



# Microsoft Dynamics 365

## 2020 RELEASE WAVE 1 PLAN

Features releasing from April 2020 through September 2020

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# Dynamics 365: 2020 release wave 1 plan

The Dynamics 365 release plan (formerly release notes) for the 2020 release wave 1 describes all new features releasing from **April 2020** through **September 2020**.

## 2020 release wave 1 overview

The 2020 release wave 1 for Dynamics 365 brings new innovations that provide you with significant capabilities to transform your business. The release contains hundreds of new features across Dynamics 365 applications including Marketing, Sales, Customer Service, Field Service, Finance, Supply Chain Management, Human Resources, Commerce, and Business Central, our comprehensive business management solution designed for small to medium-sized businesses.

### Marketing

- **Dynamics 365 Marketing** is a marketing solution that helps businesses manage customer engagement through rich personalization and automation while leveraging their Microsoft assets.

### Sales

- **Dynamics 365 Sales** is centered around the customer relationship. It helps organizations understand customer needs, drives more relevant and authentic engagements, and improves selling efficiencies.
- **Dynamics 365 Sales Insights** leverages the power of the Microsoft cloud to bring together sales information via Dynamics 365, communications via Office 365, relationships via LinkedIn, and the power of Microsoft AI to transform selling. Sales organizations gain a 360-degree view of their customer engagements to offer agility, adapting to rapid market changes, while adhering to business strategy, accommodating specific business requirements and guidelines.
- **Dynamics 365 Product Visualize**, an augmented reality mobile application on iOS, accelerates the sales process by helping buyers and sellers reach a shared understanding faster.



## Service

- **Dynamics 365 Customer Service** is an end-to-end service for customer support, spanning self and assisted scenarios across multiple channels of customer engagement. It provides comprehensive and efficient case routing and management for agents, and enables authoring and consumption of knowledge management articles.
- **Dynamics 365 Customer Service Insights** provides an actionable view into critical performance metrics, operational data, and emerging trends using industry-leading artificial intelligence (AI). These insights empower customer service managers to make better decisions to improve customer satisfaction and operational efficiency with confidence.
- **Dynamics 365 Field Service** is an end-to-end solution for on-site service that empowers organizations to move from being reactive to providing proactive or predictive field service, and to embrace new business models such as outcome-based service or “anything-as-a-service.”
- **Dynamics 365 Remote Assist** is a mixed-reality solution available on HoloLens for first-line workers to collaborate with remotely located personnel to more effectively and efficiently get their job done.

## Finance and Operations

- **Dynamics 365 Finance** drives automation and predictive analytics capabilities, paving the way for deep proactive management.
- **Dynamics 365 Supply Chain Management** empowers employees and organizations with the ability to obtain a unified view of inventory, warehouse, manufacturing, service, and logistics with predictive analytics that turn data into insights to support better strategic decisions.
- **Dynamics 365 Guides** is a mixed-reality application that enables employees to learn in the flow of work by providing holographic instructions when and where they need them. Dynamics 365 Guides addresses the needs of three key personas: content authors, operators, and managers/analysts.

## Human Resources

- **Dynamics 365 Human Resources** helps HR professionals get the workforce insights needed to build data-driven employee experiences across multiple areas including Organization and Personnel management, Compensation, Benefits, Leave and absence, Compliance, Payroll integration, Performance feedback, and Self-service programs.

## Commerce

- **Dynamics 365 Commerce** is built on the proven Dynamics 365 Retail capabilities—delivers a comprehensive omnichannel solution that unifies back-office, in-store, call center, and e-commerce experiences to provide a delightful shopping journey for consumers across the different touchpoints.
- **Dynamics 365 Fraud Protection** focuses on **Payment fraud protection** and account creation. It will help enable an e-commerce merchant to drive down fraud loss, increase bank acceptance rates to yield higher revenue, and improve the online shopping experience of its customers. The new set of capabilities called **Loss Prevention** help brick-and-mortar retail store operations fight fraud and abuse. This will help retailers reduce shrinkage losses and improve store efficiencies.
- **Dynamics 365 Connected Store** delivers insights gathered from observational, location, and other line-of-business systems to improve the performance of their brick-and-mortar stores.

## SMB

- **Dynamics 365 Business Central** provides a comprehensive business application solution designed and optimized for small and medium-sized business (SMB) organizations.

## Customer Data Platform

- **Dynamics 365 Customer Insights** enables every organization to unify disparate data—be it transactional, observational or behavioral sources—to gain a single view of customers and derive intelligent insights that drive key business processes.

## Microsoft Forms Pro

- **Microsoft Forms Pro** is an enterprise survey solution that empowers everyone in the organization to develop enterprise-grade surveys to collect timely feedback from the customers and employees. With the point-and-click simplicity and AI-assisted features of Forms Pro, everyone has the tools to create, send, and analyze custom surveys that integrate directly into the workflows and the organization's business system.

## Industry accelerators

In 2020 release wave 1, we are adding industry accelerators as a separate section. The following industry accelerators are included in this wave:

- **Nonprofit** accelerator enables you to develop nonprofit solutions based on entities and attributes that nonprofits commonly leverage for constituent management, fundraising, awards, program delivery, and impact tracking.

- **Financial services** accelerator enables you to quickly develop solutions based on entities and attributes that banks commonly leverage for customer experience and other business processes. These entities include banks, branches, financial products, loans, referrals, limits, requested facilities, and more.
- **Health** accelerator allows you to build solutions and create new use cases and workflows with entities focused on enhanced care coordination and the ability to segment patients and providers based on Electronic Medical Record (EMR) data.
- **Automotive** accelerator enables you to quickly develop solutions based on entities and attributes that dealerships and OEMs commonly leverage for customer experience and other business processes. These entities include deals, sales contracts, specifications, fleet, warranties, inspection, test drives, branding, business, customer-vehicle relationship, vehicle and equipment, lead, service and after-sales management, and more.

**IMPORTANT** The Microsoft Power Platform features coming in the 2020 release wave 1 have been summarized in a separate [release plan](#).

## Key dates for the 2020 release wave 1

This release plan describes functionality that may not have been released yet. Delivery timelines and projected functionality may change or may not ship (see [Microsoft policy](#)).

Here are the [key dates](#) for the 2020 release wave 1.

Milestone	Date	Description
Release plans available	Jan 27, 2020	Learn about the new capabilities coming in the 2020 release wave 1 (April 2020 – September 2020) across Dynamics 365 and the Power Platform.
Early access available	Feb 3, 2020	Test and validate new features and capabilities that will be a part of the 2020 release wave 1, coming in April, before they get enabled automatically for your end users. You can view the Dynamics 365 <a href="#">2020 release wave 1 early access features</a> now.
General availability	April 1, 2020	Production deployment for the 2020 release wave 1 begins. Regional deployments will commence on April 3, 2020.

Continuing from the 2019 release wave 2, we are continuing to call out how each feature will be enabled in your environment:

- **Users, automatically** – These features include changes to the user experience for users and are enabled automatically.

- **Admins, makers, or analysts, automatically** – These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts** – These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

You can get ready with confidence knowing which features will be enabled automatically.

We've done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We're looking forward to engaging with you as you put these new services and capabilities to work, and we're eager to hear your feedback as you dig into the 2020 release wave 1.

Let us know your thoughts. Share your feedback on the [Dynamics 365 community forum](#). We will use your feedback to make improvements.

# 2020 release wave 1 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning February 3, 2020.

Features from the following apps are available as part of early access:

- Dynamics 365 Marketing
- Dynamics 365 Sales
- Dynamics 365 Customer Service
- Dynamics 365 Field Service
- Dynamics 365 Finance
- Dynamics 365 Supply Chain Management
- Finance and Operations cross-app capabilities
- Dynamics 365 Human Resources
- Dynamics 365 Commerce
- Dynamics 365 Business Central

The features from these apps update the existing user experiences. You can opt in early to enable these features in your environment. This will allow you to test these features and then adopt them across your environments. For information on how to enable these features, see [Opt in to 2020 release wave 1 updates](#).

**IMPORTANT** If you are using UCI or Power Automate, there might be early access features that could impact your users. For Microsoft Power Platform early access features, see [2020 release wave 1 features available for early access](#).

## Dynamics 365 Marketing

For a complete list of the Dynamics 365 Marketing features, see [What's new and planned for Dynamics 365 Marketing](#).

Feature	Enabled for	Early access	General availability
<a href="#">Ability to test-send dynamic email messages</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Export data to Excel for further analysis</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Improved customer journey experience</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Improved email content designer</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Improved event management experience</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Improved segment design and management</a>	End users, automatically	Feb 3, 2020	Apr 2020

## Dynamics 365 Sales

For a complete list of the Dynamics 365 Sales features, see [What's new and planned for Dynamics 365 Sales](#).

Feature	Enabled for	Early access	General availability
<a href="#">Customize forecast models</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Easier selection of email templates</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Improve and adjust forecast accuracy</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">License enforcement: users with new Team Member licenses</a>	End users, automatically	Feb 3, 2020	Apr 2020



Feature	Enabled for	Early access	General availability
<a href="#">Manage activities with ease</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Sales – Team Member app module</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Save standardized PDF documents to Dynamics 365 Sales or Microsoft SharePoint</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Understand forecasts with precision pipeline management</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Work with opportunities in the Kanban view</a>	End users, automatically	Feb 3, 2020	Apr 2020

## Dynamics 365 Customer Service

For a complete list of the Dynamics 365 Customer Service features, see [What's new and planned for Dynamics 365 Customer Service](#).

Feature	Enabled for	Early access	General availability
<a href="#">Agent productivity enhancements to knowledge capabilities</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Configurable case resolution page</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Customer Service app available for users with Team Member license</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Customer Service Hub app is now available by default</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Enhancements in the queue page</a>	End users, automatically	Feb 3, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
<a href="#">Familiar, modern email experience for agents</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">License enforcement – users with new Team Member licenses</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Rich text notes and keyword search in the timeline</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Support for Site entity in the Unified Interface</a>	End users, automatically	Feb 3, 2020	Apr 2020

## Dynamics 365 Field Service

For a complete list of the Dynamics 365 Field Service features, see [What's new and planned for Dynamics 365 Field Service](#).

Feature	Enabled for	Early access	General availability
<a href="#">Enhanced work hours calendar for resources</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Integrated technician time tracking</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Requirement dependency for efficient workflow</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Resource scheduling dashboard</a>	End users, automatically	Feb 3, 2020	Apr 2020

## Dynamics 365 Finance

For a complete list of the Dynamics 365 Finance features, see [What's new and planned for Dynamics 365 Finance](#).

Feature	Enabled for	Early access	General availability
<a href="#">Allow filtering the Tax 1099 detail report by reporting year</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Budget planning query optimization for performance</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Credit management</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Date range for Posted transactions by journals report</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Extended French localization: ISO 20022 format for international payment and treasury transfer</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Extended Italian localization: advanced notes management</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Extended Italian localization: bank account setup enhancement</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Extended Italian localization: general ledger simulations</a>	End users by admins, makers, or analysts	Feb 3, 2020	Aug 2020
<a href="#">Extended Italian localization: improved inquiry on debit/credit</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Extended Italian localization: intent letters – invoicing of usual exporters</a>	End users by admins, makers, or analysts	Feb 3, 2020	Aug 2020
<a href="#">Extended Italian localization: miscellaneous charges per kilogram in Intrastat declaration</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
<a href="#">Extended Italian localization: posting invoices with zero amount</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Extended Italian localization: sales invoice lines sorting by packing slips</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Extended Italian localization: separate accounts for credit notes</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Extended Italian localization: tax invoice for goods delivered for free</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Extended Italian localization: Unique Certification</a>	End users by admins, makers, or analysts	Feb 3, 2020	Aug 2020
<a href="#">Extended Swiss localization: QR-bill implementation</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Prohibit submission to workflow when the invoice total and registered invoice total are not equal</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020

## Dynamics 365 Supply Chain Management

For a complete list of the Dynamics 365 Supply Chain Management features, see [What's new and planned for Dynamics 365 Supply Chain Management](#).

Feature	Enabled for	Early access	General availability
<a href="#">Calculate PO delivery date based on lead times and working days (public sector)</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020



Feature	Enabled for	Early access	General availability
<a href="#">Catch weight product processing with warehouse management</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Compare item price storage</a>	End users by admins, makers, or analysts	Feb 1, 2020	Apr 2020
<a href="#">Country of origin enhancements</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Customer self-service experiences</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">External catalog enhancements</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Fixed assets integration with Asset Management lifecycle</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Hazardous materials product information management</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Hazardous materials shipping documentation</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Improved job card device</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Inbound and outbound logistics improvements</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Integration framework for material handling equipment for automated warehouse processes (previously MHAX)</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
<a href="#">IoT Intelligence core insights</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Miscellaneous charges enhancements</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Purchase order delivery via cXML</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Visual scheduling for work orders in Asset Management</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020

## Finance and Operations cross-app capabilities

For a complete list of the Finance and Operations cross-app capabilities features, see [What's new and planned for Finance and Operations cross-app capabilities](#).

Feature	Enabled for	Early access	General availability
<a href="#">Data in Common Data Service – phase 1 &amp; 2</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Entity store data is available in Azure Data Lake</a>	End users by admins, makers, or analysts	✓ Jun 1, 2019	Apr 2020
<a href="#">Finance and Operations licensing</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">New task recorder capabilities for RSAT</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Recommended fields</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020

## Dynamics 365 Human Resources

For a complete list of the Dynamics 365 Human Resources features, see [What's new and planned for Dynamics 365 Human Resources](#).

Feature	Enabled for	Early access	General availability
<a href="#">Create leave rules to meet company and regulatory policies</a>	Admins, makers, or analysts, automatically	Feb 3, 2020	Apr 2020
<a href="#">Enhanced benefit plan configuration</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Enhanced worker benefit inquiry</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Flex credit programs</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Leave calendar views</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Online benefit enrollment</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Qualified life event processing</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020

## Dynamics 365 Commerce

For a complete list of the Dynamics 365 Commerce features, see [What's new and planned for Dynamics 365 Commerce](#).

Feature	Enabled for	Early access	General availability
<a href="#">Auto-charges improvements to support fees based on channel</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
<a href="#">Enable resetting of receipt numbers at the beginning of the fiscal year</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Improved inbound and outbound inventory operations in store</a>	End users by admins, makers, or analysts	Jan 27, 2020	Apr 2020
<a href="#">Set preferred payment methods for returns</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
<a href="#">Support for bulk URL redirects</a>	Admins, makers, or analysts, automatically	Feb 3, 2020	Apr 2020
<a href="#">Task management in HQ and POS for first-line workers and managers</a>	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020

## Dynamics 365 Business Central

For a complete list of the Dynamics 365 Business Central features, see [What's new and planned for Dynamics 365 Business Central](#).

Feature	Enabled for	Early access	General availability
<a href="#">AL interfaces</a>	Admins, makers, or analysts, automatically	Feb 1, 2020	Apr 2020
<a href="#">Application version for aliasing base application</a>	Admins, makers, or analysts, automatically	Feb 1, 2020	Apr 2020
<a href="#">Auto-insert recurring sales and purchase lines</a>	End users, automatically	Jan 27, 2020	Apr 2020
<a href="#">Bank reconciliation improvements</a>	End users, automatically	Feb 1, 2020	Apr 2020



Feature	Enabled for	Early access	General availability
<a href="#">Business Central integration with Common Data Service</a>	End users, automatically	Feb 1, 2020	Apr 2020
<a href="#">Camera/location AL API available in the browser</a>	End users by admins, makers, or analysts	Feb 1, 2020	Apr 2020
<a href="#">Disable export of data to Excel</a>	Admins, makers, or analysts, automatically	Feb 1, 2020	Apr 2020
<a href="#">Enable non-interactive printing with advanced printer selection</a>	End users, automatically	Feb 1, 2020	Apr 2020
<a href="#">Enhanced customer and vendor document layout</a>	End users, automatically	Jan 27, 2020	Apr 2020
<a href="#">Enhanced Dynamics GP Chart of Accounts migration</a>	End users, automatically	Feb 1, 2020	Apr 2020
<a href="#">Enhanced mobile accessibility related to device orientation</a>	End users, automatically	Feb 1, 2020	Apr 2020
<a href="#">Expanded country and regional availability</a>	End users, automatically	Feb 1, 2020	Apr 2020
<a href="#">Import profiles and UI customizations</a>	Admins, makers, or analysts, automatically	Feb 1, 2020	Apr 2020
<a href="#">Improved load time for pages</a>	End users, automatically	Feb 1, 2020	Apr 2020
<a href="#">Improved onboarding experience</a>	End users, automatically	Feb 1, 2020	Apr 2020
<a href="#">Improvements to data entry</a>	End users, automatically	Feb 1, 2020	Apr 2020
<a href="#">Improvements to filters and views on lists</a>	End users, automatically	Feb 1, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
<a href="#">Improvements to pages composed of multiple parts</a>	End users, automatically	Feb 1, 2020	Apr 2020
<a href="#">Look up events and insert event subscriber in code</a>	Admins, makers, or analysts, automatically	Feb 1, 2020	Apr 2020
<a href="#">Manage direct-debit collections in Service Management</a>	End users, automatically	Jan 27, 2020	Apr 2020
<a href="#">Migrate all or only active customer master records from Dynamics GP</a>	End users, automatically	Feb 1, 2020	Apr 2020
<a href="#">Migrate all or only active vendor master records from Dynamics GP</a>	End users, automatically	Feb 1, 2020	Apr 2020
<a href="#">Migrate data from Business Central 14.x on-premises to Business Central 15.x online</a>	End users, automatically	Jan 6, 2020	Apr 2020
<a href="#">Multiple languages</a>	End users, automatically	Feb 1, 2020	Apr 2020
<a href="#">Multiple variable declarations of the same type in the same line</a>	Admins, makers, or analysts, automatically	Feb 1, 2020	Apr 2020
<a href="#">Navigate trees more easily</a>	End users, automatically	Feb 1, 2020	Apr 2020
<a href="#">Notify requester about all changes for an approval request</a>	Admins, makers, or analysts, automatically	Jan 27, 2020	Apr 2020
<a href="#">Obsolete tag and URL properties</a>	Admins, makers, or analysts, automatically	Feb 1, 2020	Apr 2020
<a href="#">Receive more items than ordered</a>	End users, automatically	Jan 27, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
<a href="#">Resource limits for reports and web service calls</a>	End users, automatically	Feb 1, 2020	Apr 2020
<a href="#">Revert Qty. to Invoice when canceling order</a>	End users, automatically	Jan 27, 2020	Apr 2020
<a href="#">Telemetry in Application Insights for partners</a>	End users by admins, makers, or analysts	Feb 1, 2020	Apr 2020
<a href="#">Unhide parts on a page</a>	End users, automatically	Feb 1, 2020	Apr 2020

# Marketing

## Overview of Dynamics 365 Marketing 2020 release wave 1

Dynamics 365 Marketing is a marketing solution that helps businesses manage customer engagement through rich personalization and automation while leveraging their Microsoft assets. Since its launch in April 2018, Dynamics 365 Marketing has seen adoption by customers of various sizes and industries implementing a wide variety of use cases—including marketing campaign automation, demand generation, communication and newsletter scenarios, fan engagement, prospect capture, and event management.

Our customers are looking to achieve more with less effort through an intuitive experience that doesn't require the assistance of technical experts to perform common tasks. With 2020 release wave 1, the product remains focused on easy personalization and simplification while continuing to invest in fundamental improvements.

Key investment areas for this release are:

- **Personalized marketing:** The application helps marketers build and send effective content effortlessly. It can send emails related to business transactions that include context details, and send test messages that render dynamic content for a selected contact.
- **Marketing made simple:** We continue to streamline the product by reducing click counts, and have introduced many improvements that help make marketers' lives easier. Improvements include: enhanced content editor usability, in-line editing of entities inside the journey experience, ability to understand relationships between the customer journeys and the marketing entities, and more.
- **Integration and adaptability:** The application is more powerful now as we enable events forms to be integrated with third-party content management systems, and also bring in Microsoft Forms Pro experience for managing surveys.
- **Performance and scalability:** Fundamental investments continue to deliver improved performance, scalability, and throughput for campaign execution and email marketing. The application delivers an improved unsubscribe experience, prevents phishing, improves accessibility, and more.

## What's new and planned for Dynamics 365 Marketing

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Contextual email messages</a>	End users by admins, makers, or analysts	Aug 2020	-	-
<a href="#">Compliance made easier</a>	End users by admins, makers, or analysts	-	-	Apr 2020
<a href="#">Support for surveys using Microsoft Forms Pro</a>	End users by admins, makers, or analysts	-	-	Apr 2020
<a href="#">Ability to test-send dynamic email messages</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Export data to Excel for further analysis</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Improved email content designer</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Improved event management experience</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Improved segment design and management</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Improved customer journey experience</a>	End users, automatically	-	Feb 2020	Apr 2020

\* Some features are available for you to opt-in as part of early access on February 3, 2020, including all mandatory changes that impact end users. Learn more about [early access](#).

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **End users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their end users.

For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

For more information about geographic areas, data centers (regions), data storage, and replication, click **expand all** on the [Where your data is located page](#) and find the Microsoft cloud service for this feature.

## Contextual email messages

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Aug 2020	-	-

## Feature details

With this release, Dynamics 365 Marketing can send context-rich, personalized email messages triggered by business transactions such as purchases, returns, payments, and more. You can create customer journeys that target contacts associated with a recent record change (such as a purchase), and are able to send email messages to the same contact multiple times throughout the customer journey as the context changes.

## Compliance made easier

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Apr 2020

## Feature details

With this release, we make it easier for marketers to stay compliant with GDPR and accessibility guidelines. Improvements include:

- Consolidated opt-in confirmation messages, which can combine several notifications and confirmation requests in a single message (such as updated GDPR consent together with multiple new subscriptions)
- Easily view the history of subscription-list and GDPR consent-level changes without building your own report
- Check the accessibility of emails, forms, and pages created using the Dynamics 365 Marketing content designer

## Support for surveys using Microsoft Forms Pro

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Apr 2020

## Feature details

Surveys based on Microsoft Forms Pro bring a rich set of capabilities for asking for feedback about your customers' needs, helping you make data-driven decisions and apply your findings to your marketing initiatives. You can also automate survey responses by including them in the criteria for segmentation or lead scoring, or when branching a customer journey.

## Ability to test-send dynamic email messages

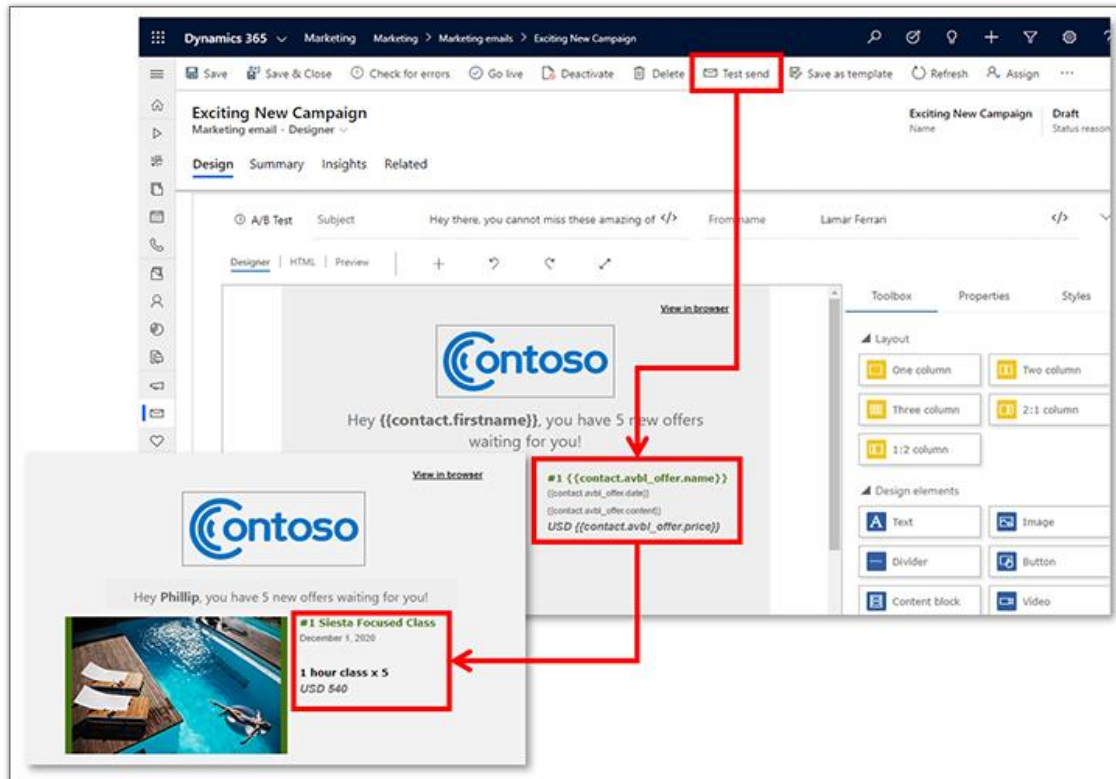
Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

## Feature details

Dynamics 365 Marketing enables marketers to design visually rich marketing email messages that include personalized dynamic content. Because email clients render messages slightly differently, and because dynamic content often requires careful testing, we recommend that you preview and test your messages thoroughly before going into production.

With this release, the test-send function has been improved to provide:

- Improved error checking for outgoing test messages.
- Test messages that contain fully rendered dynamic content (including dynamic field values, entity relationships, loops, and conditionals) based on a selected sample contact record.



*Personalized dynamic data in a test message*

## Export data to Excel for further analysis

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Feature details

Marketers can quickly and easily export marketing results and insights into Excel, where they can use the data to do further analysis and plan their next actions.



## Improved email content designer

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Feature details

Marketers can create attractive and sophisticated email messages using an improved email designer with a more intuitive design and updated styling.

With this release we are adding these enhancements:

- **New and improved email templates** that use new layout capabilities to help jumpstart the process of designing email messages.
- **Picture-over-picture** and button-over-picture capabilities to allow setting background images and make email messages more attractive.
- **Accessibility design and testing** built into the email designer.
- **Custom email preheaders** for higher open rates.
- Ability to set **rounded corners** for images, borders, and buttons.
- **Additional element properties** for creating better layout and design. For example, selectable columns with properties to set the background.

## Improved event management experience

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Feature details

With this release, the event registration experience is undergoing a major overhaul to increase the speed and concurrency of the registration process. Event planners are able to use forms within the Marketing application to create forms for event registration, which enables event planners to build registration forms using a familiar drag-and-drop interface and to include more types of fields. Additionally, for the first time, event registration forms can be embedded into any third-party content management system (CMS), just like other forms in the Marketing application.

We will also empower event planners to design event registration forms right from the event entity without having to leave the event.

## Improved segment design and management

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

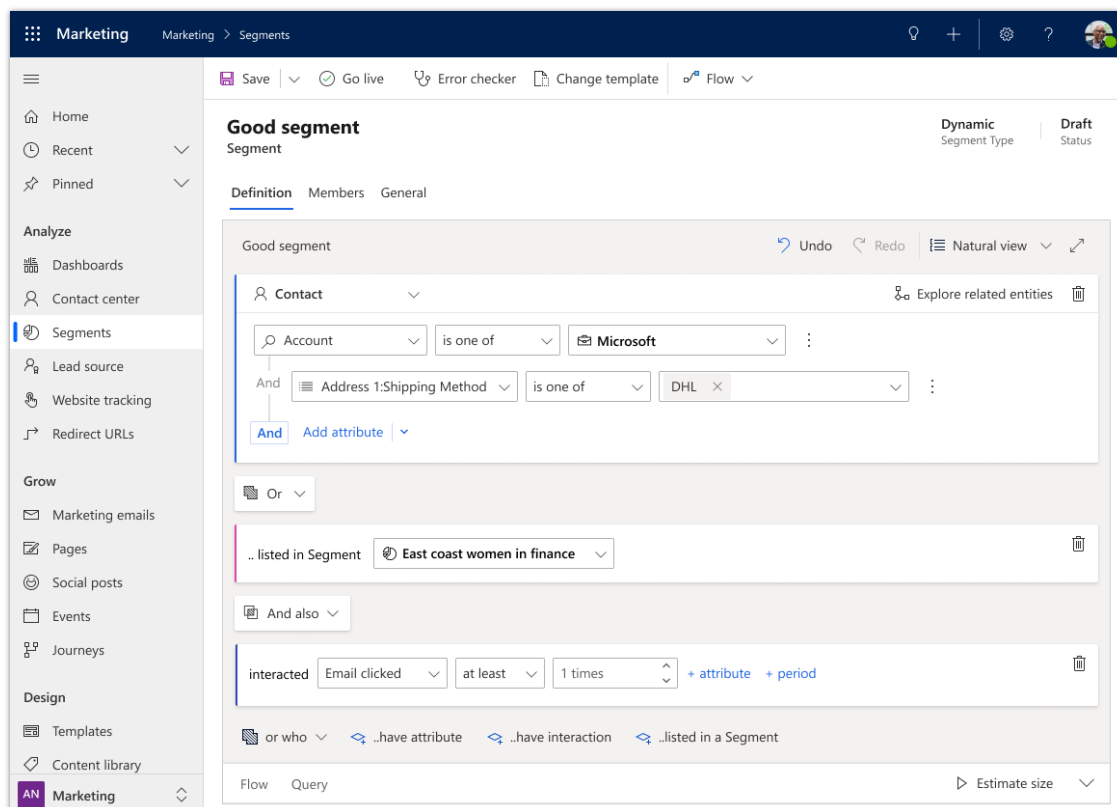
### Feature details

The enhanced segment designer enables users to define dynamic segments more quickly and intuitively. New features for dynamic segments include:

- Drop-down lists for selecting entities, fields, interactions, and relations now highlight recently used items and provide improved sorting.
- Segment templates for typical marketing use cases help make commonly used segments easier to create.
- Hybrid segments enable marketers to combine hand-picked audiences with demographic, behavioral, and compound segments.

We've improved the list capabilities of static segments to provide the following benefits:

- Static segments can now contain many more members, so it's no longer necessary to build segments that encapsulate static marketing lists.
- Member management has been improved to feature support for segment queries, including the ability to select members based on their interaction history.



*The segment designer*

## Improved customer journey experience

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Feature details

With this release, the customer journey designer has been enhanced with these capabilities:

- Ability to view relationships between customer journeys and marketing entities such as segments, email, forms, and more.
- Ability to join split branches within a customer journey.
- Ability to set time-sensitive email messages to expire after a specified time, for example to prevent outdated reminder messages from being sent to contacts who register at the last minute.

# Sales

## Overview of Dynamics 365 Sales 2020 release wave 1

Dynamics 365 Sales continues to be a highly adopted sales tool that brings value to sales teams around the globe with out-of-the-box capabilities tailor-made for several sales scenarios. It is an entire system that is much more than a mere sales application. Dynamics 365 Sales is centered around the customer relationship. It helps organizations understand customer needs, drives more relevant and authentic engagements, and improves selling efficiencies.

With the 2020 wave 1 release of Dynamics 365 Sales, we have spent time listening to customers and empathizing with their experiences to learn about what works and understand what doesn't. As with the previous release, there is a continued emphasis on simplified experiences, improved workflow, and a new mobile experience—all designed to make it more useful for users.

Dynamics 365 Sales continues to evolve to meet changing customer and sales needs. In the 2020 wave 1 release, we are expanding the focus to include inside sales scenarios, including sales acceleration, automated record updating, and sales cadences. We aim to streamline the work of inside sellers and deepen their engagement with customers.

These are the 2020 wave 1 release themes:

- **Simplify:** Get things done more easily to keep the focus on selling.

Sellers need to focus on building deeper relationships with customers. To do this, they must focus their time on personal engagements and understand customer needs to close more deals faster. Dynamics 365 Sales is committed to simplifying experiences and introducing intelligence that promotes productivity. Through close collaboration with our customers and consistently listening to their feedback, we continue to enhance the seller experience.

- **Enhance productivity:** Leverage productivity tools to enhance selling effectiveness.

Every sales team utilizes a variety of productivity tools to draft proposals, communicate with customers, and collaborate internally with peripheral teams. These tools are key to meeting ever-changing customer demands. It is imperative to enable a smooth and frictionless experience, so sellers can move quickly between tasks and spend their time on building customer relationships. Dynamics 365 Sales offers seamless integration with relevant productivity tools to help sellers be more agile. They can communicate, collaborate, and analyze – leveraging the tools they love, without constantly switching context.

- **Accelerate:** Prioritize the next best customer and next best action to accelerate sales.

Sales acceleration aims to transform the sales process with intelligent prioritization that helps convert leads and to close opportunities successfully and faster. To reach every

customer, sellers benefit from cross-channel communication directly from Dynamics 365 Sales, all while enforcing consistent sales processes through sales cadences.

- **Transform forecasting:** Track the pulse of your business accurately to inform strategic decisions.

Forecasting empowers sellers to confidently build a strong pipeline, while shortening sales cycles and improving forecast accuracy. As a result, sales leaders gain a more accurate view of their business, and can plan more effectively. Dynamics 365 Sales will introduce a Forecasting solution that offers both the flexibility to meet unique business requirements and an intuitive interface to forecast intelligently.

- **Offer mobility:** Get work done on-the-go with an optimized native mobile experience.

Dynamics 365 Sales is reimagining the mobile experience and focusing on empowering sellers with an easy-to-use tool for updating records and accessing information on the go. The new mobile experience is being designed from the ground up to meet sellers where they work.

The challenges of sales organizations described in this section are based on enterprise research, analyst reports, and conversations with customers.

As always, we want to hear from our customers and partners. If you have any ideas or thoughts about Dynamics 365 Sales, please share with us, <https://aka.ms/SalesIdeas>.

## What's new and planned for Dynamics 365 Sales

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

### Forecasting

With Dynamics 365 Forecasting, we are introducing a new set of capabilities that empower organizations to natively create and manage bottom-up sales forecast processes.

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Customize forecast models</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Improve and adjust forecast accuracy</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Understand forecasts with precision pipeline management</a>	End users, automatically	-	Feb 2020	Apr 2020

## Licensing

The license enforcement will ensure that users with Team Member licenses can access only the designated app modules for Sales, Service, and Project Resource Hub.

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">License enforcement: users with new Team Member licenses</a>	End users, automatically	-	Feb 2020	Apr 2020

## Simplified experiences

As part of our commitment to make Dynamics 365 Sales better, we are continually introducing enhancements that remove unnecessary friction and make experiences easier to use.

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Enhanced experience for adding products</a>	End users by admins, makers, or analysts	Feb 2020	-	Apr 2020
<a href="#">Easier selection of email templates</a>	End users, automatically	-	Feb 2020	Apr 2020

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Manage activities with ease</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Manage feature settings and configure the Sales Hub application from a centralized location</a>	Admins, makers, or analysts, automatically	Feb 2020	-	Apr 2020
<a href="#">Sales Team Member app module</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Save standardized PDF documents to Dynamics 365 Sales or Microsoft SharePoint</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Work with opportunities in the Kanban view</a>	End users, automatically	-	Feb 2020	Apr 2020

\* Some features are available for you to opt-in as part of early access on February 3, 2020, including all mandatory changes that impact end users. Learn more about [early access](#).

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **End users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their end users.

For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

For more information about geographic areas, data centers (regions), data storage, and replication, click **expand all** on the [Where your data is located page](#) and find the Microsoft cloud service for this feature.

## Forecasting

### Overview

Organizations need to accurately forecast sales targets to truly understand business health and to accurately informed strategic decisions. CEOs need to foresee demand for every product to undertake strategic business transformations, COOs need to understand the scope of the business to allocate resources efficiently, and CFOs need visibility into upcoming cash flows to craft financial plans for business growth. However, organizations often struggle to develop accurate sales forecasts that can truly inform these strategic decisions.

With Dynamics 365 Forecasting, we are introducing a new set of capabilities that empower organizations to natively create and manage bottom-up sales forecast processes.

Accurate forecasting helps everyone on the team:

- **Sellers** can manage their pipeline and focus time more effectively, by identifying the deals they need to close to meet quotas.
- **Sales managers** and leaders can plan sales team execution and meet sales forecasts more confidently with greater flexibility and a clearer view into bottom-up projections, all the while, gaining a deeper understand of those opportunities that impact the business.
- **Sales enablement managers** can benefit from greater flexibility to offer more granular and meaningful guidance that accurately reflects sales execution.

### Customize forecast models

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Business value

Although many organizations follow a common methodology of requiring sellers to forecast best, most likely, and worst-case revenue, there are variations to this approach across industries, products, and geographies. The native forecast capabilities provide flexible configurations and filtering to support multiple types of forecasting, rollup categories, and measurements.

### Feature details

- **Use flexible column modeling:** Create custom rollup and calculated columns.
- **Support different organizational structures:** Create forecasts based on product, territory, or reporting hierarchy.



- **Benefit from quota management:** Enable quotas in the forecast grid or upload quotas for entire forecast time periods using an Excel template.
- **Benefit from advanced filtering:** Use limits to filter out specific opportunities included in the forecast with the new query builder.
- **Adapt security modeling to meet business needs:** Select who has access to specific forecast models and fields.

Forecast FY2019 Org based

Forecast configuration

General Permissions Layout Publish & Quota

Layout and columns

Add or remove columns—or change order with drag-and-drop

Save & close Cancel

Name: forecast

Type: Calculated

Calculation: won + committed

Unique name: forecast

Additional filters

Apply additional filters to the forecast

Preview

User	Target	Won	forecast	Committed
Delores		75 %	75 %	
Dustin Ochs		75 %	75 %	
Sergio Blythe		75 %	75 %	

*Configure the forecast to meet business needs*

## NOTE

- This feature is available in the Unified Interface only.
- This capability is intended only for Dynamics 365 Sales Enterprise.

## Improve and adjust forecast accuracy

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Business value

Although bottom-up forecasting is based on existing opportunity data, sales managers know that in certain cases their experience requires subjective judgment. Sellers may not have the expertise required to accurately predict the confidence or the value of a deal. This may lead some sellers to hide ongoing deals until the period comes to an end, to increase their chance of exceeding quota.

To ensure sales managers can provide leadership with meaningful forecast numbers that they trust, forecasting offers great flexibility. Sales managers are empowered to adjust any of the enabled forecast values.

### Feature details

- **Adjust forecasts seamlessly:** Easily make adjustments to any forecasted values that are propagated based on existing forecast or organizational hierarchy, including deleting adjustments or reverting back to an older adjustment.
- **Gain deeper understanding with forecast adjustments:** Identify the underlying records that contribute to changes and capture the reasons for the changes in order to analyze the history of adjustments.

*Adjust the forecast with notes and view the history*

## NOTE

- This feature is available in the Unified Interface only.
- This capability is intended only for Dynamics 365 Sales Enterprise.

## Understand forecasts with precision pipeline management

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

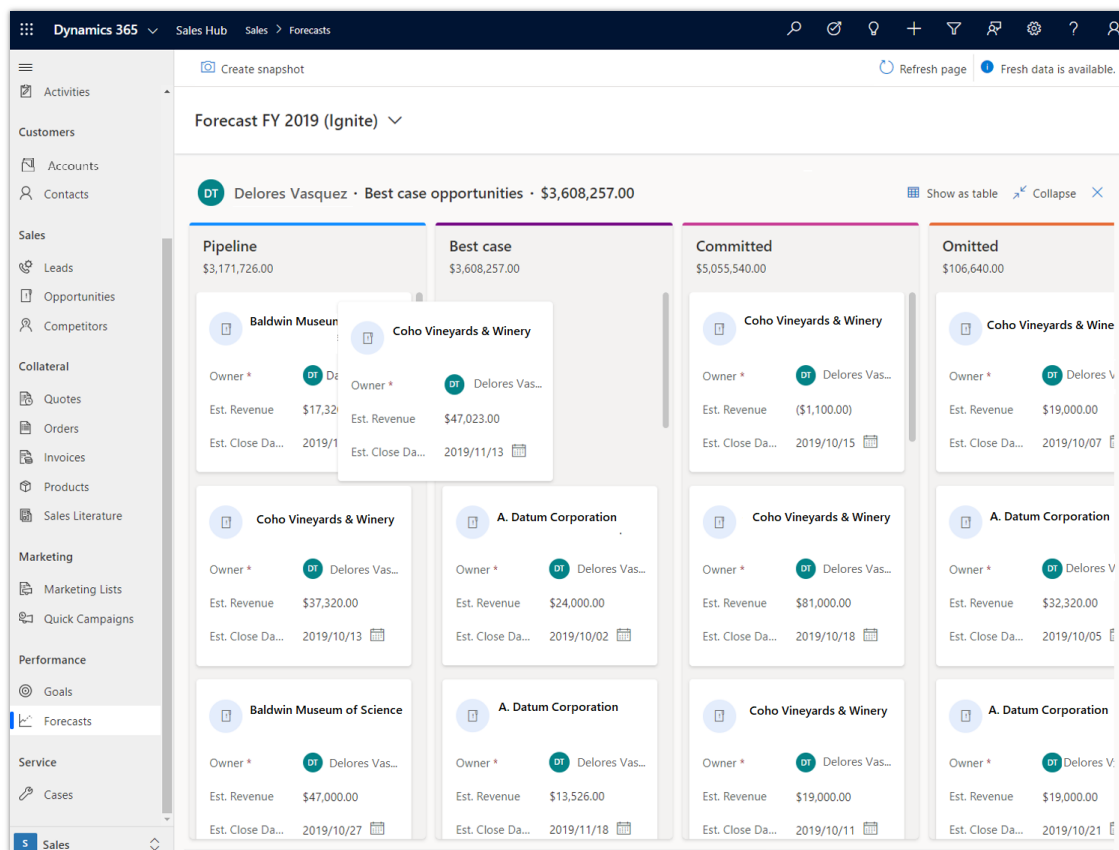
## Business value

A forecast can contain a lot of information and in some cases, a deep hierarchy. Often, the organization's forecast and opportunities are disjointed. Sellers and sales managers need to understand where forecast values are coming from in order to introduce necessary changes that can help to resolve these gaps. In the forecasting capabilities for Dynamics 365 Sales, both the forecast and the underlying opportunity data are part of one fluid experience, allowing sellers to

directly modify deal information in the flow and to instantly see changes to the forecast reflected.

### Feature details

- **Benefit from a responsive forecast grid with visual cues:** Enable visual representation of the whole forecast hierarchy and quota attainment in each cell, directly from the grid.
- **Edit participating records inline:** View and edit underlying opportunities for any calculated metric to instantly modify the forecast.
- **Manage pipeline and visualization:** Easily manage and update the full forecast with the drag-and-drop feature to move opportunities across different stages, to instantly update forecast data.
- **Benefit from near real-time updates:** Enjoy automatic recalculation of forecast values to ensure data is always as fresh as possible.



*Adjust deals using a visual Kanban board*

### NOTE

- This feature is available in the Unified Interface only.

- This capability is intended only for Dynamics 365 Sales Enterprise.

## Licensing

### License enforcement: users with new Team Member licenses

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Business value

This licensing enforcement helps customers align with the Team Member license restrictions described in the [Microsoft Dynamics 365 Licensing Guide](#).

### Feature details

For Team Member licenses purchased during or after October 2018, license-based access will restrict users to a set of designated app modules. These users will no longer be able to access Customer Service Hub, Sales Hub, or custom app modules. The designated app modules are as follows:

- Customer Service Team Member
- Sales Team Member
- Project Resource Hub

During the early access phase, users with Team Member licenses will be able to use the designated app modules mentioned above alongside all existing apps. Once license enforcement is turned on (starting April 1, 2020), unentitled apps such as Customer Service Hub, Sales Hub, and custom apps will not be accessible. Customers are advised to test their Team Member scenarios and migrate customizations to the designated app modules as needed.

Before general availability, customers can enable enforcement within specific environments to proactively preview full enforcement (that is, the scenario where non-designated app modules are blocked based on license entitlement).

**NOTE** This feature is available in the Unified Interface only.

## Simplified experiences

### Overview

Sellers want to focus their time on building successful customer relationships and winning deals. They seek tools that help them complete mundane tasks quickly and intuitively, while providing access to relevant information promptly.

We are actively listening to our customers to learn from them about how we can make Dynamics 365 Sales better, easier, and more efficient. Dynamics 365 Sales aims to help sellers develop deeper relationships and improve their productivity. As part of our commitment to make Dynamics 365 Sales better, we are continually introducing enhancements that remove unnecessary friction and make experiences easier to use.

### Enhanced experience for adding products

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Feb 2020	-	Apr 2020

### Business value

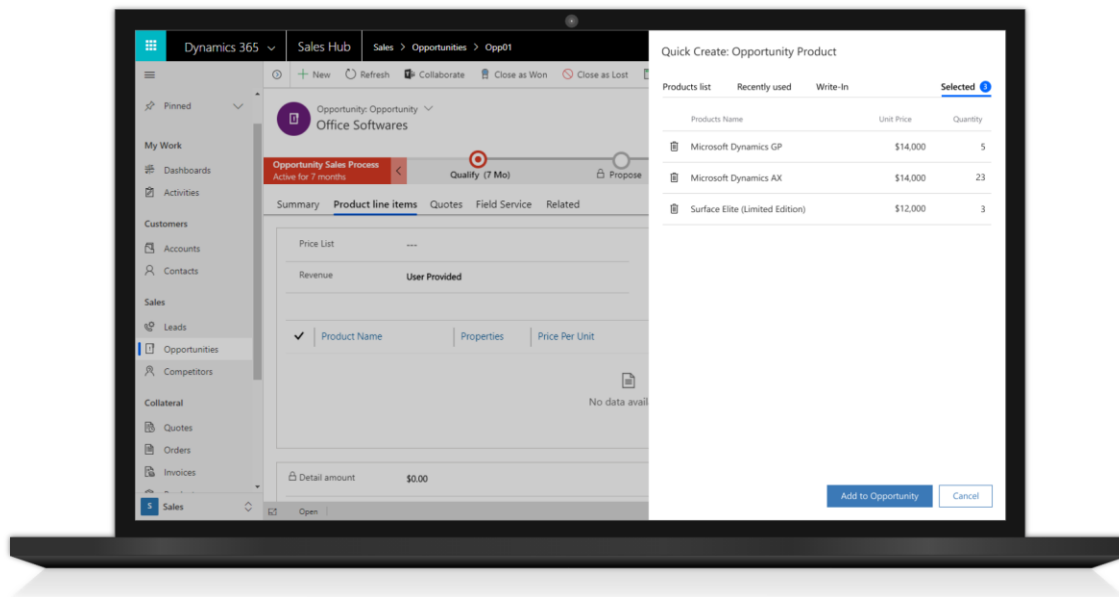
Dynamics 365 Sales holds a vast amount of customer information that feeds into pipeline management, product procurement, and overall sales tracking. To ensure these are managed properly, opportunities must accurately reflect customer interest. To achieve this, sellers are required to update opportunities regularly to reflect the purchase intent for every product, as it arises, even if sellers manage a wide range of products.

Keeping opportunities current competes with selling activities as well as many other repetitive tasks, which means oftentimes, product information is either excluded or not updated to reflect the latest customer interest. In the 2020 wave 1 release, we simplify and expedite matching products to opportunities, reducing friction and motivating sellers. With this feature, seller can add products quickly and intuitively, with minimal effort.

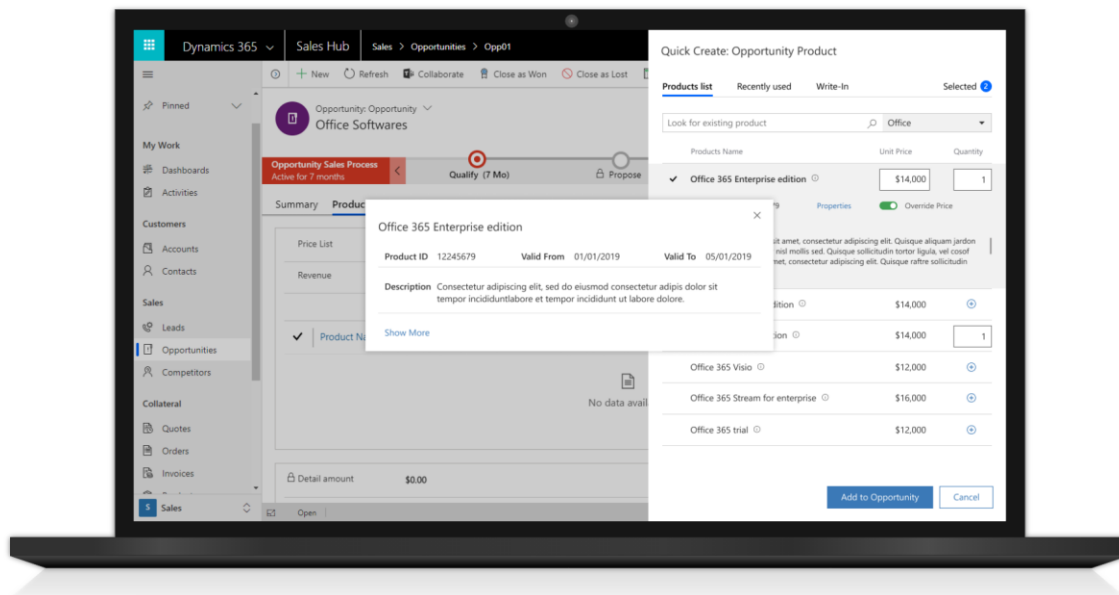
### Feature details

- **Look up products directly from the catalog:** Search and find products based on free text across name and description columns within the Product entity. Filter products based on product family or predefined views to simplify and expedite finding the right product.
- Explore product details inline and compare products to make an informed selection: View additional information for each product before selecting it.

