

 Microsoft
Dynamics 365

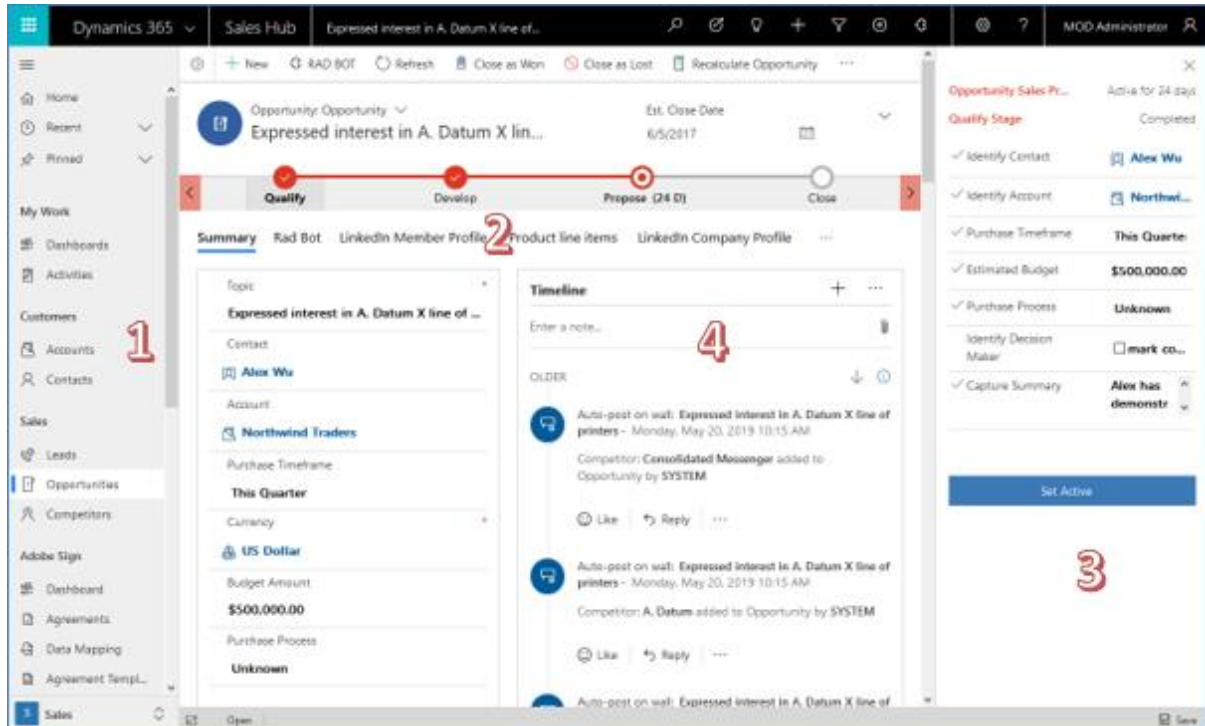


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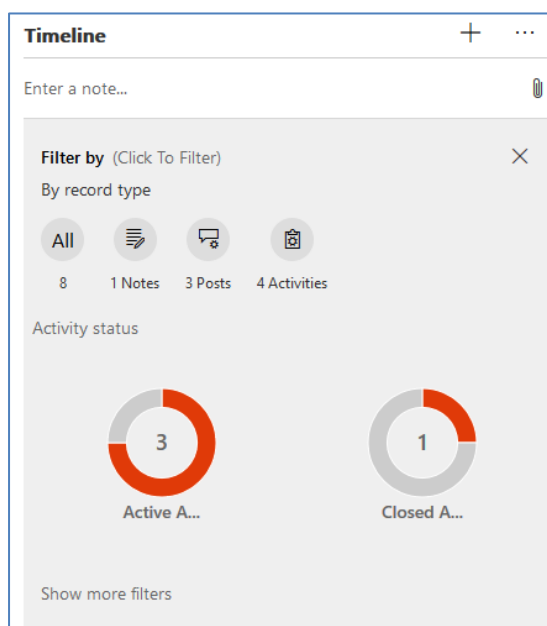
Explanation of the Unified Client and how to plan to move to it

What is the Unified Interface?

