Microsoft

III Edición del CX Tech Day

CRM Customer Engagement Dynamics 365

Diana Durán
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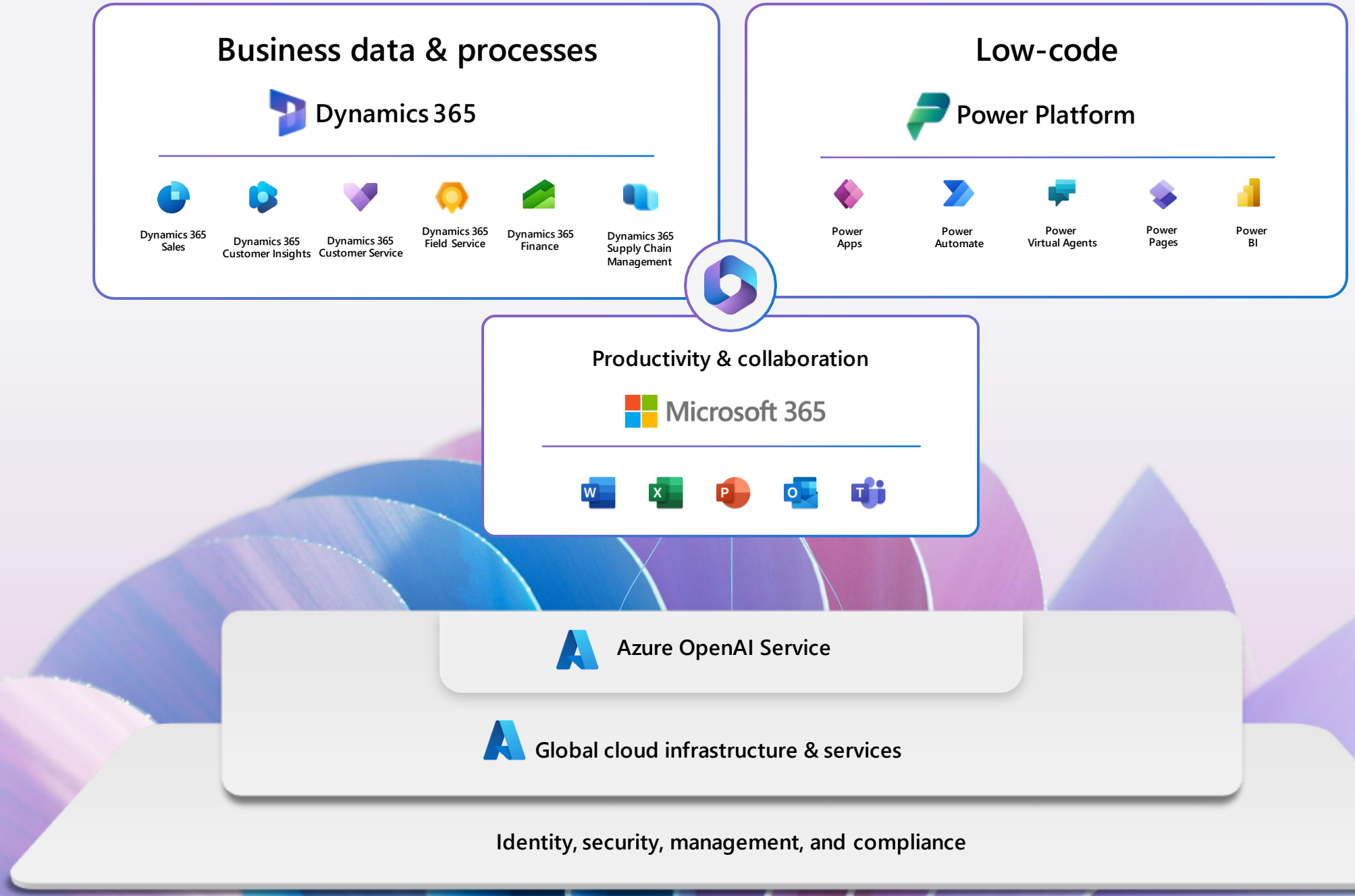
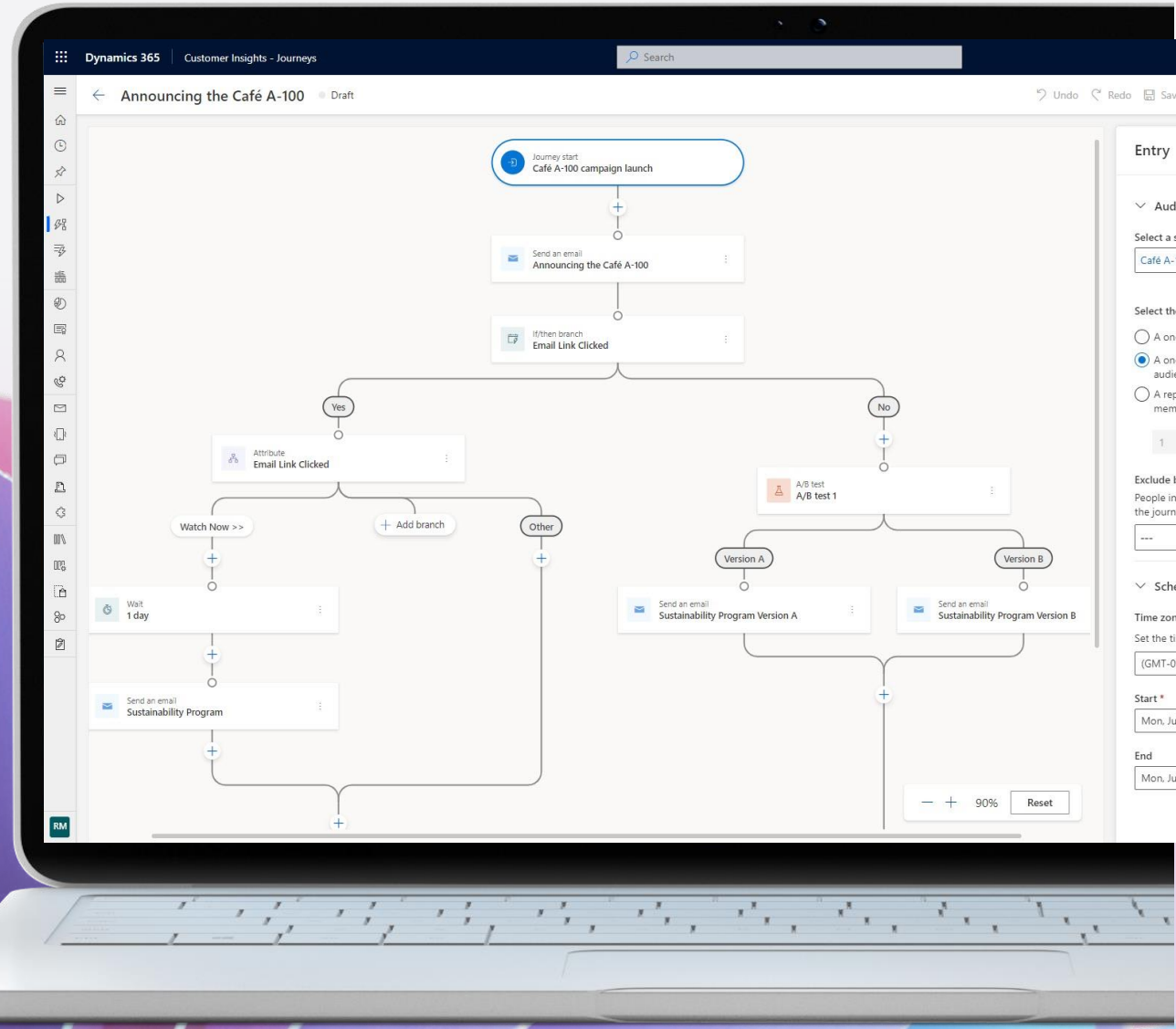
Microsoft España