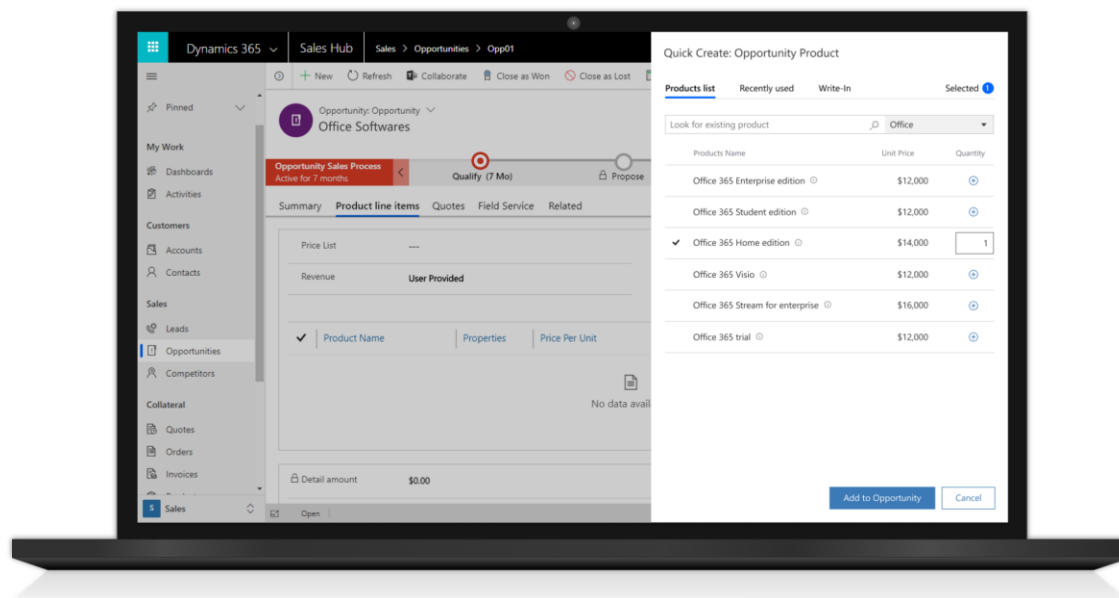
- **Add multiple products at once:** Select multiple products at the same time to save time and increase productivity.



### Add products to opportunity



### Product details



### Search and select products

#### NOTE

- This feature is available in the Unified Interface only.
- This capability is available in Dynamics 365 Sales Enterprise and Dynamics 365 Sales Professional.

### Easier selection of email templates

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Business value

Sales organizations use email templates to ensure consistency and to create deeper engagement across customer communications.

Dynamics 365 Sales automates data entry in emails by mapping template text to field data and automatically fills in these values in emails. Standardized content saves sellers time and effort in crafting common messages.

As part of our commitment to simplifying experiences across the product, we are introducing enhancements to the email template selection experience. These improvements will help sellers



take advantage of email templates effortlessly—unifying communications across the organization and improving productivity.

### Feature details

- **Select an email template from the gallery intuitively:** Benefit from a list of all available email templates from which to scroll and find the most relevant one.
- **Get a quick view of the template before selecting it:** Preview templates from a list that displays highlighted titles so context is clear prior to making a selection.
- **Benefit from categories to simplify template lookup:** View templates via categories, such as those recently used or added to help quickly identify the relevant one.

### NOTE

- This feature is available in the Unified Interface only.
- This capability is available in Dynamics 365 Sales Enterprise and Dynamics 365 Sales Professional.

### Manage activities with ease

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Business value

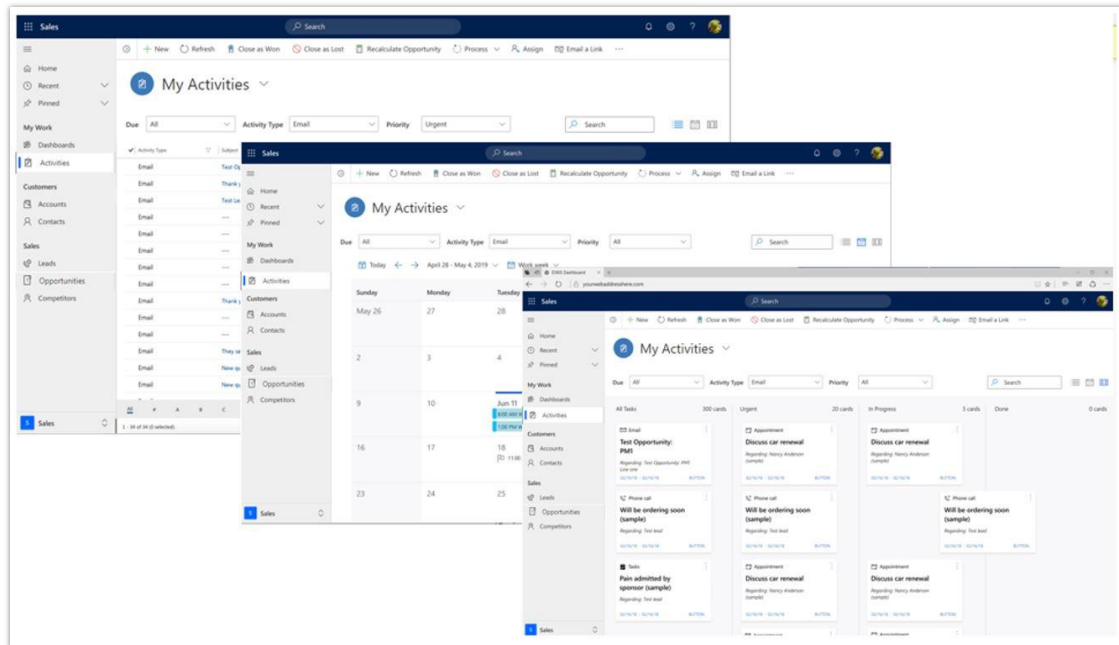
Working collaboratively on opportunities and leads means there are tasks that must be completed by multiple team members. Creating new tasks, assigning these tasks, and completing them is critical to the overall success of customer engagements. Activity management in Dynamics 365 Sales provides an efficient way to manage and assign tasks across the team to ensure harmony.

As part of our commitment to simplifying experiences across the product, we are introducing enhancements to activity management. These improvements offer productive and intuitive ways to manage tasks across the team, offering sellers peace of mind knowing that team tasks are organized, prioritized, and delivered.

### Feature details

- **Find activities quickly:** View activities listed in a newly improved grid. Benefit from a newer interface for managing and filtering activities to help quickly find the right activity to work on.

- **Navigate activities easily:** Simplified process to create new activity, edit existing activity, complete or delete an activity without having to navigate away from the main page.
- **Update activities intuitively:** Use drag-and-drop pipeline management with a Kanban board to drag and drop activities and instantly update the status. Ideal for managing many activities.
- **Benefit from Calendar view:** See all activities in a visualized calendar view to easily get a clear understanding of daily to-dos.



### Calendar view

**NOTE** This feature is available in the Unified Interface only.

## Manage feature settings and configure the Sales Hub application from a centralized location

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Feb 2020	-	Apr 2020

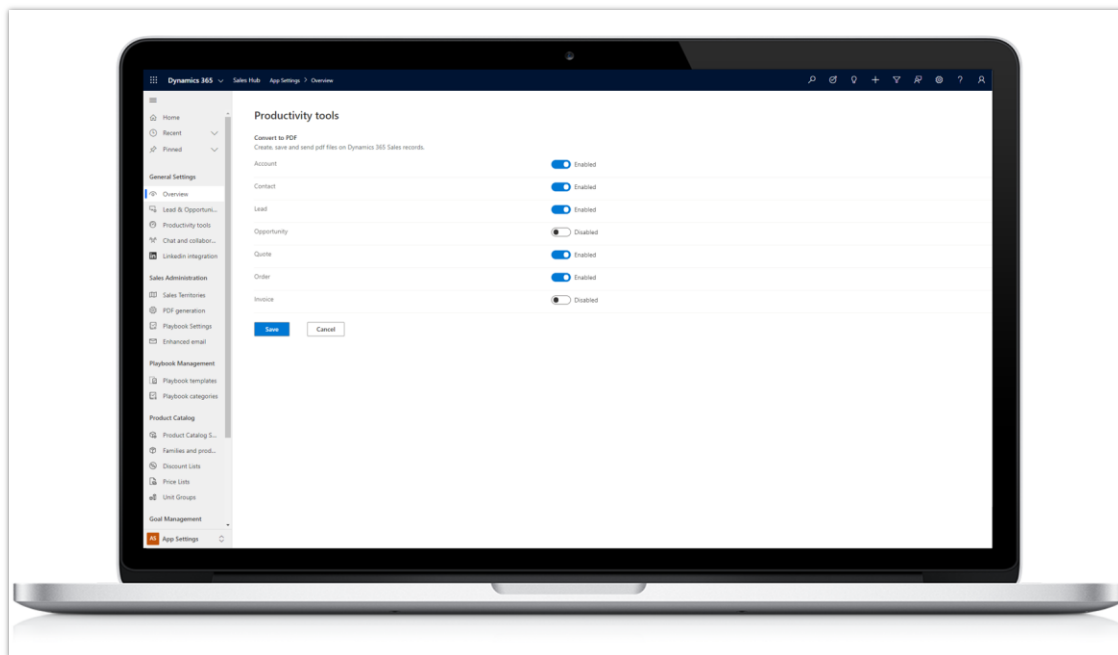
### Business value

Administrators need to configure the sales application per their organization's needs. Providing a centralized location for discovering and managing Dynamics 365 Sales settings aims at simplifying the administrators' experience and helps them to be more productive.

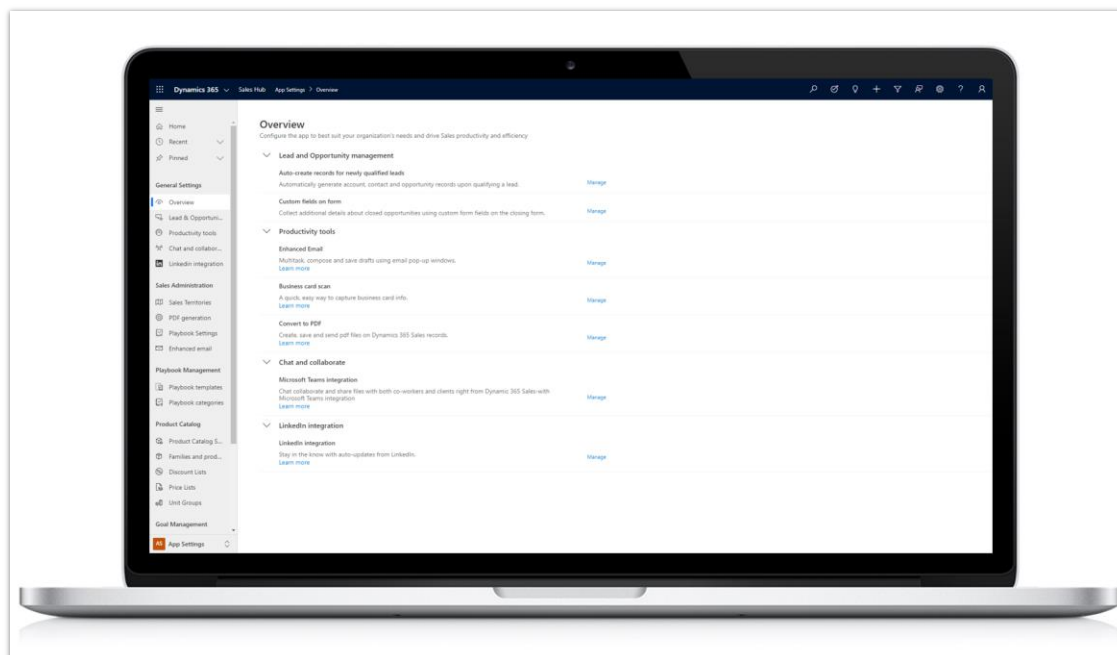
As part of our commitment to make Dynamics 365 Sales better, we are continually introducing enhancements that remove unnecessary friction and make experiences easier to use.

### Feature details

- Easily discover specific Dynamics 365 Sales feature configuration settings within the Sales Hub application's App Settings.
- Easily discover entities and features that support configurability, and navigate to their settings and configure them.



*Feature setting*



## General settings

### NOTE

- This feature is available in the Unified Interface only.
- This capability is intended only for Dynamics 365 Sales Enterprise.

## Sales Team Member app module

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

## Business value

Sales Team Member is a new app module that will be available to users with the Team Member license and is designed for users who are not tied to a particular function, but require basic Dynamics 365 functionality within sales scenarios.

## Feature details

The Team Member license provides use rights to a limited set of use cases. The Sales Team Member app module enables those use cases and provides guidance and clarity on the use rights. The new app module will support the following sales use cases:

- View customer details
- View leads and opportunities related to a customer
- Create and view activities for a customer or related leads or opportunities

Admins can configure the app for additional scenarios, but not beyond those listed in the [Microsoft Dynamics 365 Licensing Guide](#).

## NOTE

- This feature is available in the Unified Interface only.
- This capability is available with the Dynamics 365 Team Member license.

## Save standardized PDF documents to Dynamics 365 Sales or Microsoft SharePoint

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

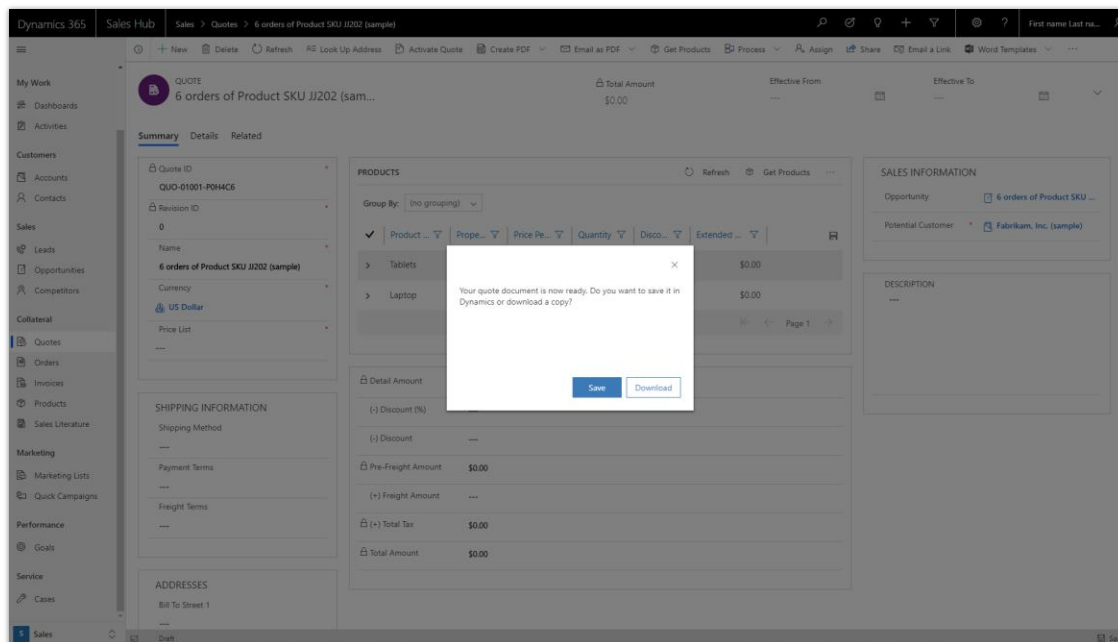
## Business value

Over the last few months, Dynamics 365 Sales made it easier for sellers to create and email standard PDF documents based on quotes and other entity records. To make it even easier to collaborate on these PDF-generated documents, we are introducing the ability to save the PDF directly in Dynamics 365 Sales as a Notes attachment or in Microsoft SharePoint.

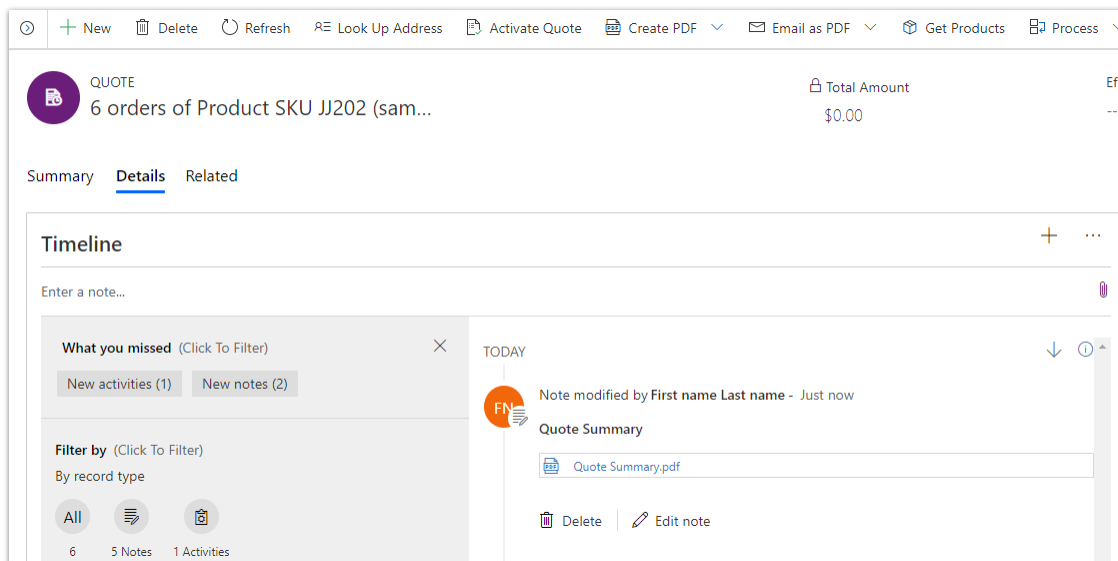
## Feature details

With this enhancement, sales people will be able to:

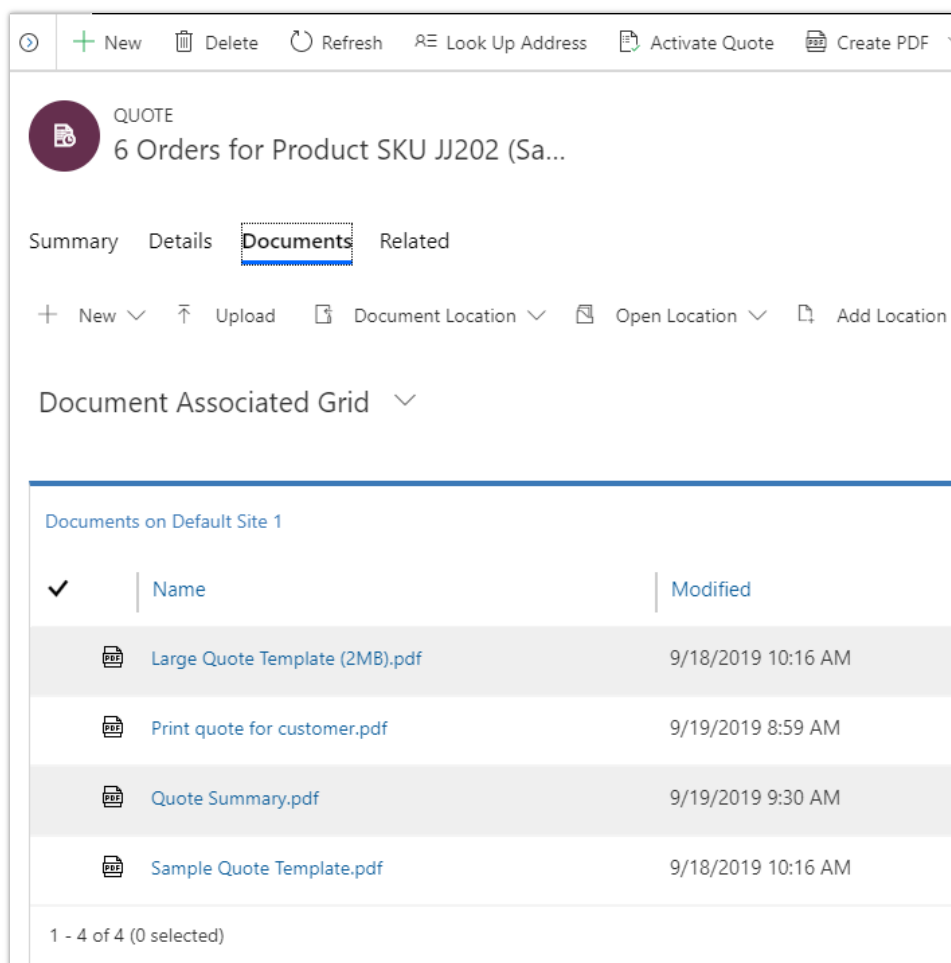
- More quickly save standardized PDF documents created from Word templates as attachments in Notes.
- Save standardized PDF documents based on Word templates in SharePoint.



*Dialog box to save the PDF to Dynamics 365 Sales or Microsoft SharePoint*



*PDF document added to Notes*



*PDF documents added to the SharePoint site*

## NOTE

- This feature is available in both the legacy web client and Unified Interface.
- This capability is available in Dynamics 365 Sales Enterprise and Dynamics 365 Sales Professional.

## Work with opportunities in the Kanban view

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

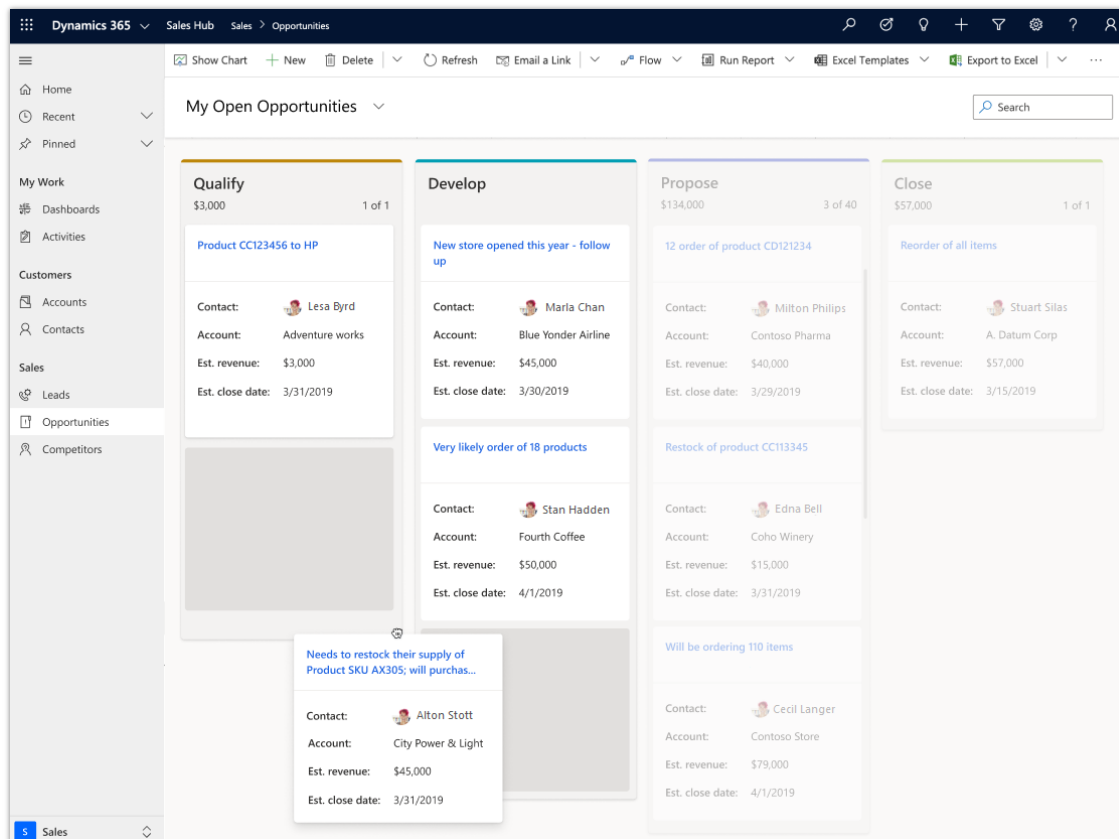
## Business value

We are actively listening to our customers to learn from them about how we can make Dynamics 365 Sales better, easier, and more efficient. Dynamics 365 Sales aims to help sellers develop deeper relationships and improve their productivity.

As part of our commitment to make Dynamics 365 Sales better, we are continually introducing enhancements that remove unnecessary friction and make experiences easier to use.

## Feature details

- Easily toggle between the existing grid view and the new Kanban view.
- Sellers can view their opportunity pipeline by sales path on the Kanban board.
- Simplified and intuitive experience to move opportunities into a different stage. The Kanban view allows your sales team to move opportunities from one stage to another by simply dragging it.



## Teams

**NOTE** This feature is available in the Unified Interface only.



## Overview of Dynamics 365 Sales Insights 2020 release wave 1

Everything we do at work creates data. This data sits at the center of the organization, powering processes, generating archives, and informing decisions. As organizations grow and expand, so does their data footprint, which in turn ignites the need to accelerate processes and enhance decision-making through digital transformation. Organizations that embrace digital transformation show significant improvements to profit margins, increasing revenue while also reducing costs.

For sales organizations, transformation means making sales data go further to help sell smarter and faster as well as to outsmart competition. Deeper customer knowledge and accelerated intelligence can guide organizations to proactively pursue opportunities at the right time and with the right context. Furthermore, coaching and learning can be tailored to each organization, so your business is always moving forward.

Dynamics 365 Sales Insights leverages the power of the Microsoft cloud to bring together sales information via Dynamics 365, communications via Office 365, relationships via LinkedIn, and the power of Microsoft AI to transform selling. Sales organizations gain a 360-degree view of their customer engagements to offer agility, adapting to rapid market changes while adhering to business strategy and accommodating specific business requirements and guidelines.

We do this by democratizing sales intelligence. Dynamics 365 Sales Insights is designed to empower everyone in the sales organization to be more productive, more agile, and more customer focused—ultimately closing more deals, faster:

- Sales leaders can improve sales team efficiency and impact, manage pipelines more intelligently, and enhance customer relationships with actionable insights and relevant recommendations. Intelligence is drawn from all forms of communication to deliver a coherent and current state of the business.
- Sellers, whether in the field or at call centers, can spend more time on selling activities, with automation of mundane tasks, and better prioritize pipelines with timely sales guidance, benefiting from relevant insights tailored to meet specific context and individual performance.
- Sales enablement professionals, who help to operationalize selling, can become more agile with simpler discovery of winning strategies, develop more meaningful guidance with deeper understanding of sales performance, and broadcast the right information at the right time with streamlined dissemination across the sales team. All this, while adhering to and enforcing business strategies with powerful tools that augment sales guidance.

We deliver on this vision by infusing artificial intelligence (AI), machine learning, and advanced technologies into ongoing sales processes. Powered by data across Dynamics 365, Office 365, and LinkedIn and built on top of Microsoft Power Platform to easily integrate external data

sources, Dynamics 365 Sales Insights offers a wide breadth of actionable insights tailored to meet specific business needs. Altogether, it can empower sales organizations to close more deals, forecast more accurately, and meet sales quotas, while maximizing selling potential through deeper customer relationships.

Our product offering includes:

- **Dynamics 365 Assistant:** Dynamics 365 Assistant offers sellers just-in-time intelligence, automating mundane tasks and surfacing the right information, at the right time, in the right context. The assistant aggregates data and insights across multiple systems to offer a frictionless way for sellers to excel.

In previous releases, the assistant offered relationship insights in Dynamics 365 Sales alongside daily planning and meeting assistance via the Teams mobile app. Now we are bringing all insights together, while enhancing with more actions and context. Furthermore, we are making assistance available wherever selling happens, across new surfaces.

- **Sales Studio for AI guided selling:** Sales Studio empowers sales organizations to build AI-driven insights and sales guidance that align with and help to enforce business strategies and best practices, unique to every sales organization. This helps ensure that sellers and sales managers are well-informed and empowered to sell smarter and faster.

In previous releases, Sales Studio introduced the opportunity to build sales guidance, made available via the Relationship Assistant. Now we are combining all sales guidance under the Dynamics 365 Assistant, so guidance built via the studio will be surfaced to sellers across surfaces. Furthermore, enhanced capabilities and simplified experiences empower sales enablement managers to build actionable insights, with full context, while monitoring engagement to always learn and improve sales guidance.

- **Advanced forecasting and pipeline intelligence:** Focusing on the right leads and opportunities helps ensure valuable time is spent on those customers that are most likely to move to the next stage.

In this release, we will introduce advanced forecasting capabilities powered by cutting-edge machine learning models that empower organizations to more accurately predict their forecasts and more easily identify anomalies across opportunities. Pipeline intelligence is an enhancement to previous releases, introducing significant model improvements to capture more information, across a broader set of dimensions.

- **Relationship analytics and Auto capture:** Relationship analytics helps form trusted customer relationships that power long-term sales engagements and lead to repeat selling. Objective measures spark attention when needed, so no lead is left behind and no opportunity overlooked. Auto capture ensures consistent information, so models and insights are powered by meaningful data. Combining reliable data with top quality AI models offers accurate and valuable understanding that enhances productivity and provides visibility to inspire alignment across the sales team.

In this release, we capture a wider set of signals and offer flexibility to adapt models to specific business needs so relationship health understanding is more accurate. At the same time, we incorporated Natural Language Processing (NLP) to identify contact information updates and detect action items within captured activities, all while continuing to focus on capturing more sales information with minimal effort and improving the accuracy and consistency of the data captured.

- **Conversation intelligence:** Conversation intelligence offers a unique opportunity to monitor all customer conversations and extract valuable insights that can help sales organizations move forward faster and smarter. Sales managers can easily identify "rock star" sellers and winning strategies, as well as potential gaps, to inform coaching and propagate positive behaviors across the team. Sellers benefit from the opportunity to self-reflect and learn.

In this release, we introduce new ways to easily onboard the organization so everyone can benefit from Conversation intelligence. We offer deeper analysis, with emotion detection, to help tune in to those behaviors that drive successful outcomes. With real-time insights, we ensure that sellers are empowered with the information they need, when they need it.

As always, we want to hear from our customers and partners with any ideas or thoughts about Dynamics 365 Sales Insights. To learn more or give us feedback please go to:

- [Dynamics 365 Sales Insights product website](#)
- [Dynamics 365 Sales Insights product documentation](#)
- [Dynamics 365 Sales Insights product ideas site](#)

## What's new and planned for Dynamics 365 Sales Insights

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

## Advanced forecasting and pipeline intelligence

Feature	Enabled for	Public preview	General availability
<a href="#">Benefit from more accurate pipeline predictions</a>	Admins, makers, or analysts, automatically	Apr 2020	
<a href="#">Remove the guesswork with predictive forecasting</a>	Admins, makers, or analysts, automatically	Feb 2020	Apr 2020
<a href="#">Uncover hidden insights in your forecasts</a>	Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

## Conversation intelligence

Feature	Enabled for	Public preview	General availability
<a href="#">Better understand customers with advanced conversation insights</a>	Admins, makers, or analysts, automatically	Apr 2020	
<a href="#">Boost seller productivity with conversation insights inside Dynamics 365 Sales</a>	Admins, makers, or analysts, automatically	Apr 2020	
<a href="#">Easily onboard with out-of-the-box functionality and integrations</a>	Admins, makers, or analysts, automatically	Sep 2020	

## Dynamics 365 Assistant

Feature	Enabled for	Public preview	General availability
<a href="#">Receive assistance on the go via the new Dynamics 365 Sales mobile app</a>	End users by admins, makers, or analysts	Sep 2020	
<a href="#">Benefit from enhanced insights</a>	End users, automatically	Feb 2020	Apr 2020

## Relationship analytics and Auto capture

Feature	Enabled for	Public preview	General availability
<a href="#">Benefit from easy setup and UI configuration with relationship analytics</a>	Admins, makers, or analysts, automatically	Apr 2020	
<a href="#">Benefit from evergreen contact information and stakeholders detection with Auto capture</a>	End users by admins, makers, or analysts	Aug 2020	
<a href="#">Empower sellers with highly granular controls with Auto capture</a>	End users by admins, makers, or analysts	Aug 2020	
<a href="#">AI-infused Auto capture is generally available</a>	End users by admins, makers, or analysts	-	Apr 2020
<a href="#">Better privacy controls for Who knows whom</a>	End users by admins, makers, or analysts	-	Apr 2020

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **End users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their end users.

For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

## Advanced forecasting and pipeline intelligence

### Overview

To stay ahead of the market, sales teams are constantly pressured to sell more and faster to meet sales quotas. It is imperative that sellers spend time on the best leads and opportunities, prioritizing prospects that are likely to move quickly through the pipeline. Potential customers are introduced into the pipeline through various channels and sellers struggle to tell these

“hidden gems” apart—for example, new prospects who are ready to buy, stranded prospects who need to be contacted, or unlikely prospects who are better left unattended. Managers need to proactively understand their business even when their sellers have yet to update them, keeping them honest and accurate.

Predictive forecasting and pipeline intelligence with predictive lead scoring and predictive opportunity scoring help sales teams uncover top deals. Intelligent scores offer sellers guidance on where best to invest their time, improving resource allocation and increasing productivity, while helping to ensure rigorous quotas can be met, efficiently.

Intelligent forecasting and optimal resource allocation help everyone on the team:

- **Sellers** can manage their time more efficiently by focusing on potential customers and deals they are most likely to win.
- **Sales managers** can plan sales team execution and meet sales forecasts more confidently with greater flexibility and clearer view into bottom-up projections, all the while gaining a deeper understand of those opportunities that impact the business.
- **Sales enablement managers** can benefit from greater flexibility to offer more granular and meaningful guidance that accurately reflects sales execution.

### Benefit from more accurate pipeline predictions

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 2020	-

### Business value

With competitive pressure growing, sellers are pressed to sell faster. Accelerating selling depends on engaging with the right customers, to leads most likely to convert, and to opportunities most likely to close as won. Time spent on a lost lead or opportunity is the time that could be invested in closing another deal.

With the growing abundance of data, there is an opportunity for every sales organization to benefit from Dynamics 365 Sales Insights, powering resource allocation and intelligent pipeline management with machine learning models, to direct sellers to the next best customer engagement.

Predictive lead and opportunity scoring provides sellers with meaningful predictions, guiding toward the next best customer, and ensuring time is spent with those leads and opportunities most likely to convert or close as won, respectively.

### Feature details

- **Gain a deeper understanding of scores:** Benefit from extended score explanations to help better understand the reasoning behind every score.
- **Benefit from models informed by a wider set of signals:** Calculate predictive lead and opportunity scores accounting for a wider set of signals, including custom related entities.

### Remove the guesswork with predictive forecasting

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

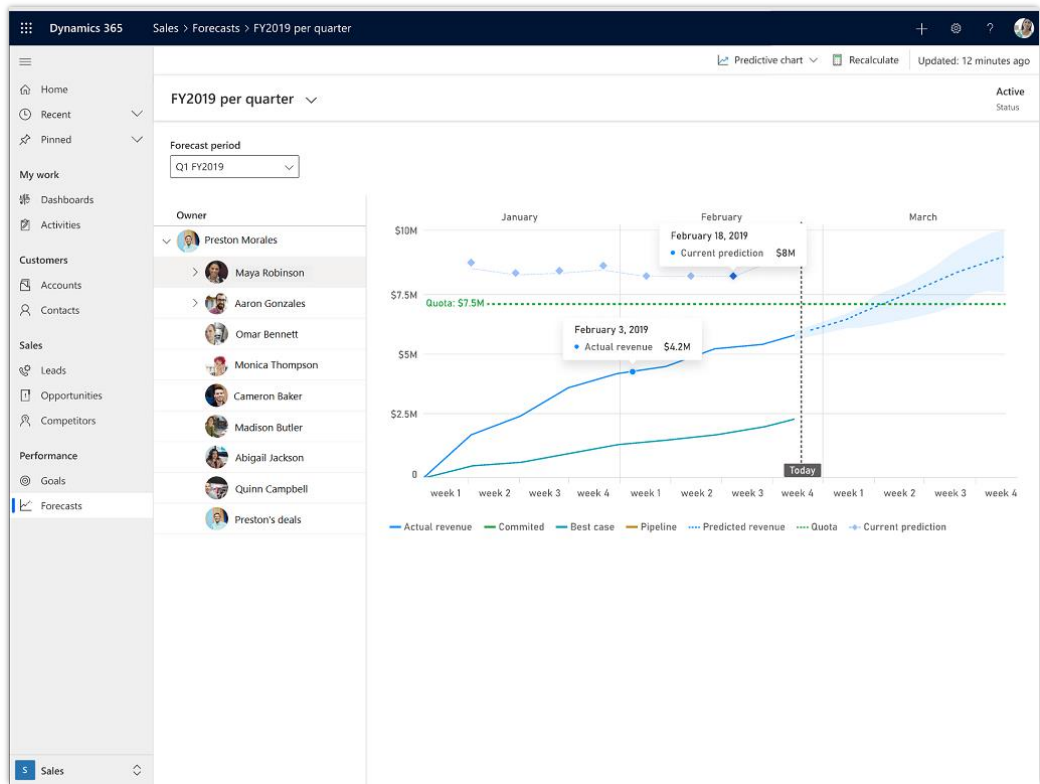
### Business value

Growing volumes of sales data offer a unique opportunity to inform business decisions and enhance sales performance. Sales organizations can transform forecasting with large-scale sales data to make more comprehensive and reliable sales predictions.

Predictive forecasting complements subjective bottom-up projections with objective data-driven forecasts. By leveraging both historical and pipeline data, sales managers can forecast sales more accurately and without bias.

### Feature details

- **Explore historical evidence:** Complement subjective bottom-up forecasts with predictive projections to identify discrepancies or inconsistencies without manual effort.
- **Leverage your existing data:** Compare actual performance directly against predictions to visually contrast how the number of deals won is pacing against predictions. The predictive model captures all related data from past deals and open pipelines to identify signals that have the most impact.



*Compare actual results against predicted values*

**Uncover hidden insights in your forecasts**

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

**Business value**

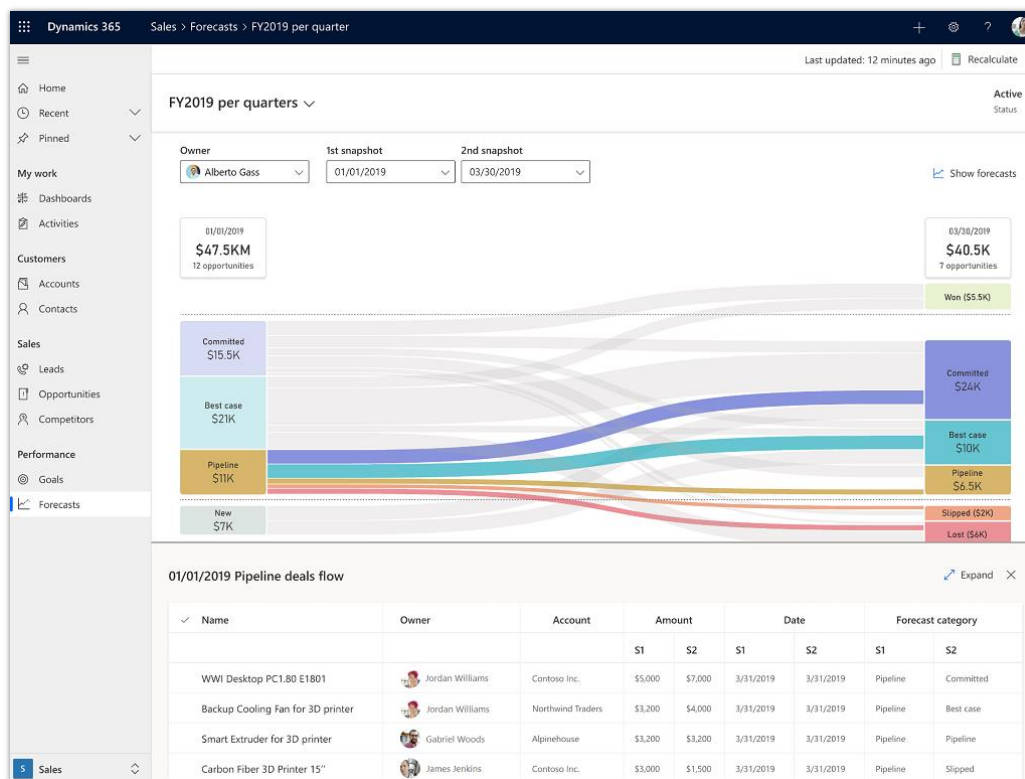
To ensure sales managers can provide leadership with meaningful forecast numbers that they trust, the forecasting capabilities of Dynamics 365 Sales offer great flexibility. Sales managers are empowered to take snapshots to freeze a forecast in the moment and to analyze forecasts, gaining a deeper understanding through changes that occur between snapshots.

With deal flow analyses, comparing two snapshots visually, sales managers can easily view changes in forecasted values as well as the underlying records that contribute to the change. For example, if a sales manager's team forecasted to close 100,000 deals, but only closed 80,000, the sales manager can investigate which deals slipped and why to get a deeper understanding and inform future planning.



## Feature details

- **Take advantage of snapshots:** Trigger snapshot creations before or after adjustment periods end. Empowers sales enablement managers to offer automated snapshots.
- **View snapshot history:** Explore a log of all snapshots taken per forecast and manage these as needed. Empowers sales enablement managers to develop valuable learnings for the organization.
- **Benefit from deal-flow and snapshot visualization:** Visually compare two forecast snapshots to better understand how and why forecasting has changed over time.
- **Take advantage of cumulative trend chart:** Inspect forecast projections visually across a timeline chart.



*Know how the forecast is changing over time*

## Conversation intelligence

### Overview

Talking directly with customers is an important part of any sales cycle. While many organizations have already amassed large volumes of conversational data, most are not deriving any value from these interactions, despite the tremendous potential. In today's resource-constrained

environment, extracting value from existing data is vital for profitable growth. By leveraging Microsoft's recent advancements in AI and natural language processing, Conversation intelligence automatically extracts these insights to help close deals faster and to identify new opportunities.

By automatically transcribing calls and analyzing content, sentiment, and behavioral style, Conversation intelligence provides meaningful insights. Sellers can effectively guide buyers toward a purchase using proven conversation techniques. Managers can make better strategic decisions for new sales motion or sales training by identifying new market trends. By understanding unique behaviors of top sellers, managers can bring those learnings to the rest of the team to lift the team performance.

In the 2020 release wave 1, we bring call summary and action item extraction right within Dynamics 365 Sales to help sellers save precious time after every customer call. We are also introducing new AI models that detect emotions and high-level topics discussed during customer conversations.

Conversation intelligence is relevant to everyone on the team:

- **Sellers** need a simple way to keep track of conversations and ensure they follow best practices to make the most out of every conversation.
- **Managers** need to keep track of team performance in real time, so top sellers are reinforced, successful behaviors propagated, and potential gaps immediately addressed to meet sales quotas effectively and to ensure customer satisfaction.

### Better understand customers with advanced conversation insights

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 2020	-

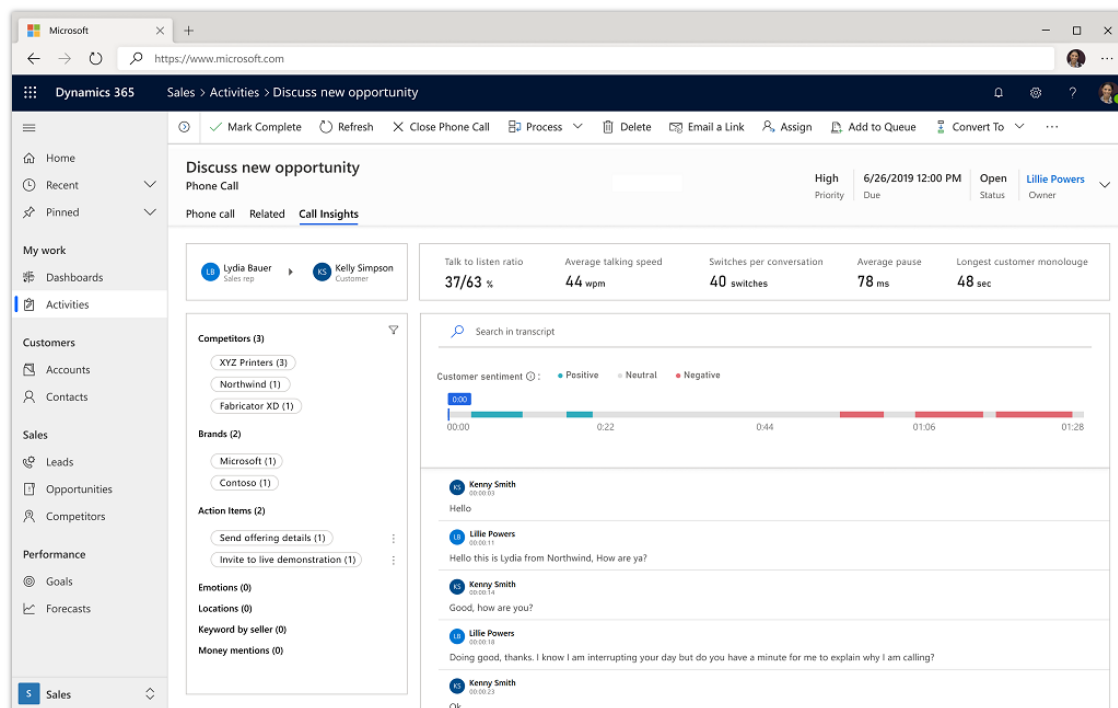
### Business value

In today's world, organizations must be able to quickly understand customer needs and sentiment toward business brands. Understanding vocal patterns and the nuances of a customer tone can help to determine the potential for success or failure of a deal.

With advancements to Conversation intelligence, sales managers and sellers will be able to better understand customer attitudes and discern potential approaches for handling competitive threats at a deeper level. Providing organizations with emotion analysis based on vocal tones, topic analysis of key discussion points in the conversation, and easy drill-down into relevant conversations that inferred specific insights, all offer greater ability to take appropriate action to move deals forward faster.

## Feature details

- **Emotion detection:** This feature includes an AI model and conversation review experience enhancement.
- **Deeper topic analysis:** Explore communication patterns and important topics that lead to successful conversations.
- **Updates to insights details page:** Create faster drill-downs into conversations that led to the insights.



*Call insights sample page*

## Boost seller productivity with conversation insights inside Dynamics 365 Sales

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 2020	-

## Business value

Sellers spend an average of 8 minutes after every customer call summarizing what they learned and the next steps. Often these learnings are not captured within Dynamics 365 Sales. When

multiple sellers are jointly working on a shared opportunity, it is critical that everyone has exposure to all customer conversations.

In the 2020 release wave 1, a complete call summary including action items, topics discussed, and call playback, are available directly within Dynamics 365 Sales phone call activity logs. Capturing these learnings automatically with Conversational Intelligence enables a seller to focus their time on customer needs. Additionally, sales enablement managers can create sales guidance and insights for sellers using Sales Studio.

### Feature details

- **Easy access to conversations:** View call summary within Dynamics 365 Sales phone call activity including playback, transcript, action items, topics, keywords, brand mentions, conversation KPIs, and sentiment analyses.
- **Access to conversational insights and highlights:** Easily view playback, keywords, sentiment, compete mentions, conversational KPIs, and action items.
- **Create the next best actions and highlighted information:** Conversational data available within Dynamics 365 Sales is easily accessible via Dynamics 365 Assistant Studio.

### Easily onboard with out-of-the-box functionality and integrations

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Sep 2020	-

### Business value

Sales organizations are looking to unleash the power of customer conversations to help drive their sales strategies and training. Some of the challenges that organizations face might include:

- A lack of a call-recording system in place to create this powerful data asset.
- A telephony system that is not integrated with their Dynamics 365 Sales Insights system.
- A significant engineering investment to pull these recordings from their recording platforms.

In the 2020 release wave 1, sales organizations can use Conversation intelligence out of the box to more easily set up custom call recording solutions that work directly with Dynamics 365 Sales Insights. A seamless onboarding experience empowers customers to start gaining deep AI insights and transform their business, effortlessly.

## Feature details

- **Dial-Record-Playback:** Customers using Dynamics 365 Channel Integration Framework for their telephony (CTI) needs can now record those calls and use Conversation intelligence within Dynamics 365 Sales Insights.
- **Extend strategic partnership to more recording platforms:** Continue to work with recording players and telephony systems to build easy-to-deploy integrations.

## Dynamics 365 Assistant

### Overview

In today's competitive environment, sellers spend significant time on the road, fostering personal customer engagements to convert more opportunities into wins.

But sellers often struggle to manage their day productively. They spend valuable time collecting information across multiple systems to paint a complete picture for each opportunity, to take the next best course of action that will lead to a successful outcome. Then they spend more time updating CRM, so everyone on the sales team is on the same page. Ultimately, this leaves little time to focus on what matters most—building meaningful relationships with customers.

When time is limited and information stands to offer strategic differentiation for closing deals, having personal and contextual sales guidance can empower sellers to achieve more. Dynamics 365 Assistant offers the seller a competitive advantage by surfacing relevant and actionable insights and by automating mundane tasks. This gives time back to sellers and, in turn, increases productivity across the entire sales organization.

In the 2020 release wave 1, we focus on delivering Dynamics 365 Assistant across more mobile surfaces, providing more recommendations and insights from across new data sources, so every field seller on the road receives the right information, at the right time, and in the right context.

Offering contextual insights and task automation helps every seller:

- **Field sellers** can receive assistant on-the-go, empowering them to get things done while in motion, in the surface of their choice, to ensure nothing gets overlooked.
- **Insider sellers** can benefit from just-in-time guidance based on sales cadences, to ensure every customer is contacted at the right time and in the right way.

### Receive assistance on the go via the new Dynamics 365 Sales mobile app

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Sep 2020	-

## Business value

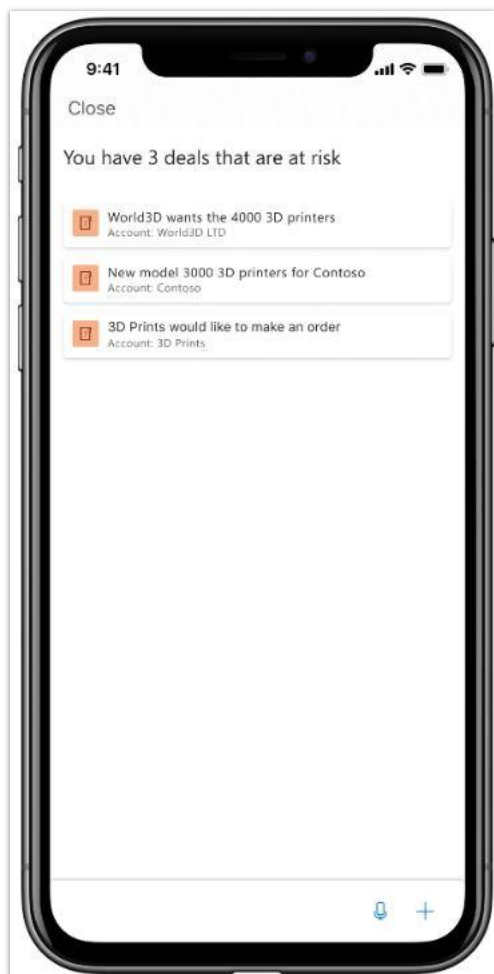
Field sellers spend valuable time traveling to meet with customers, making every engagement more personal and meaningful. While on the road, they often struggle to stay well-informed, which means key information might be overlooked in key moments.