The Unified Interface (UI) is Microsoft’s new way to access 365 CE/CRM. Previously using the classic web interface meant that multiple forms had to be maintained for Desktop v Phone v Tablet. The UI is a design once responsive form which means it works for any screen size.

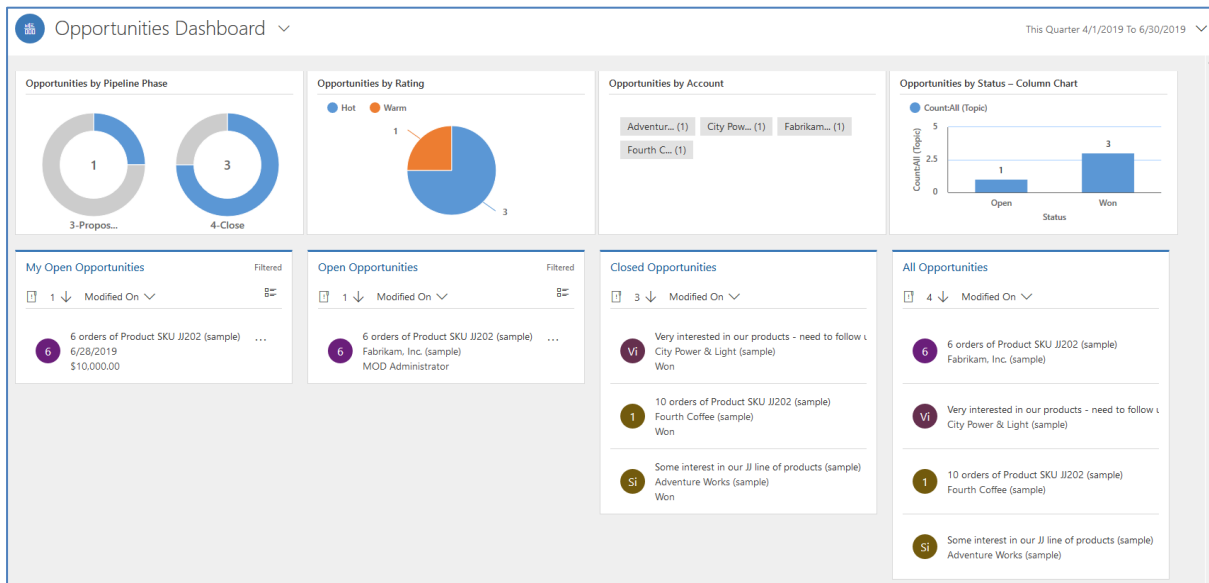


- 1 The Menu appears on the left and can be hidden if required
- 2 The form is split into tabs, so you don't have to scroll down a long form
- 3 You can pin the process stage to the side if you wish to
- 4 All activities are shown in a single timeline that has a filter function – see below