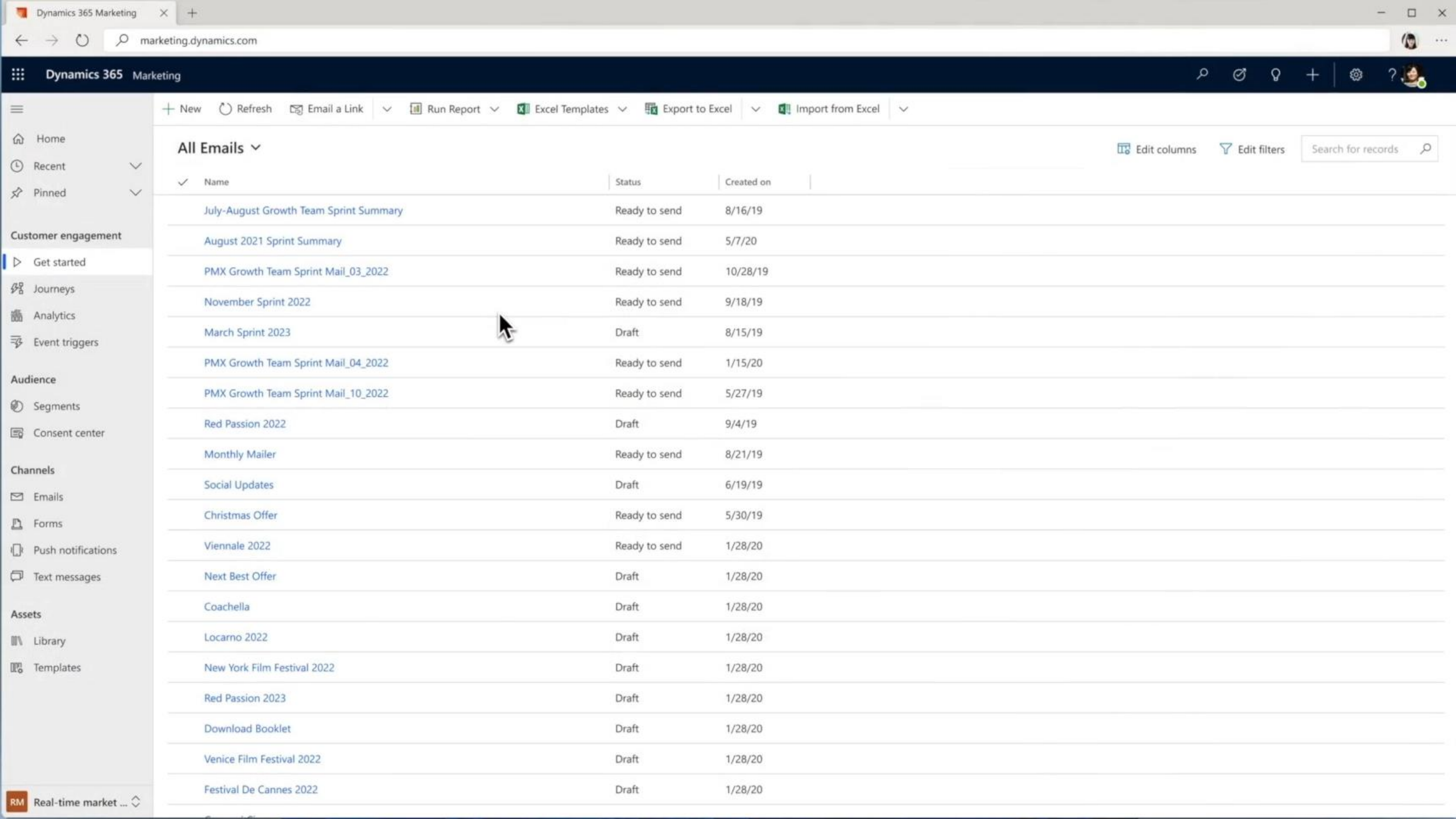
The age of AI

AI sets the stage for
a new era of innovation.