By introducing Dynamics 365 Assistant across more devices, we ensure sales guidance and insights are available to every seller, when and where they need it. Sellers receive key insights to help maximize every customer engagement while on the move, whether via the Teams app or with the new Dynamics 365 Sales mobile app. The flexibility to choose means sellers get the information they need wherever they are.

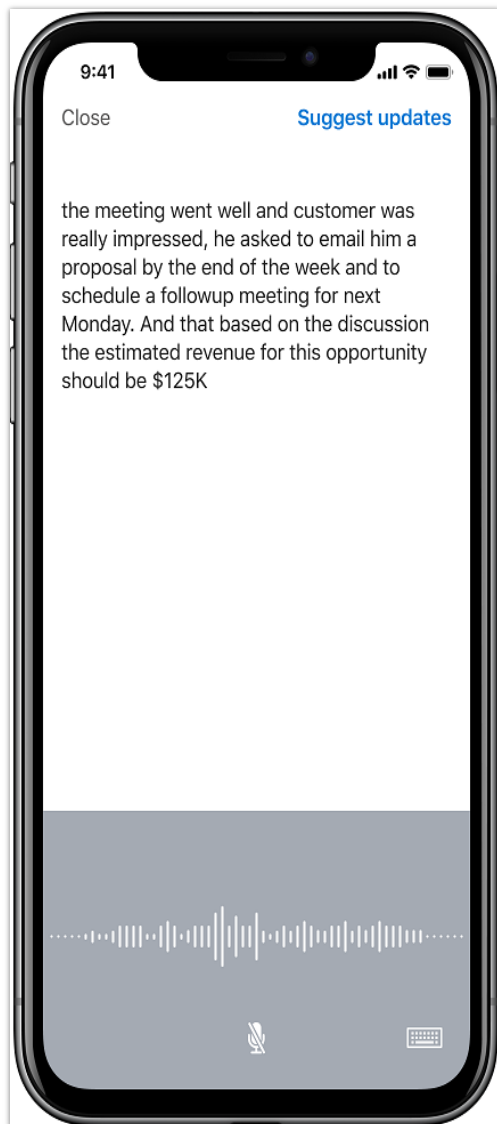
## Feature details

Benefit from features introduced via the Teams app, now available with the new Dynamics 365 Sales mobile app:

- **Plan and prioritize your day:** Receive a daily summary of upcoming customer meetings and a prioritized list of relevant insights to help focus on what matters most so nothing falls through.
- **Come prepared to every customer meeting:** Benefit from a 360-degree view of the customer and meeting participants in a single place. This includes previous interactions, related tasks, commitments, details about meeting participants, and actionable insights—making the most of every meeting.
- **Capture post-meeting information:** Keep Dynamics 365 Sales up to date by capturing meeting notes in a single click. Meeting summaries are automatically turned into actionable tasks while new acquaintances are added as new contacts or leads, directly from scanned business cards.
- **Benefit from conversational assistance:** Interact with Dynamics 365 Sales through natural language interactions. Conversational assistance includes the ability to use Q&A to get information from Dynamics 365 Sales and to update records.

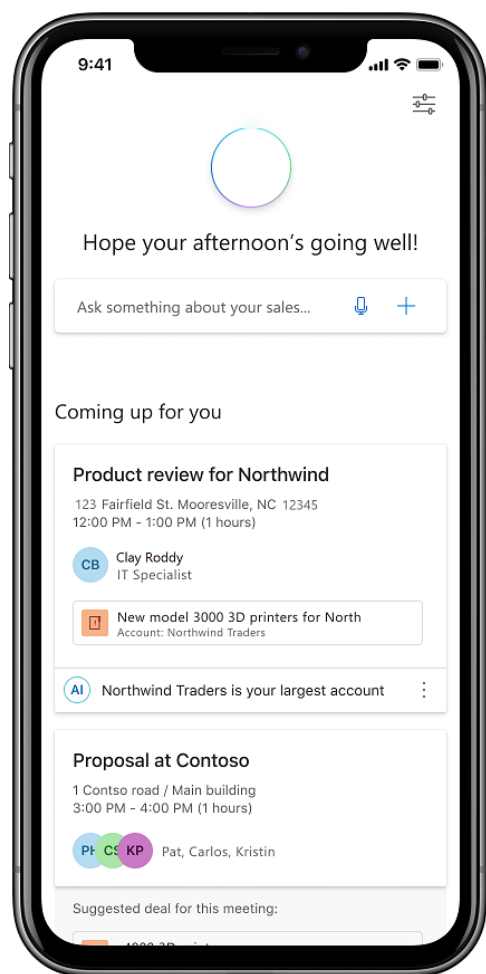


*Get prioritization guidance for the day*



*Assistant offers more ways to capture meeting outcomes*





*Receive assistance on the go via the mobile app*

## Benefit from enhanced insights

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

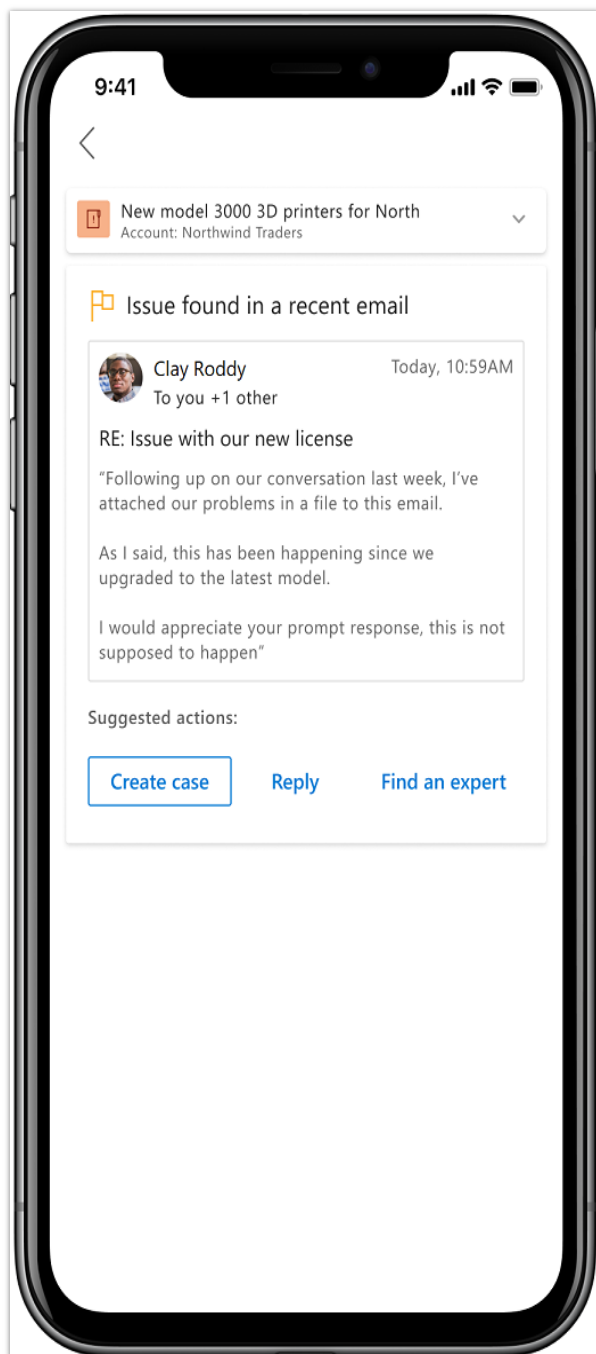
## Business value

Companies deliver guided selling to keep sellers on track and to enforce successful selling strategies. Sellers often struggle to get the information they need to achieve successful outcomes. This means valuable steps that are key to achieving success might be overlooked. Sales Studio empowers sales enablement managers to surface sales guidance at the right time and in the right context, so no step is skipped and no relevant information untapped.

In previous releases, we introduced next-best-action recommendations. As part of our commitment to make our AI-driven experiences better, we are continually introducing enhancements that make sales guidance contextual and impactful. New capabilities help sellers gain more control as well as introduce additional information and relevant actions to help get things done in the moment.

### Feature details

- **Group insights by topic for better prioritization:** Group insights based on different attributes help to prioritize work based on the immediate context. For example, grouping insights by opportunity identifies relevant actions to progress a specific deal.
- **Drill down to receive more context:** Benefit from the flexibility to drill down into insights and receive more information in order to choose the best course of action. Sales enablement managers will define drill-down availability and details via Sales Studio.
- **Benefit from more context with every insight:** Receive better clarity for every insight including context on why the insight is being surfaced. Sales enablement managers will define a brief explanation via Sales Studio.



*Sample insight on issue found in email*

## Relationship analytics and Auto capture

### Overview

Relationships are the cornerstone of successful engagements, and information is a strategic resource that powers more valuable customer connections. Sellers that foster trust and long-term relationships win more deals and spark opportunities to generate more revenue.

Relationship analytics helps to objectively understand the quality of customer relationships in real time, guiding sellers to focus on the right customers. This ensures no deal at risk is overlooked and no deal ready to close lingers. With impartial insights into relationship health and clear visibility into what contributes or withholds success, sellers can make smarter decisions. Sales managers can benefit from a more accurate indication of success to better coach sellers and to more accurately anticipate sales.

Auto capture enables more reliable data to power trustworthy intelligence with powerful AI capabilities, made available via Dynamics 365 Sales Insights. Sales organizations benefit from high-quality information that is consistently recorded and actionable insights that inspire data-driven decisions, altogether powering efficient customer engagements that increase revenue.

Data entry automation and better understanding of what drives successful relationships are relevant to everyone on the team:

- **Sellers** need to focus on making sure every customer engagement is a seamless continuation of the previous one. Automation helps save time updating Dynamics 365 Sales while relationship benchmarks help to uncover effective sales strategies and identify selling experts. All contribute to moving deals forward at an accelerated pace.
- **Sales managers** need to track progress effectively and have a clear understanding of the status of ongoing deals to quickly identify gaps and proactively address them. Understanding behaviors and attributes of top sellers helps to proliferate best practices across the sales team.
- **Sales enablement managers** need relationship insights to better understand what drives successful outcomes, based on attributes of similar deals. Relevant sales guidance, contextual to every engagement, is more likely to be used by sellers.

### Benefit from easy setup and UI configuration with relationship analytics

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 2020	-

## Business value

Businesses often customize Dynamics 365 Sales forms to meet unique organizational workflows. This empowers sales organizations to surface relevant information, helping sellers to be more productive. Unique information needed to align with business processes is made immediately available, without unnecessary context switching.

With the 2020 release wave 1, we are making it easier to introduce relationship analytics into Dynamics 365 Sales forms. Relationship analytics UI components or measures can be individually added with the form editor. Simple customization helps to save time and resources and ensures that relationship health is made available where it is needed. Furthermore, relationship analytics will be enabled automatically after Dynamics 365 Sales Insights is installed, streamlining setup and removing any redundant friction.

## Feature details

- **Benefit from easy setup:** Get quick visibility into customer engagements with relationship metrics that are automatically enabled with Dynamics 365 Sales Insights to offer sellers and managers visibility into customer engagements with zero additional setups and configuration.
- **Easily add relationship measures to forms:** Place relationship analytics UI components, relationship metrics, or relationship health on new or existing forms using the form designer to address specific business needs.

## Benefit from evergreen contact information and stakeholders detection with Auto capture

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Aug 2020	-

## Business value

Records in Dynamics 365 Sales must be maintained consistently to ensure they accurately reflect reality, eliminating outdated and irrelevant information that might impede sales rhythm and the potential of drawing meaningful insights.

Auto capture leverages Natural Language Processing (NLP) to keep data fresh and up to date, offering continuous contact information updates and stakeholder suggestions to maximize the quality of data and in turn help form more meaningful customer engagements.

### Feature details

- **Benefit from ongoing contact information updates:** Sellers often re-engage customers to benefit from cross-selling opportunities. However, stale and irrelevant contact information can lead to fragmented experiences that waste time and money. Auto capture will now capture and apply ongoing updates to contact, lead or account records, based on related communications to make sure sellers have the right information available.
- **Take advantage of stakeholder suggestions:** Sales organizations can have a tremendous number of entities in CRM, making it hard to connect the dots between these entities. Auto capture will reveal hidden links and enrich accounts and opportunities with related contacts to offer a more complete picture of ongoing engagements.

### Empower sellers with highly granular controls with Auto capture

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Aug 2020	-

### Business value

Auto capture logs customer-related activities to form a single source of truth for the sales organization. However, different organizations and different users within the organization might have different needs when it comes to logging activities and maintaining privacy and compliance.

With the 2020 release wave 1, Auto capture helps to maintain the balance between privacy and organizational knowledge, exposing more granular controls and empowering sellers to achieve the right level of details.

### Feature details

- **Benefit from granular user settings:** Benefit from highly granular controls, adjusting Auto capture settings to match specific seller requirements and working styles.
- **Control the granularity of what is captured:** Get the flexibility to decide whether to track upcoming related activities (such as additional emails added to the thread) or just the specific activity (such as this specific email only), whenever a capture suggestion is raised pertaining to a specific activity.

## AI-infused Auto capture is generally available

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Apr 2020

### Business value

As part of 2019 release wave 2, we released for public preview a new version of Auto capture. By incorporating AI capabilities, mapping of captured activities to the appropriate records was improved, and new contacts mentioned in captured activities were automatically detected. Furthermore, we improved onboarding and streamlined the UI, making it easier for admins to enable the feature and easier for sellers to track activities and contacts.

As part of 2020 release wave 1, these capabilities become generally available.

### Feature details

- **Benefit from the automated mapping of activities to entities:** AI-driven mapping of activities to entities. We incorporated Natural Language Processing (NLP) models to improve the association between activities to the appropriate records and increase the quality of the data in Dynamics 365.
- **Take advantage of UI improvements so nothing falls between the cracks:** Auto capture aggregates activity suggestions at the top of the timeline wall to increase discoverability of captured activities, so sellers can track, edit, or dismiss captured activities in a more streamlined manner. Once the captured activity is tracked, it will be added to the timeline wall seamlessly.
- **Benefit from dedicated list views for activity and contact suggestions:** To make data entry more productive and proactive, Auto capture introduces new list views for captured activities and contacts so sellers can have a one-stop-shop from which they can track multiple activities and create new contacts. This offers a more complete and accurate picture of customer-related activities.
- **Onboard easily with no preliminary setup or prerequisites:** Auto capture onboarding experience is now simplified, and configuration barriers removed. Auto capture is no longer dependent on server-side sync and admins can enable it for specific security roles or for the entire organization while selecting the types of communication channels to capture.

## Better privacy controls for Who knows whom

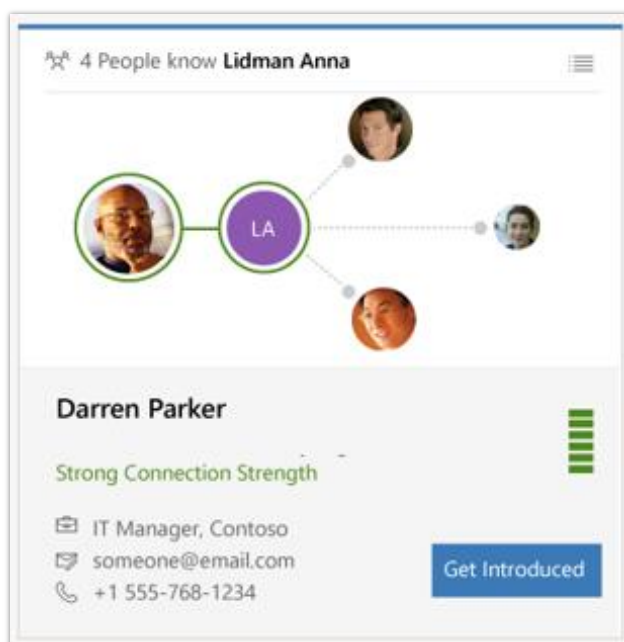
Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Apr 2020

### Business value

It is important to ensure that every person in the organization has control over their personal information. Who knows whom now supports more granular privacy controls to meet the privacy preferences of different individuals. Office 365 users are empowered to control connection graph inclusion with opt-in and opt-out controls, and whether their identity is always shared or hidden until permissions are granted.

### Feature details

- **User controls:** Sellers can independently opt in and opt out from the connection graph without requiring involvement from the tenant admin.
- **Anonymous controls for organizational users:** Organizational users can remain anonymous in the connection graph. Their identity could be revealed only if permission is requested and granted.



*Who knows whom*



## Overview of Dynamics 365 Product Visualize 2020 release wave 1

Microsoft Dynamics 365 Product Visualize, an augmented reality mobile application on iOS, accelerates the sales process by helping buyers and sellers reach a shared understanding, faster. Dynamics 365 Product Visualize was released to public preview in April 2019, and features deep data and workflow integration with Dynamics 365 Sales. With the 2020 release wave 1, a new set of capabilities will focus on enabling salespeople to conduct deeper and more information-rich demonstrations of their products.

The expansion of the Spatial Notes (3D model annotations) system directly addresses pain points heard from customers about the challenges they face as they try to convey information about a product, like its capabilities, how it functions, and how to service it. This is particularly true for companies that manufacture complex equipment with long sales cycles and increasing levels of technical sophistication that their customers struggle to comprehend. Consistent with the Spatial Notes data strategy introduced in public preview, all Spatial Notes are stored in Common Data Service. This allows for augmented reality-assisted sales interactions to connect downstream processes.

### What's new and planned for Dynamics 365 Product Visualize

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

Feature	Enabled for	Public preview	General availability
<a href="#">Attach a PDF file to a 3D model</a>	Users, automatically	Apr 2020	Jun 2020
<a href="#">Attach a video to a 3D model</a>	Users, automatically	Apr 2020	Jun 2020
<a href="#">Offline mode</a>	Users, automatically	Apr 2020	Jun 2020

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience for users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

## Attach a PDF file to a 3D model

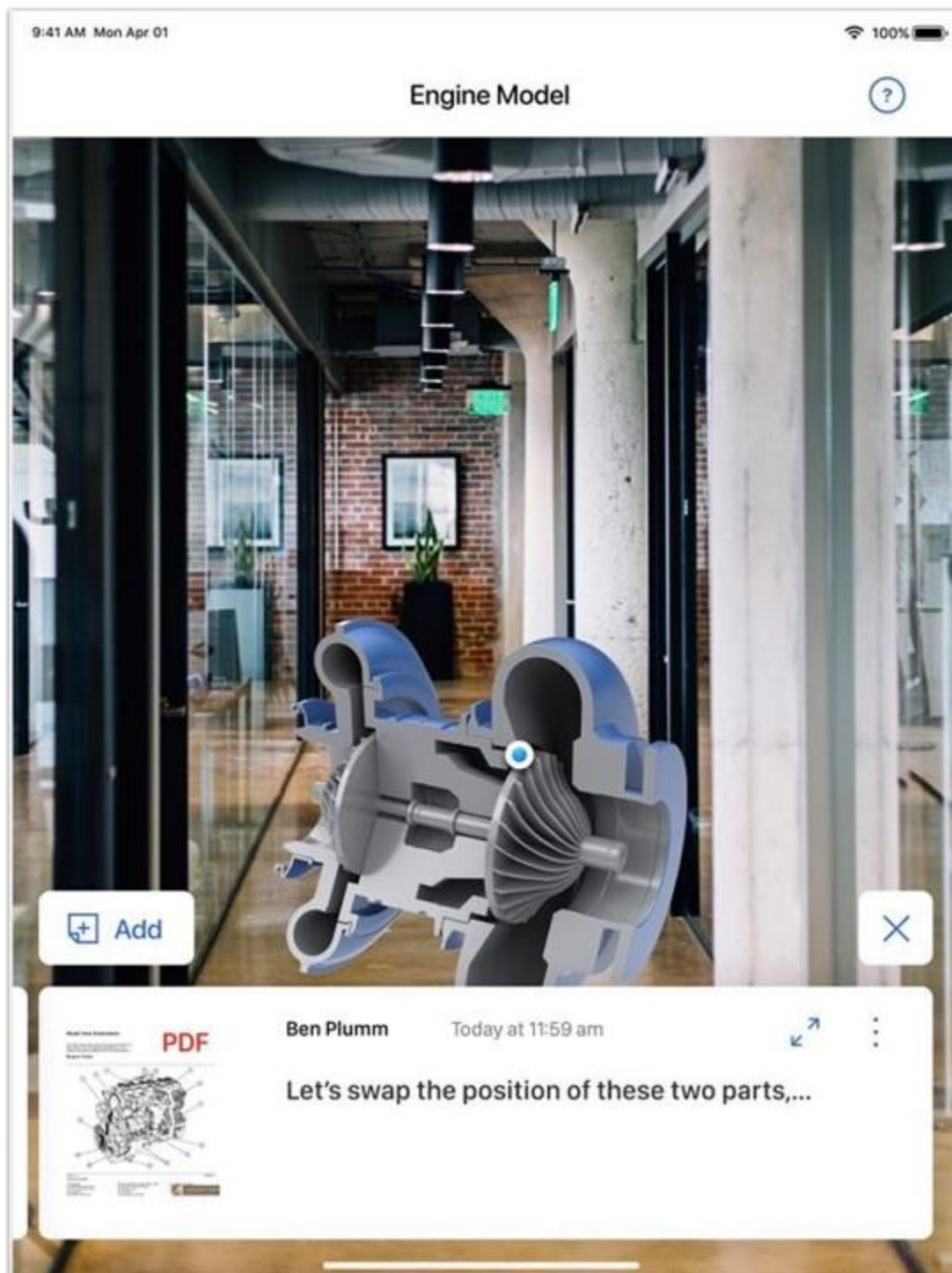
Enabled for	Public preview	General availability
Users, automatically	Apr 2020	Jun 2020

## Business value

Attaching PDF content to various points on a 3D model will give Dynamics 365 Product Visualize customers much more flexibility to enrich the sales conversation. As an example, a large consumer package goods brand might want to provide sales data to enable sellers to analyze and determine their optimal product assortment. Customers can also link to a service manual, brochure, or any other PDF resource that will enhance the sales conversation.

## Feature details

Users will be able to attach PDF content to a specific point on the model (anchored), or attach it generally around the model (unanchored). The PDF content will be rendered as 2D. It won't be spatially rendered in the context of the 3D model. The PDF content will be stored in Common Data Service.



*PDF notes*

## Attach a video to a 3D model

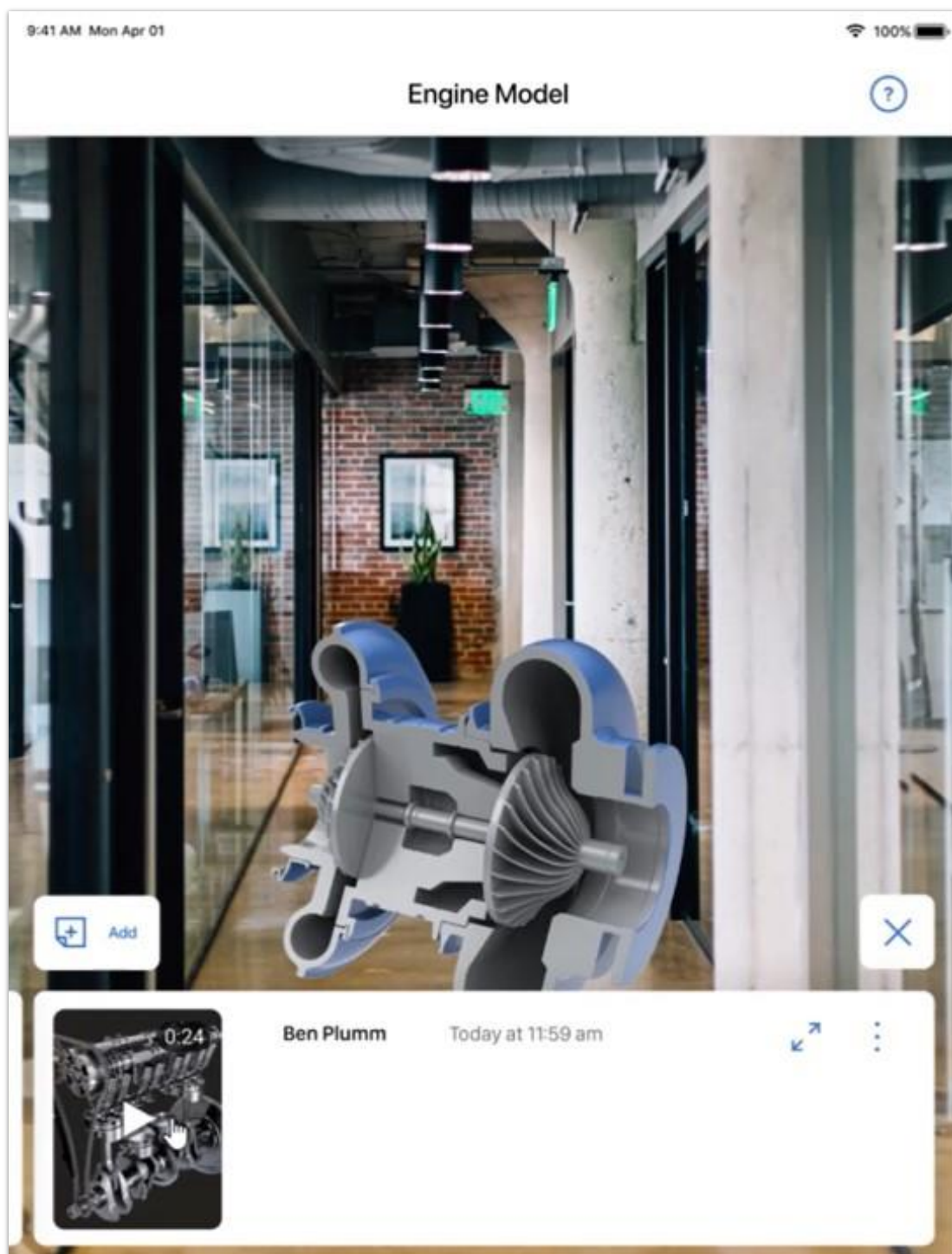
Enabled for	Public preview	General availability
Users, automatically	Apr 2020	Jun 2020

### Business value

Customers with complex products need to be able to visually demonstrate how their product functions. Video is a highly requested and common media format. By watching a video in the context of a 3D model, a prospective buyer can better understand the product or parts of the product.

### Feature details

A video—including its audio—attached to 3D model notes will play spatially around the model. The video will rotate to always face the user as they walk around the model. The user can also expand the video screen, which will expose the pause, rewind, and fast-forward controls.



*Video attached to a 3D model*

## Offline mode

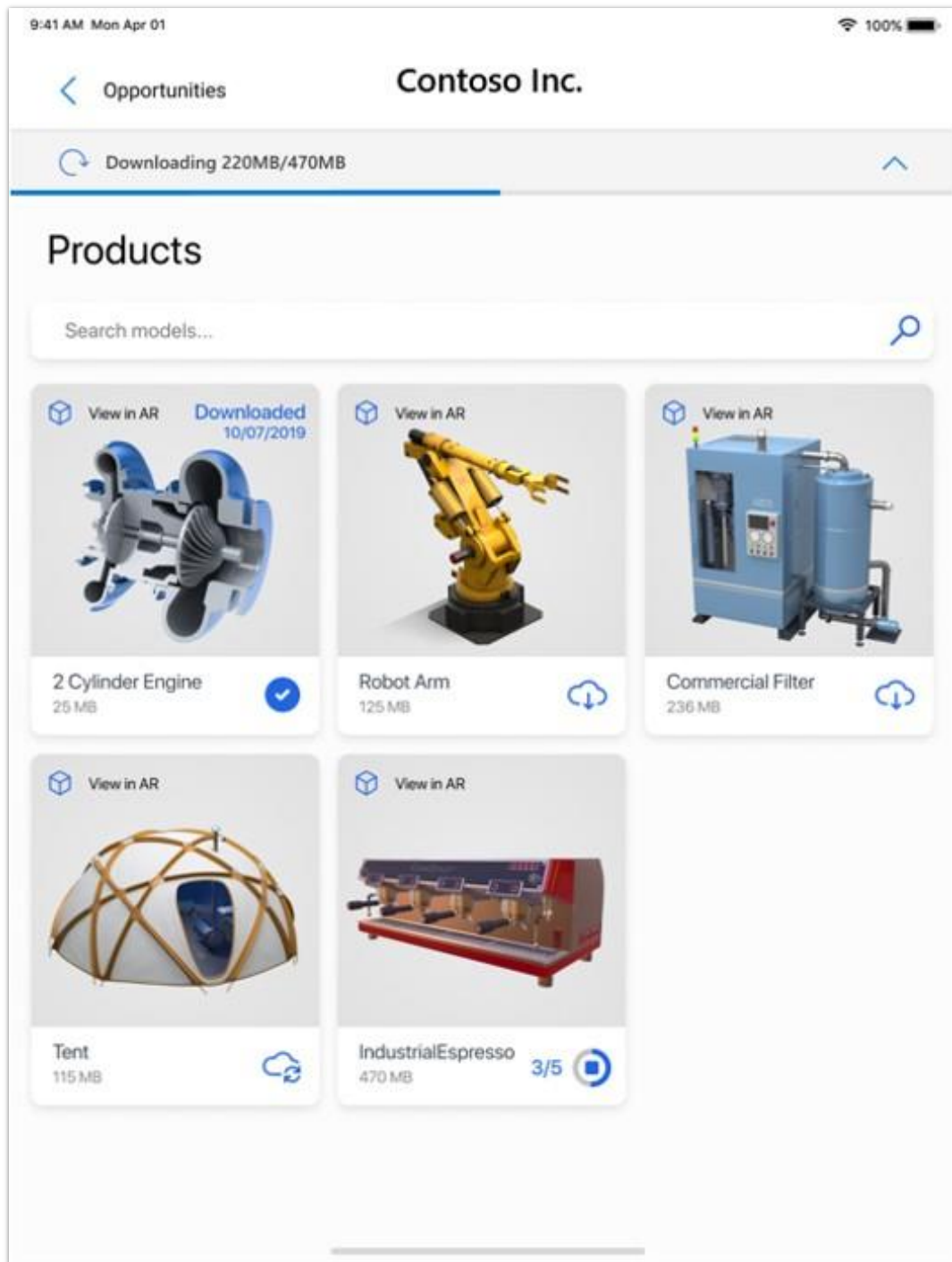
Enabled for	Public preview	General availability
Users, automatically	Apr 2020	Jun 2020

### Feature details

Use Offline mode to save 3D models and associated notes to your device. This capability is critically needed when users are in environments that have low connectivity or no connectivity at all. With Offline mode:

- You can select which products you want to save to your device.
- You can manage downloaded content and delete locally saved products as needed.
- The 3D model and associated notes (images, text, videos) are saved and made available for offline access.
- The locally saved data is stored in the Dynamics 365 Product Visualize app, not with your local files.
- You can still sign in to the app in low- or no-connectivity environments to access the downloaded content.

**NOTE** Notes made offline aren't saved or synced back to the cloud.



Offline mode



# Service

## Overview of Dynamics 365 Customer Service 2020 release wave 1

Dynamics 365 Customer Service is an end-to-end service for customer support, spanning self and assisted scenarios across multiple channels of customer engagement. It provides comprehensive and efficient case routing and management for agents, and enables authoring and consumption of knowledge management articles. For wave 1 of 2020, we are focused on the following three areas:

- **Agent productivity:** Delivering improvements that help agents be more productive such as improved knowledge article search, email authoring, and timeline enhancements.
- **Omnichannel for Customer Service:** Expanding the range of supported channels and agent productivity tooling.
- **Connected Customer Service:** Linking IoT diagnostics, IoT device updates, and case management to help organizations evolve a proactive and predictive service model.

The next sections offer details on the specific features being released across these areas.

### What's new and planned for Dynamics 365 Customer Service

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

### Customer Service

Customer Service empowers every organization to provide the best customer experiences and outcomes with purpose-built tools that ensure thorough case management and efficient issue resolution.



Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Connected Customer Service (IoT + Customer Service)</a>	End users by admins, makers, or analysts	-	Feb 2020	Apr 2020
<a href="#">Agent productivity enhancements to knowledge capabilities</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Configurable case resolution page</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Customer Service app available for users with Team Member license</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Customer Service Hub app is now available by default</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Enhancements in case routing rules</a>	Admins, makers, or analysts, automatically	-	Feb 2020	Apr 2020
<a href="#">Enhancements in the queue page</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Familiar, modern email experience for agents</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">License enforcement – users with new Team Member licenses</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">New work hour calendar in Service Scheduling</a>	End users by admins, makers, or analysts	-	Feb 2020	Apr 2020
<a href="#">Rich text notes and keyword search in the timeline</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Support for Site entity in the Unified Interface</a>	End users, automatically	-	Feb 2020	Apr 2020

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Enhancements in service level agreements</a>	Admins, makers, or analysts, automatically	-	Mar 2020	Apr 2020
<a href="#">Automatically create and update records</a>	Admins, makers, or analysts, automatically	-	Feb 2020	Jun 2020

## Omnichannel for Customer Service

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service to enable organizations to instantly connect and engage with their customers across digital messaging channels.

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Digital messaging support for Microsoft Teams</a>	End users by admins, makers, or analysts	Apr 2020	-	-
<a href="#">Digital messaging support for WhatsApp through Twilio</a>	End users by admins, makers, or analysts	Apr 2020	-	-
<a href="#">Digital messaging support for LINE</a>	End users by admins, makers, or analysts	-	-	Apr 2020
<a href="#">Digital messaging support for SMS through Twilio</a>	End users by admins, makers, or analysts	-	-	Apr 2020
<a href="#">Digital messaging support for Twitter</a>	End users by admins, makers, or analysts	-	-	Apr 2020
<a href="#">Digital messaging support for WeChat</a>	End users by admins, makers, or analysts	-	-	Apr 2020
<a href="#">Elevate live chat conversations to a voice/video call</a>	End users by admins, makers, or analysts	-	-	Apr 2020

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Co-browse capabilities through third-party providers</a>	Admins, makers, or analysts, automatically	Jan 2020	-	Apr 2020
<a href="#">Remote assistance capabilities through third party</a>	Admins, makers, or analysts, automatically	Jan 2020	-	Apr 2020

\* Some features are available for you to opt-in as part of early access on February 3, 2020, including all mandatory changes that impact end users. Learn more about [early access](#).

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **End users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their end users.

For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

For more information about geographic areas, data centers (regions), data storage, and replication, click **expand all** on the [Where your data is located page](#) and find the Microsoft cloud service for this feature.

## Customer Service

### Overview

Customers today value the ease and speed of resolution and they want to receive service on their preferred channel of engagement, at any time, and on any device. We are enabling these capabilities by building an intelligent omnichannel customer experience and an empowered agent experience.

A true omnichannel experience in the product will preserve context and provide a continuous experience as customers seamlessly switch across self-service, peer-to-peer service, and assisted-service channels. An empowered agent experience will provide an application experience that is unified across channels and line-of-business (LOB) applications, is contextual to the engagement, and comes with productivity tools to resolve issues faster.

## Connected Customer Service (IoT + Customer Service)

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	Feb 2020	Apr 2020

### Business value

Leveraging Connect Customer Service enables businesses to actively look for issues with customers' devices through IoT signals and proactively resolve those issues, simultaneously increasing customer satisfaction and reducing assisted support service costs.

### Feature details

Connected Customer Service helps organizations evolve a proactive and predictive service model by fully integrating IoT diagnostics, IoT device updates, and case management. Key capabilities in this release include:

- Convert IoT Alert to a support case.
- View all devices registered to the customer.
- View all IoT Alerts from devices registered to the customer.
- Send command to the customer's device.
- View IoT activity in the case timeline.

## Agent productivity enhancements to knowledge capabilities

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Business value

The ability to quickly find and share knowledge articles is a key asset that agents can use to help customers resolve questions and issues. By referring customers to knowledge articles that address common issues, agents can improve their efficiency and focus on resolving more complex or unique issues.

## Feature details

In this release, we're enhancing agent access to and usability of knowledge articles so that agents can:

- Use an improved layout of knowledge search results to simplify scanning, reading, and action.
- Review knowledge articles in a separate, full screen.
- Search the knowledge base outside the context of a customer case. (Knowledge search is now available in the Customer Service Hub app navigation for anytime access.)

## Configurable case resolution page

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

## Business value

When resolving a case, businesses often need to capture additional details that help characterize the case and resolution approach taken, helping drive trend reports and service analytics. By supporting customization of the **Case Resolution** dialog box, Dynamics 365 Customer Service helps managers identify recurring issues and proven resolution patterns to inform other incident responses.

## Feature details

With this release, administrators can:

- Add fields such as resolution type in the form/dialog box for case resolution.
- Introduce new client-side business validations or remove existing ones.
- Customize the case resolution entity.
- Choose between the non-customizable modal dialog experience (default setting) and the customizable form experience.

## Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

## Customer Service app available for users with Team Member license

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Business value

Employees with the entry-level Team Member license can now address self-service support scenarios using a Dynamics 365 Customer Service app.

### Feature details

Customer Service Team Member is a new app module that will be available to users with the Dynamics 365 Team Member license. In the customer service context, this app module enables the following limited set of use cases provided by the Team Member license for employee self-service:

- Create cases.
- Read and update the cases that they created.
- Search and view knowledge articles.

## Customer Service Hub app is now available by default

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Business value

Businesses will benefit from the latest Dynamics 365 Unified Interface app capabilities by moving to the Customer Service Hub, Unified Interface app. This feature makes it easier for customers to find and use the Unified Interface, Customer Service Hub app.

### Feature details

As previously announced, customers will need to migrate to the Unified Interface experience by October 1, 2020. The Customer Service Hub solution that is built on the Unified Interface framework will be automatically installed in all the environments in this release. Existing customers will have access to the **Customer Service Hub** app, and users with the **Customer service app access** security role will be able to view and use the app.

## Enhancements in case routing rules

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	Feb 2020	Apr 2020

### Business value

Routing cases to the right queue, user, or team as quickly as possible ensures customers get service quickly and without having to transfer between agents.

### Feature details

Case routing rules help trigger automatic or manual routing of cases to the right support resources. This release provides a new experience built on the Unified Interface that enables easy configuration of routing rules and brings feature parity with the legacy web client.

## Enhancements in the queue page

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Business value

Agents are constantly navigating between queue grids and record forms and that results in too many click actions and context switching. With the enhancements made to the queue page, agents can now save time with fewer click actions and resolve customer issues more quickly.

### Feature details

In this release, the user experience has been enhanced for agents to manage their queues. The agents can now select an item in the queue and view its details on the same page without having to switch contexts. They can also go through the list of items in the queue without the need to navigate away from the page.

## Familiar, modern email experience for agents

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

## Business value

Email is a critical communication channel that support agents use to communicate with customers. A robust, modern email experience ensures agents can quickly and easily create high-quality emails through templates and with rich formatting capabilities to further the best customer service experience possible.

## Feature details

Agents spend a significant amount of time using email to communicate with customers. Simple and intuitive email experiences help improve agent productivity and quality of service to customers. In this release, we are bringing the following modern email capabilities to the agent experience:

- Author emails using a complete rich text experience, including the ability to send, receive, and manage images inline.
- Use a modern toolbar and have the ability to cut and paste formatted content from Office documents such as Word and Excel, while maintaining formatting.
- Preview email templates prior to applying them to email.
- Compose email in a pop-up, non-blocking window, with the ability to write an email with context of the current record, navigate between records, and have multiple active draft emails open simultaneously.

## License enforcement – users with new Team Member licenses

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

## Business value

Helps customers to be aligned with the Team Member license-based access mentioned in the licensing guide.

## Feature details

The platform license-based access can ensure that users with the Team Member license can access only a limited set of designated app modules after April 1, 2020. These users will no longer be able to access Customer Service Hub, Sales Hub, or any other custom app modules. The designated app modules are as follows:

- Customer Service Team Member



- Sales Team Member
- Project Resource Hub

In the early access phase, these new app modules will be available along with the existing app modules.

### New work hour calendar in Service Scheduling

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	Feb 2020	Apr 2020

#### Business value

Scheduling resources quickly and accurately is a key part of optimizing service for a business. This enhanced user experience makes scheduling easier and introduces flexibility to customize the experience for how the business operates to enhance scheduling efficiency.

#### Feature details

Administrators currently navigate several screens to access a resource's calendar and update work hours and time off. With this release, we are delivering a new experience using an accessible Power Control Framework (PCF) calendar control in the Unified Interface. Organizations will have flexibility to design new experiences (for example, using canvas apps) that modify resources' working hours from outside entity forms and views.

### Rich text notes and keyword search in the timeline

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

#### Business value

The timeline control provides an easy and immersive experience to view a customer's history across cases, accounts, or contacts. This experience gives agents a better understanding of the customer's history, which helps them deliver more personalized service in an efficient and effective manner.

## Feature details

Enhancements to the Dynamics 365 timeline control include:

- Create rich text notes that provide detail about the case and enable formatting for emphasis and readability.
- Perform keyword search filter to quickly display matching records.
- Identify closed or completed activities visually.
- Show only User or System records with the additional filter.

## Support for Site entity in the Unified Interface

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

## Business value

As businesses migrate to the new Unified Interface, they require continuity of access to administrative configurations and settings.

## Feature details

To provide business continuity during transition to the Unified Interface, this release delivers support for administrator configuration and interaction with the Site entity used to define customer service locations.

## Enhancements in service level agreements

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	Mar 2020	Apr 2020

## Business value

Businesses must ensure that they deliver the right level of support to which their customers are entitled. Service level agreements (SLAs) help administrators define a contractually agreed target level and key performance indicators (KPIs) that track the success and failure of SLA metrics.

## Feature details

In this release, a new SLA administration experience has been enabled on the Unified Interface that brings feature parity with the legacy web client. Administrators can now leverage the various out-of-the-box actions available with Microsoft Power Automate to easily configure actions, such as success, failure, and warning actions for SLAs. For example, the administrator can post a Microsoft Teams message to an agent when an SLA is violated.

## Automatically create and update records

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	Feb 2020	Jun 2020

## Business value

Businesses can migrate to the latest Dynamics 365 applications and continue to take advantage of automatic creation of case records based on emails submitted by customers. Administrators can also use this feature to create leads or any other entity record from a set of available activities.

## Feature details

This feature enables a new record creation administration experience on the Unified Interface and brings feature parity with the legacy web client. The new experience uses Microsoft Power Automate and provides an easy-to-use interface to create or update conditions and actions.

# Omnichannel for Customer Service

## Overview

Omnichannel for Customer Service provides a modern, customizable, high-productivity app that allows agents to engage with customers across different channels. This app offers contextual customer identification, real-time notification, integrated communication, and agent productivity tools like knowledge base (KB) integration, search, and case creation to ensure agents are effective.

Supervisors get real-time and historical visibility and insights into the operational efficiency of agents and the utilization across various channels.

The enterprise-grade routing and work distribution engine allows customers to configure agent presence, availability, and routing rules, thus ensuring agents are working on the most relevant engagements.

## Digital messaging support for Microsoft Teams

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Apr 2020	-	-

### Business value

Businesses that already use Microsoft Teams for internal business collaboration can now use it to facilitate internal support delivery to employees. This may reduce the number of tools and infrastructure a business has to manage for internal business operations and simplify the user experience, depending on the solutions they already use.

### Feature details

As organizations continue to adopt Microsoft Teams for internal team collaboration and business operations, there is an increasing desire to allow their employees to obtain internal support through Teams. This feature allows organizations to connect their employees with internal support personnel using Omnichannel for Customer Service by bringing in Microsoft Teams as an engagement channel for support of internal functions like tech support, human resources, and finance.

- Administrators can configure the Microsoft Teams channel in the **Omnichannel Administration** app.
- Employees can contact the business through Microsoft Teams and seek support in an asynchronous nature.
- Agents can use the same unified, contextual, and productive **Omnichannel for Customer Service** app interface to engage with customers and resolve their issues.
- Supervisors and managers can access the rich reports to run the support center efficiently and effectively.

## Digital messaging support for WhatsApp through Twilio

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Apr 2020	-	-

## Business value

Businesses can offer expanded channel choice to customers by offering WhatsApp messaging as a support channel to service customers who prefer to communicate through WhatsApp.

## Feature details

Social messaging platforms such as WhatsApp give businesses an opportunity to engage with customers in their own context to provide them with a seamless and personalized customer service experience. WhatsApp is a channel introduced in this release of Omnichannel for Customer Service. It has the following capabilities:

- Administrators can configure the WhatsApp channel in the **Omnichannel Administration** app.
- Customers can reach out to the business through WhatsApp and seek support in an asynchronous nature.
- Agents can use the same unified, contextual, and productive **Omnichannel for Customer Service** app interface to engage with customers and resolve their issues.
- Supervisors and managers can access rich reports to run the support center efficiently and effectively.

## Digital messaging support for LINE

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Apr 2020

## Business value

Businesses can offer expanded channel choice to customers by offering LINE messaging as a support channel to service customers who prefer to communicate through LINE.

## Feature details

Social messaging platforms such as LINE give businesses an opportunity to engage with customers in their own context to provide them with a seamless and personalized customer service experience. LINE is a channel introduced in this release of Omnichannel for Customer Service. It has the following capabilities:

- Administrators can configure the LINE channel in the **Omnichannel Administration** app.
- Customers can contact the business through LINE and seek support in an asynchronous nature.

- Agents can use the same unified, contextual, and productive **Omnichannel for Customer Service** app interface to engage with customers and resolve their issues.
- Supervisors and managers can access the rich reports to run the support center efficiently and effectively.

### Digital messaging support for SMS through Twilio

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Apr 2020

### Business value

Businesses can offer expanded channel choice to customers with text messaging as a support channel to service customers who prefer to communicate through SMS.

### Feature details

The SMS channel is a useful tool for organizations to interact with their customers in a timely manner and increase customer satisfaction, improve agent productivity, and reduce support costs. Customers will need an SMS subscription with Twilio to leverage the following capabilities:

- Administrators can configure the SMS channel in the **Omnichannel Administration** app using Twilio as a provider.
- Customers can reach out to the business through SMS and seek support in an asynchronous nature.
- Agents can use the same unified, contextual, and productive **Omnichannel for Customer Service** app interface to engage with customers and resolve their issues.
- Supervisors and managers can access rich reports to run the support center efficiently and effectively.

### Digital messaging support for Twitter

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Apr 2020

## Business value

Businesses can offer an expanded channel choice to customers by offering Twitter messaging as a support channel for those customers who prefer to communicate that way.

## Feature details

Social messaging platforms such as Twitter give businesses an opportunity to engage with the customers in their own context to provide them with a seamless and personalized customer service experience. Twitter Direct Message is a channel introduced in this release of Omnichannel for Customer Service. It has the following capabilities:

- Administrators can configure the Twitter Direct Message channel in the **Omnichannel Administration** app.
- Customers can reach out to the business through Twitter and seek support in an asynchronous nature.
- Agents can use the same unified, contextual, and productive **Omnichannel for Customer Service** app interface to engage with customers and resolve their issues.
- Supervisors and managers can access rich reports to run the support center efficiently and effectively.

## Digital messaging support for WeChat

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Apr 2020

## Business value

Businesses can offer an expanded channel choice to customers by offering WeChat messaging as a support channel to service customers who prefer to communicate through WeChat.

## Feature details

Social messaging platforms such as WeChat give businesses an opportunity to engage with the customers in their own context to provide them with a seamless and personalized customer service experience. WeChat is a channel introduced in this release of Omnichannel for Customer Service. It has the following capabilities:

- Administrators can configure the WeChat channel in the **Omnichannel Administration** app.
- Customers can reach out to the business through WeChat and seek support in an asynchronous nature.

- Agents can use the same unified, contextual, and productive **Omnichannel for Customer Service** app interface to engage with customers and resolve their issues.
- Supervisors and managers can access the rich reports to run the support center efficiently and effectively.

### Elevate live chat conversations to a voice/video call

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Apr 2020

### Business value

Businesses can offer expanded channel choice to customers by offering the ability to elevate a conversation from live chat to a voice/video call to provide expediency in addressing complex issues.

### Feature details

This feature allows organizations to elevate live chats to include voice/video communication. Voice conversations can be more efficient for resolving complex customer issues. Adding video creates a more personal connection with your customer and allows for quick exchanges of visual information.

The feature enables:

- Administrators to configure chats to enable the elevation to voice and video.
- Agents to elevate a text chat to a voice or video conversation with their customers.
- Agents and customers to control their voice or video conversation using common controls like camera on/off, mute/unmute, and end call.

### Co-browse capabilities through third-party providers

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Jan 2020	-	Apr 2020

### Business value

Agents can quickly and accurately support customers when customers can co-browse on their device with the agent and show the issue they are having. This feature enables integration



capabilities to add existing third-party, co-browse services into Omnichannel for Customer Service.

### Feature details

The ability for the agents to co-browse with customers is critical in many customer support scenarios. Agents can better help customers when customers can show agents what's happening on their device. With this release, we are providing APIs and related artifacts that allow partners to integrate existing third-party, co-browse solutions with the Omnichannel for Customer Service Chat channel.

### Remote assistance capabilities through third party

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Jan 2020	-	Apr 2020

### Business value

Businesses can offer customized and expedient support to customers by allowing agents to access the customer's machine remotely to address their issues.

### Feature details

The ability for agents to remotely access the desktop with customers is critical in many customer support scenarios. Agents can better help customers when they can view the customer's device to see what's happening, as well as access the device remotely to address the issue. We are providing APIs and related artifacts that allow partners to integrate an existing third-party remote assistance solution with Omnichannel for Customer Service.

## Overview of Dynamics 365 Customer Service Insights 2020 release wave 1

Dynamics 365 Customer Service Insights provides an actionable view into critical performance metrics, operational data, and emerging trends by using industry-leading AI. These insights empower customer service managers to make better decisions to improve customer satisfaction and operational efficiency with confidence.

Thanks to the power of AI, machine learning, and business intelligence (BI), you can easily get a clear view into your contact center on what's happening, why it's happening, and what could happen, in order to make decisions with confidence. The AI model used by Customer Service Insights proactively learns from users' gestures and optimizes itself over time. Best of all, the AI capabilities are included out of the box and don't require any AI expertise to use.

In the 2020 release wave 1 updates, you'll see a number of new capabilities in Customer Service Insights. These features include new views across the dashboards to help customer service managers focus on key support areas that need attention. These highlights will also be included directly in Dynamics 365 Customer Service, so you can get insights in context. Other new capabilities will help you take better action on the insights, including richer integration with Power Virtual Agents and access to the insights data for further analytics.

Please review the "what's new" page regularly for the latest updates. Additional feature requests can be added in the [Customer Service Insights ideas page](#).