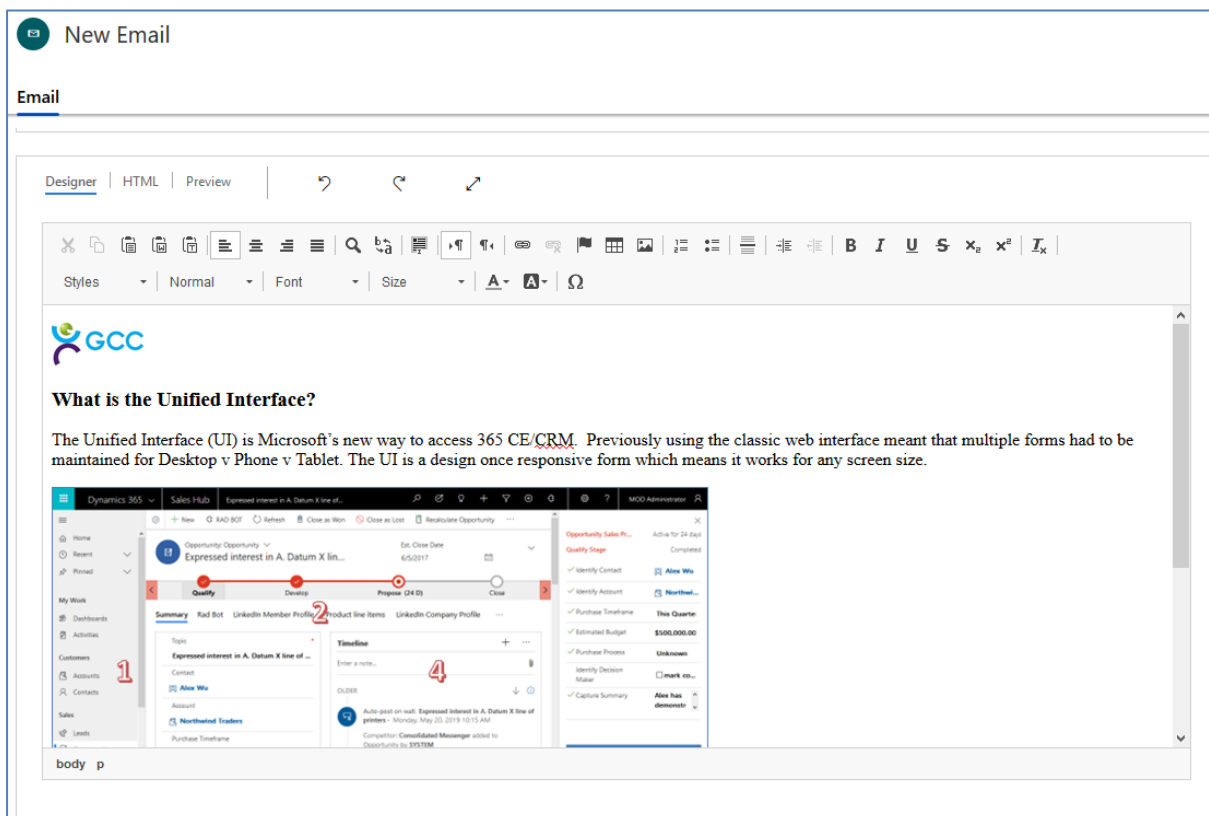


The timeline filter function gets you to the information you are searching for much quicker

There are other new types of functionality like responsive dashboards



Plus, a rich text email editor



Do I have to use the Unified Interface?

Microsoft have been building these new forms behind the scenes for a while and in the April 2019 update a function was added for the first time where administrators can switch off access to the classic web interface thereby making everyone use the new UI, which is the first step towards turning off the classic interface entirely.

We currently do not have a date for when the classic web interface will be turned off but recently the expected updates for October 2019 have been published and all but one of the new functionalities are for the new UI only, so in effect Microsoft have already forgotten it.

GCC are therefore recommending that we assist you in preparing to move to the new UI.

How do I prepare to move to the Unified Interface?

For the most part the work involved would be just checking (and if required tweaking) the layout of each screen so it looks OK in the new interface. For example, you may have hidden sections in the classic layout to make the form look right there that render as tabs in the new layout that make no sense. You need to test these changes and your users need to be educated about the new access method.

The steps would be:

- 1 GCC make a copy of your live system into a “sandbox” copy
- 2 GCC make the screen changes in the sandbox
- 3 Your key users test the changes in the sandbox and request further changes if required
- 4 GCC make the additional changes
- 5 You update your remaining users about the forthcoming change, they can be added to the sandbox if required
- 6 We agree on a date to update the live system
- 7 GCC update the live system and turn off the old interface access method
- 8 You are live with the new UI