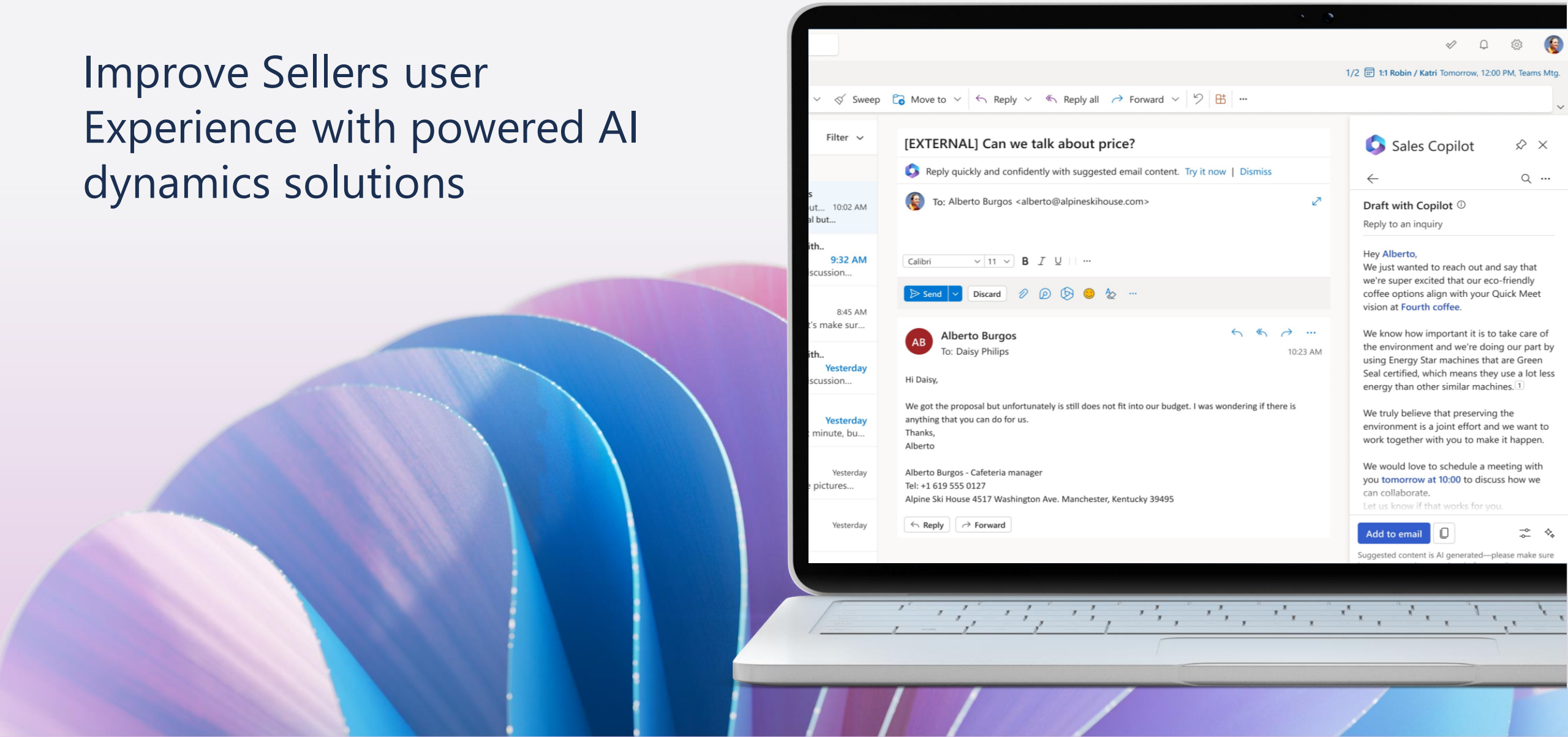

Business data & processes
Dynamics 365
Dynamics 365 Sales
Dynamics 365 Customer Insights
Dynamics 365 Customer Service
Dynamics 365 Field Service
Dynamics 365 Finance
Dynamics 365 Supply Chain Management
Low-code
Power Platform
Power Apps
Power Automate
Power Virtual Agents
Power Pages
Power BI
Productivity & collaboration
Microsoft 365
Azure OpenAI Service
Global cloud infrastructure & services
Identity, security, management, and compliance

Improve Marketing user Experience with powered AI dynamics solutions




Dynamics 365 Marketing
marketing.dynamics.com
Dynamics 365 Marketing
New
Refresh
Email a Link
Run Report
Excel Templates
Export to Excel
Import from Excel
Home
Recent
Pinned
Customer engagement
Get started
Journeys
Analytics
Event triggers
Audience
Segments
Consent center
Channels
Emails
Forms
Push notifications
Text messages
Assets
Library
Templates
Real-time market ...
All Emails
Edit columns
Edit filters
Search for records
Name
Status
Created on
July-August Growth Team Sprint Summary Ready to send 8/16/19
August 2021 Sprint Summary Ready to send 5/7/20
PMX Growth Team Sprint Mail_03_2022 Ready to send 10/28/19
November Sprint 2022 Ready to send 9/18/19
March Sprint 2023 Draft 8/15/19
PMX Growth Team Sprint Mail_04_2022 Ready to send 1/15/20
PMX Growth Team Sprint Mail_10_2022 Ready to send 5/27/19
Red Passion 2022 Draft 9/4/19
Monthly Mailer Ready to send 8/21/19
Social Updates Draft 6/19/19