### What's new and planned for Dynamics 365 Customer Service Insights

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

Feature	Enabled for	Public preview	General availability
<a href="#">Data access for custom analysis and reporting</a>	Admins, makers, or analysts, automatically	Apr 2020	

Feature	Enabled for	Public preview	General availability
<a href="#">Highlighting topics as automation candidates for Power Virtual Agents</a>	Admins, makers, or analysts, automatically	Apr 2020	
<a href="#">Enable robust customer service insights in the Customer Service Hub app</a>	Users by admins, makers, or analysts	May 2020	
<a href="#">Improve topic generation by excluding unnecessary phrases</a>	Admins, makers, or analysts, automatically	Jun 2020	
<a href="#">Focused insights highlight relevant information</a>	Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience for users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

## Data access for custom analysis and reporting

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 2020	-

## Business value

Data provides endless possibilities to surface insights and opportunities to optimize the customer support experience. Connecting to Customer Service Insights data outside of the application allows businesses to meet their custom reporting needs, helping to deliver better service and customer satisfaction.

## Feature details

Dynamics 365 Customer Service Insights provides dashboards showing key business metrics, in addition to derived and calculated insights like issue topics and impact scores. While the out-of-the-box solutions have a number of benefits, there isn't a way to deeply customize the reports or bring in data from other sources.

With this release, users will be able to connect to the data derived in Customer Service Insights through a basic web request, allowing that data to be used in custom reports or analytical solutions.

## Highlighting topics as automation candidates for Power Virtual Agents

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 2020	-

## Business value

Businesses will now find it easier to identify support topics that might best be handled by virtual agents to optimize self-service opportunities for customers.

## Feature details

Dynamics 365 Customer Service Insights identifies key topics and support issues customers are facing. With the general availability release of Power Virtual Agents, users can select topics to be automatically imported as bot topics in Power Virtual Agents.

With 2020 release wave 1, the integration is further improved with suggestions for the best topics to automate based on a number of factors related to the topic, such as its overall impact and the channels where customers typically engage. These suggestions will appear on the home page of Customer Service Insights as a separate card, with links to the details for each topic.

## Enable robust customer service insights in the Customer Service Hub app

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2020	-

## Business value

Agents and managers using the Customer Service Hub app will now have richer analytics and insights to help them deliver better customer service and improve customer satisfaction.

## Feature details

Dynamics 365 Customer Service Insights provides many key analytics and insights about your customer service data.

With this release, these insights will now be embedded within the Dynamics 365 Customer Service app, providing rich insights to users in the familiar context of the Customer Service Hub app.

## Improve topic generation by excluding unnecessary phrases

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Jun 2020	-

## Business value

Analyzing support topic clusters helps businesses optimize support delivery and improve customer experience, but can be time-consuming. This feature helps organizations improve the quality of AI-driven clustering by identifying phrases, such as a company name, that can skew the clustering and should be excluded.

## Feature details

Dynamics 365 Customer Service Insights automatically parses support case data and groups semantically similar cases into autogenerated topics by using natural language understanding. Knowing which are the top-trending topics allows managers to optimize their support and provide feedback to core product teams. However, common phrases like the company or product name can dilute the strength of the topic-clustering algorithm, making the support topic clusters less useful. Today, users can specify delimiters that are used as tags (among others) within the case title that can be ignored to help alleviate this problem, but there's no way to ignore non-delimited text.

With this release, users will be able to specify additional keywords or phrases (such as the company name or other common, irrelevant terms) that should be ignored when the text is parsed, resulting in more accurate and meaningful topic generation.

## Focused insights highlight relevant information

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

### Business value

With data as a commodity in technology today, businesses need ongoing help deciphering all the data they're gathering. This update distills the data and highlights insights to help managers focus on specific areas for improvement and take action quickly.

### Feature details

Dynamics 365 Customer Service Insights provides five out-of-the-box dashboards showing key topics and support issues that customers are facing, along with over one hundred different business metrics. Although the breadth of information ensures that users can view what they need, they can also benefit from additional guidance on how to read the data and take action.

With this update, a new landing page in each workspace will highlight the key insights in that organization. This will distill the large amount of information, helping customer service managers understand which issues are having the most impact and take action quickly.

## Overview of Dynamics 365 Field Service 2020 release wave 1

Dynamics 365 Field Service is an end-to-end solution for on-site service that empowers organizations to move from being reactive to providing proactive or predictive field service, and to embrace new business models such as outcome-based service or “anything-as-a-service.”

For the 2020 release wave 1, we are focused on the following areas:

- New feature capabilities including time entries and inspections.
- Previewing AI-based suggestions for IoT alerts and incident types.
- Ongoing enhancements to resource scheduling and optimization capabilities.
- Continued investment in proactive service with Azure IoT.
- Deeper alignment with Dynamics 365 Supply Chain Management for supply chain management and asset management.

### What's new and planned for Dynamics 365 Field Service

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

### Insights

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Incident type AI-based suggestions</a>	End users by admins, makers, or analysts	Apr 2020	-	
<a href="#">IoT alert AI-based suggestions</a>	End users by admins, makers, or analysts	Apr 2020	-	-

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">IoT alert measures and service history</a>	End users by admins, makers, or analysts	Feb 2020	-	Jun 2020

## Proactive service delivery

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Leveraging Power Automate flows</a>	End users by admins, makers, or analysts	Apr 2020	-	
<a href="#">Combined asset capabilities across Dynamics 365 Supply Chain Management and Field Service</a>	End users by admins, makers, or analysts	Feb 2020	-	Apr 2020
<a href="#">Integration with Dynamics 365 Supply Chain Management</a>	End users by admins, makers, or analysts	Feb 2020	-	Apr 2020
<a href="#">Intune support for Field Service Mobile</a>	End users by admins, makers, or analysts	Feb 2020	-	Apr 2020

## Scheduling

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Next generation schedule board experience</a>	End users by admins, makers, or analysts	Apr 2020	-	
<a href="#">Enhanced work hours calendar for resources</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Requirement dependency for efficient workflow</a>	End users, automatically	-	Feb 2020	Apr 2020



Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Resource scheduling dashboard</a>	End users, automatically	-	Feb 2020	Apr 2020

## Technician success

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Field Service inspections</a>	End users by admins, makers, or analysts	Apr 2020	-	
<a href="#">Integrated technician time tracking</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Technician time-capture precision</a>	Admins, makers, or analysts, automatically	-	Feb 2020	Apr 2020

\* Some features are available for you to opt-in as part of early access on February 3, 2020, including all mandatory changes that impact end users. Learn more about [early access](#).

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
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For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

For more information about geographic areas, data centers (regions), data storage, and replication, click **expand all** on the [Where your data is located page](#) and find the Microsoft cloud service for this feature.

## Insights

### Incident type AI-based suggestions

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Apr 2020	-	-

#### Business value

Incident types provide a means to standardize service work, including the services to be performed and the parts required. Improving incident types to more accurately reflect actual work performed allows organizations to better plan their parts availability and technician scheduling, leading to better outcomes like first-time fix rate.

#### Feature details

Incident type suggestion analyzes an organization's completed work orders to make improvements in accuracy of incident types. The feature provides suggestions based on historical data to improve incident types, suggesting where records may be improved by merging other incident types, or by adding existing products or services. Improved incident type accuracy will allow higher first-time fix rates, inventory planning, and less time that a technician needs to spend on their device with fewer clicks to accurately capture work details.

**NOTE** This feature is available in the Unified Interface only.

### IoT alert AI-based suggestions

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Apr 2020	-	-

#### Business value

Businesses continue to leverage IoT capabilities to further delivery of proactive service to customers. Understanding and taking quick action on IoT alerts improves service delivery. This feature helps businesses assess the importance of alerts and when to take action to improve proactive service delivery.

### Feature details

As IoT device alerts are received, it helps to have smart suggestions about how to treat the alert, like suggesting priority or incident type. New IoT alert suggestions add AI-based suggestions for the priority and incident type from the alert, based on past service history and actions. For example, an alert suggestion might show that a temperature-based alert is a high priority, and needs an incident type for recalibrating the equipment.

**NOTE** This feature is available in the Unified Interface only.

### IoT alert measures and service history

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Feb 2020	-	Jun 2020

### Business value

IoT alerts help businesses to provide more proactive service. With improved IoT alerting by including device measures such as temperature or vibration and the service history, it's easier and faster to take service action.

### Feature details

In order for IoT alerts to be actionable, additional context is helpful to determine what to do with the alert. With IoT alert measures and service history, we're building on the previous preview by enhancing the time series experience and also adding a summary of the measures for the alert. For example, you can see the temperature and vibration reading history from a piece of equipment overlaid with past work orders.

**NOTE** This feature is available in the Unified Interface only.

## Proactive service delivery

### Leveraging Power Automate flows

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Apr 2020	-	-

## Business value

With tight integration between Power Automate and Field Service, businesses can more easily and quickly use flows to improve process automation.

## Feature details

Existing workflows such as agreement process maintenance are being migrated to use Power Automate flows with the added benefit of solving for scenarios such as change of record ownership. Flows are designed to allow change of ownership while avoiding service disruption for customers.

**NOTE** This feature is available in the Unified Interface only.

## Combined asset capabilities across Dynamics 365 Supply Chain Management and Field Service

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Feb 2020	-	Apr 2020

## Business value

Many customers need to model, track, and service valuable assets. Dynamics 365 Supply Chain Management has added rich enterprise asset management capabilities, which are now aligned with the comprehensive asset service capabilities in Dynamics 365 Field Service.

## Feature details

This feature aligns the asset entity models between Field Service and Supply Chain Management to enable technicians to complete asset management related tasks while using Field Service. Leveraging the Common Data Model and Common Data Service, these asset management capabilities have now been brought together to support a variety of asset-centric scenarios.

Aligning the customer asset entity across both Field Service and Supply Chain Management's Asset Management solution helps in unlocking the full capability of Field Service scenarios for Asset Management customers and the capabilities of Asset Management for Field Service customers. This supports the critical asset lifecycle that begins in manufacturing, continues through installation, maintenance, and repair, and ends in retirement.

**NOTE** This feature is available in the Unified Interface only.

## Integration with Dynamics 365 Supply Chain Management

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Feb 2020	-	Apr 2020

### Business value

Customers often need support for both supply chain management and field service scenarios as part of their Dynamics 365 deployment. This feature enhances Field Service with Supply Chain Management features to make it faster and easier for technicians to complete service tasks while using Field Service.

### Feature details

This feature provides integration between Dynamics 365 Supply Chain Management and Dynamics 365 Field Service for warehouse, payment type, and shipment method. It leverages the Common Data Model and Common Data Service.

**NOTE** This feature is available in the Unified Interface only.

## Intune support for Field Service Mobile

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Feb 2020	-	Apr 2020

### Business value

Businesses can take advantage of the power of Microsoft Intune to manage the Field Service Mobile app.

### Feature details

Security and data protection are important for businesses, especially when working with technical employees deployed in the field. Intune brings this layer of centrally managed control to devices, including corporate-managed devices and bring-your-own-device scenarios. With Intune, administrators can roll out the Field Service Mobile application to their iOS and Android field technicians via standard Intune infrastructure and controls.

This feature enables the Field Service Mobile app as a first-party application within the Intune administration experience. By enabling Intune support, businesses can take advantage of all Intune features including deployment, configuration, security, and updates.

With an Intune-enabled Field Service Mobile app, IT administrators can:

- Add and assign your Field Service Mobile app to user groups and devices, including users in specific groups, devices in specific groups, and more.
- Configure the Field Service Mobile app to start or run with specific settings enabled and update your existing app when already on the device.
- See reports and track app usage.

**NOTE** This feature is available in the Unified Interface only.

## Scheduling

### Next generation schedule board experience

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Apr 2020	-	-

### Business value

The reimagined schedule board experience makes it faster and easier for dispatchers to manage scheduling and better ensure effective use of valuable resources.

### Feature details

The schedule board is a powerful tool that provides centralized scheduling capabilities for dispatchers to schedule technicians. It is also used by other workstreams to plan work for various types of resources, such as sales reps and engineers. There is investment in the schedule board in every wave across critical tenets, including performance, scale, security, and user experience.

This is a completely new version of the schedule board, enhancing both the user experience and performance on the hourly view. The time it takes to create bookings, along with the initial schedule board load time, is measurably improved. The intraday scheduling experience is also simplified.

The 2020 release wave 1 preview will support drag-and-drop scheduling scenarios for individual requirements in the hourly view of the schedule board. It will be followed by regular updates with additional functionality throughout wave 1.

**NOTE** This feature is available in the Unified Interface only.

### Enhanced work hours calendar for resources

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

#### Business value

Managing resource availability is a key factor in the efficiency of a business's service operation. This enhancement improves the user experience, making it easier to manage work hours and time off.

#### Feature details

Resource managers currently set resources' calendars, establishing work hours and time off. This is a new and simplified experience for maintaining working hours. The experience is accessible and consistent with Unified Interface experiences. Additionally, the calendar control will be a Power Apps Component Framework (PCF) control, meaning that partners and customers can enable scenarios to modify resources' working hours from outside entity forms and views, like via a canvas app.

**NOTE** This feature is available in the Unified Interface only.

### Requirement dependency for efficient workflow

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

#### Business value

Sometimes it's necessary to sequence work in order to make sure that it's done in the correct order. For example, a physical installation must occur before electrical connection. Businesses can optimize operations workflows by ensuring dependent tasks are done in order. This feature allows organizations to complete work in a specific order.

#### Feature details

This feature enables the configuration of requirement dependencies to ensure technicians follow the optimal workflow and achieve the most efficient service operation. Requirement

dependencies allow customers to schedule requirements in a specific order by relating them through a predecessor and successor dependency relationship. For example, a technician might need to pick up a unique part from the warehouse and then perform work at the customer's site. Critical jobs that rely on a series of tasks dependent on one another can now be linked together as predecessors and successors and booked through the resource scheduling optimizer.

In 2020 release wave 1, this feature will only be supported by resource scheduling optimization with the ability to view these bookings on the schedule board. Also these dependencies will work only for single-resource, single-day scenarios.

**NOTE** This feature is available in the Unified Interface only.

### Resource scheduling dashboard

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Business value

In order for service managers and dispatchers to ensure they are using their resources effectively, they need to see the right metrics and measures. This new dashboard will provide out-of-the-box resource scheduling metrics and measures.

### Feature details

This dashboard enables a field service manager or dispatcher to use the Resource utilization report to monitor resource utilization, bookings, and truck roll KPI. They can also unpack territory insights such as fulfilling requirements with available resources, measure operation performance, and understand how resources are using their time and how each resource is performing over time compared to other groups.

It helps a resource scheduling optimization admin/dispatcher to do an analytical recap of each optimization request such as number of requirements, number of bookings, allocated hours, and least allocated resource.

**NOTE** This feature is available in the Unified Interface only.



## Technician success

### Field Service inspections

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Apr 2020	-	-

### Business value

In many cases, field service technicians need to capture a set of answers to questions as part of offering service. For instance, a technician might need to conduct safety checks before servicing a piece of equipment, or perhaps need to inspect pressure levels or remaining liquid in a machine. In other cases, technicians might need to perform an inspection after the work is complete, or the inspection itself might constitute the entire work order.

### Feature details

Field Service now includes the capability to define and capture inspections. It enables customers to:

- Create an inspection through a designer experience.
- Associate an inspection with a work order.
- Complete an inspection via a mobile experience.
- Capture the inspection results for analysis or further action.

**NOTE** This feature is available in the Unified Interface only.

### Integrated technician time tracking

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Business value

Capturing time in an easily viewable and editable format within Dynamics 365 Field Service is needed by many Field Service organizations to accurately record cost and revenue. Customers can now track technician time in Field Service.

## Feature details

Field Service time entry aligns with Dynamics 365 Project Service Automation to capture time entries into the same entity that Project Service Automation has used for consistent capture, regardless of whether your organization uses Field Service, Project Service Automation, or both.

Customers will not be required to install Project Service Automation simply to capture time entries within Field Service.

Field Service will support:

- Automatic time capture for work orders based on booking timestamps.
- Manual time capture.
- Custom time capture mechanisms unique to specific business processes or needs.

This feature makes it simple to capture time actuals that capture costs from approved time entries, enabling organizations to drive more accurate accounting practices and profit-loss calculations.

**NOTE** This feature is available in the Unified Interface only.

## Technician time-capture precision

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	Feb 2020	Apr 2020

## Business value

Dynamics 365 Field Service has supported capture of booking timestamps when the underlying Field Service states are changed. However, many customers need to capture timestamps at the more granular frequency of the change of booking status. They use this to drive increased accuracy of costing, better understanding of where time goes on each booking and work order, or other extension scenarios. This is now supported via configuration in Field Service.

## Feature details

Field Service has introduced this configuration setting to simplify implementations for Field Service customers and to allow customers the flexibility of deciding the level of detail they wish to capture when performing work.

This includes:

- Define in Field Service settings the frequency at which timestamps will be captured for each booking.
- Enabling the system to respect that setting regardless of whether the booking status change occurs on the mobile device or via a web browser.
- Capturing appropriate details on the relevant timestamps.
- When a time entry is created from a timestamp, ensure that the time entry holds the right level of detail depending on the org's setting.

**NOTE** This feature is available in the Unified Interface only.

## Overview of Dynamics 365 Remote Assist 2020 release wave 1

Dynamics 365 Remote Assist is a mixed-reality solution available on HoloLens for first-line workers to collaborate with remotely located personnel, to more effectively and efficiently get their jobs done. The product was released for general availability in October 2018 for HoloLens, October 2019 for mobile (Android and iOS), and November 2019 for HoloLens 2.

Dynamics 365 Remote Assist is used in the following scenarios:

- Maintenance, repair, and operations: Enable customers to run their operations more efficiently through remote collaboration for project implementations and reviews, interactive walks, break/fix, and so on.
- Technician success: Improve field technicians' mean time to repair by enabling access to remote experts for advice or to relevant data in a heads-up, hands-free setting.
- Asset capture and audits: Save time and travel costs by using remote asset capture; heads-up, hands-free access to inspection checklists; and real-time evidence capture.

For the 2020 release wave 1, we're focused on the following areas:

- Enabling features that support break/fix scenarios, such as video recording or file sharing.
- Introducing new capabilities beyond performing Teams calls around asset capture by using spatial markup.
- Expanding integration with Dynamics 365 Field Service by allowing richer information to flow in the work orders.

### What's new and planned for Dynamics 365 Remote Assist

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

Feature	Enabled for	Public preview	General availability
<a href="#">Capture asset condition through spatial markup</a>	Users by admins, makers, or analysts	Jun 2020	-
<a href="#">Capture session history through call recordings</a>	Users by admins, makers, or analysts	-	Apr 2020
<a href="#">Share files between technicians and experts to improve collaboration</a>	Users by admins, makers, or analysts	-	Apr 2020

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience for users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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## Capture asset condition through spatial markup

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2020	-

### Business value

First-line workers don't always need to engage with a remote expert through a call; they often have to work independently, in scenarios such as solving a specific incident or performing a quality review on an asset installation. When performing these operations, they'll benefit from being able to capture spatial information about a specific asset and integrate that information with their business processes.

## Feature details

This feature was originally planned as the ability to capture and share annotations without being in a call. We've evolved the feature scope based on extensive customer learnings and feedback.

Now, the feature will introduce the concept of "asset capture" in Dynamics 365 Remote Assist, which will enable technicians to use spatial markups to do checkups and inspections without being on a call, and save their work for post-processing. Inspectors will be able to do an asset survey or asset inspection hands-free and in context, which will improve their paper and Excel processes and result in faster, safer, and more accurate inspections.

Captured data will be stored in Common Data Service and integrated with Dynamics 365 Field Service inspection. Field Service technicians will be able to reference the information recorded in Dynamics 365 Remote Assist in their work orders, so they can better keep track of asset history.

## Capture session history through call recordings

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2020

## Business value

For businesses, it's important to keep a record of different incidents that happen on a daily basis. Oftentimes, these records are kept through paper trails or text-based collateral. Taking advantage of the information captured through video in a Dynamics 365 Remote Assist session will allow operations managers, technicians, and business decision makers to refer back to sessions later and create a knowledge base of calls for other technicians.

## Feature details

In this release, we're enabling the following scenarios:

- The ability for technicians using Dynamics 365 Remote Assist for mobile to comprehensively document their processes and service calls through video recordings between users. This feature is available on HoloLens today for group calls.
- The ability for Dynamics 365 Field Service users to associate a video recording with an existing work order.

## Share files between technicians and experts to improve collaboration

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2020

### Business value

Solving an issue with the help of a remote expert is usually a complex task where rich information and context are essential. In addition to getting the expert's help directly, field technicians can solve specific incidents faster if they can receive instructions, diagrams, or photos from the expert. This allows businesses to save costs by reducing incident resolution times.

### Feature details

In this release, we're enabling collateral files—including instructions, diagrams, photos, and other media—to be captured and shared with remote experts through text chat as conversation attachments. Technicians will also be able to link those files to Dynamics 365 Field Service work orders. This functionality is already available on HoloLens.

# Finance and Operations

## Overview of Dynamics 365 Finance 2020 release wave 1

Chief financial officers are expected to grow beyond reporting and transactional mediation, and more to proactive creation of business value, risk reduction, and finding new investment opportunities. They must spend time on action, not on daily transactional activities. Dynamics 365 Finance will drive automation and predictive analytics capabilities, paving the way for deep proactive management.

Our 2020 release wave 1 plan focuses on automation, predictive analytics, and core capabilities as the key themes to help the CFO in this journey.

## What's new and planned for Dynamics 365 Finance

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

### Core financials

Feature	Enabled for	Public preview	General availability
<a href="#">Allow filtering the Tax 1099 detail report by reporting year</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Budget planning query optimization for performance</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Credit management</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020



Feature	Enabled for	Public preview	General availability
<a href="#">Date range for Posted transactions by journals report</a>	End users, automatically	Feb 2020	Apr 2020
<a href="#">Prohibit submission to workflow when the invoice total and registered invoice total are not equal</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020

## Globalization

This release focused on merging the Italian add-in EXIL into core localization, shipping ISO 20022 format for international payment for France (highly requested in the Idea Portal), and extending configurable business documents with PDF conversion and direct printing features (in Public Preview).

Feature	Enabled for	Public preview	General availability
<a href="#">Extended French localization: ISO 20022 format for international payment and treasury transfer</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Extended Italian localization: advanced notes management</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Extended Italian localization: bank account setup enhancement</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Extended Italian localization: improved inquiry on debit/credit</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Extended Italian localization: miscellaneous charges per kilogram in Intrastat declaration</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Extended Italian localization: posting invoices with zero amount</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020

Feature	Enabled for	Public preview	General availability
<a href="#">Extended Italian localization: sales invoice lines sorting by packing slips</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Extended Italian localization: separate accounts for credit notes</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Extended Italian localization: tax invoice for goods delivered for free</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Extended Swiss localization: QR-bill implementation</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Extended Italian localization: general ledger simulations</a>	End users by admins, makers, or analysts	Feb 2020	Aug 2020
<a href="#">Extended Italian localization: intent letters – invoicing of usual exporters</a>	End users by admins, makers, or analysts	Feb 2020	Aug 2020
<a href="#">Extended Italian localization: Unique Certification</a>	End users by admins, makers, or analysts	Feb 2020	Aug 2020
<a href="#">Extended Italian localization: commission settlement on payments</a>	End users by admins, makers, or analysts	May 2020	Aug 2020
<a href="#">Extended Italian localization: configurable posting profiles for banks and remittance types</a>	End users by admins, makers, or analysts	May 2020	Aug 2020
<a href="#">Extended Italian localization: protest handling for bills of exchange</a>	End users by admins, makers, or analysts	May 2020	Aug 2020
<a href="#">Extended Italian localization: tax plafond</a>	End users by admins, makers, or analysts	May 2020	Aug 2020
<a href="#">Configurable business documents: conversion to PDF</a>	End users by admins, makers, or analysts	Apr 2020	To be announced

Feature	Enabled for	Public preview	General availability
<a href="#">Configurable business documents: direct printing</a>	End users by admins, makers, or analysts	Apr 2020	To be announced

## Public sector

Feature	Enabled for	Public preview	General availability
<a href="#">Daily statement of treasurer's accountability</a>	End users by admins, makers, or analysts	-	Apr 2020
<a href="#">Accounts payable check approval register report</a>	End users by admins, makers, or analysts	-	Jun 2020
<a href="#">Canadian Harmonized Sales Tax</a>	End users by admins, makers, or analysts	Jun 2020	Jul 2020

Description of **Enabled for** column values:

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For more information about geographic areas, data centers (regions), data storage, and replication, click **expand all** on the [Where your data is located page](#) and find the Microsoft cloud service for this feature.

## Core financials

### Allow filtering the Tax 1099 detail report by reporting year

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

#### Business value

By filtering the Tax 1099 detail report by reporting year, members of your accounting staff won't have to spend as much time and energy finding the information that they need to work with now.

#### Feature details

For the Tax 1099 detail report, a new filtering option is available that lets you filter by reporting year.

### Budget planning query optimization for performance

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

#### Business value

By improving the performance of processing budget planning data, this feature reduces the likelihood that queries will be blocked. The feature also adds optimizations to the queries used in data processing.

#### Feature details

A new feature is available within Feature management that helps improve performance when processing data in the Budget Planning module. On initial release in 10.0.9, this feature will improve performance when using the **Publish** button in Excel to update existing records.

## Credit management

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

Credit management will proactively suggest credit control activities, thereby improving cashflow, reducing bad debts, and providing insight and controls that help you manage credit risks while ensuring that customers have the flexibility to take advantage of promotions and make the purchases they need.

### Feature details

Credit management's capabilities will include:

- Management of risk scores
- System-suggested credit limits
- Configurable blocking rules
- Automation of credit cases
- Dynamic release of credit holds
- Credit limit management
- Tracking historical credit limits

## Date range for Posted transactions by journals report

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Business value

The Posted transactions by journals report now requires a date range, which allows it to be generated faster. Specifying a date range limits the amount of data that's processed for the Posted transactions by journals report. Without any restriction, the amount of data that's processed can be huge, and can significantly degrade system performance.

### Feature details

This feature is enabled by default. This change adds two fields to the user interface, a **From date** field and a **To date** field, on the report dialog for the Posted transactions by journals report.

### Prohibit submission to workflow when the invoice total and registered invoice total are not equal

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

Finding an issue before an invoice is submitted to workflow helps prevent errors that might stop posting and require resubmitting the vendor invoice to workflow later, saving submitters and approvers time in the long run.

### Feature details

This feature lets you prevent a vendor invoice from being submitted to the workflow process when the invoice total and registered invoice total are not equal. Instead, the person who submitted the invoice receives an alert that the totals aren't equal, letting them correct it before submitting it to workflow.

## Globalization

### Overview

To run their operations globally, businesses need to meet regulatory and other local requirements in multiple countries in the areas of tax, e-invoicing, payment formats, regulatory reporting, audit, and business document layouts. These requirements are different for different countries and are frequently changed by tax authorities, often with very tight law enforcement dates.

To reduce the complexity of meeting the constantly changing regulatory and other local requirements in multiple countries and efficiently address global regulatory trends, we made key globalization areas of Dynamics 365 Finance configurable by power users and even business users (for business documents).

Partners and customers used our configuration tools to extend 37 out-of-the-box country localizations as well as to create features for more than 60 additional countries, resulting in more than 7,000 new features.

In 2020 release wave 1, we focused globalization investments on maintaining regulatory compliance in 37 countries and regions and extending out-of-the-box localization by integrating a partner's Italian add-in EXIL into the core Italian localization. We also are delivering ISO 20022 format for international payment and treasury transfer for France, which was highly requested on the Idea Portal. In addition, we extended configurable business documents with PDF conversion and direct printing features (in Public Preview).

### Extended French localization: ISO 20022 format for international payment and treasury transfer

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

#### Business value

With more and more international money transfers, French businesses can use the solution to create an electronic payment file that meets the country-specific requirements. Because the format is fully configurable, it's easier to adapt it to bank-specific requirements by a power user.

#### Feature details

France localization required at least one payment format for international payment and treasury transfer where the payment would be allowed:

- In foreign/non-EUR currency
- In EUR outside of the SEPA area
- In EUR with selected fees allocation
- In EUR without BIC or IBAN

### Extended Italian localization: advanced notes management

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

#### Business value

Global and local customers who deploy Dynamics 365 Finance in Italy receive selected regulatory and competitive Italian features out of the box without the need to apply the

Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

### Feature details

It is possible to define notes not only for a specific type of document but also for using references to individual customers, vendors, and goods. Defined notes are printed in sales and purchase documents per a combination of customer, item and vendor, and item.

### Extended Italian localization: bank account setup enhancement

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

Global and local customers who deploy Dynamics 365 Finance in Italy receive selected regulatory and competitive Italian features out of the box without the need to apply the Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

### Feature details

A company needs to store data related to the company's own reference banks and the banks that are used by the company's customers and vendors. Having all of the Italian banks already available as reference information with the bank description and their routing numbers saves a lot of entry time. This is done through normalizing Bank and Bank group information as well as an import of a file provided by the banks that includes the bank descriptions, the routing numbers (bank codes), and the bank addresses.

### Extended Italian localization: improved inquiry on debit/credit

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

Global and local customers who deploy Dynamics 365 Finance in Italy received selected regulatory and competitive Italian features out of the box without the need to apply the



Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

### Feature details

When a user needs to review customer and vendor transactions or wants to print the corresponding account statement, the order of the transactions is not easy to read. A user often needs to have the transaction details to be able to analyze the business trends. The transactions were previously sorted and displayed by registration date. Now, it is possible to see the list of transactions sorted by invoice number with an indication of the related payment or credit note for every invoice.

### Extended Italian localization: miscellaneous charges per kilogram in Intrastat declaration

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

Global and local customers who deploy Dynamics 365 Finance in Italy receive selected regulatory and competitive Italian features out of the box without the need to apply the Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

### Feature details

The miscellaneous charges in the Intrastat declaration are calculated as a percentage of the invoice amount. In Italy, another common scenario is to calculate the miscellaneous charges according to goods weight, which is the cost for each kilo multiplied by the number of kilos.

### Extended Italian localization: posting invoices with zero amount

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

Global and local customers who deploy Dynamics 365 Finance in Italy receive selected regulatory and competitive Italian features out of the box without the need to apply the

Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

### Feature details

It is fiscally mandatory to post sales and purchase invoices even when the total invoice amount is equal to zero (0). This feature allows you to create accounting documents for these invoices.

### Extended Italian localization: sales invoice lines sorting by packing slips

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

Global and local customers deploying Dynamics 365 Finance in Italy get selected regulatory and competitive Italian features out of the box without the need to apply the Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

### Feature details

This feature allows for specific sales invoices to be printed per packing slip.

### Extended Italian localization: separate accounts for credit notes

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

Global and local customers who deploy Dynamics 365 Finance in Italy receive selected regulatory and competitive Italian features out of the box without the need to apply the Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

### Feature details

It is necessary to post the values of issued credit notes on general ledger (GL) accounts different from revenue accounts. A separate setup is available for credit notes in posting profiles where the user can define different accounts from usual revenue accounts.

## Extended Italian localization: tax invoice for goods delivered for free

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

Global and local customers who deploy Dynamics 365 Finance in Italy receive selected regulatory and competitive Italian features out of the box without the need to apply the Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

### Feature details

When goods are delivered for free to a customer, there is still an obligation to pay taxes. There are two cases where this can occur:

- The company pays the sales tax. The goods are shipped to the customer with a delivery note that includes the reason code **Free**. The company issues a self-invoice where the text **Free invoice** is clearly printed on the header, the value of goods is printed, the sales tax is calculated, and the total of the invoice is equal to the tax amount.
- The customer pays the sales tax. The goods are shipped to the customer with a delivery note with the reason code **Free**. The delivery note is then invoiced to the customer. On the invoice, the text **Free invoice** is clearly printed on the header, the value of goods is printed, the sales tax is calculated, and the total of the invoice is equal to the tax amount.

## Extended Swiss localization: QR-bill implementation

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

The payment slips used in Switzerland go back over 100 years and are used 100 million times a year. The increasing regulatory requirements for payment traffic have made some system modifications necessary. The QR-bill now is replacing the existing multiplicity of payment slips in Switzerland, and the coverage on the ERP side is required to help with increasing efficiency and simplifying payment traffic.

### Feature details

This feature satisfies Swiss-specific requirements around QR-bill creation and processing aligned with identified and supported business scenarios.

### Extended Italian localization: general ledger simulations

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Aug 2020

### Business value

Global and local customers who deploy Dynamics 365 Finance in Italy receive selected regulatory and competitive Italian features out of the box without the need to apply the Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

### Feature details

The feature allows register anticipated general ledger (GL) transactions to simulate GL entries that can then be deleted or modified. This is used by the accountants to pre-verify and adjust the year-end profit and loss statement.

### Extended Italian localization: intent letters – invoicing of usual exporters

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Aug 2020

### Business value

Global and local customers who deploy Dynamics 365 Finance in Italy receive selected regulatory and competitive Italian features out of the box without the need to apply the Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

### Feature details

A company is called a *usual exporter* when, in the previous period, the previous calendar year for fixed plafond or the previous 12 months for variable plafond, more than 10 percent of the whole revenue is from sales to foreign countries. This type of company has a special tax-exemption

process where they can purchase and import goods and services without paying sales tax, within a limited value (plafond) of their sales to foreign countries in a previous period.

When this limit value is reached during the year, they continue to buy using the normal sales tax percentage. The *usual exporter* company must send an intent declaration (a numbered and dated letter) to its vendors declaring its exemption to pay tax.

When the *usual exporter* company exceeds its tax plafond, it must communicate this to its vendors so that they will immediately begin issuing invoices with sales tax.

### Extended Italian localization: Unique Certification

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Aug 2020

#### Business value

Global and local customers who deploy Dynamics 365 Finance in Italy receive selected regulatory and competitive Italian features out of the box without the need to apply the Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

#### Feature details

The Unique Certification (CUD) is a document employees periodically receive that details the income for activity that is carried out as an employee. The document must be submitted to the Revenue Agency in electronic form. The feature allows you to collect all of the required data and then create a file that follows the layout recommended by the Revenue Agency.

### Extended Italian localization: commission settlement on payments

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Aug 2020

#### Business value

Global and local customers who deploy Dynamics 365 Finance in Italy receive selected regulatory and competitive Italian features out of the box without the need to apply the Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

### Feature details

Many companies settle the commissions of their sales agents when customer invoices are paid and not when the invoice is issued. The reason is to lead the agents to debt collection.

This feature introduces the possibility to specify whether the settlement should occur at the moment of invoicing or payment. This determines the posting timing of commissions on general ledger accounts.

### Extended Italian localization: configurable posting profiles for banks and remittance types

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Aug 2020

### Business value

Global and local customers who deploy Dynamics 365 Finance in Italy receive selected regulatory and competitive Italian features out of the box without the need to apply the Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

### Feature details

When the drafts are remitted to one of the company banks, it is necessary to update a different offset account in the general ledger. This is based on the bank and the remittance type selected by the user in the case of bills of exchange, and based on the bank selected by the user in the case of promissory notes.

The feature allows you to create a different dedicated posting profile for every company bank account to post the transactions in the ledger account linked to the selected bank. The bank account is specified during the journal creation, and because it is linked to a specific posting profile, the transactions for the remittance will use the main account connected to the bank.

### Extended Italian localization: protest handling for bills of exchange

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Aug 2020

## Business value

Global and local customers deploying Dynamics 365 Finance in Italy receive selected regulatory and competitive Italian features out of the box without the need to apply the Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

## Feature details

When bills of exchange are not paid, the bank sends an electronic file to the company with the list of the protested payments. This feature allows you to import an external electronic file into a journal using matching by the field **Bill ID**. The structure of the external electronic file is a common structure that has been adopted by all banks.

## Extended Italian localization: tax plafond

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Aug 2020

## Business value

Global and local customers who deploy Dynamics 365 Finance in Italy receive selected regulatory and competitive Italian features out of the box without the need to apply the Extended Italian Localization (EXIL) add-in or any other add-in with similar features available in the Italian market.

## Feature details

The extended Italian localization tax plafond is a tax-exemption process that allows companies, usually exporters, to purchase and import goods and services without paying sales tax within a limit value of their sales to foreign countries in the previous period. A company is a "usual exporter" when, in the previous year, 10 percent of the company's revenue value came from selling to a foreign country. To support that, the initial plafond and the validity dates (from and to dates) are established at the beginning of the period. The company can buy without paying sales tax until the purchases value is below the initial plafond.

## Configurable business documents: conversion to PDF

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	To be announced

## Business value

The ability to exchange business documents in PDF format is routinely requested by customers and partners. This feature helps customers cover end-to-end scenarios for exchanging business documents from within the product.

## Feature details

This feature allows conversion for any business document generated in Excel or Word via a new setting, **Convert to PDF**, in **Electronic reporting destination setup** for a given report.

### Configurable business documents: direct printing

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	To be announced

## Business value

This feature helps increase efficiency by letting customers print business documents (such as orders and invoices) directly from the system. This enables batch processing for printing many documents at once.

## Feature details

This feature lets you select printer destinations for electronic reporting destinations of Word, Excel, and PDF-based configurations. This setup is then used to send PDF documents (either converted from Word or Excel, or documents that were generated in PDF format) to the Document Routing Agent (DRA).

## Public sector

### Daily statement of treasurer's accountability

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Apr 2020

## Business value

Use the Treasurer's statement of accountability report to generate a trial balance report specifically for the treasurer's fund to be used for reconciliation purposes.



### Feature details

You can generate the report on a daily basis to review the activity in selected accounts for the treasurer's fund and compare that to the equity activity in other funds. This daily report allows you to search for discrepancies, unexpected balances, and possible adjustments needed, and to complete other general audit functions.

### Accounts payable check approval register report

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Jun 2020

### Business value

This feature makes it easier to reconcile the printed checks with the system.

### Feature details

This feature adds a total number of checks and invoices to the check approval register report, which makes it easier to reconcile the printed checks with the system.

### Canadian Harmonized Sales Tax

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Jun 2020	Jul 2020

### Business value

Dynamics 365 Finance now supports the Harmonized Sales Tax (HST). The HST helps public sector entities maintain compliance with Canadian tax policies. The HST is used by some Canadian provinces and is a combination of the Goods and Services Tax and the Provincial Sales Tax.

### Feature details

Portions of the HST can be recovered by public sector entities if the tax has been paid to vendors, depending on the purpose of the purchase. The purpose is designated by the financial dimension values and main account on the transaction document line (for example, purchase requisitions, purchase orders, or vendor invoices).

## Overview of Dynamics 365 Supply Chain Management 2020 release wave 1

The Dynamics 365 Supply Chain Management April 2020 release includes:

- **Planning.** The Planning Optimization service distribution requirements planning will be generally available. Furthermore the manufacturing support will be enabled as public preview.
- **Asset management.** Enables integration with fixed assets to provide a comprehensive assets view including physical and financial information.
- **IoT intelligence.** The connected manufacturing and quality scenarios will be generally available and the connected assets scenario will be enabled as public preview.
- **Sales and procurement.** Several enhancements are made in the Sales and the Procurement areas enabling: country of origin, hazardous materials management, and eProcurement vendor collaboration.
- **Warehouse management.** Enables mass deployment support for warehouse mobile applications, catchweight improvements, improved material handling, and improvements in inbound and outbound logistics.
- **Manufacturing.** The job card device experiences are enhanced to improve productivity for manufacturing operations.

Also, several miscellaneous enhancements are being introduced across the Supply Chain Management areas to support CDS integration, performance, usability, monitoring and reliability.

### What's new and planned for Dynamics 365 Supply Chain Management

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

## Asset management

Feature	Enabled for	Public preview	General availability
<a href="#">Fixed assets integration with Asset Management lifecycle</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Visual scheduling for work orders in Asset Management</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">IoT integration with asset management maintenance requests from IoT intelligence</a>	End users by admins, makers, or analysts	May 2020	Jul 2020
<a href="#">Manufacturing resource scheduling based on asset availability</a>	End users by admins, makers, or analysts	May 2020	Jul 2020
<a href="#">Integration with new Project module changes related to project type</a>	End users by admins, makers, or analysts	May 2020	Jul 2020

## Costing

Feature	Enabled for	Public preview	General availability
<a href="#">Compare item price storage</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Multiple inventory asset representations (Preview)</a>	End users by admins, makers, or analysts	May 2020	Jul 2020

## Inventory

Feature	Enabled for	Public preview	General availability
<a href="#">Inventory on-hand service</a>	End users by admins, makers, or analysts	May 2020	

## IoT intelligence

Feature	Enabled for	Public preview	General availability
<a href="#">IoT Intelligence core insights</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020

## Manufacturing

Feature	Enabled for	Public preview	General availability
<a href="#">Improved job card device</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Manufacturing intelligence</a>	End users by admins, makers, or analysts	May 2020	Jul 2020

## Portals

Feature	Enabled for	Public preview	General availability
<a href="#">Customer self-service experiences</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020

## Trade and source

Feature	Enabled for	Public preview	General availability
<a href="#">Calculate PO delivery date based on lead times and working days (public sector)</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Country of origin enhancements</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020

Feature	Enabled for	Public preview	General availability
<a href="#">External catalog enhancements</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Hazardous materials product information management</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Hazardous materials shipping documentation</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Miscellaneous charges enhancements</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Purchase order delivery via cXML</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Enterprise scale – purchase system performance</a>	End users by admins, makers, or analysts	-	Jul 2020
<a href="#">Enterprise scale – sales system performance</a>	End users by admins, makers, or analysts	-	Jul 2020
<a href="#">Sales order operator efficiency - distribution</a>	End users by admins, makers, or analysts	May 2020	Jul 2020
<a href="#">Sales process control via enhanced order holds</a>	End users by admins, makers, or analysts	May 2020	Jul 2020
<a href="#">Delegation of multiple purchasing work items</a>	End users by admins, makers, or analysts	Jul 2020	Sep 2020

## Warehouse management and transportation

Feature	Enabled for	Public preview	General availability
<a href="#">Catch weight product processing with warehouse management</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Inbound and outbound logistics improvements</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Integration framework for material handling equipment for automated warehouse processes (previously MHAX)</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Mass deployment for Warehouse mobile app</a>	Admins, makers, or analysts, automatically	Mar 2020	Apr 2020

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **End users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their end users.

For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

For more information about geographic areas, data centers (regions), data storage, and replication, click **expand all** on the [Where your data is located page](#) and find the Microsoft cloud service for this feature.

## Asset management

### Fixed assets integration with Asset Management lifecycle

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

#### Feature details

This functionality enhances the "acquire to retire" asset lifecycle with end-to-end process flows with the **Fixed Assets** module.

This functionality will enable customers to acquire and install or commission assets using the **Fixed Assets** module by enabling seamless process flows between the **Fixed Assets** and **Asset Management** modules. Financial impact to an asset during the maintain phase will be transferred back to the **Fixed Asset** module for relevant accounting treatment.

### Visual scheduling for work orders in Asset Management

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

#### Feature details

This functionality will enable users to visually schedule maintenance work orders using the Gantt chart.

### IoT integration with asset management maintenance requests from IoT intelligence

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Jul 2020

#### Feature details

This functionality provides users with the capability to automatically generate maintenance requests in asset management for equipment down or production delay scenarios in IoT intelligence.

## Manufacturing resource scheduling based on asset availability

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Jul 2020

### Business value

Production planners will be able to schedule production orders while taking into account planned downtime for maintenance.

### Feature details

This functionality provides alignment with the materials requirements planning engine and planning service, enabling a single view of manufacturing resources and capacity.

## Integration with new Project module changes related to project type

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Jul 2020

### Feature details

This feature introduces enhanced cost control and financial integration by enabling tighter interfacing with the Projects module. It provides enhanced control over finances and maintenance costs, plus the ability to invoice work orders.

## Costing

### Compare item price storage

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

This new way of executing the Compare item price report is useful in cases where the output contains a large number of lines. For example, requesting a comparison of the current active standard cost against next year's pending standard cost for 60,000 items would yield a very long



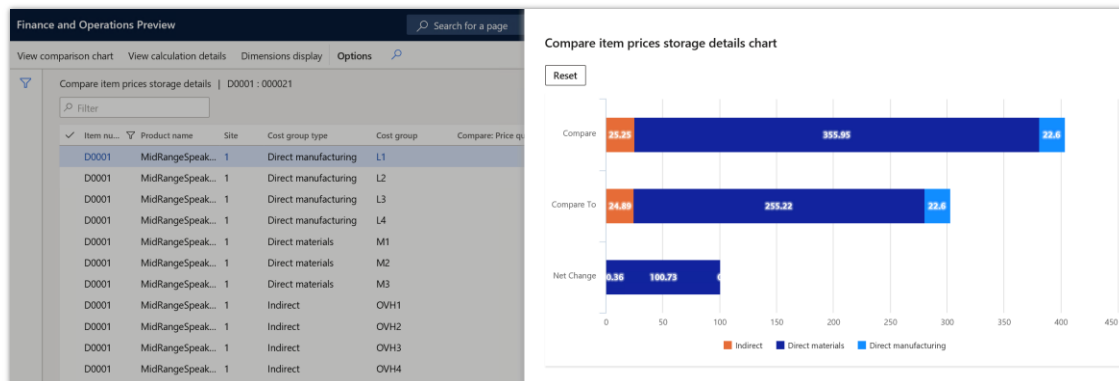
report, where data is difficult to review. Being able to sort and filter the results, or to export the results to an external system, makes the report faster and easier to navigate.

## Feature details

We are introducing new functionality for comparing item price storage. When you execute the "Compare item price" report, you must provide a unique name for the specific execution, and the results of the report will be stored under this name.

The output will be accessible on the **Compare item price storage** page. This page dynamically adjusts columns and aggregates balances depending on the configuration made by the user. You can add a filter so the items with the largest net change in price is listed in the top of the grid. A drill-through function provides the ability to see the net change by cost group type or cost group. In case a specific price requires further analysis, a link to the actual cost calculation is available.

We are also introducing a new "Compare item price" data entity. This data entity enables you to export the output of a specific, named "Compare item price" report to any format supported by data management, making the data available for use with external applications.



*View comparison chart. Filtered by item with breakdown by Cost group type and Cost group*

Finance and Operations Preview

Search for a page

USMF

View comparison chart View calculation details Dimensions display Options

Compare item prices storage details | D0001 : 000021

Filter

Item no.	Product name	Site	Cost group type	Cost group	Compare to: Price quantity	Compare to: Unit price	Compare to: Price quantity	Compare to: Unit price	Net change unit price	Net change price %
D0001	MidRangeSpeak...	1	Direct manufacturing	L1	1.00	0.47	1.00	0.47	0.00	0.00
D0001	MidRangeSpeak...	1	Direct manufacturing	L2	1.00	5.46	1.00	5.46	0.00	0.00
D0001	MidRangeSpeak...	1	Direct manufacturing	L3	1.00	12.00	1.00	12.00	0.00	0.00
D0001	MidRangeSpeak...	1	Direct manufacturing	L4	1.00	4.67	1.00	4.67	0.00	0.00
D0001	MidRangeSpeak...	1	Direct materials	M1	1.00	131.81	1.00	129.23	2.58	2.00
D0001	MidRangeSpeak...	1	Direct materials	M2	1.00	79.99	1.00	79.99	0.00	0.00
D0001	MidRangeSpeak...	1	Direct materials	M3	1.00	144.15	1.00	46.00	98.15	213.37
D0001	MidRangeSpeak...	1	Indirect	OVH1	1.00	2.44	1.00	5.10	-2.66	-52.14
D0001	MidRangeSpeak...	1	Indirect	OVH2	1.00	3.00	1.00	3.00	0.00	0.00
D0001	MidRangeSpeak...	1	Indirect	OVH3	1.00	14.34	1.00	11.32	3.02	26.69
D0001	MidRangeSpeak...	1	Indirect	OVH4	1.00	5.47	1.00	5.47	0.00	0.00

Compare item prices storage details. Filtered by item with a breakdown by Cost group

## Multiple inventory asset representations (Preview)

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Jul 2020

## Business value

International organizations are under increasing pressure to be compliant by local governments (local GAAP) and General Accepted Accounting Practices like IFRS/IAS, even in cases where these practices may be in direct conflict. International organizations having subsidiaries in countries with a hyper-fluctuation of local currency may be required by the local government to account and manage inventory in local currency. To comply with IFRS/IAS, the subsidiary is required to account and manage inventory in a stable currency like the euro or US dollar.

## Feature details

Organizations often prefer to account inventory by standard cost as part of their management accounting setup. Local governments, tax authorities, and IFRS do not recognize standard cost as an accounting principle and often require average, FIFO, or specific identification.

Collectively these requirements must be addressed in a comprehensive solution that supports the ability to perform inventory accounting in multiple inventory representations, where each representation can be configured with a specific set of accounting policies.

With this new functionality, customers can define as many inventory representations as required. Inventory accounting in dual currency and inventory accounting in dual valuation is supported.

Inventory accounting is performed in individual ledgers. Several ledgers can be created for a legal entity in the organization ensuring that multiple inventory representations can be

obtained. All documents (purchase order, sales order, transfer order, etc.) posted in a legal entity will be accounted in all the ledgers associated with the legal entity.

A ledger is defined by:

- Calendar
- Currency
- Exchange rate table
- Convention

A convention is a collection of inventory accounting policies that can be associated to one or more ledgers. This provides the ability to share a common convention in the organization.

The multiple inventory representations support multiple inventory accounting policies. For each policy, a single rule can be selected, and it applies to all products.

Input measurement basis:

- Normal historical
- Standard

Cost flow assumption:

- Average
- Specific identification (Batch)

Recording interval:

- Perpetual

The multiple inventory representations provide key measures and KPIs, enabling insights to inventory performance:

- Beginning balance
- Net change
- Net change inflow
- Net change outflow
- Ending balance
- Inventory turn
- Inventory accuracy
- Days of inventory

Key visuals using Power BI and enabling drill-through and slicing by product, location, and time are also provided for:

- Inventory status
- Inventory aging
- ABC analysis
- Variance analysis

Lastly, this solution provides a detailed audit trail from a cost-accounting measure all the way back to the original document posted in Supply Chain Management.

## Inventory

### Inventory on-hand service

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	-

### Business value

Providing near real-time access to inventory on-hand information through a separate micro-service simplifies integration with external systems, optimizes response times, and reduces the incremental load and performance impact on Dynamics 365 Supply Chain Management.

