:** Follow an email getting activity information on this email, how does this go with privacy(laws)?
**Answer:** We won’t be sharing any private information contained in the activity if the logged in user does not have access to it.

**Question:** Follow an email getting activity information on this email, how does this go with privacy(laws)?
**Answer:** We have worked with Microsoft legal teams to ensure privacy laws are complied with. We are following industry standard methods used for this capability that has been proven over the last 10 years in the marketing field.

**Question:** Do the cards also integrate intro Operations? Do you have inventory?
**Answer:** The Relationship Assistant does not integrate into Operations at this time. Our future roadmap includes extensibility and at the same time we will consider adding new capabilities to cover this area as well.

**Question:** Do meetings also consider the organizer when calculating the KPI?
**Answer:** Not today, but hopefully later once we can get insights from the person.
Question: Is Server Side Sync a requirement for Auto Capture?
Answer: Exchange Online with a mailbox that is test & enable is required to VIEW emails. SSS for incoming emails is required to TRACK emails

Question: What automation in Activity tracking vs. what will need to be more manually tracked as in today's experience?
Answer: For the analytics, we only automatically pull in data for a record when we have confidence it's related. For lower confidence matches, we'll require those to be set regarding to the record by the customer. We'll be making it easier for users to track and set regarding with automatic capture.

Question: Can we trigger a custom workflow and process based on Relationship Health?
Answer: Not in this release

Question: Can we track out of office emails, ad bounced emails?
Answer: In this release, there is no specific handling of out of office or bounced emails

Question: Can this be enabled on custom entities so we can gain insights on custom data items for customers.
Answer: Custom entities are not supported now but we will look in to this for the future.

Question: Can I set a follow up later on a card if I want to work on it later?
Answer: Follow cards are for sent emails designed to remind you to follow up with the customer on a date or if there was no reply or if the email was not opened

Question: Can custom cards be added?
Answer: Extensibility for the Relationship Assistant is on our roadmap which will allow external systems to create cards.

Question: Are these features available on bulk send. i.e. any unopened emails, follow up with a call/campaign?
Answer: Currently "follow" capabilities are only available on individual emails sent from Dynamics. We'll consider your request for future feature enhancements.

Question: Do we have to setup our own Cortana Intelligence Suite instance?
Answer: Yes, you would need ACI subscription which is a new Azure service which will also be in preview.

Question: This now tracks opens of emails like other marketing automation tools do?
Answer: Correct.

Question: Are you scanning through the e-mail content for the insights or just the subject?
Answer: We are scanning only the body of the email for insights.

Question: So... if a customer isn't on the O365 platform, is any of this available to them?
Answer: These features are only available to Office 365 (I.E. Exchange Online) customers initially.

Question: Will there be details provided to the Field as to what is included in the Fall release versus roadmap items. I'm hearing a lot of references to Exchange data but also previously it was stated that Exchange analytics and intelligence is not yet available. Can you please clarify which of the card items and analytic items are included in Fall?
Answer: Relationship Insights, as a family of features, will ship in the fall release. Initially, Relationship Analytics will ingest only CRM data. Exchange data will follow soon after.
Social

**Question:** Will Microsoft Social Engagement be integrated into Dynamics 365? If so, which App?
**Answer:** Social Engagement will be included in all Plan 1 Apps (sales, field service, etc.) and Plan 1.

**Question:** Any new China specific sources being added to support Chinese language?
**Answer:** We are looking to add Asian Sources such as Weibo and WeChat. We will share the timeline soon SnapChat is not on our roadmap now, but Instagram is already available now.

**Question:** How about Instagram and Snapchat as a source?
**Answer:** Instagram is already there in MSE.

**Question:** There doesn't seem to be any mention of Social Engagement in Dynamics 365, is that still going to be part of the overall suite?
**Answer:** Yes, we continue Social Engagement in Dynamics 365.

**Question:** Where does Social Engagement fit in?
**Answer:** It is included in all the Plan 1 business apps (aka all the CRM apps).

**Question:** What will happen with Social Engagement?
**Answer:** It will be included in Apps and Plan 1.