Christmas Offer Ready to send 5/30/19
Viennale 2022 Ready to send 1/28/20
Next Best Offer Draft 1/28/20
Coachella Draft 1/28/20
Locarno 2022 Draft 1/28/20
New York Film Festival 2022 Draft 1/28/20
Red Passion 2023 Draft 1/28/20
Download Booklet Draft 1/28/20
Venice Film Festival 2022 Draft 1/28/20
Festival De Cannes 2022 Draft 1/28/20

Improve Sellers user Experience with powered AI dynamics solutions



Home
Recent
Pinned
My Work
Sales accelerator
Activities
Dashboards
Customers
Accounts
Contacts
Sales
Leads
Opportunities
Competitors
Sales Analytics
Sales usage reports
Sales Acceleration...
Collateral
Quotes
Orders
Invoices
Products
Sales Literature
Marketing
Sales

Search work items

My work list

Introduction... 12/13/2023 12:35 PM

Jorge Perote ★ 90
Procurement Manager •
Fondo Renta Variable Contoso ... • $60,000...
Traspaso Fo... 12/13/2023 12:40 PM

Winford Asher 90
Cafeteria Manager • Fabrikam, Inc.
Call the cust... 12/13/2023 12:41 PM

Ana Gil ★ 71
CTO • Alpine Ski House
Jubilación • $0.00
Introduction... 12/13/2023 12:42 PM

Kenya Brady 90
Store Mana... • Consolidated Messen...
Call the cust... 12/13/2023 12:45 PM

Cacilia Viera 72
Purchasing Manager • Margie's Travel
Fondo Renta variable • $0.00
Follo... 12/13/2023 1:00 PM - 1:30 PM

Diana Durán ★
Technology Specialist •
Home Insurance Policy • €850.00
Call customer

2 weeks ago 1

Alex Baker 62
Cafeteria Manager • Trey Research
Review inter... 12/18/2023 12:42 PM