### Feature details

Organizations that leverage Dynamics 365 Supply Chain Management for managing their inventory on-hand might also have other external systems that could benefit from on-hand inventory information. These could be external sales solutions or mobile solutions. Other scenarios include the requirement to share inventory on-hand information with trading partners.

The inventory on-hand service is a separate micro-service that provides on-hand information in a hyper-scalable, hyper-performant manner without incurring additional load or compromising the performance of Dynamics 365 Supply Chain Management.

All information that relates to on-hand information is exported in near real-time to the inventory on-hand service through low-level SQL integration. External systems access the inventory on-hand service through RESTful APIs that enable on-hand information on given sets of dimensions to be queried, and that enables retrieval of a list of available on-hand positions.

The inventory on-hand service also enables external systems to update on-hand information. In these scenarios, the service will maintain on-hand information that is accurate in near real time,

even though the on-hand changes are processed in Dynamics 365 Supply Chain Management with significant delay (for example, through a daily import job).

## IoT intelligence

### IoT intelligence core insights

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Feature details

IoT intelligence core insights and actions scenarios:

- **Delayed orders.** Notification services and actions for delayed production orders and display of impacted operations. Ability to define metrics for order delays for resource and product combination and enable users to get notified when an exception to these thresholds occur. Also enable users to take relevant business actions for delayed orders, such as view impact or create a maintenance request.
- **Equipment down.** Notification services and actions for equipment down scenarios and display of impacted operations. Ability to define metrics for machine down threshold and enable users to get notified when an exception to these thresholds occur. Also enable users to take relevant business actions for delayed orders, such as view impact or create a maintenance work order.
- **Quality anomaly.** Notification services and actions for quality anomalies. Provides users with the ability to define quality attributes for products and get notified when exceptions to these attributes happen.
- **Automated inventory updates.** Automated inventory update from shop floor. Provides the ability to define batching/grouping rules for automatic inventory update journals/RAF creation from part out signals received from the IoT Hub.

Seamless onboarding experience providing the 5X5 experience:

- **No-code capability.** Provide users the no-code capability to quickly connect their machines to IoT intelligence service and get started with actionable insights.

Real time analytics and insights for better visibility, control, and smarter business decision-making:

- **Analytics enhancements.** Provide key analytics and Overall Equipment Effectiveness (OEE) metrics from shop floor to top floor, enabling users to make critical decisions.

## Manufacturing

### Improved job card device

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

#### Business value

Providing a single integrated user experience where shop floor workers can effectively manage production jobs can help to improve effectiveness and efficiency and help reduce error rates. Capturing accurate data about production activities also enables manufacturers to increase productivity, decrease scrap and defect ratios, reduce work-in-progress, and improve throughput.

#### Feature details

The job card device will be enhanced with capabilities that have so far been available only on the job card terminal. It provides shop floor workers with a more intuitive and touch-friendly experience towards managing production jobs:

- Improvements to the user interface of the **Report progress** dialog box that provides the user a more intuitive, touch-friendly, and workflow-driven experience.
- The ability to print labels for license plates when reporting as finished from the device.
- Report as finished on batch/serial number. Enables the shop floor worker to generate a batch or serial number, or to scan an existing batch or serial number when reporting a production job as finished.

These enhancements to the job card device represent the first steps towards renewing the manufacturing execution capabilities and delivering a single, integrated, touch-friendly experience that integrates time, attendance, and job management. It will also eventually bring together IoT and sensor data, work instructions, quality management, and asset maintenance jobs.

#### Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

## Manufacturing intelligence

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Jul 2020

### Business value

As manufacturers build increasingly robust data assets around their products, people, assets, and processes, opportunities quickly appear to deliver products and services more efficiently and reliably. By creating a feedback loop encompassing the data collected in the business applications, sensors on the floor and external signals, and leveraging the Microsoft best-in-class business intelligence and artificial intelligence offerings, customers can gain operational efficiency, drive quality, reduce waste, and be more agile.

### Feature details

This feature provides a **Production Insights dashboard** for production managers and executives that:

- Focuses on the current performance and industry standard measures for Overall Equipment Effectiveness (OEE), with timelines and trends in context with equipment and rolled up across plants through resource hierarchies.
- Helps key questions like "Are we going to meet our goals today?" and "Is my production line healthy?"
- Augments the supervisor's knowledge with data insights to recommend actions, for instance:
  - *Regressions on time series metrics*, such as machine slowing down over time, scrap rate increasing over time, or WIP increasing over time
  - *Deviations in key metrics* (operation time, standard cost, and so on), with detection of key influencers
  - *Prediction of operational metrics*, such as: probability of delay in operation, probability of scrap, probability of over-consumption

## Portals

### Customer self-service experiences

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Feature details

The new Customer Portal will provide basic administration capabilities and inquiry functions, such as:

- View:
  - Sales orders and lines (such as selected fields and status)
  - Quotes
  - Customer Invoices
  - Your own contact information and relevant business master data
  - Your own contacts
  - Product catalog and product images and description
  - Prices and item availability
  - Account balances
- Request updates to sales orders (adjust existing lines with quantity and delivery dates)
- Accept quotes
- Update contact information
- Make online order inquiries

### Trade and source

#### Calculate PO delivery date based on lead times and working days (public sector)

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020



### Feature details

Calculate a delivery date for a line based on a vendor's lead time and your organization's working-days calendar. Vendors can enter a lead time for each line. When a purchase order is confirmed, a delivery date for a line is calculated from the confirmation date, based on the lead time and the working-days calendar. If no lead time is specified, the delivery date is the confirmation date. After the admin enables the feature, the admin must enable the functionality using the procurement and sourcing parameters.

### Country of origin enhancements

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Feature details

Trading across country borders often requires that companies include information about the country of origin of the products they are moving. Dynamics 365 Supply Chain Management includes a related field on the product master document. The enhancements will build on that existing capability. Often, suppliers will provide a certificate to customers that has an expiry date and certificate number. These enhancements will provide the capability for the procurement organization to document this information. They can then use this information to prepare shipping documentation.

The feature also enables the procurement organization to follow up with suppliers when a certificate expires. Sales organizations can also verify this information before making sales—for example, if product from a specific country shouldn't be shipping into another country due to possible tariffs or additional paperwork that the shipping department will need to prepare. These updates will help organizations build trade-compliance processes.

### External catalog enhancements

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Feature details

Procurement organizations were able to leverage the external catalogs cXML protocol in Microsoft Dynamics 365 for Finance and Operations version 7.2. Due to different vendor systems, setting up and testing external catalogs can involve some troubleshooting. With the

new catalog enhancements, the procurement organization can enable the logging feature that captures common issues that might require changes to external catalog parameters.

We're adding additional support to allow the return of the **SupplierPartAuxiliary** ID from the shipping basket and to capture it on the purchase requisition and the related purchase order. This identification is used by some suppliers to represent a unique configuration for an item.

### Hazardous materials product information management

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

#### Feature details

Distribution companies that handle products that contain hazardous or dangerous goods need to be able to store additional information about those products. This information will help a company build a process to conform with regulations around shipping and handling the products. With this enhancement, product information management will include additional setup options to store data related to the item, including item descriptions per the different shipping regulations on the dangerous-goods lists.

### Hazardous materials shipping documentation

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

#### Feature details

Because additional information regarding hazardous materials will now be stored for products, we are introducing additional documents that can be used in the warehouse to manage shipments that contain hazardous materials. The new documents are an enhanced bill of lading, CMR document, multimodal dangerous goods document, enhanced packing list, and Verified Gross Mass (VGM) document. These documents will work much like the existing bill of lading. The operator can generate the data for the document and then edit as needed to include external data or adjustments needed to represent the shipment.

## Miscellaneous charges enhancements

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Feature details

We are providing enhancements to the charges framework to support additional scenarios for sales and procurement. These enhancements include making the charges allocation feature that is available on purchase orders also available on sales orders. This allows sales entry operators the ability to allocate sales header charges to sales lines. Additional sales charges has the ability to set up from and to amounts. This is being made available on purchase orders to allow scenarios for charges to be assigned based on the value of the purchase order.

Customers have also requested the ability to set up charges both in sales and procurement by site and warehouse. This will allow for scenarios where charges like freight might vary based on the site and warehouse allocated to the document.

## Purchase order delivery via cXML

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Feature details

Procurement organizations can gain operational efficiencies and provide value-added service to their organization by enabling external catalogs and allowing employees to purchase directly from suppliers' e-commerce sites. When the requisition is returned, approved, and converted to a purchase order, the communication of the purchase order back to the vendor is manual. With this enhancement, we have added support for the cXML purchase order request message. You can enable vendors for this feature if your supplier supports receiving the purchase order. Additional setup and parameters are enabled through the external catalog configuration.

Purchased orders are sent using confirmed purchase orders. The procurement team can enable background processing for the purchase order sending the order, and they can monitor the acknowledgment of purchase orders.

### Enterprise scale – purchase system performance

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Jul 2020

#### Feature details

Through telemetry and customer feedback on purchase order processing scenarios, we have identified some key improvements to system performance that can help customers who are dealing with a large volume of purchase orders through different scenarios.

### Enterprise scale – sales system performance

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Jul 2020

#### Feature details

Through telemetry and customer feedback on sales-order processing scenarios, we have identified some key improvements to system performance that can help customers who are dealing with a large volume of sales orders. These improvements help in both manual entry order and import scenarios.

### Sales order operator efficiency – distribution

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Jul 2020

#### Feature details

Sales order management efficiency is important for distribution businesses that need to process and manage large volumes of sales orders. In response to feedback from customers, we have identified key areas for improvement to the operator experience around quick order entry, order editing, inventory availability, and item searching. These improvements will reduce the number of steps needed to perform common actions, which will lead to improved operator efficiency.

## Sales process control via enhanced order holds

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Jul 2020

### Feature details

In business-to-business trading scenarios, departments are trying to reduce the time involved in processing a sales order through the organization. This often involves collaboration between customer services, financial teams, and operation teams to review the order and deal with exceptions. Often, a full workflow process is too much overhead for the sales order. With this enhancement, organizations can use additional parameters on order holds to create virtual workflows, and they can use status indication processes to enable communication of the order status and requirements for follow-up activities to control the order. The status information is visible on the warehouse release and shipment, which enables the communication of status information between the sales representatives and the operational fulfillment teams.

## Delegation of multiple purchasing work items

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Jul 2020	Sep 2020

### Feature details

This feature will enable users to delegate multiple work items to another user in one action on the **Work items assigned to me** page. This feature will make it easier to hand over work to a colleague.

## Warehouse management and transportation

### Catch weight product processing with warehouse management

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

## Business value

With catch weight products, you can now handle business scenarios related to warehouse management processes.

This feature provides a catch weight tag that fetches the captured weight per catch weight unit assigned. The goal of this approach is to weigh the product only once—at the time of receipt. This works for products that don't change weight over time (such as frozen shrimp) and products that have a handling unit of measure that is shippable (such as a box of shrimp). With this approach, the user scans the catch weight tag to identify the weight at the time of picking or packing based on the product configuration. Then invoicing is based on the weight that is associated with the captured catch weight tag.

## Feature details

The feature is enabled in the **Feature management** interface. The new functionality includes upgrade capabilities for existing catch weight items that have open inventory transactions. The items can be enabled for warehouse management processes by means of the **Change storage dimension group for items** option.

## See also

[Feature exploration](#) (video)

[Catch weight product processing with warehouse management](#) (docs)

## Inbound and outbound logistics improvements

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

## Feature details

Most of these features have been released as flighted during 2019 wave 2 timeframe. They are now released as public preview and customers have the ability to include these features in production environment through **Feature management** from Dynamics 365 Supply Chain Management version 10.0.9.

Inbound:

- **Quality check.** With this functionality, you can perform rapid quality checks on the spot at the time of receiving to the inbound dock area.

- **Put away clusters.** This is a way to pick multiple license plates at once and take them for a putaway to different locations. It is very useful for retail where many license plates are not full pallets of inventory.

Warehouse operations:

- **Packaging product dimensions.** This allows users to have different sets of dimensions for when an item is being stored in the warehouse (storage), being packed into a box for packing, and being packed into a box with more of itself (nested packing).
- **Item consolidation – location utilization.** The new location utilization form serves as a tool to warehouse managers to easily view and filter the volumetric utilization of location across the warehouse.
- **Location license plate positioning.** This allows the user to see where the LP is located in a multi-pallet location, such as double-deep pallet racking. This functionality adds a sequence number to the license plate for each license plate that is put to a location.
- **Location product dimension mixing.** This new location profile functionality enables better location managing when using product variants or products with dimensions, such as with the fashion industry. It allows you to decide whether configurations, colors, style, and sizes can be mixed on a certain location (profile) or if only one or a combination of some of those dimensions can be put to the same location.
- **Flexible warehouse-level dimension reservation.** Available since version 10.0.7 and 10.0.8. This enhancement introduces flexibility in the inventory reservation policy to allow businesses who sell batch-tracked products and run their logistics as WMS-enabled operations, to register their customers' requests for specific batches on sales orders even though the inventory reservation hierarchy associated with the product prevents this (by being of type that is known as "batch-below".)

Outbound:

- **Small package shipping.** Small package shipping adds functionality for setting up carrier login credentials, printing labels received back from carrier web services, charging freight to customer third-party accounts, additional freight terms, and additional accessorial delivery types.
- **System-directed work sequencing.** This setup offers the ability to sort and filter which work orders the system will present to the user for execution.
- **Wave load building.** Advanced load building allows the wave to assign the shipment to an existing load, if one exists that meets the criteria, or create a new load if required.
- **Warehouse slotting.** Picking locations can be replenished before releasing orders to the warehouse. Warehouse slotting allows you to create replenishment work at any time based on order demand.

- **Wave label printing enhancements (available since version 10.0.2 and version 10.0.4):**
  - Allow for labels to be printed according to number of cartons on a single work line, without using the containerization feature.
  - Include an enumeration of the labels (1/124, 2/124...124/124).
  - Allow for BOL (bill of lading) to be created and printed on label.
  - Allow a unique Serial Shipping Container Code (SSCC) to be created per carton and included on a label.
  - Allow for creation of GS1-compliant number sequence for BOL and SSCC numbers.
  - Allow for HAZMAT code to be included on a label.
  - Support for reprint of labels (from handheld devices).
  - Support for voiding of labels (for short pick scenarios) and reprint.
  - Support for clean-up of wave label history.

These amendments will make it more efficient to support labeling of cartons prior to palletizing. It supports companies shipping to large retailers that perform order receipt confirmation automatically using scanning of each individual carton.

- **Wave step code.** With this functionality, you can pre-define codes that can be used as wave step codes. This functionality removes the risk of entering the wrong step code.
- **Shipment consolidation policies:**
  - Batch release to warehouse (consolidate shipment enhancements). Available since version 10.0.3.
  - **Load planning workbench.** Available since version 10.0.5.
  - **Shipment consolidation workbench and manual consolidation.** Available since version 10.0.7. This consolidate shipment policies feature allows for automated consolidation of a shipment at the time of batch releasing sales or transfer orders. Shipment consolidation policies can be set up. The policies have queries to define their applicability and a modifiable set of fields driving the decision for grouping load lines on shipment level automatically at release to warehouse. When releasing to warehouse manually, the same logic is triggered when added to open shipments. The feature is included at the five release to warehouse places. The consolidation workbench allows for further manual overview of consolidation and for adjustments.
- **Deferred put processing.** Available since version 10.0.4. This is a performance-related feature focused on increasing the productivity of the warehouse worker. Instead of requiring online processing of inventory updates each time a put is complete, which “freezes” the mobile device, we will allow for that process to be performed asynchronously.



- **Outbound sorting.** This functionality allows for the guided building of pallets from containers packed through the packing functionality.
- **Replenishment over location capacity.** This allows all replenishment work to be created that will be needed for the day and manages availability of the replenishment work to ensure that the pick location doesn't run out of inventory, but also doesn't go above capacity.
- **Planned cross docking.** This functionality introduces advanced planned cross docking where the inventory quantity required to satisfy an order will be directed to the correct outbound dock or staging area straight from receipt or creation. All remaining inventory from the inbound source will be directed to the correct storage location through the regular put away process.
- **Put to wall/Put to store.** With this feature, you can handle scenarios where consolidation of product is required to a prepack staging area based on configurable criteria.
- **Auto release shipment for cross docking.** This feature enables cross docking of supply coming out of a finished production order. When creating cross-dock work with a supply source of a production order, it's possible to set the cross-dock template up and enable cross docking.

### Integration framework for material handling equipment for automated warehouse processes (previously MHAX)

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

The integration framework for material handling equipment (MHE) serves as an interface between the warehouse work created by the WMS and the material handling equipment that can perform basic warehouse handling operations. The functionality is flexible and integrates with all types of equipment, as long as the equipment can integrate through web services.

It's essential for customers to have a WMS system that can integrate to the capital investment made into a variety of MHE, such as conveyor, vertical carousel, High bay - ASRS (Automated Storage and Retrieving Systems), and packing equipment. Many customers would prefer to avoid investing in an additional provider to organize the integration with simple material handling equipment.

## Feature details

Users can set up outbound subscriptions on warehouse events such as work creation, completion, and cancellation. These events, along with associated data will be tracked in a queue, which external equipment can access by web service. The data associated with each transaction is completely user configurable. Up to 10 fields can be specified to accompany each queue record. The status of each record will be tracked from blocked through sent.

Similarly, an inbound queue exists that external equipment can populate via web service. When the inbound queue records are consumed, warehouse actions such as work completion and license plate receiving will be triggered. Work can be executed one work line at a time, or a pick/put pair can be executed in a single transaction. Short pick and location override is also supported.

This new functionality will also address some refactoring to cater for performance and scale, new data model, and other needed design enhancements compared to the licensed solution MHAX that has been released as a private preview for selected existing customers.

## Mass deployment for Warehouse mobile app

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2020	Apr 2020

## Feature details

This new feature allows users to silently perform a mass deployment of the connection settings for the Warehouse mobile app. Customers can choose the deployment tool of their choice (such as Microsoft Intune) to deploy and service warehouse mobile devices.

## Overview of Finance and Operations cross-app capabilities 2020 release wave 1

Finance and Operations cross-app capabilities apply to all Finance and Operations apps like Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and Dynamics 365 Commerce.

To enable businesses everywhere to accelerate their digital transformation, we are continuously enhancing the platform and services that support Finance and Operations apps with new capabilities. As we add product enhancements at a rapid pace, we deliver monthly updates that will help customers stay current in a consistent, predictable, and seamless manner. The core capabilities introduced with the 2020 release wave 1 will be persona opt-in enabled, which allows customers to implement new features at their own cadence. The key driver for all of the new core capabilities is to increase productivity and return on investment.

This release wave also focuses on fundamentals to enhance the user experience. The targeted areas of these enhancements include performance, compliance, automation, and supportability of service.

### What's new and planned for Finance and Operations cross-app capabilities

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

#### Cross-app features

Feature	Enabled for	Public preview	General availability
<a href="#">Expanded chart types supported by embedded Chart control now include Line and Area ranges</a>	Admins, makers, or analysts, automatically	Apr 2020	-

Feature	Enabled for	Public preview	General availability
<a href="#">Embed third-party apps – phase 2</a>	End users by admins, makers, or analysts	Apr 2020	-
<a href="#">Grouping with subtotals in grids</a>	End users by admins, makers, or analysts	Apr 2020	-
<a href="#">User productivity – new grid control – phase 2</a>	End users by admins, makers, or analysts	Apr 2020	-
<a href="#">User productivity – Saved views – phase 2</a>	End users by admins, makers, or analysts	Apr 2020	-
<a href="#">Connect your Finance and Operations apps with back-end systems using BarTender labeling system integration</a>	End users by admins, makers, or analysts	Jun 2020	-
<a href="#">Spotlight your brand using modern designs for business-critical documents</a>	End users by admins, makers, or analysts	Jun 2020	
<a href="#">Usability improvements for filtering and personalization</a>	End users by admins, makers, or analysts	Aug 2020	
<a href="#">Finance and Operations licensing</a>	End users, automatically	Feb 2020	Apr 2020
<a href="#">New task recorder capabilities for RSAT</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Recommended fields</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020

## Data and process integration

All your data is available in your own ADLS Gen2 Data lake

Feature	Enabled for	Public preview	General availability
<a href="#">Trigger and monitor a flow – phase 2</a>	End users by admins, makers, or analysts	Apr 2020	
<a href="#">Entity store data is available in Azure Data Lake</a>	End users by admins, makers, or analysts	✓ Jun 1, 2019	Apr 2020
<a href="#">Data in Common Data Service – phase 1 &amp; 2</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Tables in a customer's Data Lake Storage Gen2 data lake</a>	End users by admins, makers, or analysts	Mar 2020	Apr 2020
<a href="#">Finance and Operations apps data is described in the Common Data Model</a>	End users by admins, makers, or analysts	-	May 2020
<a href="#">Finance and Operations entities in a customer's data lake</a>	End users by admins, makers, or analysts	May 2020	Jun 2020

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **End users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their end users.

For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

For more information about geographic areas, data centers (regions), data storage, and replication, click **expand all** on the [Where your data is located page](#) and find the Microsoft cloud service for this feature.

## Cross-app features

### Overview

#### User productivity and experiences

Investments in improved user experiences and enhancements to existing capabilities are focus areas for the 2020 release wave 1. For example, the new grid control supports grouping of rows with subtotals. The system can recommend fields and filters based on usage of other users in the organization. This wave also includes improvement in filtering capabilities (that make it easy for users to find their desired data) and bolstering personalization so customers and users can create tailored, optimized user experiences. Task Recorder includes new functionality to support the Regression Suite Automation Tool (RSAT).

#### Connect to BarTender for printing documents

Finance and Operations apps now integrate BarTender, a service designed to deliver accelerated production of standard business documents. The BarTender service provides customers with the ideal solution for designing and printing documents like labels, packing slips, and other monochromatic views.

#### Reporting and analytics

Modern designs for business-critical documents are available to spotlight your brand. Additional chart types supported by the embedded Chart control are made available for application developers to use to create advanced visualizations of business data. Use the Area Range visualizations to effectively present data that offers a historical view of measured data.

#### Licensing

The interface will adapt to the Finance and Operations apps that the current user is licensed to use, avoiding clutter by hiding menus and menu items that are not part of your license.

#### Expanded chart types supported by embedded Chart control now include Line and Area ranges

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 2020	-

## Business value

These new range chart types are designed to simplify the consumption of large amounts of historical data using native controls embedded directly in the web application.

## Feature details

Deliver information that would normally require two reports. The new chart types supported by the embedded **Chart** control are specifically designed for analyzing historical views of data. These chart visualizations include a smaller time scale, making it easy to drill down into specific windows. Use the intuitive drag-and-drop Visual Studio designer to create charts bound to form data sources.

## Embed third-party apps – phase 2

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	-

## Feature details

You might have third-party apps that work in conjunction with Finance and Operations apps that are either built in-house or by a partner. This feature aims to provide a seamless integration by allowing you to embed third-party apps within your Finance and Operations apps by using personalization, similar to how you can embed Power Apps inside of Finance and Operations apps. You'll have the option to embed third-party apps inside tab pages within existing forms, or create new full-page experiences that showcase your third-party app.

### 10.0.8 / Platform update 32

Third-party apps can be embedded inside tab pages in existing forms via personalization by privileged users in the same places where users can add a Power App inside a tab page. To facilitate this, the **Add a Power App** option in the personalization toolbar has been replaced with an **Add an app** option. Selecting this option opens a gallery page where the user can decide which kind of app they want to embed, such as a Power App or website. Note that only system administrators, security administrators, and IT managers have access to this capability out of the box.

Note that this functionality is dependent on the **Saved views** feature being enabled.

### 10.0.7 / Platform update 31

A new Website Host control has been added to allow developers to embed third-party apps directly into Finance and Operations pages.

## Grouping with subtotals in grids

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	-

### Business value

Users often need to perform ad-hoc analysis of data. This can be done currently by exporting data to Microsoft Excel and then using pivot tables. By enabling the grouping of data within the web client and extending the previously added **Totals** feature to provide subtotals at the group level, users will be able to get these insights directly from Finance and Operations apps.

### Feature details

This feature is only available with the new grid control. It will evolve over the release wave to eventually allow users to group data in a grid based on the values in up to five columns. Users will be able to expand or collapse groups as desired, which can help create a summarized view of data. Subtotals will also be shown at the group header level.

### 10.0.9 / Platform update 33

Group data based on a single column. This can be saved via personalization when the saved views feature is enabled. At this time, the ability to expand or collapse groups is not supported.

## User productivity – new grid control – phase 2

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	-

### Feature details

A private preview of a new and improved grid control was made available in October 2019 with 10.0.5 / Platform update 29. This feature is transitioning to public preview in the 2020 release wave 1 with 10.0.9 / Platform update 33. Continued evolution of this feature will come as part of monthly updates until this feature becomes generally available.

The new grid provides a number of benefits:

- **Performance:** The new grid provides improved rendering speed and a faster scrolling experience.



- **Positional scrolling:** Users can now positionally scroll in the data that has been loaded in the web browser. For example, if you have browsed through 10,000 rows in a grid, you can click the middle of the scrollbar to immediately go to record 5,000 without having to retrieve data from the server.
- **General improvements:** Various enhancements have been made to improve the usability of the grid. For example, in the existing grid, users might run into situations occasionally where the grid headers and data are misaligned, or the grid jumps while users scroll through data or create new records.
- **Reorder columns:** Users can now reorder columns by dragging them. Hover the mouse pointer over the column header, and then drag the gripper control that appears on the left side of the column.
- **Mathematical formulas:** Users can now enter mathematical formulas into numeric cells in a grid. For example, you can enter **=15\*4**. To make the system recognize a value as an expression, start the value with an equal sign (=).

The new grid also enables more complex features to be built into it. These additions to the grid will be introduced and enhanced in subsequent monthly updates:

- **Totals:** Business users can see totals for numeric columns in tabular grids. For example, financial users can view totals for a filtered set of transactions for a specific customer. This feature first became available as part of the new grid control feature in 10.0.5 / Platform update 29, and will continue to evolve in subsequent platform versions.
- **Fast data entry:** This feature lets users enter data in a grid ahead of the server. Therefore, it minimizes the need for users to wait for the server to validate one row in the grid before they move to another row. This feature first became available as part of the new grid control feature in 10.0.7 / Platform update 31, and will continue to evolve in subsequent platform versions.

For instructions on how to enable the new grid, follow the link in the **See also** section of this article.

### See also

[What's new or changed in Platform update 31](#) (docs)

### User productivity – Saved views – phase 2

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	-

## Feature details

A preview of [Saved views](#) was made available in October 2019 with Platform update 29.

Continued evolution of this feature will come as part of monthly updates until this feature becomes generally available.

### 10.0.9 / Platform update 33

- Publish views as default to users.

### 10.0.8 / Platform update 32

- Continued feature stabilization.

### 10.0.7 / Platform update 31

- Overhaul of the administrator's page for managing views and personalization.
- Bulk import/export of views and personalizations.
- Publish views to users in specific legal entities.

### 10.0.6 / Platform update 30

- Pin views as tiles, lists, and links on workspaces.
- Assign trusted users to the **Saved views administrator** role for access to the **Publish** functionality.

For instructions about how to enable Saved views, follow the link in the **See also** section of this article.

## See also

[Saved views](#) (docs)

## Connect your Finance and Operations apps with back-end systems using BarTender labeling system integration

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Jun 2020	-

## Business value

Every delay in printing comes at the expense of business productivity. The BarTender service allows customers to take advantage of special high-speed printing functions. As a result, the

difference in speed to printer is significant when compared to legacy SQL Server Reporting Services (SSRS)-based solutions. Reference custom fonts using a simple professional design canvas for standard label platforms: Tech, Citizen, Zebra, Domino, and hundreds more.

### Feature details

Enhancements include IT Admin tools to manage the connection information that is used to access the local Bartender service. These extensions provide a standard integration for existing printer devices that use application business logic to define label generation instructions.

The service compiles and renders in the native language of the printer based on the design definition. For example, the service will render the label using ZedPL for Zebra printers. As a result, instructions such as incremental or repeating serial numbers for barcodes will be handled directly by the Zebra print engine to achieve optimal performance.

### Spotlight your brand using modern designs for business-critical documents

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Jun 2020	-

### Business value

Reduce report customization costs. Customers no longer need to employ expensive engineering resources to customize application business documents. Embedded Office designer tools are now available for power users to tailor configurable documents that will accommodate design requirements specific to your business. Avoid the frustration of waiting for the next service update. Use Print management to select custom designs and replace standard application solutions without disrupting business operations.

### Feature details

The colors, logos, and styles of modern documents can be changed without requiring developer intervention. Use built-in brand management tools to customize styling and color schemes, business contact information, and document logos. In addition, power users can use built-in familiar tooling to extend the ready-made document templates defined by Microsoft design professionals.

## Usability improvements for filtering and personalization

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Aug 2020	-

### Feature details

Filtering is one of the most common and important foundational features of the user interface and affects most users and business scenarios. Being able to find data easily is critical to user success and satisfaction. Investments in this area will be of use to nearly every user of the system.

The ability for customers and users to tailor their user experience so that it is optimized for their needs is also extremely important for achieving customer satisfaction and maximizing user satisfaction. A continued focus on improving the usability of personalization and in adding capabilities so that users can create the views they need is vital for broad uptake of personalization.

These improvements will come incrementally over the course of the release wave. Check back for updates on specific improvements and when they will be available.

## Finance and Operations licensing

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Feature details

Finance and Operations licensing was divided into three separate apps with the October 2019 release: Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and Dynamics 365 Retail (Commerce). The 2020 release wave 1 will introduce changes to the user interface and license enforcement based on the new licenses. Users can only access menu items that their license allows. In addition, the product name and brand will reflect the license associated with the current user. This functionality is controlled by Microsoft and is OFF by default. It will be rolled out in a gradual manner to specific customers between April and October 2020. Branding changes may be rolled out earlier than license enforcement.

## New task recorder capabilities for RSAT

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Feature details

Customers are encouraged to create regression test suites using the Regression suite automation tool (RSAT) and task recorder to ensure updates to Finance and Operations apps are seamless and issue-free for their businesses. Toward this initiative, a continued investment will be made to allow coverage of additional scenarios by these tests and to improve the experience of users creating and maintaining these regression tests.

These improvements will come incrementally over the course of the release wave. Check back for updates on capabilities that will be added and when they will be available.

### 10.0.9 / Platform update 33

The task recorder pane is now resizable to give you more space to work with all the content in that pane. This capability also applies to all the other content that displays in that space, including the help pane, trace parser, and message details.

### Recommended fields

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

To maximize user satisfaction and productivity, Finance and Operations apps have been encouraging customers and users to utilize personalization to create optimized experiences. With AI, we can do more than just provide personalization capabilities; instead, we can utilize usage data from other users doing similar work to make personalized suggestions to increase user productivity.

### Feature details

When users add a field to a page or a column to a grid, the user will be able to see a list of suggested fields. Suggested fields will also be surfaced when a user starts to add a field to filter on in the Filter pane.

## Data and process integration

### Overview

#### Finance and Operations data in Azure Data Lake Storage Gen2

On-premises customers in Dynamics AX 2012 and earlier had direct access to data—you might be accustomed to accessing data directly and creating reports with tools such as Power BI. As you migrate to Finance and Operations apps and begin your digital transformation journey in the cloud, you might want to keep your existing reports and data warehouse investments, at least for the near future. We want to enable your transition to the cloud easily by enabling access to all data. Core tables, data entities as well as aggregate measurements defined in Finance and Operations apps will be available in your own data lake (Data Lake Storage Gen2).

With an easy-to-use interface, an administrator can configure a data lake with Finance and Operations apps. Microsoft manages data refresh—a power user can choose tables, entities, and aggregate measurements. The data is refreshed and kept up to date—you don't need to manage export schedules.

Core tables, entities, and aggregate measurements are defined in the Common Data Model along with rich attributes, definitions, and relationships. Data exported to the data lake is described in the Common Data Model. The data structure in Data Lake Storage Gen2 mirrors the organization of data definitions in the Common Data Model. Data stored in Data Lake Storage is described using metadata as defined by the Common Data Model language specification. This enables existing tools to understand data semantics and relationships—they light up with data in the data lake.

With the General Availability of tables, entities, and aggregate measurements in Data Lake Storage Gen2, you can use Data Lake Storage Gen2 as the source of data for reporting and downstream integrations. If you are currently using Bring your own database (BYOD) to export data from Finance and Operations, you can transition to Data Lake Storage Gen2—no need to export data on your own, you can use data already present in Data Lake Storage Gen2.

#### Trigger and monitor a flow – phase 2

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	-

#### Feature details

An administrator can create instant flows for entities that are then listed on forms under a Power Automate menu. Users can trigger these flows and then monitor the performance of each flow

in Power Automate. These capabilities provide a competitive advantage in regard to integration because they reduce the cost of implementation.

### Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

### Entity store data is available in Azure Data Lake

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✓ Jun 1, 2019	Apr 2020

### Business value

Enable advanced analytics and AI (such as reasoning over data) across Finance and Operations apps and other data in a customer's own Azure Data Lake. Finance and Operations apps provide easy access to denormalized transnational data in a near real-time basis.

The same dataset that powers analytical workspaces is now available for your own reports and data mash-up scenarios.

### Feature details

Aggregate measurements are denormalized star schemas defined within Dynamics 365 Finance and Operations apps. Aggregate measurements enable users to navigate operational data without having to understand complex data schemas. Aggregate measurements are staged in Entity store, and the operational data warehouse is included.

With the general availability of Entity store schemas in Azure Data Lake, customers can directly access denormalized data for reporting and analytics. Aggregate measurements are stored in Data Lake Storage as Common Data Model folders enabling rich data mash-up and analytical scenarios. For example, aggregate measurement data can be attached as Power BI reference data flows with and used for reporting with Power BI. Power users can easily create new data mashups and reports in Power BI Desktop.

Developers and BI professionals can use tools such as Azure Synapse and Azure Data Factory to work with data and create enterprise data warehouses.

### See also

[How to configure Entity store in Data Lake](#) (docs)

## Data in Common Data Service – phase 1 & 2

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Feature details

Get your Finance and Operations apps data in Common Data Service and keep it up to date.

We are making the dual-write framework a seamless experience by harmonizing the converging concepts between Finance and Operations apps and other Dynamics 365 apps. This allows businesses to exchange near real-time data in a synchronous, bidirectional fashion beyond application boundaries, giving users a "One Dynamics 365" experience.

Knowing every business is unique, we have made the dual-write framework extensible. This includes enabling custom entities, as well as extensions to existing entities, to fully use Common Data Service and surrounding tools for your most important business data.

### Phased release

Phase 1 features provide multimastering capabilities for customers, vendors, and products, along with an introduction of the company concept in Common Data Service. It also includes finance and tax reference data. These features have been in preview since July 2019.

The following entities are supported:

- Payment schedules - Header
- Payment schedules – Line
- Payment day - Header
- Payment day - Line
- Customer groups
- Terms of payment
- Customer payment method
- Loyalty card
- Loyalty reward points
- Customers
- Customer contact
- Currency



- Fiscal calendar
- Fiscal calendar year
- Exchange rate types
- Exchange rate pair
- Ledger fiscal periods and financial calendar period
- Main account category
- Main account
- Ledger
- Exchange rates
- Dimension attribute
- Dimension integration format
- Organization classification and organization hierarchy purpose
- Organization hierarchy
- Organization hierarchy type
- Company
- Released products
- Distinct released products
- Product number identified barcode entity
- Global products
- Product default order settings entity
- Product specific default order settings
- Product dimension group entity
- Tracking dimension group entity
- Unit of measures entity
- Unit of measure conversion
- Product specific unit of measure conversion
- Site entity
- Warehouses entity
- Color entity

- Size entity
- Storage dimension group entity
- Style entity
- Configuration entity
- EcoResProductMasterColor entity
- EcoResProductMasterSize entity
- EcoResProductMasterStyle entity
- EcoResProductMasterConfig entity
- Product categories
- Product category assignments
- Product category hierarchies
- Product category hierarchy roles
- Tax groups
- Tax item groups
- Tax exemptions
- Tax authorities
- Withholding tax codes
- Withholding tax groups
- Tax ledger account group and tax posting groups
- Vendors
- Vendor groups
- Vendor payment method
- Vendor contacts
- Chart of accounts

While the preview for the [Phase 1](#) set of features around master and reference data scenarios are continuing, **Phase 2** features are about supporting end-to-end scenarios on pricing, quotes, orders, invoices, and assets. These scenarios can be further enriched by customers and partners. Entity coverage for these areas will be revealed during preview.

Phase 2 features are planned for preview in the January-February timeframe.

## Tables in a customer's Data Lake Storage Gen2 data lake

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Mar 2020	Apr 2020

### Business value

Exporting data to your own Azure SQL Database isn't needed when the data is readily available in your own data lake. This feature enables customers to reduce their reliance on Bring your own database (BYOD) and to eventually retire the use of BYOD.

Customers upgrading from Dynamics AX 2009 and Dynamics AX 2012 who have their existing data warehouses integrated into an operational database can now upgrade to Finance and Operations apps with minimal disruptions to their existing integrations.

### Feature details

Tables in the Finance and Operations apps are now available within your own Azure data lake. Customers can choose the required tables while the system keeps the data refreshed on a near real-time basis. There is no need to monitor and manage export jobs or schedules. Power users and developers can use a variety of tools and languages to access data within their own data lake, including DataFlows, Spark, and SQL.

## Finance and Operations apps data is described in the Common Data Model

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	May 2020

### Business value

The Common Data Model is the data schema that describes all of the data available in Microsoft services including Dynamics 365 Finance and Operations apps. Customers and partners can build downstream applications and extensions using the data model described in the Common Data Model knowing that their applications can integrate tightly with Microsoft services. Partners, providers, and industry groups can evolve the core ERP schemas with extensions that are specific to industries and verticals.

AI and analytics tools such as Power BI natively understand the Common Data Model schema. For example, when ingesting external data using Power BI connectors, users can easily store the data in the destination using the Common Data Model entities such as Purchase Orders,

Inventory, and Ledger. This enables users to create rich applications that combine data from multiple sources without spending too much time transforming and wrangling data from one entity shape to another.

### Feature details

All of the data in Finance and Operations apps, including tables and entities, are described in the Common Data Model. This makes combining data from multiple applications easy because the destination data is stored in a broadly accepted standard set of entities.

### Finance and Operations entities in a customer's data lake

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Jun 2020

### Business value

Why export data to your own Azure SQL Database when the data is readily available in your own data lake? This feature enables customers to reduce their reliance on Bring your own database (BYOD) and eventually retire the use of BYOD. Having access to Data Entity definitions in Azure Data Lake enables customers to retire BYOD service without changing their downstream integrations.

Customers upgrading from Microsoft Dynamics AX 2009 and Dynamics AX 2012 who have their existing data warehouses integrated into operational databases can now upgrade to Finance and Operations apps with minimal disruptions to their existing integrations with access to Table level data. With the addition of Entity shapes, business users can easily consume the data without having to understand underlying table definitions and relationships.

### Feature details

Entities in the Finance and Operations apps are now available within your own Azure data lake. Customer can choose the required entities. The system identifies the underlying tables and keeps the corresponding data refreshed on a near real-time basis. There is no need to monitor and manage export jobs or schedules. Power users and developers can use a variety of tools and languages to access data within their own data lake, including DataFlows, Spark, and SQL. By using Azure Synapse, you can get access to entity data as SQL view definitions.

## Overview of Dynamics 365 Project Service Automation 2020 release wave 1

Dynamics 365 Project Service Automation helps you to win and deliver projects on time and within budget, while optimizing resource usage. The application has pricing, sales, resourcing, time and expense, and invoicing management capabilities, along with some project task and work breakdown structure (WBS) functionality. The product team's investments for this release and the next will focus on providing a modular offering for organizations with project-based services. This offering will seamlessly bring together capabilities across Microsoft Project, Project Service Automation, and the Service Industries module in Dynamics 365 Finance to enable a frictionless and functionally rich Quote to Cash for projects.

Dynamics 365 Project Service Automation currently takes advantage of Microsoft Power Platform and Common Data Service to help our customers connect and build end-to-end business solutions for project organizations by using rich pricing, costing, and resource management experiences. With Microsoft Project replatforming to Common Data Service, we'll be uniquely positioned to deliver a competitive set of project-planning and task-scheduling capabilities. Our customers will be able to deliver successful projects with this expanded project management functionality.

The Service Industries module in Dynamics 365 Finance delivers project accounting, with revenue recognition and customer-facing invoicing that takes advantage of date-effective exchange rates and a rich sales-tax feature set. Our customers will be able to better manage invoicing, cash flow, and project accounting by using this expanded financial capability brought into our solution.

The themes for this and the next release wave are:

- **Taking advantage of the best of Office and Dynamics 365 solutions for project management on the Finance and Operations and CE platforms**
- **Model alignment with project functionality in Finance**

We're currently reworking our engineering and release timelines for this feature set, so please stay tuned as we strategize on the best path forward for our customers. The timelines will be updated in the coming few weeks.

## Overview of Dynamics 365 Guides 2020 release wave 1

Dynamics 365 Guides is a mixed-reality application that enables employees to learn in the flow of work by providing holographic instructions when and where they need them. Dynamics 365 Guides:

- Engages employees through hands-on learning
- Helps organizations improve training efficiency
- Generates data to improve processes

Dynamics 365 Guides addresses the needs of three key personas: content authors, operators, and managers/analysts.

Authors can easily create guides without 3D or programming skills by using a simple PC app and a HoloLens app. Operators use guides on HoloLens in training and on the job to learn by doing in a heads-up, hands-free style. Trainers and managers can analyze usage data to optimize their workflows.

For 2020 Release Wave 1 (April-September 2020), the product team will focus on:

- Expanding extensibility capabilities to enable partners inside and outside the Dynamics 365 ecosystem to connect Dynamics 365 Guides to existing workflows to bring concrete business value.
- Enterprise-focused features that extend the reach of Dynamics 365 Guides to more use cases and environments (branching and publishing).

## What's new and planned for Dynamics 365 Guides

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

Feature	Enabled for	Public preview	General availability
<a href="#">Access Dynamics 365 Guides content through Common Data Service entities</a>	Admins, makers, or analysts, automatically	Aug 2020	-
<a href="#">Extend analytics capabilities with Guides Insights</a>	Admins, makers, or analysts, automatically	Aug 2020	-
<a href="#">Create guides that support branching flows</a>	End users, automatically	-	Sep 2020
<a href="#">Restrict access to guides that aren't ready to use through publishing process</a>	End users, automatically	-	Sep 2020

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **End users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their end users.

For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

## Access Dynamics 365 Guides content through Common Data Service entities

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Aug 2020	-

### Business value

Easy and reliable access to Dynamics 365 Guides data so that customers and partners can connect it to their digital enterprise ecosystems.

## Feature details

Dynamics 365 Guides stores all content (instructions, text, pictures, videos, and 3D models) in the Common Data Service. To provide better access to this content, we are moving this data to a set of Common Data Service entities that define the data structures the content is stored in. Using the Common Data Service API, customers and partners will be able to read and write these content entities, push and pull content to and from Dynamics 365 Guides, and build custom integrations. For example, a system integrator will be able to build an app in Power Apps that reads Dynamics 365 Guides content and displays it on a mobile device for expert workers that don't have access to a HoloLens.

## Extend analytics capabilities with Guides Insights

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Aug 2020	-

## Business value

Guides Insights provide easy access to product usage analytics that enables Dynamics 365 Guides to be part of the larger enterprise ecosystem.

## Feature details

Guides Insights allows partners and customers to easily leverage product usage information in use cases that extend beyond the current Power BI template for time-tracking. Easy access to pre-defined Common Data Service entities that contain insights computed from low-level usage data will enable a wide variety of applications. For example, you can use Microsoft Power Automate to send a notification when a guide is completed. A more complex application could provide a guide-completion-time-trend analysis.

Using Guides Insights, customers and partners will be able to easily access data in Dynamics 365 Guides, including:

- Raw data collected during operator run-throughs
- Statistical summaries (for example: average times, distributions, and anomalies)

Guides Insights will be designed and developed by the product team based on partner and customer feedback.



## Create guides that support branching flows

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

### Business value

Training and maintenance tasks are often too complicated for linear workflows. Using branching logic makes Dynamics 365 Guides more flexible, increases the number of addressable use cases, and ensures the solution fits industrial needs.

### Feature details

When an author creates a guide, they'll have the option to set up branching events which will move the operator to a different set of steps based on their input. For example, an author can create a branch that automatically advances operators from task 2 to task 5 depending on the operator's answer to a question in step 2.

## Restrict access to guides that aren't ready to use through publishing process

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

### Business value

Restrict operators from using guides that aren't ready to use.

### Feature details

Operators should only have access to guides that are ready to use. This feature will prevent operators from viewing unfinished guides as they will only have access to guides that have been published.

# Human Resources

## Overview of Dynamics 365 Human Resources 2020 release wave 1

As mentioned in our announcement, [Building a more successful workforce with Dynamics 365 Human Resources](#), we have renamed Dynamics 365 Talent: Core HR to Dynamics 365 Human Resources.

The way we work, and the workplace, have fundamentally changed—and yet, for many businesses, HR processes have not. When workforce practices are disconnected, the result is lower employee engagement and higher turnover rates. Employee disruption ultimately impacts the organization through a lack of product innovation, expensive operational errors, less satisfied customers, and suboptimal financial results.

Dynamics 365 Human Resources helps HR professionals get the workforce insights needed to build data-driven employee experiences across multiple areas:

- Organization and personnel management
- Compensation
- Benefits
- Leave and absence
- Compliance
- Payroll integration
- Performance feedback
- Self-service programs

Dynamics 365 Human Resources connects people and operations data to ensure businesses can optimize workforce costs and take better care of employees.

### What's new and planned for Dynamics 365 Human Resources

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

Feature	Enabled for	Public preview	General availability
<a href="#">Create leave rules to meet company and regulatory policies</a>	Admins, makers, or analysts, automatically	Feb 2020	Apr 2020
<a href="#">Enhanced benefit plan configuration</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Enhanced worker benefit inquiry</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Flex credit programs</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Leave calendar views</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Online benefit enrollment</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Qualified life event processing</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Suspend leave for employees meeting certain criteria</a>	Admins, makers, or analysts, automatically	Mar 2020	Apr 2020
<a href="#">Allow employees to buy and sell leave</a>	End users by admins, makers, or analysts	Apr 2020	May 2020
<a href="#">Enable an absence manager to manage leave</a>	End users by admins, makers, or analysts	Apr 2020	May 2020
<a href="#">Manage employee sick leave</a>	End users by admins, makers, or analysts	May 2020	Jun 2020

Feature	Enabled for	Public preview	General availability
<a href="#">Access and maintain HR data in Common Data Service</a>	Admins, makers, or analysts, automatically	-	Sep 2020

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **End users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their end users.

For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

For more information about geographic areas, data centers (regions), data storage, and replication, click **expand all** on the [Where your data is located page](#) and find the Microsoft cloud service for this feature.

## Create leave rules to meet company and regulatory policies

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

### Feature details

Providing more flexibility in the policies related to leave plans allows HR to configure leave and absence to meet their specific regional and company requirements. Along with these policies, providing additional ways on how employees accrue time off, such as full-time equivalent (FTE), provides HR more control when providing time-off benefits to employees.

Enhanced leave and absence plan policies and accruals include the following:

- Accrue based on full-time equivalent (FTE), along with employment dates.
- Configurable accrual rounding.
- Expiration rules.

- Carry-forward transfer rules.
- Adjust leave based on holiday corrections.

### Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

## Enhanced benefit plan configuration

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Feature details

Companies are offering broader and richer sets of benefits to attract and retain their employees. Enhanced benefit plan configuration provides organizations the ability to manage their plans with a wider range of setup options to offer flexibility, while supporting complex scenarios.

Enhanced benefit plan configuration includes the following:

- Support for complex rate tables and nested tiers.
- Easily create benefit bundles and programs.
- Create flexible and robust eligibility rules in a simplified user experience.

## Enhanced worker benefit inquiry

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Feature details

The enhanced worker benefit inquiry form provides a summarized view of all of the benefits-related information for a worker.

The **Enhanced worker benefit inquiry** form contains the following:

- Single view of all the plans an employee is eligible for.

- View of the coverage options that the employee is qualified for, and might be qualified for in the future.
- View of employee's life event history and any future dated life events.

## Flex credit programs

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Feature details

Companies might want to showcase the cost of benefits to employees as well as give the employees control over the way they spend their benefit dollars. With Advanced Benefits, you can establish flex credit programs to support these scenarios.

Flex credit programs contain the following:

- Establishment of flex credit program, made up of individual plans.
- Proration rule definition to support retirement and other life events.

## Leave calendar views

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Feature details

Enable employees and managers to plan time off more efficiently by providing a leave calendar for viewing who is and isn't at work.

Leave calendar views include the following:

- Company calendar to be reviewed by human resources.
- Manager calendar to include time-off information for direct reports.
- Employee calendar to include time-off information for team members reporting to the same manager.

## Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

## Online benefit enrollment

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Feature details

Benefit selections are an important part of an employee's overall rewards package. Online benefit enrollment provides employees the opportunity to review their benefits prior to selection, and guides them through the checkout process.

Online benefit enrollment contains the following:

- Auto enroll options based on the prior year's selections.
- Familiar shopping cart experience for employees.

## Qualified life event processing

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Feature details

Life events provide the opportunity for employees to update their benefit selections based on changes in their situation, such as adoption of a child or marriage. Life event processing enables an organization to track these changes, and update the associated benefits.

Life event processing includes the following:

- Create custom actions based on life event changes.
- Future dated life event support.
- Integrate with employee self-service.

## Suspend leave for employees meeting certain criteria

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2020	Apr 2020

### Feature details

Organizations have policies around when employees should and shouldn't accrue leave. In some cases, this means an employee's leave accrual is suspended for a while on a specific type of leave.

Suspending leave includes the following:

- Define start and end dates for leave suspension.
- Prorate accruals based on suspension dates.

### Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

## Allow employees to buy and sell leave

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	May 2020

### Feature details

Provide employees with the ability to buy leave via payroll deduction or cash out (sell) leave to be included in their pay. This allows employees to have more control over how they want to use their leave benefits.

Buying and selling leave includes the following:

- Provide dates when employees can buy and sell leave.
- Configurable limits and rates for buying and selling leave.
- Approve buy and sell requests.



## Enable an absence manager to manage leave

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	May 2020

### Feature details

In some organizations, a people manager might not be managing the leave for their team. This process might be handled by an absence manager for team members across multiple departments and teams.

Enabling an absence manager to manage leave includes the following:

- Review and approve time off based on an alternate hierarchy.
- View team member balances.
- View absence calendar for team.

## Manage employee sick leave

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Jun 2020

### Feature details

Provide organizations the ability to manage employee sick leave in more detail to meet company and regulatory policies.

Sick leave management includes the following:

- Open-ended sick leave requests.
- Return-to-work notices.
- Sick leave reporting.
- Manage and approve sick leave requests.

## Access and maintain HR data in Common Data Service

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Sep 2020

### Business value

Enable scenarios to extend and integrate with Human Resources.

### Feature details

Integrations, extensibility, and reporting all have dependencies on Common Data Service as the source for the data needed across solutions. Bringing additional data to Common Data Service has been an ongoing effort and will continue over the course of 2020 release wave 1 and 2020 release wave 2.

Our focused efforts include:

- Enabling new scenarios and completing existing scenarios through additional entities.
- Completing existing entities.
- Focusing on the reliability of updating the Common Data Service data that exists and changes over time.

# Commerce

## Overview of Dynamics 365 Commerce 2020 release wave 1

Dynamics 365 Commerce—built on the proven Dynamics 365 Retail capabilities—delivers a comprehensive omnichannel solution that unifies back-office, in-store, call center, and e-commerce experiences to provide a delightful shopping journey for consumers across the different touchpoints. Dynamics 365 Commerce enables you to deliver better business outcomes by:

- Building brand loyalty through personalized customer engagements.
- Increasing revenue with improved employee productivity.
- Optimizing operations to reduce costs.
- Driving supply chain efficiencies.

The investments in this release further empower the different commerce personas to be highly productive in their tasks by helping them to know and serve the consumers better, make a better outreach to them, and efficiently run operations across the value chain.

With frictionless information flow and in-process insights powered by the Dynamics 365 ecosystem, retailers are better equipped than ever to truly realize the vision of digital transformation:

- **E-commerce:** Empower marketers to narrate their brand story quickly and more effectively with the capability to style e-commerce webpages without the need of a developer. With the capability for bulk redirect URLs, retailers can protect their investments in SEO optimization by redirecting legacy URLs to the Dynamics 365 Commerce URLs, while also providing a continuity for the consumer experience. Enhanced inventory visibility with the option to define inventory buffers empowers merchandisers to meet consumer expectations and optimize inventory allocation across the distribution network.
- **Modern store:** By enabling the ability to perform health checks from the point of sale (POS) for connected peripheral devices and the services upon which the POS has a dependency, retailers can be certain that checkout lanes are always operational for a smooth consumer experience. Enhancing the in-store processes that are vital for every retailer, we're making improvements around:
  - Receipt numbering.
  - Inventory visibility.
  - Emailing receipts.

- Supporting serial number tracked products.
- Setting up and selling warranties.
- **Know your customers:** Engage with the consumer and gain insights about them as they go through their shopping journey across the channels. Use these insights to provide personalized experiences and value-added services to make them a real fan of your brand.
- **Employee productivity:** Empower your employees by providing them with insights and next-best-action recommendations by providing them with a view of available, applicable, and upcoming discounts so that they can upsell and cross-sell to consumers. Help them to be organized and productive in their work through cross-channel task management and notifications, along with the capability to communicate and collaborate across their peer groups and management, which also aids them in providing delightful consumer experiences. Enhanced and new inbound and outbound operations for receiving inventory and creating and fulfilling transfer orders can also help improve employee productivity in addition to making these processes more resilient.
- **Omnichannel:** With support for modern payment methods like Alipay and WeChat Pay, along with a consistent and improved payment flow across the channels, consumers can have a much more frictionless checkout experience. Also, by enabling return policies and improved return scenarios, retailers can provide a level of service to consumers that would enable them to stand apart from competition.
- **Fundamentals:** With seamless and reliable connectivity loss management for the POS devices in stores, along with the efficiency and reliability improvements around data synchronization and storage, retailers can be confident their store components will operate smoothly, boosting productivity and efficiency of the store operations. Support for Azure Active Directory-based sign-in and improvements on the sign-in page provide retailers with a world-class authentication system, helping them to secure their systems.

## What's new and planned for Dynamics 365 Commerce

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

## Fundamentals

Feature	Enabled for	Public preview	General availability
<a href="#">Auto-charges improvements to support fees based on channel</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Azure AD support for POS sign-in</a>	End users by admins, makers, or analysts	Feb 2020	May 2020
<a href="#">Financial reconciliation of retail transactions in the store</a>	End users by admins, makers, or analysts	Feb 2020	May 2020
<a href="#">POS sign-in page improvements</a>	End users, automatically	Feb 2020	May 2020
<a href="#">Commerce data sizing improvements</a>	End users, automatically	May 2020	Jul 2020
<a href="#">Efficiency and reliability of data synchronization and storage</a>	End users, automatically	May 2020	Jul 2020
<a href="#">POS and headquarters extensions</a>	Admins, makers, or analysts, automatically	May 2020	Jul 2020
<a href="#">Seamless and reliable connectivity loss management</a>	End users by admins, makers, or analysts	May 2020	Jul 2020

## Globalization

In 2020 release wave 1, we will extend out-of-the-box localization by delivering Commerce localization for Brazil and fiscal service integration for Germany.

Feature	Enabled for	Public preview	General availability
<a href="#">Digital signing of retail transactions for France based on the fiscal integration framework</a>	End users by admins, makers, or analysts	-	Jul 2020

Feature	Enabled for	Public preview	General availability
<a href="#">Digital signing of retail transactions for Norway based on the fiscal integration framework</a>	End users by admins, makers, or analysts	-	Jul 2020
<a href="#">Fiscal service integration for Germany</a>	End users by admins, makers, or analysts	Apr 2020	Jul 2020

## Industry excellence

Investments in core retail business processes and industry requirements and capabilities.

Feature	Enabled for	Public preview	General availability
<a href="#">Improved inbound and outbound inventory operations in store</a>	End users by admins, makers, or analysts	Jan 2020	Apr 2020
<a href="#">Enable resetting of receipt numbers at the beginning of the fiscal year</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Task management in HQ and POS for first-line workers and managers</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Channel-side calculations for available physical inventory for stores</a>	End users by admins, makers, or analysts	Feb 2020	May 2020
<a href="#">Email a receipt from the journal</a>	End users, automatically	Feb 2020	May 2020
<a href="#">External gift card support in e-commerce and call center</a>	End users by admins, makers, or analysts	Feb 2020	May 2020
<a href="#">Improved order recall for omnichannel orders in Customer Service</a>	End users by admins, makers, or analysts	Feb 2020	May 2020

Feature	Enabled for	Public preview	General availability
<a href="#">Improved support for serial number tracking dimension in store inventory processes</a>	End users, automatically	Apr 2020	Jul 2020
<a href="#">Enhanced customer record creation and edit capabilities in POS</a>	End users, automatically	May 2020	Jul 2020
<a href="#">Warranty setup and sell</a>	End users by admins, makers, or analysts	May 2020	Jul 2020
<a href="#">Consistency in payments management across retail channels</a>	End users by admins, makers, or analysts	May 2020	Aug 2020
<a href="#">No-code site styling</a>	Admins, makers, or analysts, automatically	May 2020	Aug 2020

## Unified Commerce

Feature	Enabled for	Public preview	General availability
<a href="#">Set preferred payment methods for returns</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Support for bulk URL redirects</a>	Admins, makers, or analysts, automatically	Feb 2020	Apr 2020
<a href="#">In-store health check for POS peripherals</a>	End users by admins, makers, or analysts	Feb 2020	May 2020
<a href="#">Define and utilize inventory buffers to drive inventory level displays in e-commerce</a>	End users by admins, makers, or analysts	Apr 2020	Jul 2020

Feature	Enabled for	Public preview	General availability
<a href="#">Upsell and cross-sell using available discounts by enabling store associates to view promotions in POS</a>	End users by admins, makers, or analysts	Apr 2020	Jul 2020
<a href="#">Enable store associates to communicate with customers from POS using their preferred means of communication</a>	End users by admins, makers, or analysts	May 2020	Jul 2020
<a href="#">POS payments flows improvements</a>	End users by admins, makers, or analysts	May 2020	Aug 2020

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **End users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their end users.

For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

For more information about geographic areas, data centers (regions), data storage, and replication, click **expand all** on the [Where your data is located page](#) and find the Microsoft cloud service for this feature.

## Fundamentals

### Auto-charges improvements to support fees based on channel

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020



## Business value

Retailers can define auto-charges rules to add a fee based on the channel the order was created in. Retailers can configure the channel-based auto-charges at both the header level and line item level.

## Feature details

This feature provides additional criteria to allow auto-charges to be defined by Commerce channel. Functionality will be similar to how Commerce currently filters modes of delivery or assortments by channel. The feature will use the Commerce organizational model hierarchy and allow headquarters users who have the **Advanced auto charges** configuration key enabled to be able to define additional filters on their auto-charges table by Commerce channels. The functionality will be tied to a configuration key to ensure that non-Commerce users of Dynamics 365 Finance and Operations apps are not impacted by these added features.

## Azure AD support for POS sign-in

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	May 2020

## Business value

Our Commerce point of sale (POS) application today only supports staff authentication based on our own identity provider. Azure Active Directory (Azure AD) support for POS sign-in has been a request from various retailers, with generally two requirements: security and maintainability. Customers with stringent corporate security requirements usually look at Azure AD as a more secure way to handle authentication against the POS. Many customers typically use multiple Microsoft cloud services (Azure, Office 365, Dynamics 365), and already have their workers set up in Azure AD. They don't want to manage them (and their passwords) again in the Dynamics 365 Commerce back office in order to use the Commerce solution. This creates duplicate effort for them that could be easily avoided.

## Feature details

This feature will introduce:

- A new configuration parameter in Commerce headquarters (HQ) to specify the desired authentication method for POS sign-in.
- A modified POS sign-in page to leverage Azure AD for user authentication.

## Financial reconciliation of retail transactions in the store

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	May 2020

### Feature details

This feature will only work with the [trickle feed order creation](#) process and will be driven by a parameter for retailers to decide if they want to create financial statements in the Modern point of sale (MPOS) or Cloud point of sale (CPOS) client or in the Retail headquarters. This feature will enable store managers to:

- Create financial retail statements for their shift in MPOS/CPOS.
- Make adjustment entries for cash, as needed, using the currently available cash management transaction types.
- Post financial retail statements in MPOS/CPOS.
- Use financial statements posted in MPOS/CPOS and post the same in Retail headquarters.

This process will eliminate the need to create and post financial statements in Retail headquarters.

## POS sign-in page improvements

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	May 2020

### Business value

Retailers want more flexibility to customize their point of sale (POS) sign-in page for their branding needs, and a better visual experience for touch-enabled devices.

### Feature details

This feature will improve the current POS sign-in experiences by:

- Adding new user interface (UI) elements to the sign-in page, including date and time and custom logo.
- Providing more options for retailers to customize the sign-in page theme and layout.

- Using numeric keypad (numpad) and people picker to optimize the sign-in experience for touch-enabled devices.

## Commerce data sizing improvements

Enabled for	Public preview	General availability
End users, automatically	May 2020	Jul 2020

## Business value

Our Retail on-premises components, such as Modern point of sale (MPOS) offline and Retail Store Scale Unit (RSSU), are critical for our contingency story for scenarios of planned unavailability, for outage of cloud components, and for regions with poor network connectivity. As a function of this, it is crucial to maximize the efficiency, resiliency, and speed with which data is synchronized.

## Feature details

This features targets the following scope: The ability to configure synchronization-related data to better differentiate between what is required at the channel database and what is required within the offline database. It will function at a job level and at a subjob level, at least, to allow separation of data and minimization of data in the offline database.

## Who uses this feature

This will be used by Retail IT or operations roles that manage the Retail Channel Setup.

## License required

No

## Setup required

No

## Efficiency and reliability of data synchronization and storage

Enabled for	Public preview	General availability
End users, automatically	May 2020	Jul 2020

## Business value

Our Channel Data Exchange (CDX) component synchronizes data between Commerce Channel Databases (co-located cloud channel, Commerce Cloud Scale Unit, Commerce Store Scale Unit, and Modern point of sale (POS) with offline support).

A number of performance and reliability updates have been implemented that solve issues regarding data unavailability, slowness on other components, or impact on database data and log sizes. It is a constant focus to maximize availability, reliability, and efficiency in our data synchronization framework (CDX).

## Feature details

This feature will contain several independent improvements in the following areas:

- Improve data package generation in headquarters.
- Improve data package when applying to a channel database.
- Reduce the number of required full synchronizations and, when unavoidable, minimize the performance impact.
- Multiple data optimizations, including master data stripping at the channel level, updating DB statistics, and indexing during synchronization.

## POS and headquarters extensions

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	May 2020	Jul 2020

## Feature details

### Framework enhancements

After moving toward the binary-based extension model, we are wrapping and exposing all our core point of sale (POS) logic and user interface (UI) controls as SDK (APIs) to help the extension easily consume and override our logic. Without these APIs, it is difficult for the extension to implement custom logic. In some cases, the extension has to rewrite some of the existing code or write too many lines of code to do a simple scenario. To avoid this and to reduce the number of lines of code, we are introducing more advanced APIs and configuration-driven development to simplify the overall development process.

### POS UI and API extension

We have enhanced the POS framework by adding more POS APIs to consume our logic in extensions, and UI extension points to add custom columns, app bar buttons, and custom controls in core POS views.

### POS overridable requests and triggers

We added new overridable requests in POS to override the POS workflow or POS business logic, and to add custom logic or validation. The POS trigger framework helps you to run custom logic before or after core POS logic. With this new pattern, developers can more easily customize any workflow in POS.

## Seamless and reliable connectivity loss management

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Jul 2020

### Business value

Our Real-time Transaction Service (RTS) component is the main connection point between Commerce Server (formerly Retail Server) serving various channels (for example, point of sale (POS) and e-commerce) and the Commerce headquarters.

There are multiple performance and reliability scenarios that could be improved with additional logic to maximize reliability. The focus is to provide meaningful messages where necessary and to function seamlessly whenever possible.

### Feature details

This feature will contain several independent improvements in the following areas:

- Ensure seamless Modern POS (MPOS) offline is triggered when there are systemic issues on the Commerce Server (formerly Retail Server). For example, trigger offline functionality if the channel DB is down.
- Improve design for seamless offline availability so that it is more reliable.
- Add dashboard details in headquarters that show the current status for devices.

## Globalization

### Digital signing of retail transactions for France based on the fiscal integration framework

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Jul 2020

#### Business value

The digital signing of retail transactions for France can be used by customers to build their POS solutions that are compliant with local cash register regulations.

#### Feature details

The digital signing of retail transactions for France now takes advantage of the [fiscal integration framework](#), meaning it supports all of the built-in fiscal integration capabilities. It is included in the out-of-the-box solution but needs to be configured to be used. The feature enables fiscal registration of sales by means of digital signing in various cash-and-carry sales and customer order scenarios, as well as fiscal registration of audit events of various types.

The Retail fiscal integration framework enables multinational retailers to build common POS solutions that are compliant with different local fiscal regulations in the countries or regions that they operate in.

### Digital signing of retail transactions for Norway based on the fiscal integration framework

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Jul 2020

#### Business value

The digital signing of retail transactions for Norway can be used by customers to build their point of sale (POS) solutions that are compliant with local cash register regulations.

#### Feature details

The digital signing of retail transactions for Norway now takes advantage of the [fiscal integration framework](#), which means that it supports all of the built-in fiscal integration

capabilities. It is included in the out-of-the-box solution but needs to be configured to be used. The functionality enables fiscal registration of sales by means of digital signing in various cash-and-carry sales and customer order scenarios, as well as fiscal registration of audit events of various types.

The Retail fiscal integration framework enables multinational retailers to build common POS solutions that are compliant with different local fiscal regulations in the countries or regions that they operate in.

### Fiscal service integration for Germany

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	Jul 2020

### Business value

This functionality enables global and local Dynamics 365 Commerce customers to comply with the local cash register regulations in Germany.

### Feature details

This functionality includes a sample of the integration of the point of sale (POS) with a third-party fiscal service that ensures compliance with cash register regulations in Germany. The integration sample supports one of the popular third-party fiscal services available on the German market and enables registration of sales in various cash-and-carry and customer order sales scenarios.

It also provides options for error handling in basic scenarios (such as when retry is possible) as well as more advanced scenarios, such as registering a completed transaction that was not previously registered in the fiscal service. The sample is a part of the Retail SDK and can be built and used as is. Implementation partners can also extend the integration functionality to cover all required retail scenarios or build integration with other fiscal services based on the sample.

## Industry excellence

### Overview

Key areas of investment include centralized and in-store inventory management enhancements as well as omnichannel management and order processing improvements.

## Improved inbound and outbound inventory operations in store

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Jan 2020	Apr 2020

### Business value

This feature will improve upon the point of sale (POS) application by adding new operations to allow for receiving inventory and the creation or fulfillment of transfer orders. These new operations are designed to improve the productivity and reliability of these inbound and outbound inventory processes in the POS application for our users.

### Feature details

This feature will create new user interfaces in POS to support workflows common to store receiving and transfer order creation and transfer order fulfillment scenarios. These new interfaces will be optimized for bar code scanning and they will provide an easier way to view items on the related inbound/outbound documents. Additional features will also be added to enhance and validate the data being entered to ensure smooth processing and error handling when posting receipts or shipments.

## Enable resetting of receipt numbers at the beginning of the fiscal year

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

There is a fiscal requirement in the India market to provide support for resetting of receipt numbers at the beginning of the fiscal year. Customers and partners are accomplishing this today through extensions and other ad-hoc steps. However, given that this is a requirement for all customers in the India market, we have enabled this as a capability within our product.

### Feature details

This feature will enable customers to reset receipt numbers at the beginning of their fiscal year in a reliable and seamless way.



## Task management in HQ and POS for first-line workers and managers

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

### Business value

Retailers can create task lists, assign tasks to stores and workers, and track status. Retailers can notify store managers and store workers about upcoming or past-due tasks in point of sale (POS).

### Feature details

Task management includes the following features:

- Store managers can create task lists for retail stores and track their status by store or by worker. Recurring tasks can also be created. For example, tasks can be created for Thursday night closures or the first day of the month.
- Store managers can assign tasks to individual workers in the store, notify them of upcoming or past-due tasks, update the status, and create ad-hoc tasks within POS.
- Store workers see notifications, view task details, and update the task status in POS.

## Channel-side calculations for available physical inventory for stores

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	May 2020

### Business value

We have many retailers who would prefer to get an estimated on-hand value for their store inventory without having to perform real-time service (RTS) calls back to headquarters (HQ) to obtain this data.

### Feature details

Channel-side calculation logic for "physical available" will be added for use with store inventory lookup-related tasks. This calculation will require a periodic "sync" of inventory data from HQ through product availability jobs. The store channel database might not know about inventory

transactions posted for the store (such as receipts, count journals, or sales orders processed against the store warehouse from HQ) without getting this information from HQ.

This channel-side calculation will take the data provided by HQ and check for unposted transactions in the store's channel database that might impact "physical available," and add or remove inventory as necessary to account for those transactions that HQ does not know about yet.

This calculation is meant to provide an estimated available inventory only. Due to the fact that the HQ database is the inventory master, it will not be possible to ensure 100 percent reliability at all times for inventory on hand in the store database. Events might happen in HQ that affect a store's inventory that might not be known by the channel database.

In order for this feature to work, the use of trickle feed statement posting will also be required.

### Email a receipt from the journal

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	May 2020

### Business value

Digital receipts offer a number of advantages and benefits to customers, such as the ability to keep track of purchases without relying on paper documents, and the ability to forward a receipt by email to someone. Dynamics 365 Commerce now offers the same features for emailed receipts as it provides for printed receipts. Specifically, customers can request a receipt for a previous transaction to be sent (or resent) to them by email.

### Feature details

Cashiers can email a receipt for a previous transaction to a customer from Modern or Cloud point of sale (POS) by going into the journal, selecting a transaction, and selecting **Show receipt**. When the cashier selects the new **Email** icon, a dialog box will open that displays the value of the receipt email property in the customer's record in Commerce headquarters. The cashier can:

- Change the destination email address for sending this receipt.
- Update the customer's receipt email address by selecting **Save changes for the customer**.

## External gift card support in e-commerce and call center

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	May 2020

### Business value

This feature adds support for external gift cards in the Dynamics 365 Commerce e-commerce storefront and call center. In addition to providing an out-of-the-box integration to SVS and Givex, external gift cards via the Dynamics 365 Payment Connector for Adyen, this feature adds SDK support to integrate third-party external gift cards into the out-of-the-box e-commerce storefront or through the e-commerce SDK. Previously these integrations required a lot of custom code for payments and in the back office. This feature helps to reduce or eliminate integration costs, depending on which storefront is used.

### Feature details

This feature provides an out-of-the-box integration with Givex and SVS gift cards through e-commerce. The out-of-the-box integration is provided via the Dynamics 365 Payment Connector for Adyen. In addition to the out-of-the-box integration, the payment SDK has been updated to support enhancements to third-party payment connectors to support external gift cards.

## Improved order recall for omnichannel orders in Customer Service

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	May 2020

### Business value

Dynamics 365 Commerce provides solutions to allow order capture and processing through multiple channels (such as point of sale (POS), call center, and e-commerce). When dealing with multiple order capture systems, the methods used to provide the customer with their order reference data are different. POS transactions use receipt IDs, call center orders use order numbers from a headquarters sequence, and e-commerce orders use a different order number sequence. Eventually, these orders are centralized in the headquarters and reassigned a headquarters order number. From a customer service perspective, our headquarters (HQ) users are challenged today to properly locate transactions and orders in the headquarters if they were created as "guest checkout" or "customer unknown" transactions.

By adding more visibility and cross-referencing all of these various order identifiers through our customer service and order search functionality in both the headquarters and POS applications, we can provide users with an easier time of locating the order in question in a customer service scenario.

### Feature details

This feature will enhance the existing customer service pages in HQ to allow for cross-referencing and easier lookup of sales orders by customer, order number, receipt ID or e-commerce transaction ID.

POS order recall features will also be improved to allow for lookup by receipt ID, order number, or e-commerce order number.

E-commerce will be improved to ensure that a customer has the ability to view their order history and see receipt numbers, HQ sales order numbers, or e-commerce sales order numbers as applicable.

### Improved support for serial number tracking dimension in store inventory processes

Enabled for	Public preview	General availability
End users, automatically	Apr 2020	Jul 2020

### Business value

As we increase our customer base, we are finding more retailers that sell products that require serial control. Our current in-market point of sale (POS) application only uses a limited set of inventory dimensions. The tracking dimensions (serial number, batch ID, and so on) are not fully supported. This feature will improve upon the POS inbound inventory operation to support the serial number tracking dimension in store inventory receiving processes.

### Feature details

This feature provides point of sale (POS) users with the ability to register serial numbers during receiving of purchase or transfer orders.

## Enhanced customer record creation and edit capabilities in POS

Enabled for	Public preview	General availability
End users, automatically	May 2020	Jul 2020

### Business value

Customer information is critical to the success of any marketing effort. We have made improvements to the customer record creation and edit capabilities in point of sale (POS)

### Feature details

We have enabled more fields to capture additional customer information in POS and have made editing of addresses easier. Additionally, we have enabled the capability to flag a customer based on certain criteria—for example, high net worth, high return risk, fraud, and so on.

## Warranty setup and sell

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Jul 2020

### Business value

Customers are opting for extended support and services when they buy products, especially for consumer products such as computers and phones that sell at a premium price point. Extended warranties can be sold in the retail channel during the initial purchase or for a limited time afterward. For a retailer, providing an extended warranty can help build customer loyalty. With the extended warranty purchase, customers know where to go for service and support in case of issues and they can gain the confidence that their issues will be handled well.

### Feature details

**Warranty item setup:** We are providing the functionality to set up a warranty item type and set attributes for the item including the association between a product and warranty item, price of the warranty, warranty duration, and more. Once the warranty item is set up and released to the organizational unit, a retailer will then be able to sell warranties through point of sale (POS).

**Warranty item sell:** Extended warranties are sold in a retail channel during the initial purchase or for a limited time after the initial purchase. In POS, a sales associate will be prompted to consider an extended warranty when a related product is added to the cart. This provides an

upsell or cross-sell opportunity to the sales associate as part of the sales flow. A customer can also come back later and buy an extended warranty for the product. In this case, sales associates can look up the original transaction and sell the customer the related extended warranty.

### Consistency in payments management across retail channels

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Aug 2020

#### Business value

Retailers want to provide the same level of customer service across all channels, while at the same time ensure that back office employees have a consistent experience when managing retail orders. It is imperative that payment transactions related to sales orders can be viewed, modified, or processed by any of our retail order processing interfaces in a consistent way.

#### Feature details

This feature will enable back office management of point of sale (POS) and e-commerce order payments using the existing MCRCustPaym\* tables previously only used by the call center channel. By managing our retail sales order payment data in a consistent way, we will allow for true omnichannel retail order payment management for call center users.

### No-code site styling

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	May 2020	Aug 2020

#### Business value

This feature reduces the time, coding dependencies, and cost for site designers to quickly style e-commerce web pages by enabling no-code style editing workflows within Site Builder.

#### Feature details

The e-commerce SDK now provides the ability for site themes to define authorable .css variables. This enables theme developers to place final style choices in the hands of a site builder author. Within site builder, this represents a no-code-required workflow for authors to set common style values within a site. Themes can still come bundled with default developer-defined style presets (example: dark, light, modern, classic). These presets can then be

customized with specific style values to match company branding by non-developers within site builder. The result is both a more flexible theme ecosystem, and a more efficient no-code workflow for common site branding tasks.

## Unified commerce

### Set preferred payment methods for returns

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

#### Business value

Returns are an integral operation for a retailer. The ability to accept returns for sales and refund the payments to the customer allows the retailer an option to service their customers' needs and issues. These new checks will allow retailers to deploy safeguards on their returns process and be able to track the refunds to the right payment types, thereby reducing operation costs and mitigating risk for fraud.

#### Feature details

This feature enables additional controls and restrictions, with the option to set eligible payment methods for refunds when processing returns.

- A new **Returns Policy** page is being introduced that gives the administrator the ability to set preferred payment methods for returns at an organization hierarchy level.
- A store associate will receive a prompt in point of sale (POS) with a list of preferred payment methods based on the store policy.

### Support for bulk URL redirects

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

#### Business value

Retailers building their site in Dynamics 365 Commerce can now manage their domain redirects for their pages in bulk format. Through Site Builder, Commerce will support the upload and download of a CSV mapping file to manage a large list of redirects. When the customer's

domain switches to point to Commerce-hosted pages, this feature saves time and effort to ensure the previous URLs will now serve the new hosted content and prevents errors for users who might be hitting those URLs. Remapping also preserves the previously established SEO. The mapping file will save Commerce users time by enabling the efficient managing of their domain mappings in an easy CSV format.

### Feature details

Within Site Builder for a given site, a menu option will be available to allow a URL redirect mapping file in CSV format to be uploaded or downloaded. The CSV file allows for referencing "source" and "Target" URLs, the redirection type (301/302), and if the source URL is case-sensitive (the default is false). Once uploaded, the Commerce rendering platform will manage user traffic to direct users to the target URL. The CSV can be downloaded from the Site Builder tool to capture and edit by the user (editing within Site Builder is not supported with this feature). Once edited, the user can re-upload the CSV file to override the previous mapping CSV supplied.

### In-store health check for POS peripherals

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	May 2020

### Feature details

This feature introduces the ability to perform health checks from the point of sale (POS) for connected peripheral devices. Moving forward, POS users will have the ability to view the current health of connected devices or review any errors resulting from attempts to communicate with the device. The health check function can also be extended to support health checks for services upon which the POS has a dependency, or to test additional peripherals and peripheral-related scenarios.

### Define and utilize inventory buffers to drive inventory level displays in e-commerce

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	Jul 2020



## Business value

Because inventory moves quickly in an omnichannel environment, it can be difficult to get an accurate on-hand assessment of stock on hand. Instead of viewing actual estimated on-hand quantity, some retailers are fine with being presented with an informational message that explains the current stock status and gives a warning to customers that an item quantity is potentially low or out of stock if the available on-hand value provided by Commerce headquarters (HQ) is lower than a designated buffer value.

## Feature details

This feature provides users with the ability to define inventory buffers during merchandising, and API access to the inventory level indicators that are derived from the inventory buffers.

## Upsell and cross-sell using available discounts by enabling store associates to view promotions in POS

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	Jul 2020

## Business value

Promotions play an important role in motivating customers when making purchasing decisions. Holidays and seasonal events, when the retail market is flooded with enticing promotions, bring the highest volume of sales. If store associates know and understand the promotions, they can easily leverage these promotions to upsell and cross-sell items.

## Feature details

This feature has two main parts. First, it helps the sales associates learn more about ongoing promotions. Knowing about the promotions can help during interactions with customers. Second, promotions will be displayed based on the items in the cart. This can help the cashier cross-sell items, as it can provide additional savings for the customer.

## Enable store associates to communicate with customers from POS using their preferred means of communication

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Jul 2020

## Business value

Many retailers, especially high-end specialty retailers, want their sales associates to form long-term relationships with their key customers. With the client book capability, associates are able to manage such customers closely. However, associates also need a way to communicate remotely with the customers so that they can share product information, request feedback, answer customer questions, and more.

## Feature details

With this investment, sales associates will be able to send product and other information to their customers via the customer's preferred means of communication, such as SMS.

## POS payments flows improvements

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	Aug 2020

## Business value

Retail point of sale (POS) usability and discoverability is extremely important for the user experience. Whether the user is a seasonal or seasoned employee, confidence when using the POS can directly affect the customer's shopping experience. The improvements introduced with this feature have shown a demonstrable impact on the user's experience at the POS based on usability research.

## Feature details

This investment provides a unified implementation of the payments UI within the POS. It provides a consistent user experience with more intuitive flows to enhance the cashier's POS experience while providing an easier-to-use underlying framework to improve the extensibility story.

Features include:

- New, consistent payments UI pattern.
- Workflow optimizations for key payment methods.
- Extensibility improvements by adding a UI layer to the new payments views.

## Overview of Dynamics 365 Fraud Protection 2020 release wave 1

Today's digitally transformed enterprises conduct significant portions of their business online and in real time. For example, omnichannel customer engagement (seamless customer journey across mobile, web, and in-store portals) is revolutionizing the retail industry. Such innovations are driving higher revenue, reduced operating costs, and improved customer experience.

However, they are also exposing the enterprise to serious threats from those who attempt to take advantage of the online channel's relative anonymity and accessibility to commit fraud. In e-commerce, for example, people might attempt to use compromised accounts and stolen payment instruments to commit payment fraud. Similarly, fraudsters might abuse programs such as "buy online and return in store" to commit returns or discounts fraud that leads to shrinkage losses for brick-and-mortar stores.

Fraudsters attempt other nefarious activities such as creating fake accounts to abuse free trials and new-customer freebies or post fake product reviews. They also try to compromise existing accounts to commit payment, warranty, or refund fraud. All these examples of fraudulent activity impact not just an enterprise's profitability but also its reputation. *It is our mission to help digitally transformed enterprises fight fraud while keeping their doors open for genuine customers and partners.*

Dynamics 365 Fraud Protection initially focused on **payment fraud protection**. It helped enable an e-commerce merchant to drive down fraud loss, increase bank acceptance rates to yield higher revenue, and improve the online shopping experience of its customers. In this release wave we are adding several new features to the product that enhance this capability:

- **Extend and tailor ontology and rules:** Enables merchants to bring custom data into the product by extending the data ontology of assessment events, and provides a richer rules capability to use that specialized data as well as the ML model score to achieve a more fine-grained control on real-time decision-making.
- **Integration with Dynamics 365 Commerce:** Enables Commerce customers to use Fraud Protection to protect their business via a low-code experience (since the product APIs come preintegrated out of the box).
- **Expanded coverage for transaction acceptance booster:** Increases the market coverage and enables merchants to boost the acceptance rate on more transactions in the United States and other countries and regions.
- **Extended localization beyond English and French, to six additional languages.**

Based on customer feedback, we are lighting up a new set of capabilities called **Loss prevention** that help brick-and-mortar retail store operations fight fraud and abuse. This will help retailers reduce shrinkage losses and improve store efficiencies.

- Provides actionable insights to help merchants stop retail losses by using artificial intelligence on historical transaction data to detect anomalies in business scenarios such as product returns and discounts.
- Enables the customer to take actions on these insights.

While we had a basic account creation protection capability already available in the payment fraud protection product, we are significantly expanding the portfolio via a new set of capabilities called **Account protection**.

- Account protection leverages Fraud Protection's proprietary risk assessment engine, artificial intelligence, as well as the Fraud Protection network to enable customers to make decisions and take proactive measures for events such as account creation, account sign-in, and other account activities.
- The customer can choose to block suspected fraudulent attempts or challenge them with two-factor authentication.
- It includes the ability to detect and prevent attempts by bots.

Loss prevention and Account protection will preview in March and will be generally available later in the year. A noteworthy aspect of Fraud Protection is that the capabilities of **Payment fraud protection**, **Loss prevention**, and **Account protection** all use a common framework of AI models, a shared customer knowledge graph including device fingerprinting data, and a common Fraud Protection network for global insights.

As a result, these applications work in tandem by sharing signals and insights. *This synergy improves the fraud detection accuracy in all three capabilities.* Moreover, the customer can see *the connections of events* across all three capabilities using the graph explorer. This gives the enterprise customer an unparalleled visibility into all aspects of its customers' journeys across omnichannel engagement.

## What's new and planned for Dynamics 365 Fraud Protection

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

Feature	Enabled for	Public preview	General availability
<a href="#">Expanded coverage for transaction acceptance booster</a>	End users by admins, makers, or analysts	May 2020	May 2020
<a href="#">Extend and tailor ontology and rules</a>	Admins, makers, or analysts, automatically	May 2020	May 2020
<a href="#">Extend geographies and localization to languages beyond English</a>	End users, automatically	Jan 2020	Jun 2020
<a href="#">Account protection</a>	End users by admins, makers, or analysts	Mar 2020	Jul 2020
<a href="#">Loss prevention</a>	End users by admins, makers, or analysts	Mar 2020	Jul 2020
<a href="#">Dynamics 365 Commerce integration with Fraud Protection</a>	Admins, makers, or analysts, automatically	May 2020	To be announced

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For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

## Expanded coverage for transaction acceptance booster

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	May 2020	May 2020

### Feature details

The transaction acceptance booster feature has enabled sharing of transaction trust knowledge with selected partner banks to help increase the acceptance rate and reduce fraud. In this release, more banks will be added to the partner network. This change will increase the market coverage and enable merchants to boost the acceptance rate on more transactions in the United States and other countries and regions.

## Extend and tailor ontology and rules

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	May 2020	May 2020

### Feature details

There are several cases where a merchant might need capabilities beyond the core features that Dynamics 365 Fraud Protection provides.

In the marquee scenarios of payment fraud and account takeover, merchants might want to use specialized data beyond the base ontology of Fraud Protection to help improve the fraud protection capability of the product. For example, for airline ticket purchases, the seat class might be an important attribute to consider. Furthermore, customers might have niche fraud protection scenarios, such as refunds, loyalty programs, and warranty programs, each of which has its own set of relevant data. Merchants will be able to bring specialized data into the product by extending the ontology as needed.

Custom knowledge can be used to create and update the configuration of model operating points by using specialized data. These model operating points can consume the full spectrum of available knowledge to produce decisions for each type of event.

## Extend geographies and localization to languages beyond English

Enabled for	Public preview	General availability
End users, automatically	Jan 2020	Jun 2020

### Feature details

As a global product addressing a global problem, the Dynamics 365 Fraud Protection portal will be available in expanded geographies and localized into multiple languages.

## Account protection

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Mar 2020	Jul 2020

### Feature details

As incidents of data breaches and bot attacks increase, account takeover has become a significant risk for many companies, regardless of the industry. Account protection leverages Dynamics 365 Fraud Protection's proprietary risk assessment engine, artificial intelligence learning capabilities, and Fraud Protection network. This feature provides device forensics and bot detection capabilities.

With real-time telemetry through APIs, attributes associated with account creation and account sign-in attempts are evaluated, returning a risk assessment score with a reason code. Customers can leverage this information to make decisions and take proactive measures, such as blocking fraudulent attempts or challenging suspicious attempts with two-factor authentication.

## Loss prevention

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Mar 2020	Jul 2020

### Feature details

Loss prevention provides actionable insights to help merchants stop retail losses by using artificial intelligence on historical transaction data and detecting anomalies in business scenarios

that can be abused, such as product returns and discounts. The insights that are provided enable trend analysis on multiple business dimensions and entities where the return rates and discounts have deviated from the normal behavior in the merchant's ecosystem. Merchants are alerted whenever anomalies are detected.

## Dynamics 365 Commerce integration with Fraud Protection

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	May 2020	To be announced

### Feature details

Dynamics 365 Fraud Protection enables Dynamics 365 Commerce customers who have an e-commerce presence to make fraud protection available for online purchases. During checkout, Fraud Protection will assess the risk that is associated with the purchase attempt and enable the merchant to decide whether to decline the purchase or send it to the payments gateway for processing and order fulfillment.



## Overview of Dynamics 365 Connected Store 2020 release wave 1

Dynamics 365 Connected Store creates insights from different types of data (observational, local weather, and events) and line-of-business applications like point-of-sale systems to improve the operational performance and customer experiences in brick-and-mortar stores. Connected Store helps retailers understand how customers move through the store, and where and when they engage with specific areas of merchandizing.

Connected Store can also:

- Monitor on-shelf availability and identify product stockouts earlier, allowing for either faster restocking or triggering replenishment.
- Enable store leaders to respond more quickly to incidents and events happening in the store, like increasing checkout wait times or needed restroom maintenance based on actual number of guest visits.

### Better understand what's happening in each store

Connected Store uses data collected by computer vision and other IoT sensors, which is then comprehensively analyzed and combined with local event, weather, and other business data to produce actionable insights for store leaders, store associates, and business planners. These insights are delivered as alerts, email reports, or through the Connected Store app.

### Make smarter decisions for your retail business

Connected Store provides customer telemetry that was previously available only for online stores. When retailers understand how customers move through the store, their decisions about layout and product placement are supported by impartial data and insights that bridge the physical/digital divide, leading to revenue growth and improved customer experiences.

### What's new and planned for Dynamics 365 Connected Store

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

Feature	Enabled for	Public preview	General availability
<a href="#">Checkout queue management</a>	End users by admins, makers, or analysts	Apr 2020	To be announced
<a href="#">Foot traffic</a>	End users by admins, makers, or analysts	Apr 2020	To be announced
<a href="#">Installation and deployment guide</a>	Admins, makers, or analysts, automatically	Apr 2020	To be announced
<a href="#">Notifications</a>	End users by admins, makers, or analysts	Apr 2020	To be announced
<a href="#">Scheduled reports</a>	End users by admins, makers, or analysts	Apr 2020	To be announced

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For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

## Checkout queue management

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	To be announced

## Feature details

Increase customer satisfaction and avoid customer abandonment by using queue analytics to monitor and react to checkout queue length and wait time. Optimize checkout staffing levels based on store foot traffic and average queue times.

## Foot traffic

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	To be announced

## Feature details

Understand your customer traffic with people count data. Make informed decisions based on customer traffic to help evaluate the effectiveness of in-store advertising campaigns, sales promotions, and product placement.

## Installation and deployment guide

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 2020	To be announced

## Feature details

Microsoft Dynamics 365 Connected Store is a SaaS solution that has on-premises hardware dependencies. This guide identifies actors and components and provides prescriptive instructions for customers to plan deployments.

## Notifications

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	To be announced

## Feature details

Set up and configure notifications so you can respond more quickly to events in your store. Trigger notifications based on in-store events like long checkout lines to improve response times and customer experience.

## Scheduled reports

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	To be announced

## Feature details

Plan ahead for changes in foot traffic and easily share this information with your teams and organizational leaders. Receive daily, weekly, and monthly summaries of activity in your store.

# SMB

## Overview of Dynamics 365 Business Central 2020 release wave 1

Dynamics 365 Business Central provides a comprehensive business-application solution designed and optimized for small and mid-sized organizations. Since its launch in April 2018, Business Central has seen increasing adoption by organizations looking to digitally transform their businesses. For 2020 release wave 1, Business Central investments center on service fundamentals to meet the demands of a rapidly growing customer base, enhanced user productivity, geographic expansion, and top customer-requested features. Improvements in migration tools reflect the prioritization of bringing on-premises Dynamics GP, Dynamics SL, and Dynamics NAV customers to Business Central online.

- **Service fundamentals:** Performance, reliability, and supportability are at the core of the business. This wave focuses on service quality and accessibility. This wave also brings the results of a material top-to-bottom investment in Business Central service security.

Partners are a critical component of the Business Central ecosystem; this wave brings telemetry visibility for partners through Azure Insights. We are delivering top partner-requested improvements to the integration with Common Data Service to improve the extensibility of integrations with other Dynamics 365 workloads. Finally, feature flagging and support for managing deprecation of code in the AL language enable the non-disruptive future evolution of the service.

- **Productivity:** End-user productivity is critical. This release continues the pattern of delivering improved productivity with enhancements to the modern client experience, streamlined data entry, and requested features, such as auto-insert for recurring sales and purchase order lines.
- **Geographic expansion:** 2020 release wave 1 adds the ability to install multiple language translations for each tenant. Also, this wave adds localizations for Slovenia, Croatia, Latvia, Hungary, Peru, and Columbia. Localization for Brazil and India will follow in a later wave.
- **Customer requested enhancements:** Business Central continues to respond to top customer-enhancement requests. In addition to multiple features picked from the product Ideas portal, we are enhancing areas that receive significant feedback, such as bank reconciliation.
- **Customer migration tools:** To simplify the journey for existing Dynamics customers to Business Central online, we're adding support for migration from a broader set of Dynamics GP and Dynamics NAV versions, making improvements for selective migration of Dynamics

GP customers and vendors, and enhancing the Dynamics GP Chart of Account setups migration.

Together, these enhancements are designed to drive further customer adoption by empowering the migration of Dynamics GP, Dynamics NAV, and Dynamics SL customers, activating the partners who are bringing their vertical solutions to Business Central online, and further accelerating the growth of net new customers to Dynamics 365.

## What's new and planned for Dynamics 365 Business Central

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

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This check mark (✓) shows which features have been released for public preview or early access and for general availability.

### Application enhancements

The Business Central ideas site ([aka.ms/bcideas](https://aka.ms/bcideas)) is a constant source of suggestions for improving the application. For this release we have updated minor features based on the feedback in the ideas site and have made several improvements to the bank reconciliation functionality.

Feature	Enabled for	Public preview	General availability
<a href="#">Auto-insert recurring sales and purchase lines</a>	End users, automatically	Jan 2020	Apr 2020
<a href="#">Enhanced customer and vendor document layout</a>	End users, automatically	Jan 2020	Apr 2020
<a href="#">Manage direct-debit collections in Service Management</a>	End users, automatically	Jan 2020	Apr 2020
<a href="#">Notify requester about all changes for an approval request</a>	Admins, makers, or analysts, automatically	Jan 2020	Apr 2020

Feature	Enabled for	Public preview	General availability
<a href="#">Receive more items than ordered</a>	End users, automatically	Jan 2020	Apr 2020
<a href="#">Revert Qty. to Invoice when canceling order</a>	End users, automatically	Jan 2020	Apr 2020
<a href="#">Bank reconciliation improvements</a>	End users, automatically	Feb 2020	Apr 2020
<a href="#">Multiple languages</a>	End users, automatically	Feb 2020	Apr 2020

## Country and regional availability

Availability of Dynamics 365 Business Central is expanding regularly and here we describe the plans for expansion going forward.

Feature	Enabled for	Public preview	General availability
<a href="#">Expanded country and regional availability</a>	End users, automatically	Feb 2020	Apr 2020

## Partner acceleration

Feature	Enabled for	Public preview	General availability
<a href="#">API for continuous delivery of the AppSource apps via Azure DevOps services</a>	Admins, makers, or analysts, automatically	Apr 2020	Jul 2020

## Migrations to Business Central online

Moving from an on-premises solution to Business Central online is a major area of focus for our partners and customers. With the 2020 release wave 1, we further enhance the scenarios for migrating data from Dynamics GP, Dynamics SL, and Business Central (on-premises) to Business Central online.

Feature	Enabled for	Public preview	General availability
<a href="#">Migrate data from Business Central 14.x on-premises to Business Central 15.x online</a>	End users, automatically	Jan 2020	Apr 2020
<a href="#">Enhanced Dynamics GP Chart of Accounts migration</a>	End users, automatically	Feb 2020	Apr 2020
<a href="#">Migrate all or only active customer master records from Dynamics GP</a>	End users, automatically	Feb 2020	Apr 2020
<a href="#">Migrate all or only active vendor master records from Dynamics GP</a>	End users, automatically	Feb 2020	Apr 2020
<a href="#">Enhanced Dynamics GP inventory data migration</a>	End users by admins, makers, or analysts	Apr 2020	Apr 2020

## Modern clients

Feature	Enabled for	Public preview	General availability
<a href="#">Disable export of data to Excel</a>	Admins, makers, or analysts, automatically	Feb 2020	Apr 2020
<a href="#">Enable non-interactive printing with advanced printer selection</a>	End users, automatically	Feb 2020	Apr 2020
<a href="#">Enhanced mobile accessibility related to device orientation</a>	End users, automatically	Feb 2020	Apr 2020
<a href="#">Import profiles and UI customizations</a>	Admins, makers, or analysts, automatically	Feb 2020	Apr 2020
<a href="#">Improved load time for pages</a>	End users, automatically	Feb 2020	Apr 2020



Feature	Enabled for	Public preview	General availability
<a href="#">Improvements to data entry</a>	End users, automatically	Feb 2020	Apr 2020
<a href="#">Improvements to filters and views on lists</a>	End users, automatically	Feb 2020	Apr 2020
<a href="#">Improvements to pages composed of multiple parts</a>	End users, automatically	Feb 2020	Apr 2020
<a href="#">Navigate trees more easily</a>	End users, automatically	Feb 2020	Apr 2020
<a href="#">Unhide parts on a page</a>	End users, automatically	Feb 2020	Apr 2020
<a href="#">Collapse and expand document lines</a>	End users, automatically	Mar 2020	May 2020

## Modern developer tools

Feature	Enabled for	Public preview	General availability
<a href="#">AL interfaces</a>	Admins, makers, or analysts, automatically	Feb 2020	Apr 2020
<a href="#">Application version for aliasing base application</a>	Admins, makers, or analysts, automatically	Feb 2020	Apr 2020
<a href="#">Camera/location AL API available in the browser</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Look up events and insert event subscriber in code</a>	Admins, makers, or analysts, automatically	Feb 2020	Apr 2020
<a href="#">Multiple variable declarations of the same type in the same line</a>	Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

Feature	Enabled for	Public preview	General availability
<a href="#">Obsolete tag and URL properties</a>	Admins, makers, or analysts, automatically	Feb 2020	Apr 2020
<a href="#">Ability to refactor a field from a table to a table extension</a>	Admins, makers, or analysts, automatically	Mar 2020	Apr 2020

## Onboarding

Feature	Enabled for	Public preview	General availability
<a href="#">Improved onboarding experience</a>	End users, automatically	Feb 2020	Apr 2020

## Power Platform

Feature	Enabled for	Public preview	General availability
<a href="#">Business Central integration with Common Data Service</a>	End users, automatically	Feb 2020	Apr 2020

## Service fundamentals

Feature	Enabled for	Public preview	General availability
<a href="#">Resource limits for reports and web service calls</a>	End users, automatically	Feb 2020	Apr 2020
<a href="#">Telemetry in Application Insights for partners</a>	End users by admins, makers, or analysts	Feb 2020	Apr 2020
<a href="#">Read scale-out</a>	Admins, makers, or analysts, automatically	Mar 2020	Apr 2020

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For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

For more information about geographic areas, data centers (regions), data storage, and replication, click **expand all** on the [Where your data is located page](#) and find the Microsoft cloud service for this feature.

## Application enhancements

### Overview

The Business Central ideas site ([aka.ms/bcideas](https://aka.ms/bcideas)) is a constant source of suggestions for improving the application. For this release we have updated minor features based on feedback in the ideas site and have made several improvements to the bank reconciliation functionality. We will continue to enhance the application through our focus on performance in the most-used areas.

### Auto-insert recurring sales and purchase lines

Enabled for	Public preview	General availability
End users, automatically	Jan 2020	Apr 2020

### Business value

Recurring sales and purchase orders are the new normal in business. Business Central now allows you to handle such recurring sales and purchases by using automatic insert of predefined recurring sales and purchase lines.

### Feature details

The existing Recurring Sales/Purchase Lines feature is extended to automatically insert on documents the recurring sales or purchase lines that are set up for the customer or vendor.

If multiple recurring sales or purchase lines exist for the customer or vendor, you will get a notification from where you can pick which one to insert. If only one recurring sales or purchase line exists, it will be inserted automatically.

Note that this works only if the new document was created from a document list—for example, by choosing the **New** action on the **Purchase Orders** page. It does not work if the document was created from a vendor card, for example.

### Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

### Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

### Enhanced customer and vendor document layout

Enabled for	Public preview	General availability
End users, automatically	Jan 2020	Apr 2020

### Business value

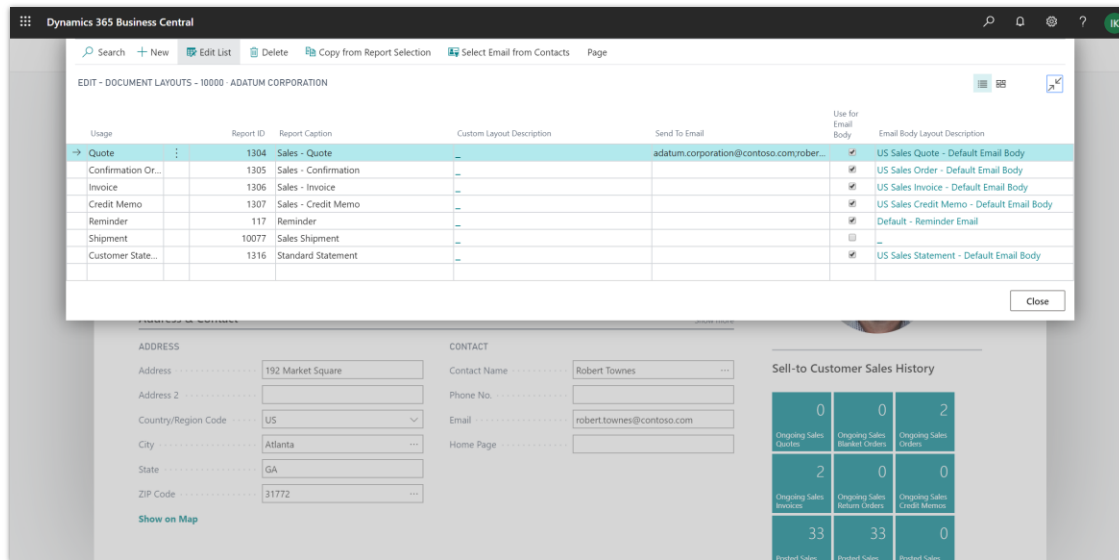
Businesses deal with multiple customer and vendor contacts who are responsible for different areas of operation, such as accountants, purchasers, and warehouse people. Each of these contacts must be sent different sets of documents generated by Business Central.