8 items Last updated at 10:18 PM

Save | New | Export to PDF | Collaborate | Close as won | Close as lost | Recalculate | Disconnect sequence | Share

Home Insurance Policy - Saved

Opportunity · AI for Sales

First Up Consultants — Account
1/1/2024 — Est. Close Date
€850.00 — Est. Revenue
Alvaro Ferrero — Owner

Opportunity Sales Process
Active for 6 months

Indentify Customer ✓ | Qualify (6 Mo) | Propose | Contract | Close

Summary | Relationship analytics | Identificación Biométrica | Simulación Contoso Bank | LinkedIn Sales Navigator | Related

Key details

Topic * Home Insurance Policy
Contact Diana Durán
Purchase Timeframe Next Quarter
Currency * Euro
Budget Amount €800.00
Purchase Process Individual
Description Diana is in the process of closing the purchase of a house, and I would like to know what home insurance options Banco Santander
Rating ★★★☆☆
Opportunity Action

More info

Current Situation
Qualifying the opportunity in order to offer the best option.

Up next

Call customer
Opportunity nurturing • Due by 12/15/2023 3:06 PM
Discuss the opportunity with the customer
Call | Mark complete

Timeline

Search timeline
Enter a note...
Recent

AF Modified on: 1:11 AM
UntrackedEmail Untracked Email from: Alvaro Ferrero
Re: Proposal for Home Insurance Policy
Hi Diana, Thanks for considering our home insurance option...
View more

AF Modified on: 1:05 AM
UntrackedEmail Untracked Email from: Alvaro Ferrero
Hola
View more

AF Modified on: 12:43 AM
Subject Call to Diana Durán Active

Opportunity score

Prioritize smarter with opportunity scores

Get insights into which opportunities are most likely to be won. Ask your admin to set up predictive opportunity scoring for your org. Learn more

Assistant

Notifications
1 reminder
Opportunity's close date has passed
Home Insurance Policy

Relationship health

Good relationship and Steady

Next interaction
No upcoming activities scheduled

Improve Customer Care user Experience with powered AI dynamics solutions

D365 Customer Service Workspace

Search

Home | Inbox | Diane Plank

Diane Plank
05:44 · Positive
End

Hello there, I am Eva. How may I help you?

Azure support bot • 10.09 AM

Hello, I'm having an issue with conditional policy error in Visual Studio when user tries to login. Can I chat with an agent?

Diane Plank • 10.09 AM

Please hold while I transfer your chat to an agent

Azure support bot • 10.09 AM

Issue description:

- Conditional policy error in Visual Studio when user tries to login.

Is this helpful? Yes No

You have joined the conversation, 10.10 AM

Type your message...

Diane Plank

Diane Plank

Account : 657-DER-3564

+1-629-456-9876

Diane@outlook.com

3764 Hollywood Dr.
Pasadena, California 94568

View More

Recent cases

Azure subscription question
2/9/22
Closed

Products used

Microsoft Azure
Software
#785347683425

Microsoft PowerBI
Software
#5116945326416

Microsoft Power Automate
Software
#4589762315799

Timeline

Search timeline

Enter a note...

Created: 2/10/2022 10:00 AM

Email Active

From: Diane Plank

Subject: Issues with Visual Studio

Visual Studio not working properly. It is showing an error to me.