You can now save time while sending documents to different customer or vendor contacts by setting up specific contacts to use with specific documents. For example, customer statements will be sent to accountant contacts, sales orders to your customers' purchasers, and purchase orders to vendors' salespeople or account managers.

### Feature details

You can now populate the **Document Layouts** page for vendors and customers based on settings on the **Report Selection** page. To send specific documents to specific company contacts, simply choose the company contacts to use for specific document layouts.

The **Document Layouts** page for a customer now contains additional usage options for reminders and posted shipments. The **Document Layout** page for a vendor now contains additional usage options for purchase orders and posted return shipment.



### Document Layouts page for customers

### Tell us what you think

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### Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

### Manage direct-debit collections in Service Management

Enabled for	Public preview	General availability
End users, automatically	Jan 2020	Apr 2020

### Business value

More and more, business is related to services. Customers want a convenient way of paying for such work, especially recurring service work. The best way to do this is by using the Direct Debit Collection functionality in integration with the Service Management modules.

## Feature details

You can now view direct-debit collection information on service orders, invoices, and contracts. When posting service invoices, direct-debit information is stored in the related customer ledger entries and then transferred to the relevant payment journal during the collection process.

The screenshot shows the 'Invoicing' form in Dynamics 365 Business Central. The form is for a service order with the title '123 · Adatum Corporation · test'. It includes fields for 'Bill-to Customer No.', 'Bill-to Contact No.', 'Name', 'Address', 'City', 'ZIP Code', 'Country/Region Code', 'Contact', 'Customer PO No.', 'Salesperson Code', 'Max. Labor Unit Price', and 'Posting Date'. On the right, there are fields for 'Document Date', 'Department Code', 'Customergroup Code', 'Payment Terms Code', 'EU 3-Party Trade', 'Due Date', 'Payment Discount %', 'Pmt. Discount Date', 'Payment Method Code', 'Direct Debit Mandate ID', 'Tax Liab', 'Tax Area Code', and 'Currency Code'. A dropdown menu for 'Direct Debit Mandate ID' is open, displaying a table of mandates.

ID ↑	Customer Bank Account Code	Valid From	Valid To	Type of Payment
→ 1	ECA	1/1/2019	12/31/2019	Recurrent

Below the table, there is a '+ New' button and a 'Select from full list' link.

*View direct-debit collection information in an invoice*

## Tell us what you think

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## Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

## Notify requester about all changes for an approval request

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Jan 2020	Apr 2020

## Business value

To ensure that an approval request is processed as fast as possible, it is essential that everyone involved can be notified about the status of every step. This is also the case for approval processes with multiple approval steps.

## Feature details

You can set up an approval workflow to notify the approval requester about every change of an approval request up until final approval.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

## Receive more items than ordered

Enabled for	Public preview	General availability
End users, automatically	Jan 2020	Apr 2020

## Business value

When you receive more goods than you ordered and it's cheaper not to return such goods or your vendor offers you a discount, order processors and warehouse workers must be able to handle such receipts without going through a lengthy process of preparing and getting approval for a new purchase order.

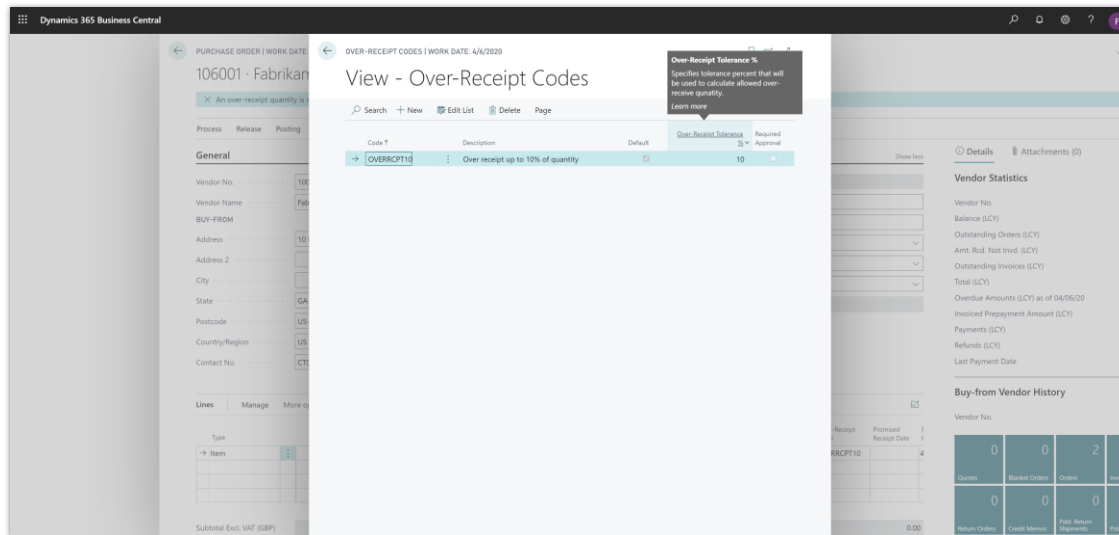
## Feature details

You can now receive a quantity higher than the ordered quantity on purchase orders according to an over-receive policy that you set up on the **Over-Receipt Codes** page. Here you can fill in the **Over-Receipt Tolerance %** field and select a policy to be used by default.

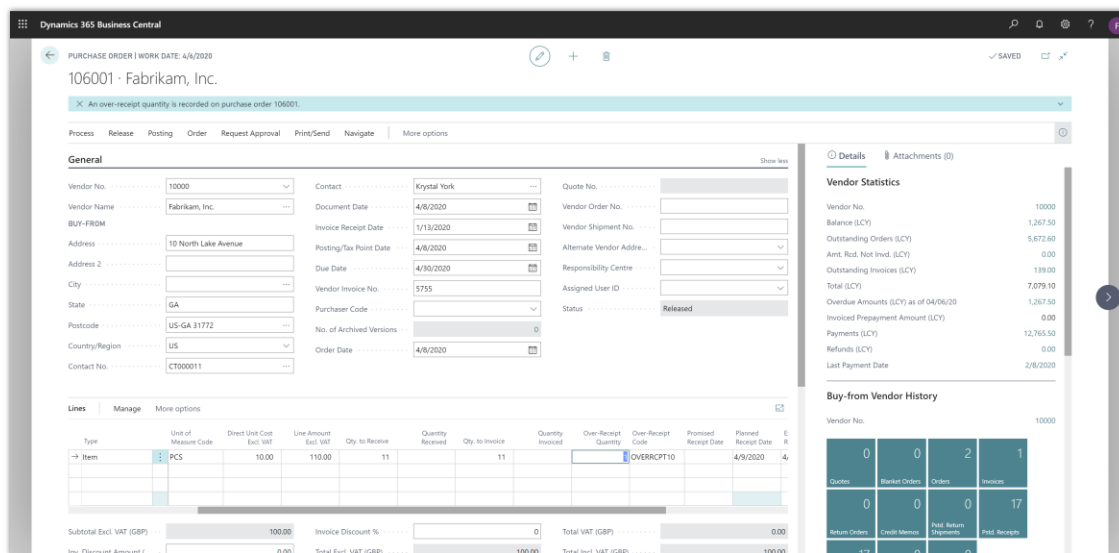
If your company uses purchase order approval, over-receiving can trigger a reapproval. You define this on the **Over-Receipt Codes** page. The **Approve Over-Receipt** workflow response is available in the workflow engine for this purpose.

On the cards for items and vendors, you can select in the **Over-Receipt Code** field which policy to use by default on purchases.

When you have selected an over-receipt code, you can enter a higher-than-ordered quantity in the **Quantity to Receive** field on released purchase orders and warehouse receipts.



*Over-receipt codes with over-receipt tolerance field highlighted*



*Over-receipt on purchase order line*

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.





### Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

### Revert Qty. to Invoice when canceling order

Enabled for	Public preview	General availability
End users, automatically	Jan 2020	Apr 2020

### Business value

Partial shipping/receiving and invoicing of orders are common practices in today's business. As mistakes happen in these core processes, it is important to have robust and easy ways to follow the correction process, thereby keeping employees productive.

### Feature details

You can now easily correct invoiced quantities on originating orders by canceling invoices created from them. The **Qty. to Invoice** field on the originating order is automatically updated.

### Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

### Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

### Bank reconciliation improvements

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Business value

By reconciling your bank account statements with your internal bank accounts and customer or payment ledgers, you can identify missing payments or unusual transactions that might be

caused by errors and thereby improve your financial management. Enhancements of these processes will ensure that reconciliation tasks can be done efficiently and quickly.

### Feature details

The **Bank Acc. Reconciliation** page will have more space for data and allow better overview and understanding of the bank statement lines and the related bank account ledger entries. A Bank Reconciliation report that can be used to report on both ongoing and posted bank reconciliations and statements is provided.

Both the **Bank Acc. Reconciliation** and the **Payment Reconciliation Journal** pages will link to explanations of the involved matching and application rules, and rules can be enabled or disabled by the user. Posting preview will be supported on both pages. The Transfer Difference function will be improved to allow transferring multiple records with differences to the general journal. Employee ledger entries will be supported in bank reconciliation. It will be easier to control number series and document numbers that appear on the **Payment Reconciliation Journal** page.

### Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

### Multiple languages

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Feature details

In 2020 release wave 1, languages are provided as apps that can be installed from AppSource to match the individual tenant's needs. Different languages can be installed on the individual environments of the tenant. For on-premises, these language apps are part of the installation media and can be installed. This enables a customer from any country or region to use any supported language. See supported languages here: <https://aka.ms/bccountries>.

### Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Country and regional availability

### Overview

Availability of Dynamics 365 Business Central is expanding regularly. Here are the plans for expansion going forward.

### Expanded country and regional availability

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Business value

There is a large demand for Dynamics 365 Business Central online. We are expanding the availability of the service to cover more countries and regions to enable small and mid-sized businesses across the world to achieve more.

### Feature details

Expansion toward new markets is primarily done through partner-led localizations that are available as localization apps in AppSource. This allows customers to choose their localization of choice for their country or region, which makes it easier to comply with local legislation and enable market-specific business processes.

With 2020 release wave 1, Business Central becomes available in six new countries. For more information, see [Country/Regional availability and Supported Translations](#).

### Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Partner acceleration

### Overview

The Dynamics NAV business has been driven by strong vertical solutions, complemented by add-on solutions. For the 2020 release wave 1 update, our focus will be on streamlining the path for partners to bring their vertical solutions—and in turn their customers—to Business Central online. The 2020 release wave 1 update delivers a set of features designed to simplify development for new solutions and, specifically, for helping partners on their journey of

migrating from the source code customization model of Dynamics NAV to the extensions model of Business Central.

### API for continuous delivery of the AppSource apps via Azure DevOps services

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 2020	Jul 2020

#### Business value

Partners of Business Central can use Azure DevOps to orchestrate their build processes and deployments to Business Central online.

#### Feature details

The global partner community in general and Business Central partner community in particular are growing passion for the continuous integration/continuous delivery and DevOps principles.

Azure DevOps services already provide a wealth of functionality for Business Central developers to manage their code following continuous integration practice. The code is written in Visual Studio Code; stored, reviewed, branched, and merged in a source control repository; then built and tested using build pipelines, targeting Business Central Docker containers.

The next step is to enable partners building Dynamics 365 Business Central apps to implement continuous delivery of their apps to the customers, running in the Business Central online service.

The partners will use a new API (fixed app management endpoint, of FAME) and Azure DevOps services to manage their apps and orchestrate the steps of the release (release pipeline).

We expect the following flow to be enabled for the Business Central 2020 release wave 1: Once a partner app has been tested in a Docker container and has passed automated AppSource validation checks, the production-ready app will be submitted for the AppSource automatic and additional manual validation via the Microsoft Partner Center portal as usual. When the app is approved, the ISV will proceed with a phased rollout of the app to all of their customers, using the previous version of the ISV app, across multiple countries.

New versions of the partner apps will be made available to the customers to upgrade to on the Extension Management page, so that customers can install or upgrade to those when they see fit.

With Business Central 2020 release wave 1, the first version of the API will be made available as a private preview to a limited audience of our AppSource ISVs with a plan to roll out to all Business Central AppSource ISVs soon after that.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Migrations to Business Central online

### Overview

Moving from an on-premises solution to Business Central online is a major area of focus for our partners and customers. With the 2020 release wave 1, we further enhance the scenarios for migrating data from Dynamics GP, Dynamics SL, and Business Central (on-premises) to Business Central online.

For more information, see [Upgrading to Dynamics 365 Business Central On-Premises](#).

### Migrate data from Business Central 14.x on-premises to Business Central 15.x online

Enabled for	Public preview	General availability
End users, automatically	Jan 2020	Apr 2020

### Business value

Customers can migrate from Business Central 2019 release wave 2 on-premises to Business Central online. In order to reach a broader audience of on-premises customers, we add support to bring a customer from the version immediately before (Business Central April '19) to Business Central 2019 release wave 2 online without having to perform an on-premises upgrade first.

### Feature details

A customer who uses Business Central April '19 on-premises can load the cloud migration extension and migrate their data to Business Central 2019 release wave 2 online.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Enhanced Dynamics GP Chart of Accounts migration

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Business value

Customers will be able to see the segments from Dynamics GP assigned to the transactions in Business Central. This way, customers can run reports by dimensions to see the breakdown of amounts by those dimensions.

### Feature details

In this release, we build out the extension to have the segments migrated as dimensions on the G/L transactions.

## Migrate all or only active customer master records from Dynamics GP

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Feature details

The migration tool will allow the user to migrate either all customers or only customers who have an active status in Dynamics GP. Along with that change, we will also migrate all customer addresses. Currently we only migrate the primary address associated with the customer card in Dynamics GP.

## Migrate all or only active vendor master records from Dynamics GP

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Feature details

The migration tool will allow the user to migrate either all vendors or only vendors who have an active status in Dynamics GP. Along with that change, we will also migrate all vendor addresses. Currently we only migrate the primary address associated with the vendor card in Dynamics GP.

## Enhanced Dynamics GP inventory data migration

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	Apr 2020

### Business value

For customers who move their data from Dynamics GP to Business Central through the cloud migration tool, we will expand the migration tool in the inventory area to include bringing over location setup information and quantities on hand for items in those specific locations.

### Feature details

We will also bring over serial and lot setup information, and serial and lot numbers for the quantities of items that are on hand.

### Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Modern clients

### Overview

Business Central offers an extensive portfolio of clients that empowers users to achieve more at their desks, on the go, or from within Office 365. With users across a diverse range of business roles, proficiency levels, and local and accessibility needs, our priority is to ensure the user interface is both intuitive to start with and powerful when needed.

In 2020 release wave 1, we place additional focus on maturing the desktop experience for browser and app to cover a broader range of customer needs. We're optimizing page layout so that developers can craft advanced screens that display richer content, we're opening up more print-related capabilities, and we're improving load time for complex pages. Based on community feedback, we're also enhancing the experience for advanced users who need to manage space on their screen more effectively, and customize more of the user interface without having to write code.

## Disable export of data to Excel

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

### Business value

With the **Edit in Excel** and **Open in Excel** actions, users can quickly get an Excel spreadsheet with Business Central data for further processing in Excel. However, some organizations have data control rules with restrictions on having data sets in Excel, where it is more difficult to control and audit. Administrators can now specify which users are allowed to export data to Excel, which gives the organization stricter control over data.

### Feature details

Business Central administrators have the option to disable features that allow users to export data to Excel. The ability to export data from Business Central is controlled by a new **D365 EXCEL EXPORT** permission set. If the permission is removed for a specific user, then the **Edit in Excel** and **Open in Excel** actions are no longer available to the user on any pages in the application.

### Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

## Enable non-interactive printing with advanced printer selection

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Business value

Users can print reports directly from the desktop using the predefined printers configured on the **Printer Selection** page. If the printers are selected and set up properly, then no additional steps, such as downloading files or navigating through previews, are necessary. In addition, administrators get the power to configure print jobs for specific tasks, users, or for more complex printer setups.



Complex printing scenarios where labels must be sent to one printer and a packing slip to another are common in many businesses. Users expect to be able configure, save, and retain certain properties describing such flows, and they expect to print each report directly to a predefined printer.

### Feature details

Printing directly to a printer is now possible from the modern desktop clients. The setup that you make on the **Printer Selection** page allows you to control which device to print to, including to cloud printers as defined by extensions. Using the Business Central modern clients, users who work in the browser can set up a printer selection for each report so that documents, labels, and other content are printed automatically on the selected printer. Administrators can manage a list of printers (including cloud printers)—for example, creating a friendly name for each and setting defaults. Additionally, for on-premises installations, any network printer that the server has access to would be available in the printer selection page.

### Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

### Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

### Enhanced mobile accessibility related to device orientation

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Business value

Users on the road must have quick access to all relevant information without having to manipulate the device or scroll extensively. Users on tablets and phones are more productive and feel more empowered when they have easy and fast access to related information in FactBoxes or to additional cues on Role Centers and when they can easily navigate to pages from the Role Center.

## Feature details

This enhancement makes access to information in FactBoxes reachable regardless of the device orientation by displaying a small chevron (either on the side or at the top of the page), allowing the user to "pull" the related information onto the screen. In previous releases, this action was only available with certain screen orientations. Now, it is available everywhere on any device. In the common scenario where a mobile phone is mounted on a holder in a vehicle (not driving), it is now possible for the operator to quickly access related information about a customer while the phone is in the holder.

Another change related to this enhancement is the redesigned Role Center view in Landscape mode on tablets. The navigation controls have been moved to the left pane, allowing users to quickly jump to a different page and get started with tasks. In previous releases, this was hidden under a menu. The change also allows users and administrators to personalize a Role Center with richer navigation by adding more elements to the Home group (for example, by bookmarking them). As a result, the cues have been moved to the right pane, allowing users to scroll the entire Role Center content.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Import profiles and UI customizations

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

## Business value

Administrators and consultants benefit from a rich toolset that supports role-tailoring in Business Central. By having both an export and import function for profiles (organizational roles) and their corresponding user interface customizations, customers can easily back up their profile customizations before making further changes, replicate profiles across environments, or safely explore possibilities in an online sandbox before importing into production. All this without requiring the assistance of developers.

## Feature details

Import a package of profiles or per-profile UI customizations using a simple wizard that guides you through the process.

## Improved load time for pages

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Business value

When navigating across pages to complete their tasks, business users expect snappy loading of pages and dialog boxes.

### Feature details

Users will find that pages they use often now open faster. Technically, the rendered page is now cached the first time it is opened. This is done without persisting any business data or sensitive information to the user's device. Subsequent accesses to the page will immediately render the page while data is fetched from the service.

### Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Improvements to data entry

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Business value

Back-office workers often need to capture information or digitize paper material at high speed. For some users, this is their main activity for the whole work day. When this cannot be automated through means like OCR and AI, users require an efficient interface that does not get in the way of quickly typing in data.

### Feature details

Various enhancements that make typing into fields more predictable and faster, and navigating fields in a list more intuitive and efficient.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Improvements to filters and views on lists

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

## Business value

As the business grows, so does table data in the database, making quick analysis of the data or even finding records more challenging without the right tools. Defining the perfect set of filters can be a time-consuming, iterative process where the ability to persist filters will save having to recreate them the next time they are needed.

## Feature details

The 2019 release wave 2 eliminated the need to recreate commonly used filters by allowing users to permanently save filters as a view. Based on community feedback, we're now improving the filter experience further:

- When authoring filters that use expressions such as date ranges or filter tokens, you can toggle the filter field to display either the expression or the corresponding value. To view the expression, simply set the focus to the filter field using a keyboard or mouse. This is particularly useful when saving list views so that date- or time-sensitive expressions can easily be modified when needed.
- While on a list page, saving the URL as a browser favorite will include the current view, allowing you to link directly to the view when you navigate to that favorite.
- When working with lists, Business Central will help you pick up where you left off if you are disconnected or you reload the web page by trying to return to the last view you visited.

## Improvements to pages composed of multiple parts

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

## Business value

Some business tasks require advanced screen layouts that reflect the nature of the task and the volume of data associated with the task. By having highly optimized layouts, users get the best overview of their data to quickly make decisions and act, reducing the need to scroll and navigate to get the task done.

## Feature details

The desktop client will add full support for page objects that are composed of multiple parts, such as ListParts or CardParts. While this is already possible today on a Role Center or FactBox pane, the canvas of other page types is not optimal for displaying parts alongside other content.

Developers will now be able to implement pages by choosing from predefined patterns that give predictable outcomes. For example, display two lists side by side on a ListPlus page, or have multiple dependent lists shown above each other on a document page. Different patterns will be made available starting in April 2020.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Navigate trees more easily

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

## Business value

Users get a better overview of their data when it is grouped into categories. Some data is best represented as a deep hierarchical list. Business Central empowers developers to design pages for both of these scenarios, so that users can get the best possible overview and navigate to the relevant records.

## Feature details

On page objects where a repeater control has the **ShowAsTree** property set to True, users will experience a new level of efficiency when working with the data tree. Users can easily drill down and back out again, using a keyboard or mouse, by expanding and collapsing groups or by using the **Expand all** and **Collapse all** actions.

Developers can also specify if a tree should start as fully expanded or fully collapsed.

### Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

### Unhide parts on a page

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Business value

Business Central is able to adapt to the unique needs of the user, department, or organization.

### Feature details

When personalizing pages in Business Central, users can show a hidden part on any page, such as a FactBox on a sales document. This unlocks two common scenarios:

- Business users can personalize their pages and bring back a part that they have previously hidden. Similarly, power users and consultants can unhide parts that they have previously hidden.
- Developers can now choose to place secondary content on a page object and hide it, giving their customers a simple starting point with the page and the ability to unhide that content if it is relevant to their business processes.

### Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

### Collapse and expand document lines

Enabled for	Public preview	General availability
End users, automatically	Mar 2020	May 2020

### Business value

Business users must be able to optimize their work space for reading and entering data.

## Feature details

On sales and purchase documents and other similar documents, business users will be able to collapse the document lines section on the page. This allows them to optimize their space as they work through a task, such as comparing document totals.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Modern developer tools

### Overview

As we have made the move entirely to Visual Studio Code, we continue to invest in areas that enhance productivity for developers. Specifically, we are enhancing the troubleshooting and debugging experiences, improving performance and usability when you work on multiple and large projects, empowering code insights and telemetry for ourselves and our partners, and extending capabilities in the AL language with, for example, profile extensibility.

### AL interfaces

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

### Business value

An interface is used when you want to decide which capabilities need to be available for an object, while allowing actual implementations to differ, as long as they comply with the defined interface.

This allows for writing code that reduces the dependency on implementation details, makes it easier to reuse code, and supports a polymorphing way of calling object methods, which again can be used for substituting business logic.

### Feature details

Use the new interface object to declare an interface name along with its methods, and apply the implements keyword along with the interface names on objects that implement the interface methods.

The interface object itself does not contain any code, only signatures, and cannot itself be called from code, but must be implemented by other objects.

The compiler checks to ensure implementations adhere to assigned interfaces.

A new QuickFix CodeAction can be used to insert interface stubs, if the compiler errors on one or more interface implementations are missing.

You can declare variables as a given interface to allow passing objects that implement the interface, and then call interface implementations on the passed object in a polymorphic manner.

### Application version for aliasing base application

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

### Business value

Embed applications as well as customized on-premises applications should be able to modify the app.json file of the base application and change the identity of the application extensions. However, by doing so, solutions on top pointing to the Microsoft base identity will not resolve against the embed application or on-premises code customizations, if these are using explicit dependencies.

Therefore, to support a way for embed applications to specify that they are aliasing Microsoft's Base Application so that any extension built on top of Microsoft's Base Application can compile against their solutions, there needs to be a level of indirection through the application alias.

### Feature details

Embed partners and on-premises solutions can create a parent extension named Application, versioned according to base version, and with an appropriate, unique publisher. This parent extension is mainly used as an indirection proxy, and should contain explicit dependencies to the extensions actually implementing the application. In addition, the propagateDependencies property in the app.json file should be set to true. This will expose the dependencies to any extension taking dependency on the proxy Application version.

Partners will use the Application version property in their extension's app.json file to specify the expected application version.

In Visual Studio Code, the full set of symbol packages that make up the "application" will be pulled in when specifying an Application version in the app.json file.



An explicit dependency to Microsoft's Base Application will take priority over the Application version, but is redirected to "application" if the Base Application is not present on the system.

**NOTE** ApplicationVersion only allows resolving dependencies on compile. Whether the extension is in fact compatible with the provided alias is up to the embed extension authors to ensure and test.

### Camera/location AL API available in the browser

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

#### Business value

Users expect modern apps to take full advantage of their device hardware, such as taking pictures with their camera. Not only does this modernize the experience, but when applied to the right scenarios, it can also reduce time and effort of data entry and help capture information closer to the source.

#### Feature details

Developers will be able to programmatically activate the camera or get the current location through an AL-based API when Business Central is accessed through the browser. With support for both browser and apps, developers can rest assured that their scenarios light up on any form factor, as long as the user's device and browser support those capabilities.

Users remain in control of their privacy settings and can choose to grant or deny access to camera and location.

### Look up events and insert event subscriber in code

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

#### Business value

A core part of extension-based "customization" is the use of events and event subscribers.

To identify an event and generate an event subscriber code template, we added the Event Recorder in the client some time ago, allowing recording and inspecting of thrown events. However, in many cases, developers are either aware of the event they want to subscribe to or

want to have a fast way to search for the event (with type ahead/completion) and then insert event subscriber in code context.

### Feature details

Use the new Shift+Alt+E shortcut in the AL code editor to invoke a list of all events. You can use type ahead to dynamically search and filter the event list, and when pressing return to select an event entry, an event subscriber for the event will be inserted at the cursor position in the active AL code editor window.

### Multiple variable declarations of the same type in the same line

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

### Business value

Until now, each variable had to be declared on its own line. In larger objects, this led to pages of variable declarations, even if most of these were of the same type.

To reduce scrolling, improve readability, and make it easier to see and declare related types, it is now possible to add multiple variable declarations of the same type in a singular line.

### Feature details

Declare multiple variables of the same type in the same line, using a comma to separate variable names. For example, "foo, bar : Integer;"

### Obsolete tag and URL properties

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

### Business value

Adding a free-form ObsoleteTag allows partners, for example, to provide contextual data around obsoleting objects—such as branches and build numbers—to track and plan a final removal of obsoleted objects.

The ObsoleteUrl allows providing a URI with additional information on how to handle and rewrite code due to obsolete pending objects.

## Feature details

Objects that support the `ObsoleteState` property or `Obsolete` attribute today will get additional `ObsoleteTag` and `ObsoleteUrl` properties for tracking processes and provide additional information on obsoleted objects. Partners can choose their own scheme for what to track in `ObsoleteTag`, such as date or build, and it could be provided during development. Likewise, partners can choose to provide URLs for documentation on changes and handling impact downstream.

## Ability to refactor a field from a table to a table extension

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2020	Apr 2020

## Business value

Together with other refactoring features, this feature will unblock the transition to Business Central online for customers that have customizations to the Microsoft base application.

## Feature details

Using Sync-NAVApp, a developer can move a field from a table to a table extension without the need to write upgrade code.

## Onboarding

### Overview

With 2020 release wave 1, we improve the onboarding experience to get new users acquainted with Business Central faster.

## Improved onboarding experience

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

## Business value

With 2020 release wave 1, we improve the onboarding experience to get new users acquainted with Business Central faster.

## Feature details

We add discoverable paths to walk new users through the startup process for better discovery of the capabilities as well as accelerate the setup of critical business processes.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Power Platform

### Overview

With 2020 release wave 1, we increase integration with Microsoft Power Platform.

### Business Central integration with Common Data Service

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Business value

A new Common Data Service onboarding experience will be provided, where users will be able to connect to a Common Data Service environment and associate a Business Central company with a Common Data Service business unit. This will allow for multiple companies to connect to a Common Data Service instance. During setup, the Common Data Service connection entities from the default Common Data Service database will be synchronized.

This provides extensibility support for developers developing integrations for Common Data Service.

## Feature details

Common Data Service is at the center of the Dynamics 365 suite. Common Data Service enables users to have a 360-degree view of their business as data is available in Common Data Service. Once data is in Common Data Service, users will have a shared, consistent view of data across the Dynamics 365 solution. Dynamics 365 Business Central will support a set of entities in the Common Data Service default database provided in a "Business Central CDS Base Solution," which other integrations will depend on. The base solution will bring the capability to map a Company entity to a Business Unit entity in Common Data Service.

When developing extensions that integrate with Common Data Service, Business Central 2020 release wave 1 will bring extensibility capabilities, where Common Data Service tables and Common Data Service table extensions can be created. This will allow for any custom attribute to be synchronized.

### **Tell us what you think**

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## **Service fundamentals**

### **Overview**

No matter the industry type of a small or medium-sized business (SMB), business users expect a dependable service and platform on which to run their business, collaborate, and get work done. Along with our wave of innovative new features, we've invested heavily in boosting performance, reliability, and scalability of Business Central, across the platform and business application.

Business Central runs much faster with a focus on typical business scenarios and usage patterns. The experience in the browser is more responsive thanks to on-demand loading of page elements, server resources that are optimized for fast user interaction, and the database being tuned to handle more data and faster load times. We will continue to improve the application performance and are prioritizing common usage scenarios.

Users experience an even more stable service with scheduled upgrades that suit the individual business, maintenance during non-working hours, and matured service health practices to ensure maximum uptime. Users requiring assistance now have a single screen through which to find self-help material, share ideas with the community, and request support with streamlined response time.

The Business Central security team works behind the scenes to safeguard the security of your data. In addition to continual improvements of our security infrastructure and processes, we ensure Business Central continues to meet ISO 27001, ISO 27017, ISO 27018, SOC 1 and 2 Type 2, HIPAA BAA, and FERPA industry security and privacy compliance standards. For more details and a list of all certificates, see [Microsoft Dynamics 365 Cloud services compliance](#).

### **Resource limits for reports and web service calls**

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

## Business value

To make sure that other users can work even if a misconfigured web service method is running or a user started a report with no filters by mistake.

## Feature details

The Business Central server will have new settings where an administrator can set limits on the execution time for reports and SOAP web service calls. When the limit is reached, the server cancels the operation.

In Business Central online (software as a service), the default values are set by the Business Central operations team and cannot be overridden by customers or partners. In the 2020 release wave 1, the default values will be set to hours (actual values are to be determined).

For Business Central (on-premises), an administrator can control the settings in the server.

## Telemetry in Application Insights for partners

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2020	Apr 2020

## Business value

Partners can proactively help their customers with sign-in issues without the need to contact Microsoft support.

## Feature details

The Business Central server will emit telemetry about sign-in attempts (successful or failed). For failed attempts, the reason will be logged in the message as well.

After a successful authorization to Business Central, the server will also emit telemetry about the Open Company operation (successful or failed). For failed authorization to a company, the reason will also be logged in the message.

## Read scale-out

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2020	Apr 2020

## Business value

Customers can choose to run selected reports, queries, and web service calls on a read-only replica of the database. This way, analytical workloads will not have any impact on the primary database.

## Feature details

Business Central artifacts (Reports, API Pages, and Queries) now can get access to a read-only replica of the database.

The Page, Report and Query objects have a new property called "DataAccessIntent" that can take values ReadOnly or ReadWrite. This property works as a hint for the server, which will connect to the secondary replica if possible. When a workload is executed against the replica, insert/delete/modify operations are not possible, so a new validation is introduced for ReadOnly objects. Any of these operations will throw an exception at runtime (new compile-time validation will be added in the future).

# Customer Data Platform

## Overview of Dynamics 365 Market Insights 2020 release wave 1

Features will be updated soon.



## Overview of Dynamics 365 Customer Insights 2020 release wave 1

Dynamics 365 Customer Insights enables every organization to unify disparate data—be it transactional, observational, or behavioral sources—to gain a single view of customers and derive intelligent insights that drive key business processes. With Dynamics 365 Customer Insights, organizations can:

- **Eliminate data silos and unify customer data.**
  - Connect and unify data with ease, bringing in transactional, observational, and behavioral data from data sources by leveraging a prebuilt connector.
  - Transform customer data intelligently to build a unified customer profile conforming to the [Common Data Model](#).
- **Enrich customer profiles with audience intelligence contained within the Microsoft Graph.**

Build richer customer profiles by incorporating aggregated audience intelligence contained within the Microsoft Graph.
- **Enable powerful AI and insights.**
  - Leverage the data gravity around customer entity for AI, insights, and KPIs atop the single view of the customer.
  - Accelerate the process through quick-start AI and machine learning templates or custom algorithms using Azure Machine Learning.
- **Power business processes and personalize customer experiences.**
  - Empower marketing, sales, and service professionals to drive personalized engagement across channels. Leverage out-of-the-box, contextual customer insights and tailored customer profile cards that are infused in the everyday business applications.
  - Leverage rich APIs and the Microsoft Power Platform to enable and extend line-of-business experiences. This includes the ability to gain deeper customer insights with Microsoft Power BI, build custom apps with Microsoft Power Apps, and trigger workflows based on customer actions and signals using Power Automate.

### What's new and planned for Dynamics 365 Customer Insights

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

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This check mark (✓) shows which features have been released for public preview or early access and for general availability.

Feature	Enabled for	Public preview	General availability
<a href="#">Additional predictive insights</a>	Admins, makers, or analysts, automatically	Apr 2020	
<a href="#">Extensibility enhancements with new Power Automate connectors and Microsoft Teams add-in</a>	End users by admins, makers, or analysts	Apr 2020	
<a href="#">Support for incremental and near real-time data ingestion</a>	End users by admins, makers, or analysts	Apr 2020	
<a href="#">Data profiling capabilities</a>	End users by admins, makers, or analysts	-	Apr 2020
<a href="#">Data unification improvements</a>	End users by admins, makers, or analysts	-	Apr 2020
<a href="#">Enhancements to segments and measures</a>	End users by admins, makers, or analysts	-	Apr 2020
<a href="#">System administration enhancements</a>	End users by admins, makers, or analysts	-	Apr 2020
<a href="#">Customer Insights available in Microsoft Dynamics 365 Online Government</a>	Admins, makers, or analysts, automatically	-	May 2020

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
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For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

## Additional predictive insights

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 2020	-

### Feature details

Easily generate predictions based on unified profiles in Customer Insights to get a deeper understanding of customer patterns.

## Extensibility enhancements with new Power Automate connectors and Microsoft Teams add-in

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	-

### Feature details

This release includes enhancements to support extensibility scenarios with Microsoft Power Platform:

- Enhanced Power Automate connectors include additional actions.
- Microsoft Teams add-in allows you to view profile and insights data directly in Microsoft Teams.

## Support for incremental and near real-time data ingestion

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Apr 2020	-

## Feature details

Customer Insights now supports incremental and near real-time data ingestion.

## Data profiling capabilities

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Apr 2020

## Feature details

Customer Insights now includes data profiling capabilities to help you understand more about your customer data.

## Data unification improvements

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Apr 2020

## Feature details

Advanced configuration options provide:

- Ability to reset unification settings.
- Support for lookup formulas in unified customer activity timeline descriptions.
- URL support for unified customer activity timelines.
- Ability to add related attribute values to merged profiles.

## Enhancements to segments and measures

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Apr 2020

## Feature details

Segment enhancements include:

- New segment insights such as segment membership trends.
- Ability to quickly create segments by clustering customer data based on customer profile attributes.

Measures improvements include support for additional operators, filters, and enhancements to advanced mode.

## System administration enhancements

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Apr 2020

## Feature details

Administration enhancements include:

- Support for configuration import and export.
- Ability to reset Customer Insights environments with the option to retain ingested data.

## Customer Insights available in Microsoft Dynamics 365 Online Government

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	May 2020

## Feature details

With this release, Customer Insights is available for Microsoft Dynamics 365 Online Government.

## Overview of Dynamics 365 Product Insights 2020 release wave 1

Features will be updated soon.

# Microsoft Forms Pro

## Overview of Microsoft Forms Pro 2020 release wave 1

Microsoft Forms Pro was released July 1, 2019 as an enterprise survey solution that empowers everyone in an organization to develop enterprise-grade surveys to collect timely feedback from customers and employees. With the point-and-click simplicity and AI-assisted features of Forms Pro, everyone has the tools to create, send, and analyze custom surveys that integrate directly into an organization's workflows and business system.

For this spring 2020 release, our goal is to make it easier for organizations to implement an end-to-end, "voice of the customer" feedback solution. We're introducing a Forms Pro template solution that bundles the survey questions and business process workflows.

Using the customer service feedback template, you can automate sending surveys when a case is resolved in Dynamics 365. You can then use Power BI to get customer satisfaction insights that integrate survey results with product and customer service agent performance.

## What's new and planned for Microsoft Forms Pro

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

## Customer service template app

Measuring and maintaining high levels of customer satisfaction have become a competitive differentiator in today's commoditized market. Organizations need to manage customer satisfaction and understand key drivers that affect it.

Feature	Enabled for	Public preview	General availability
<a href="#">Customer feedback management solution template</a>	Admins, makers, or analysts, automatically	-	Apr 2020

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience for users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

## Customer service template app

### Overview

Measuring and maintaining high levels of customer satisfaction have become a competitive differentiator in today's commoditized market. Organizations need to manage customer satisfaction and understand key drivers that affect it. [CSM magazine](#) cited a study to highlight the importance of customer satisfaction.

### Customer feedback management solution template

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Apr 2020

### Business value

Customer experience is one of the primary differentiators that businesses can exert control over. Some analysts predict that by 2020, customer experience will overtake price and product as a key brand differentiator.



Forms Pro enables organizations to measure customer experience across channels, analyze customer feedback, share the insights with relevant people in the organization, and take timely action to close the loop with customers.

### Feature details

- **Survey templates:** Forms Pro now includes survey templates that you can customize to meet your specific business needs.
- **Integrated customer satisfaction insights dashboard:** The template includes a full dashboard that integrates survey results with customer records in Common Data Service.
- **Timely follow-up actions:** The template includes a follow-up workflow that automatically notifies you of customers' negative sentiments or detractor Net Promotor Scores, so you can follow up on the feedback in a timely manner.

## Weekly Report

Hi **Kenny Smith**,  
Based on the latest survey responses for the **Customer satisfaction survey**, we have uncovered following insights for you.

[See full report](#)



### Highlights from last week

#### NPS

Time you spent collaborating through email, meetings, and chats

15

▼ 10% from previous week



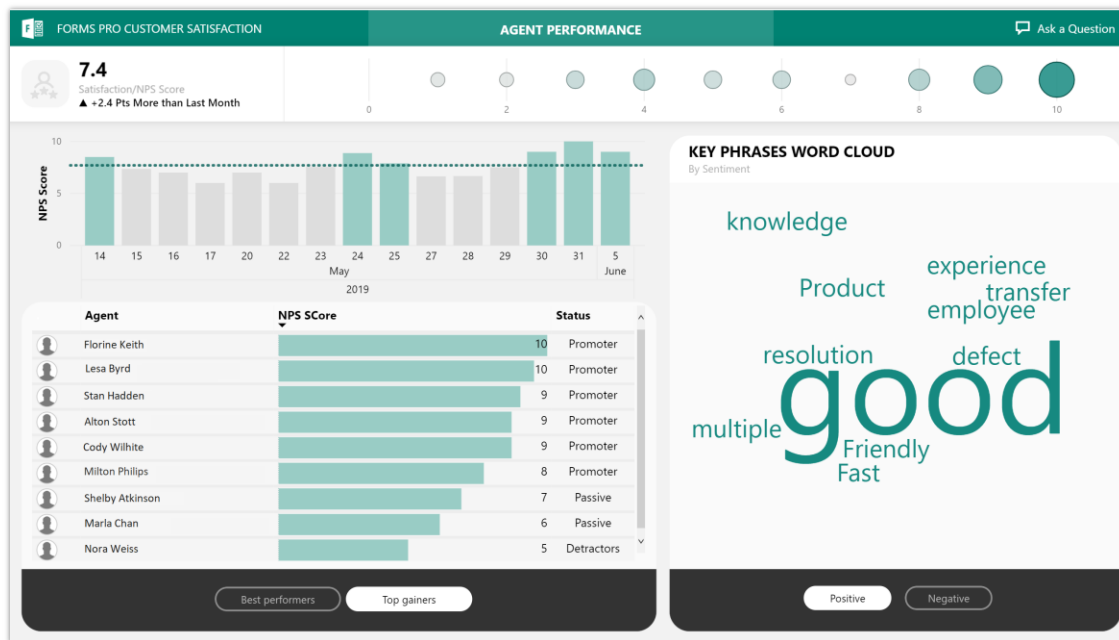
#### Response count

Time you spent focusing, based on 2-hour blocks on your calendar

500

▲ 12% from previous week

*Customer satisfaction daily report*



Customer satisfaction dashboard

**Forms Pro** **Customer Satisfaction** [Feedback](#) [?](#) [Microsoft \(default...\)](#)

Create questions Send survey View responses [Preview](#) [Theme](#) [Share](#) [...](#)

**Customer Satisfaction**

1. Hi {{First Name}}, How well do our {{Product Name}} meet your needs?

☐ Extremely well  
☐ Very well  
☐ Somewhat well  
☐ Not so well  
☐ Not at all well

2. How likely are you to recommend us to a friend or colleague?

0	1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	---	----

Not at all likely Extremely likely

3. Please share any additional comments or questions.

Saved

Customer satisfaction survey

Forms Pro Customer Satisfaction

Create questions Send survey View responses

← Choose a template or create from blank

a case is resolved in Dynamics 365

**When a record is updated**

- \* Environment: Microsoft (default) (org062da7b9)
- \* Entity Name: incidents
- \* Scope: Organization

Show advanced options

**Check if case is resolved**

statuscode x is equal to 5

Edit in advanced mode Collapse condition

**Check if customer is of type accounts**

\_customerid\_ty... x is equal to accounts

Edit in advanced mode Collapse condition

If no

### Customer satisfaction workflow

Forms Pro

Search

Customer Service Feedback

Assess and improve satisfaction of your customers with your customer service team. Quickly discover who your promoters and detractors are and take action to reduce customer churn.

**Survey Questions** Workflow Report

1. Overall how would you rate your experience with our customer service? \*

☆☆☆☆☆

2. Which feature influenced your rating the most?

- ☐ Product Knowledge
- ☐ Responsiveness
- ☐ Communication

3. How likely are you to recommend the product? \*

0 1 2 3 4 5 6 7 8 9 10

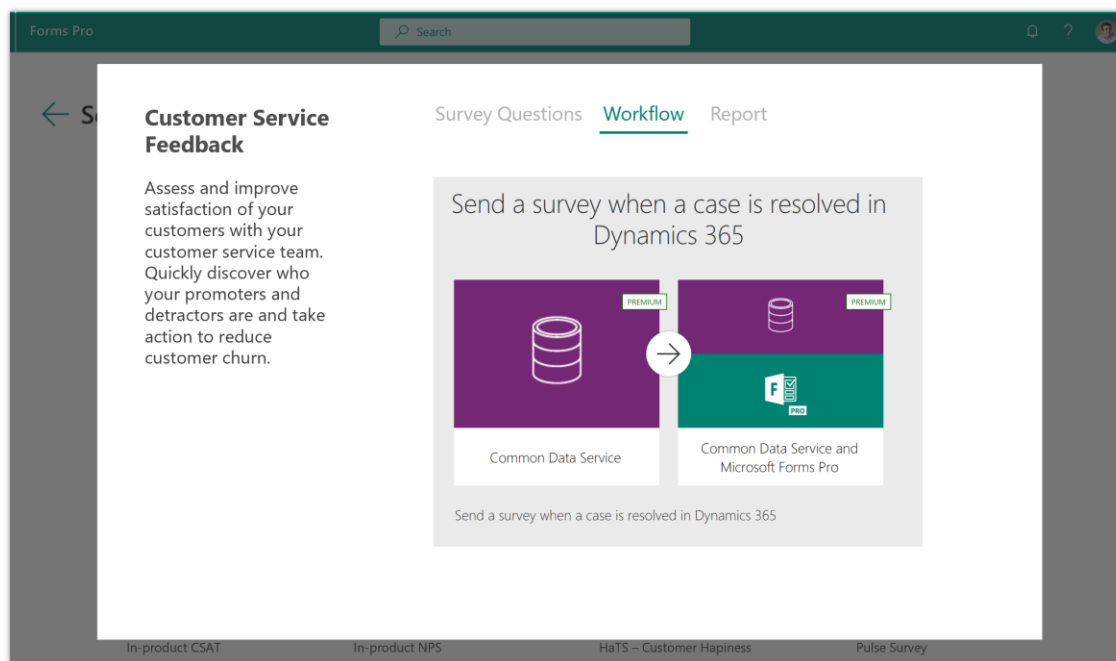
Not at all likely Extremely likely

4. Please share any comments, concerns and questions here

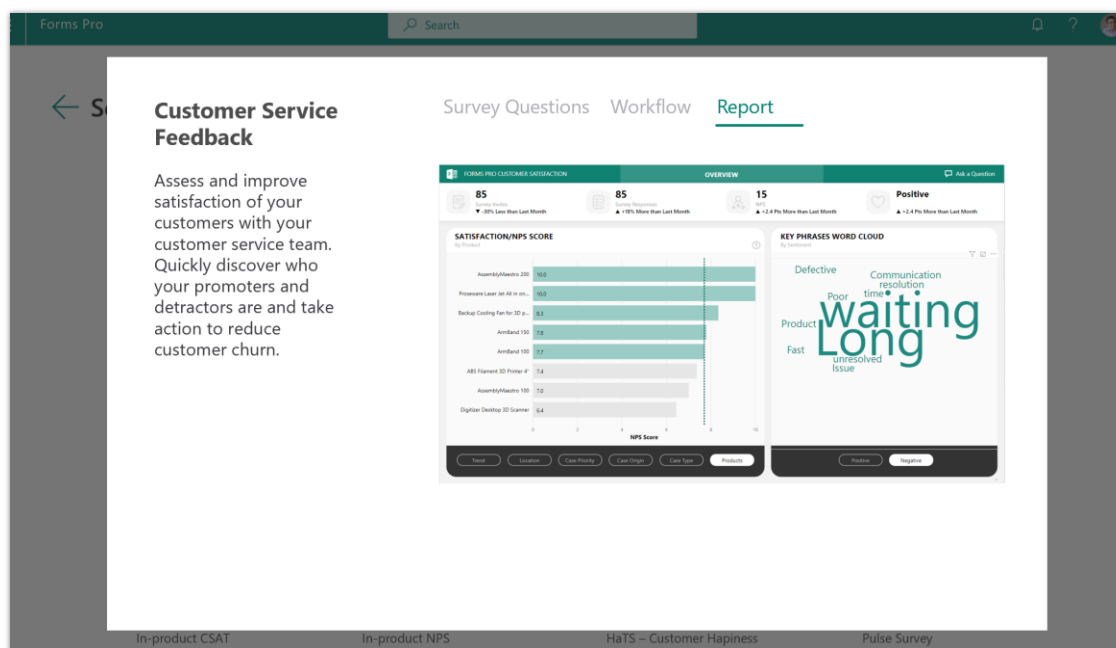
Enter your answer

In-product CSAT In-product NPS HaTS – Customer Happiness Pulse Survey

### Template for customer service feedback survey questions



*Template for customer service feedback workflows*



*Template for customer service feedback reports*

# Dynamics 365 Layout

## Overview of Dynamics 365 Layout 2020 release wave 1

Dynamics 365 Layout will no longer be updated with new features. In future releases, core features of Dynamics 365 Layout will migrate to the Dynamics 365 Guides application. Dynamics 365 Layout will remain a supported application until December 31, 2021, but you won't be able to purchase new subscriptions or additional seats after April 1, 2020. If you're an existing Dynamics 365 Layout customer or partner, please contact us at LayoutAppEoS to request support for migrating your solution to Dynamics 365 Guides. Learn more about Dynamics 365 Guides at <https://dynamics.microsoft.com/mixed-reality/guides/>.

# Industry accelerators

## Overview of Nonprofit 2020 release wave 1

The Nonprofit Accelerator enables you to develop nonprofit solutions based on entities and attributes that nonprofits commonly leverage for constituent management, fundraising, awards, program delivery, and impact tracking. These entities include donor commitments, designations, transactions, awards, disbursements, delivery frameworks, results, indicators, benefit recipients, and more. The Nonprofit Accelerator includes the Common Data Model for Nonprofits, sample apps, sample data, dashboards, and documentation.

### What's new and planned for Nonprofit

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

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This check mark (✓) shows which features have been released for public preview or early access and for General availability.

Feature	Enabled for	Public preview	General availability
<a href="#">Nonprofit Accelerator</a>	End users by admins, makers, or analysts	-	May 2020

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
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For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

For more information about geographic areas, data centers (regions), data storage, and replication, click **expand all** on the [Where your data is located page](#) and find the Microsoft cloud service for this feature.

## Nonprofit Accelerator

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	May 2020

### Feature details

The Nonprofit Accelerator continues to evolve at a rapid pace and includes the most comprehensive and inter-operable nonprofit data model available. This allows nonprofits to manage program delivery, beneficiary management, fundraising, volunteer management, and finance and operations while building to included standards like IATI (Global International Aid Transparency Initiative) and the United Nations Sustainable Development Goals (SDGs).

This release will focus on program delivery lifecycle management from proposal development to case management to monitoring, learning and evaluation. We will deliver further refined Volunteer Management and Nonprofit Operations Toolkit Template Apps while extending the nonprofit common data model to include the Humanitarian Data Exchange (HXL) standard. To advance partner enablement and nonprofit customer adoption, we will deliver a program delivery connected scenario and end-to-end test drive experience.