Image.png

Case: Visual studio access issues

Autopost: 1/12/2023 12:30 PM
Appointment created by Albert Flores for Diane Plank

Created: 12/26/2022 09:00 AM

Live Chat Closed

From: Ivan Lewis

Summary: Reviewed device alert with customer

Transcript

Copilot (preview)

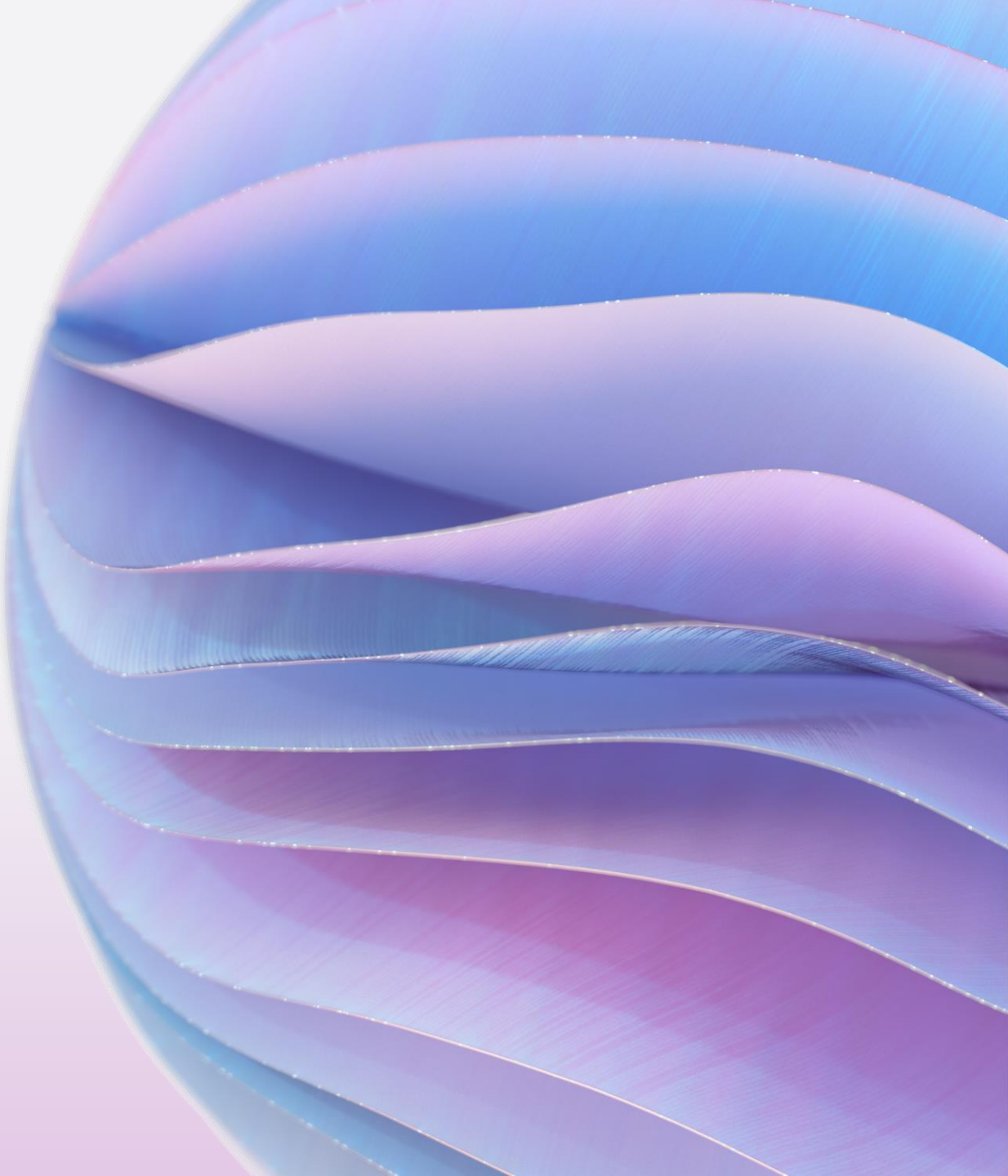
Hi Ivan, how can I help?

Describe it and get an answer generated by AI.

Example: "what's the shipping status of order CAB123?" or "Draft a response from our discussion and include all options."

Or, use AI to identify the most recent customer problem and get a response.

Always review and edit the text for accuracy before using it.

Enter a question

Thank you!