### See also

[Nonprofit Accelerator](#) (docs)



## Overview of Financial services 2020 release wave 1

The Financial Services Accelerator enables you to quickly develop solutions based on entities and attributes that banks commonly leverage for customer experience and other business processes. These entities include banks, branches, financial products, loans, referrals, limits, requested facilities, and more. The accelerator includes a banking data model, sample apps, dashboards, and connected experiences which showcase popular scenarios in the financial services industry.

### What's new and planned for Financial services

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

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Feature	Enabled for	Public preview	General availability
<a href="#">Financial Services Accelerator</a>	End users by admins, makers, or analysts	-	Apr 2020

Description of **Enabled for** column values:

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## Financial Services Accelerator

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Apr 2020

### Feature details

Our initial Financial Services Accelerator release was focused on both [Retail & Commercial Banking](#) and optimizing the customer experience, improving collaboration within a bank and being able to gain customer insights from analytics. This data model supported common banking activities as well as flexibility for other use cases in financial services and was developed in collaboration with [BIAN](#) and other open API initiatives to ensure interoperability to help unlock new Open Banking opportunities.

With this release, we have included additional out-of-the-box entity mappings to support insurance and wealth planning. This release will target new scenarios supporting claims, policies, and life events as well as new use cases for wealth management to service the needs of private banking and wealth planning.

### See also

[Financial Services Accelerator](#) (docs)

## Overview of Health 2020 release wave 1

The Healthcare Accelerator allows you to build solutions and create new use cases and workflows with entities focused on enhanced care coordination. It also gives you the ability to segment patients and providers based on Electronic Medical Record (EMR) data. We have developed the data model based on the HL7/FHIR specification to provide interoperability with EMR Systems. The Accelerator includes the patient care data model, customer engagement forms, sample apps, dashboards, and a connected experience related to holistic patient care.

### What's new and planned for Health

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

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Feature	Enabled for	Public preview	General availability
<a href="#">Healthcare Accelerator</a>	End users by admins, makers, or analysts	-	Apr 2020

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For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

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## Healthcare Accelerator

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Apr 2020

### Feature details

In the October 2019 release of the Healthcare Accelerator, we enhanced the model-driven app with an updated look and included new forms and controls to add functionality for care coordination. We also began a formal feedback process with partners and customers to ensure we are taking input in a consistent manner to drive increased innovation and usability for the upcoming releases.

The April 2020 release will include end-to-end scenarios covering Customer Service or Provider Call Center, Customer (Patient) Insights, Home Health, Physician Referrals, and Patient Segmentation and Outreach. Each facet of these scenarios will be dependent upon the corresponding Dynamics 365 app, and we also provide the baseline data model that will not rely on any dependencies and can be installed directly into a base Common Data Service environment.

### See also

[Healthcare Accelerator](#) (docs)

## Overview of Automotive 2020 release wave 1

The Automotive Accelerator enables you to quickly develop solutions based on entities and attributes that dealerships and OEMs commonly leverage for customer experience and other business processes. These entities include deals, sales contracts, specifications, fleet, warranties, inspection, test drives, branding, business, customer-vehicle relationship, vehicle and equipment, lead, service and after-sales management, and more. The accelerator includes an automotive data model, Power BI apps, canvas and model-driven sample apps based on connected customer experience.

### What's new and planned for Automotive

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

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This check mark (✓) shows which features have been released for public preview or early access and for general availability.

Feature	Enabled for	Public preview	General availability
<a href="#">Automotive Accelerator</a>	End users by admins, makers, or analysts	-	May 2020

Description of **Enabled for** column values:

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For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

For more information about geographic areas, data centers (regions), data storage, and replication, click **expand all** on the [Where your data is located page](#) and find the Microsoft cloud service for this feature.

## Automotive Accelerator

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	May 2020

### Feature details

The initial release of the Automotive Accelerator has focused on optimizing the customer experience and business processes commonly related to dealerships and OEMs. With this release, we have included out-of-the-box entity mappings to support integration with asset management, telematics, campaigns, update to the Device entity to support Connected Field Service, and predictive maintenance use cases.

This release targets end-to-end scenarios covering digital marketing, and personalized experiences with customer 360 insights, as well as a customer journey template to automate key pre and post sales activities.

### See also

[Automotive Accelerator](#) (docs)

# 2020 release wave 1 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning Feb 3, 2020. Features from the following apps are available as part of early access:

- Power Apps

The features from these apps update the existing user experiences. You can opt in early to enable these features in your environment. This will allow you to test these features and then adopt them across your environments. For information on how to enable these features, see [Opt in to 2020 release wave 1 updates](#).

**IMPORTANT** If you are using Dynamics 365 apps, such as Sales, Service, Marketing, Finance, Supply Chain Management, Business Central, and Commerce, there are early access features that could impact your users. For Dynamics 365 early access features, see [2020 release wave 1 features available for early access](#).

## Power Apps

For a complete list of the Power Apps features, see [What's new and planned for Power Apps](#).

Feature	Enabled for	Early access	General availability
<a href="#">Canvas components are generally available</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Chart and dashboard styling improvements for model-driven apps</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Improved grid column filtering in Power Apps</a>	End users, automatically	Feb 3, 2020	Apr 2020
<a href="#">Improvements to quick find search experience on a grid</a>	End users, automatically	Feb 3, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
<a href="#">Save is always visible in the command bar on edit forms</a>	End users, automatically	Feb 3, 2020	Apr 2020



# Power Apps

## Overview of Power Apps 2020 release wave 1

Power Apps is the industry-leading low-code application development platform that underpins Dynamics 365 extensibility, Office 365 customization, and standalone custom line of business applications for customers around the world. Power Apps dramatically lowers the cost, complexity, and time of software development through a range of powerful low-code development tools, and deep data platform in the Common Data Service, and hundreds of connectors to common business data sources.

Use Power Apps [documentation](#) to get expert information and answers to address your needs, regardless of how you use Power Apps.

The 2020 release wave 1 provides significant improvements for Power Apps developers of all skill levels, improving the sophistication and usability of apps that are created across the web and mobile devices.

## What's new and planned for Power Apps

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

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This check mark (✓) shows which features have been released for public preview or early access and for general availability.

## Deep integration from Azure to Microsoft Teams

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Start creating apps directly from Microsoft Teams using your existing SharePoint data</a>	Admins, makers, or analysts, automatically	-	-	May 2020

## Excellent mobile, including offline

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Enhanced capabilities and experience in offline mode</a>	End users by admins, makers, or analysts	-	-	Apr 2020
<a href="#">Canvas and model-driven apps run on a single mobile application</a>	End users by admins, makers, or analysts	-	Mar 2020	Apr 2020

## High velocity developers of all skill levels

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Instrument your canvas apps with Azure Application Insights</a>	Admins, makers, or analysts, automatically	-	Apr 2020	
<a href="#">Modern solution import experience</a>	Admins, makers, or analysts, automatically	Jun 2020	-	
<a href="#">Canvas app Monitor tool is now generally available</a>	Admins, makers, or analysts, automatically	-	-	May 2020
<a href="#">Modern solution explorer gets a makeover</a>	Admins, makers, or analysts, automatically	-	-	Jun 2020
<a href="#">Power Apps Test Studio for canvas apps is now generally available</a>	Admins, makers, or analysts, automatically	-	-	Jun 2020

## Power Apps portals improvements

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Web APIs for CRUD operations on Common Data Service entities</a>	Admins, makers, or analysts, automatically	Apr 2020	-	

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Portal Checker enhancements</a>	Admins, makers, or analysts, automatically	-	-	Apr 2020
<a href="#">Power BI Embedded component in portal designer</a>	Admins, makers, or analysts, automatically	-	-	Apr 2020
<a href="#">Simplified themes in portals Studio</a>	End users by admins, makers, or analysts	-	-	Apr 2020
<a href="#">Support for additional entities in global search</a>	End users by admins, makers, or analysts	-	-	Apr 2020
<a href="#">Support for Authorization Code flow for OpenId Connect based authentication providers</a>	End users by admins, makers, or analysts	-	-	Jun 2020
<a href="#">Simplified permission management</a>	Admins, makers, or analysts, automatically	Apr 2020	-	Jun 2020
<a href="#">Simplified portal identity provider configuration</a>	Admins, makers, or analysts, automatically	Apr 2020	-	Jun 2020

## Sophisticated apps on a unified platform

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Build responsive, reflowing canvas app pages</a>	End users by admins, makers, or analysts	Jun 2020	-	
<a href="#">Enabling printable pages in canvas apps</a>	End users by admins, makers, or analysts	Jul 2020	-	
<a href="#">Auto generate web app on top of your existing data</a>	Admins, makers, or analysts, automatically	-	-	Apr 2020

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Large file and image support in model-driven forms</a>	End users by admins, makers, or analysts	-	-	Apr 2020
<a href="#">Chart and dashboard styling improvements for model-driven apps</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Enable creating and editing data in forms displayed as a modal dialog without navigating away</a>	Admins, makers, or analysts, automatically	Feb 2020	-	Apr 2020
<a href="#">Improved grid column filtering in Power Apps</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Improvements to quick find search experience on a grid</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Save is always visible in the command bar on edit forms</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Improved themes in Power Apps</a>	End users by admins, makers, or analysts	Mar 2020	-	Apr 2020
<a href="#">Improved data source experience and Common Data Service view are generally available</a>	Admins, makers, or analysts, automatically	✓ Aug 14, 2019	-	Apr 2020
<a href="#">Canvas components are generally available</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Easily access and search for help while building apps</a>	Admins, makers, or analysts, automatically	-	-	May 2020
<a href="#">Build apps on top of your existing data in SharePoint more easily</a>	Admins, makers, or analysts, automatically	-	-	May 2020

\* Some features are available for you to opt-in as part of early access on February 3, 2020, including all mandatory changes that impact end users. Learn more about [early access](#).

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **End users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their end users.

## Deep integration from Azure to Microsoft Teams

### Overview

A core strength of Power Platform is our deep integration from productivity applications to advanced capabilities in Azure. We're continuing to invest in better Microsoft Teams integration as well as improving the experience of Azure developers on the platform.

### Start creating apps directly from Microsoft Teams using your existing SharePoint data

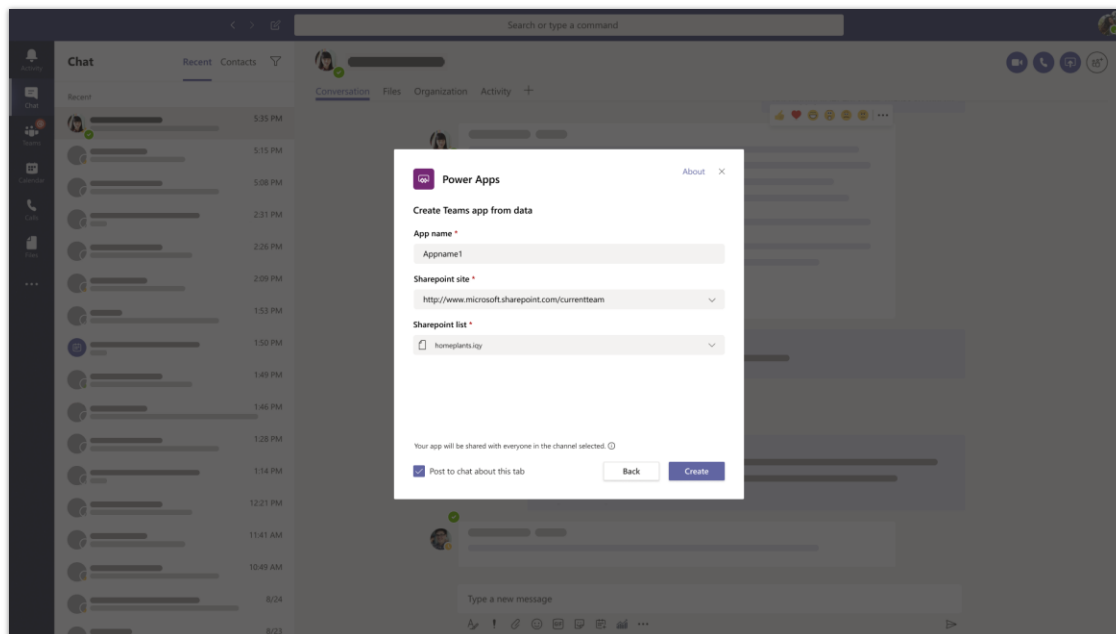
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	May 2020

### Business value

By making it easier to create apps for Microsoft Teams with existing data, your business can augment Microsoft Teams more quickly so that your employees always have the information they need while collaborating with others.

### Feature details

If you are using Microsoft Teams, you can now easily create a new app within one of your channels. While creating your new app, you have the opportunity to automatically generate the first few screens using data already existing in your Microsoft Team's SharePoint site.



*Create Microsoft Teams app from SharePoint data*

## Excellent mobile, including offline

### Overview

Power Apps is investing heavily in our mobile platform. We're combining canvas and model apps into a single front door, enhancing offline support and improving mobile-specific user experiences across the board.

### Enhanced capabilities and experience in offline mode

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Apr 2020

### Feature details

Ability to work in offline mode is critical for front line workers to perform their jobs because they usually work in an area of poor or no internet connectivity. We are continuously working towards improving this capability to ensure that users have a great experience in offline mode. These improvements are aimed at model-driven apps only.

Some of the improvements coming in April are:

- Model-driven apps are faster and more reliable in offline mode, enhancing the productivity of users.
- Seamless experience in offline mode through better communication and more actionable error messages.
- Entities, such as **Currency**, will be available in offline mode.
- The barcode scanner control will also be available in offline mode.

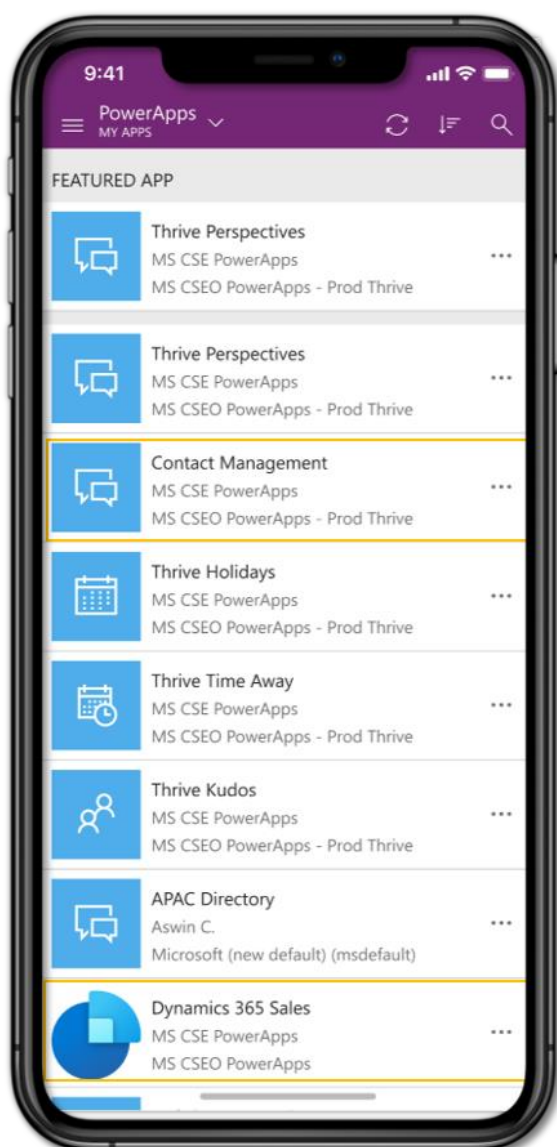
### Canvas and model-driven apps run on a single mobile application

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	Mar 2020	Apr 2020

#### Feature details

Canvas apps and model-driven apps are two rich ecosystems of Power Apps that bring different sets of capabilities to users. Today, there is no way for users to access both these applications using a single mobile app.

With this feature, users will be able to access all of their favorite apps in a single mobile application, Power Apps mobile app, without the need to switch. App Makers can deliver targeted experiences to users on a single mobile application; either through a pixel-perfect, task-based, canvas app or through a declarative, metadata-driven model-driven app. Both canvas and model-driven applications will appear together in a single list of apps in the current Power Apps mobile app.



*Canvas applications and model-driven applications (highlighted) accessed from the same app*

## High velocity developers of all skill levels

### Overview

Power Apps empowers every developer. We're adding "full stack" low code capabilities that help makers of all backgrounds test their features, ensure performance, and monitor usage.

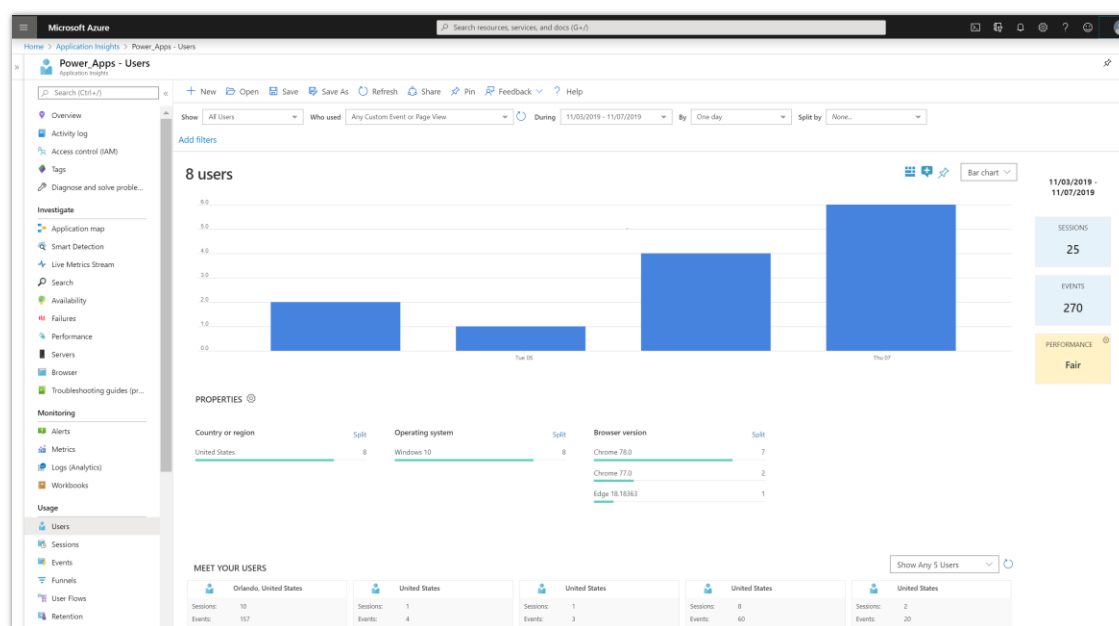


## Instrument your canvas apps with Azure Application Insights

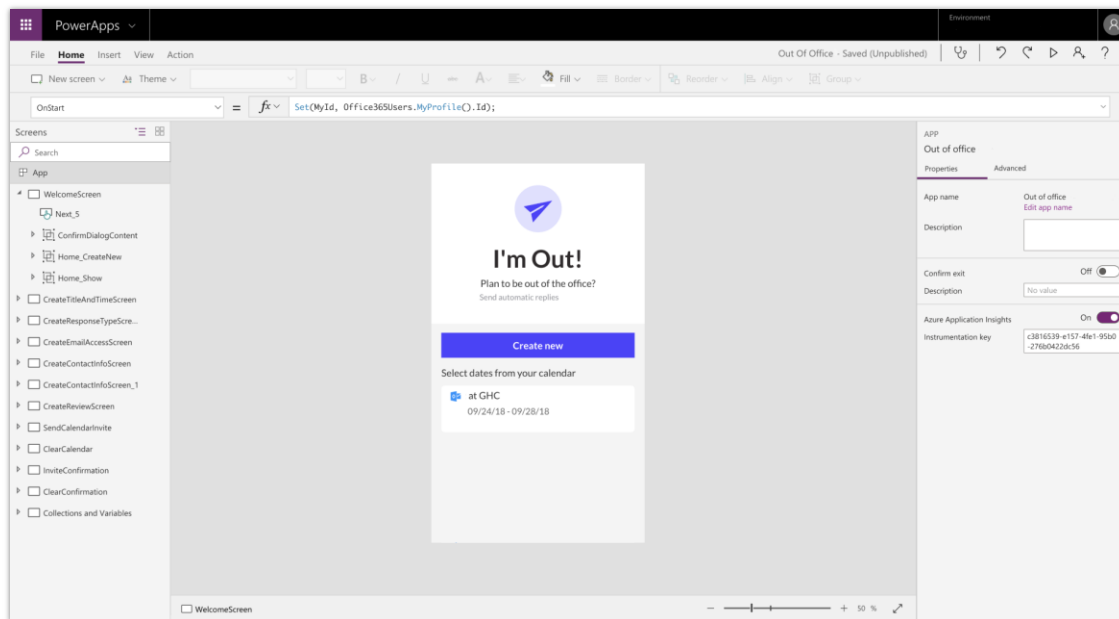
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	Apr 2020	-

### Feature details

With telemetry now available, admins and app makers can learn how many people are using the app or features and how many sessions, and they can segment the data by country, browser, or other telemetry properties. Makers are also able to write custom traces from their app to Application Insights and build custom queries, reporting, and alerting on top of their telemetry data.



### Azure Application Insights



*Enable app insights*

## Modern solution import experience

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Jun 2020	-	-

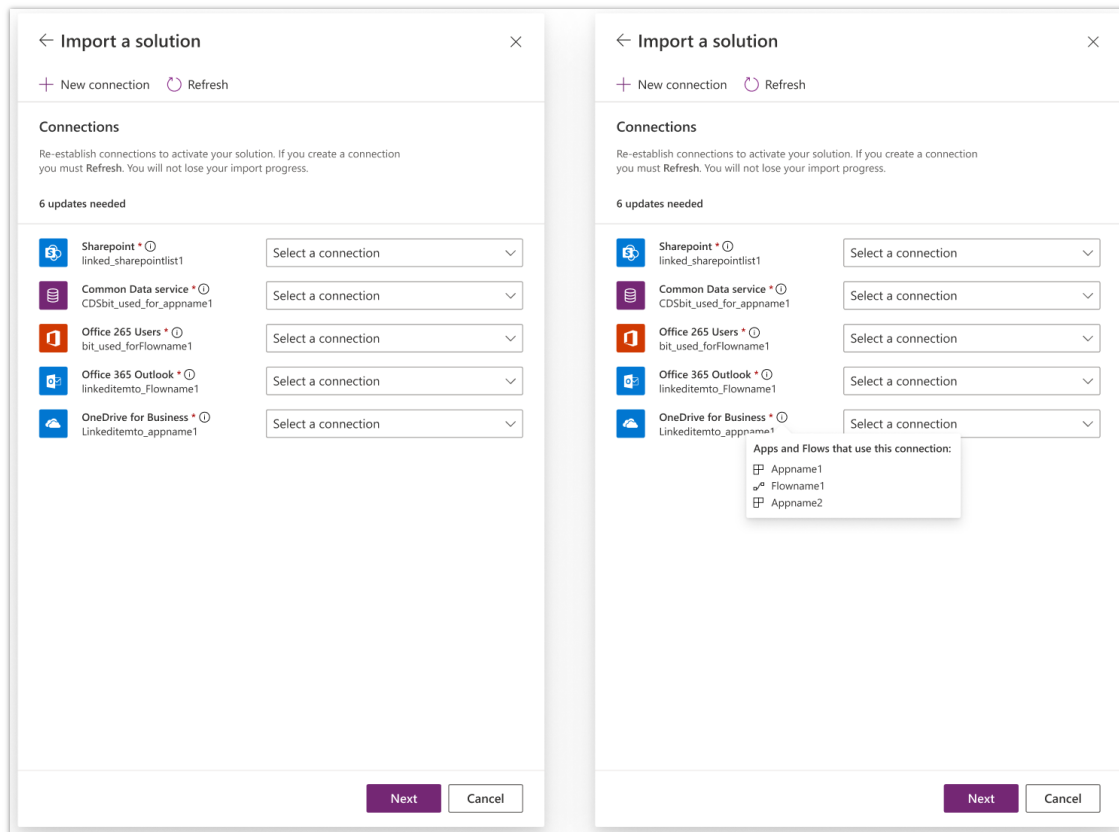
## Business value

We've reimaged the solution import interface to remove complex decision making and ensure solution health. The new experience is more streamlined and allows for configuring inputs that change from environment to environment.

## Feature details

In addition to supporting capabilities of classic solution import, the modern experience offers the following enhancements:

- You're now able to create and authorize the connections required by your flows so that they're created in a working state.
- Set environment variable values required by other components in your solution.
- Reduced complexity when choosing from import actions.
- Accessibility.



## Import

## Canvas app Monitor tool is now generally available

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	May 2020

## Business value

The canvas app Monitor tool is now generally available allowing makers to diagnose and troubleshoot their applications quicker.

## Feature details

With improved capabilities to import/export log files, share diagnostic sessions, inspect, interpret, filter the results, and visualize event timelines, makers can easily identify problem areas and fix them in their apps.

**Power Apps | Monitor - Kudos**

Clear data Download Import

#	Time	Status	Duration	Category	Operation	DataSource	Control property	Response size
1	12:06:47.289	200	302.86	Network	MyProfile	Office365Users	Select Colleague Screen.OnVisible	397
2	12:06:47.884	200	576.26	Network	RelevantPeople	Office365Users	Select Colleague Screen.OnVisible	1,388
3	12:06:48.495	200	527.23	Network	UserPhotoMetadata	Office365Users	usingImage	109
4	12:06:48.529	200	524.22	Network	UserPhotoMetadata	Office365Users	usingImage	109
5	12:06:48.555	200	975.16	Network	UserPhotoMetadata	Office365Users	usingImage	109
6	12:06:49.046	200	1,071.86	Network	UserPhotoMetadata	Office365Users	usingImage	109
7	12:06:49.083	200	1,093.1	Network	UserPhotoMetadata	Office365Users	usingImage	109
8	12:06:49.209	200	1,288.78	Network	UserPhotoMetadata	Office365Users	usingImage	109
9	12:06:49.226	200	1,288.3	Network	UserPhotoMetadata	Office365Users	usingImage	109
10	12:06:49.386	200	310.2	Network	getFlows	crd8d_kudouser	btnSelectColleague.OnSelect	676
11	12:06:50.344	200	1,281.94	Run	Kudos_Check_Membe...	btnSelectColleague.OnSelect		31
12	12:06:51.617	200	477.79	Network	getFlows	crd8d_applicationsell...	Send Kudos Screen.OnVisible	135
13	12:06:51.630	204	665.32	Network	UserPhoto	Office365Users	profilingImage	0
14	12:06:52.457	200	1,295.03	Network	Run	Kudos_Check_Membe...	Timer_CheckRecipientEnrollment_2.OnT...	31
15	12:06:52.701	200	227.02	Network	getOptionSettings			451
16	12:07:05.742	200	245.3	Network	UserProfile	Office365Users	btnConfirmSendKudos.OnSelect	401
17	12:07:13.802	200	312.65	Network	getFlows	crd8d_bhvapplicatio...	btnConfirmSendKudos.OnSelect	139
18	12:07:16.632	404	282.21	Network	Manager			290
19	12:07:16.784	201	729.91	Network	createFlow		btnConfirmSendKudos.OnSelect	3,254
20	12:07:19.283	200	2,219.83	Network	getFlows	crd8d_kudos	Dashboard Screen.OnVisible	38,793
21	12:07:20.366	204	795.86	Network	UserPhoto	Office365Users	receiveImageImage	0
22	12:07:20.387	204	775.86	Network	UserPhoto	Office365Users	receiveImageImage	0
23	12:07:20.395	204	684.16	Network	UserPhoto	Office365Users	receiveImageImage	0
24	12:07:36.381	200	1,067.21	Network	getFlows	crd8d_kudos	My Kudos Screen.OnVisible	1,499
25	12:07:36.404	200	1,091.74	Network	getFlows	crd8d_kudos	My Kudos Screen.OnVisible	4,279
26	12:07:37.758	204	1,196.53	Network	UserPhoto	Office365Users	receiveImage_2Image	0

Items: 26 Provide feedback

**Manager**

Details Formula Request Response

```

1 {}
2 {
3   "duration": 282.21,
4   "size": 290,
5   "status": 404,
6   "headers": {
7     "Cache-Control": "no-cache, no-store",
8     "Content-Length": 290,
9     "Content-Type": "application/json",
10    "Date": "Wed, 08 Jan 2020 12:07:16 GMT",
11    "Expires": "-1",
12    "Pragma": "no-cache",
13    "Strict-Transport-Security": "max-age=31536000; includeSubDomains",
14    "Timing-Allow-Origin": "*",
15    "X-Content-Type-Options": "nosniff",
16    "X-Frame-Options": "DENY",
17    "X-MS-AppInitiated-Response-ID": "70417c366-6546-49c1-9c47-fc796548-477",
18    "X-MS-Request-Id": "70417c366-6546-49c1-9c47-fc796548-477",
19    "X-MS-User-Agent": "PowerApps/3.20013.0 (Web AuthoringTool; AppName=277c47-5219-4803-8430-5c120774889)",
20    "X-MS-Client-Request-Id": "70417c366-6546-49c1-9c47-fc796548-477"
21  },
22  "body": {
23    "status": 404,
24    "message": "No manager found for the specified user.\r\nClientRequestId: 8417c366-6546-49c1-9c47-fc796548-477",
25    "error": {
26      "message": "No manager found for the specified user.",
27    },
28    "source": "office365users-dfscn-accom-dfscn-01-p.azurewebsites.net"
29  }
}

```

## Canvas app Monitor

## Modern solution explorer gets a makeover

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Jun 2020

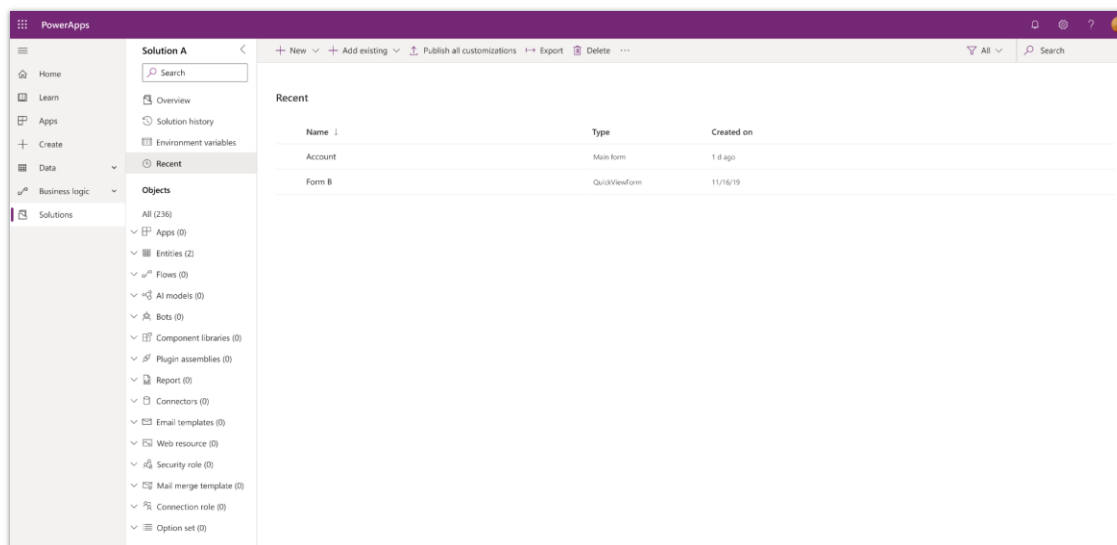
## Business value

Spend less time searching and transitioning between designers and more time on making apps.

## Feature details

We've added a secondary navigation for easier transitions between solution components. Additionally, now your recent items are just one click away. If you leave and come back we'll remember your settings so you can pick up right where you left off.





### *Solution updates*

## Power Apps Test Studio for canvas apps is now generally available

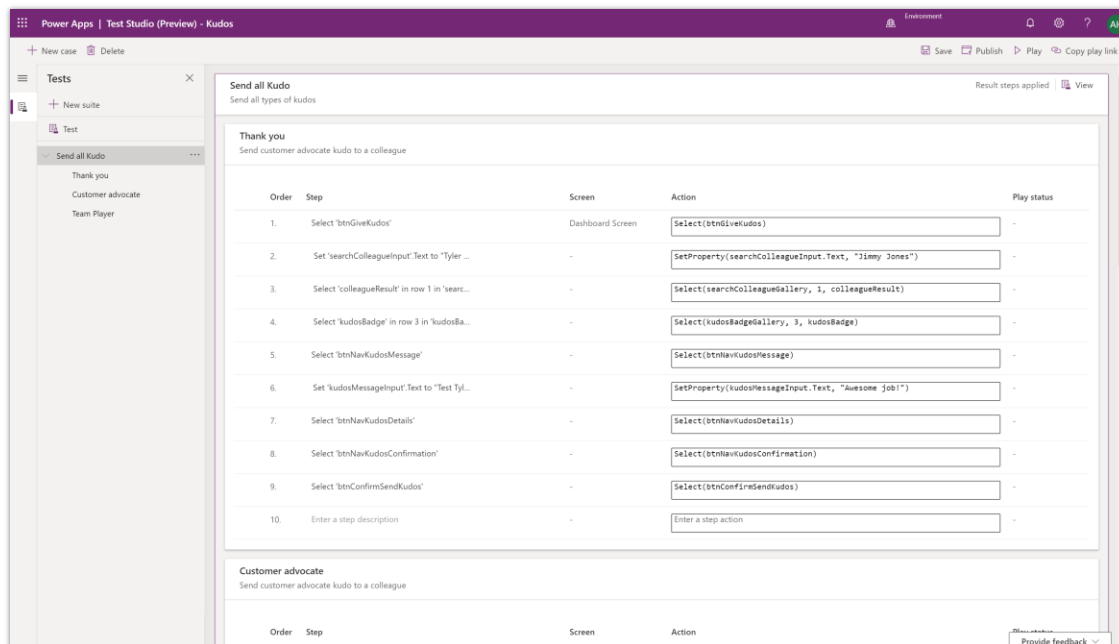
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Jun 2020

### Business value

Building on the preview release, the Power Apps Test Studio for canvas apps is now generally available with support for all controls and integration into your build and release pipelines.

### Feature details

- Full support for all Power Apps native controls and custom components.
- New capabilities to run tests automatically from release pipelines.
- Ability for makers to establish key quality gates for apps via efficient test automation.



## Test Studio

## Power Apps portals improvements

### Overview

Power Apps portals are enabling low-code makers to roll out experiences to broad external audiences. We're continuing to advance portals capabilities as usage grows.

### Web APIs for CRUD operations on Common Data Service entities

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Apr 2020	-	-

### Feature details

The liquid tags in portals today provide read-only capability. Creating, updating, and deleting operations require using UI components like entity list and entity forms. This feature adds Web APIs for portals that allow users to create, read, update, and delete operations across all Common Data Service entities.

## Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

## Portal Checker enhancements

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Apr 2020

## Feature details

The Portal Checker tool (released in the October '18 wave) checks portal configuration, identifies potential configuration problems, and provides solutions that help resolve portal issues. Portal customizers and administrators can use this tool to quickly resolve common issues and reduce the amount of time spent on diagnosing issues. As part of this feature enhancement, we add the ability to identify more scenarios that help resolve common portal issues.

## Power BI Embedded component in portal designer

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Apr 2020

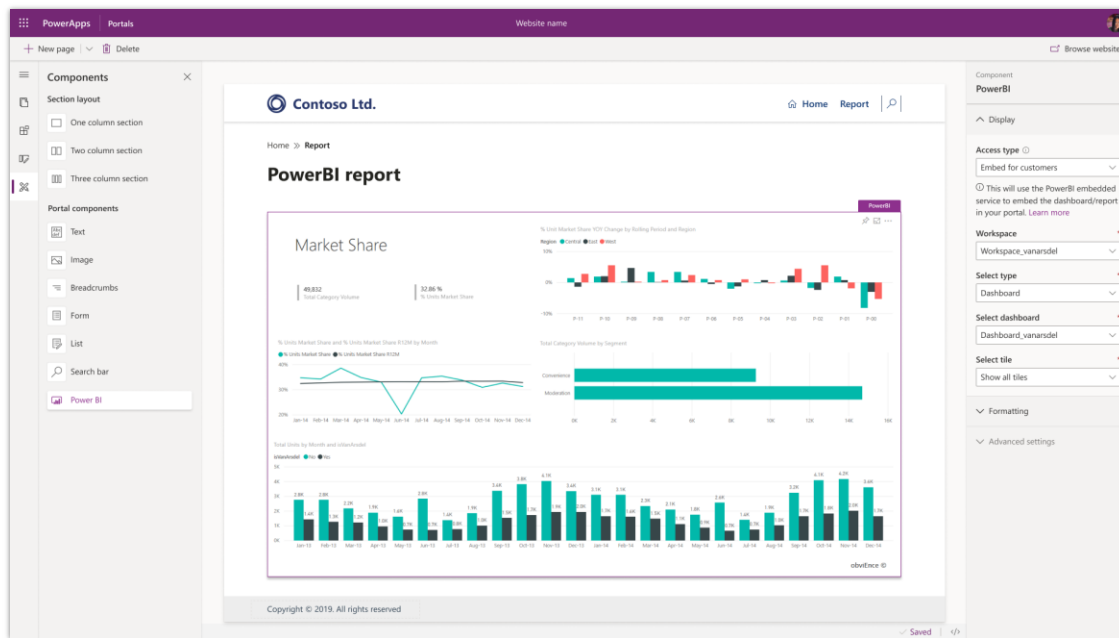
## Business value

Portal provides the first party integration with Power BI by using the liquid tags. With Power BI Embedded component in portal designer experience we aim to simplify integration and abstract the liquid tag complexity.

## Feature details

Embedding the Power BI in portal using liquid tag is quite cumbersome work, as maker has to get require data from Power BI and pass these values to appropriate parameter in liquid code.

With this feature we aimed at enabling Power BI Embedded as a first class component in portal designer experience similar to Forms and List. So, maker can add require Power BI report or dashboard in portal by using the portal designer property panel, without worrying about the liquid code.



*Power BI Embedded as component*

## Simplified themes in portals Studio

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Apr 2020

### Feature details

This feature provides simplified themes in portals Studio. Portal makers can use themes for common website properties using a simple and easy configuration experience.

## Support for additional entities in global search

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Apr 2020

### Business value

Global search helps users quickly search information across multiple record types. Users can already search across webpages and files, knowledge articles, blog and forum posts, ideas, and

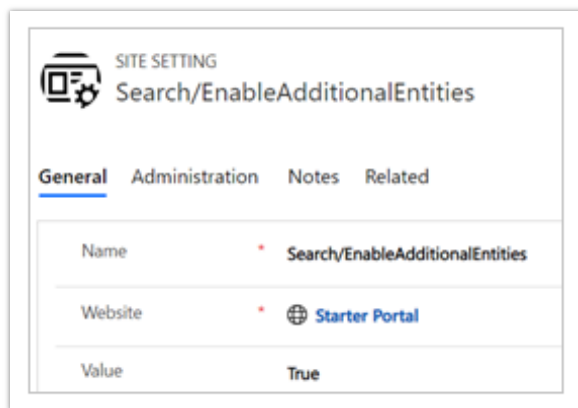


cases. Supporting additional entities, including custom ones, helps customers extend global search to more record types for their users. This especially helps customers derive more value from global search in Power Apps portals built from blank using starter portal template.

### Feature details

This feature aims at adding support for additional entities that can be searched within a portal in a configurable way.

The capability to enable search is controlled via settings:

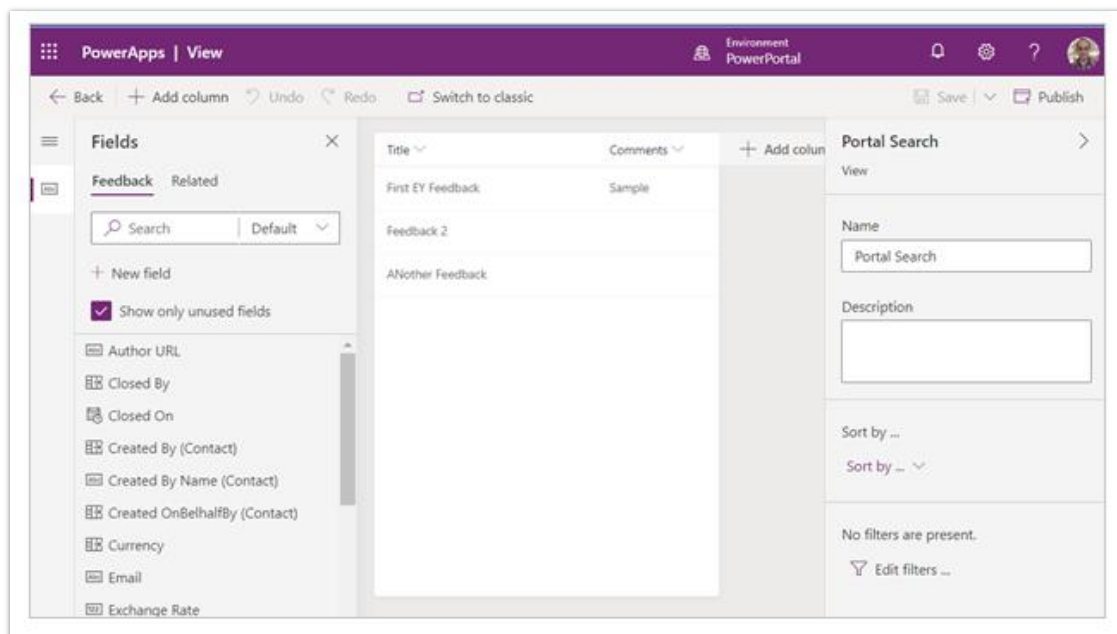


The screenshot shows a configuration page titled 'SITE SETTING' with a sub-header 'Search/EnableAdditionalEntities'. Below the header are four tabs: 'General', 'Administration', 'Notes', and 'Related'. The 'General' tab is selected. The configuration is displayed in a table-like structure with three rows: 'Name' with a red asterisk and the value 'Search/EnableAdditionalEntities'; 'Website' with a red asterisk, a globe icon, and the value 'Starter Portal'; and 'Value' with the value 'True'.

SITE SETTING	
Search/EnableAdditionalEntities	
<b>General</b> Administration Notes Related	
Name *	Search/EnableAdditionalEntities
Website *	Starter Portal
Value	True

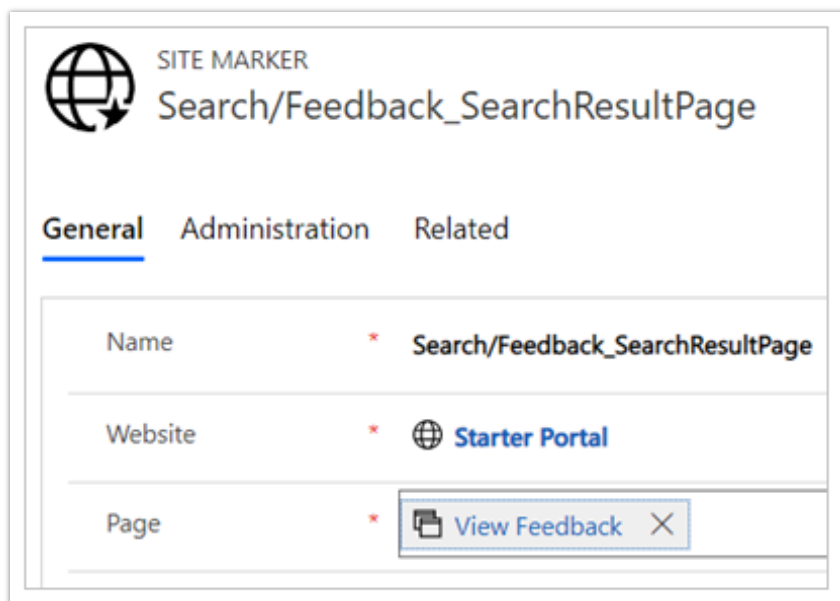
#### *EnableAdditionalEntities search site setting*

Records of a particular type that are to be made in global search and the fields that are indexed for search can be configured via a view for each entity individually.



### Portal Search view

Record types can be secured and made available in search results via explicit **Read** entity permissions. Makers can specify the page that opens from their search results for each record type that they enable the search on.



### Feedback\_SearchResultPage result page value

Global search is based on Lucene.Net, and its current capabilities, such as specifying additional weights and filters, support for terms, and wildcards are available. Also, the configuration of entity filters, support for *searchindex* liquid tag are available for additional entities.

*Search query site setting*

### Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

### Support for Authorization Code flow for OpenId Connect based authentication providers

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Jun 2020

### Feature details

Authorization Code flow is one of the major authentication flow supported by OpenId Connect protocol for user authentication in applications. As part of this feature, we are adding support for Authorization Code flow.

### Simplified permission management

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Apr 2020	-	Jun 2020

### Feature details

This feature provides a simplified roles and permission management experience to makers setting up the portal that includes the following:

- Configuring web roles
- Configuring entity permissions

### Simplified portal identity provider configuration

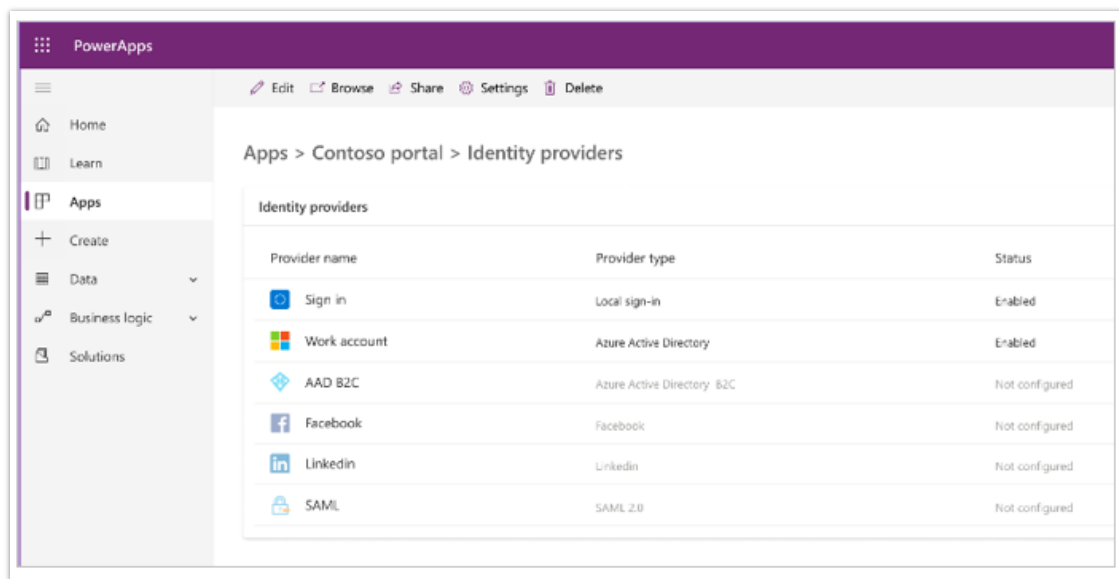
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Apr 2020	-	Jun 2020

### Business value

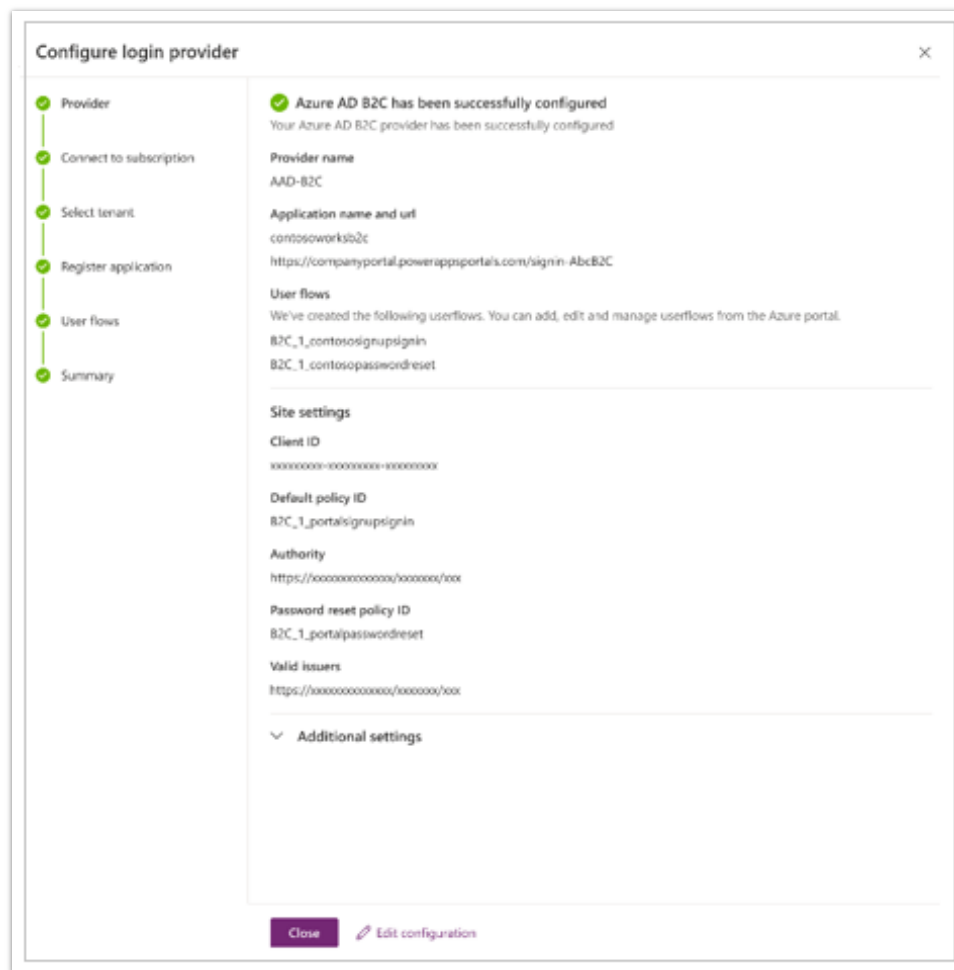
Setting up authentication provider is a core customization in any portal. With simplified portal identity provider configuration we aim at providing in-app guidance for identity provider setup and abstract setup complexities. This helps makers and administrators quickly and easily perform setup for supported identity providers and also reduce usual configuration errors.

### Feature details

The authentication setup experience today is complex and involves multiple steps. With the Azure Active Directory B2C as a provider, we make the experience easier with a step-by-step wizard and automate as much as possible so a user does not have to follow long documentation steps configuring all of this manually.



*Identity providers for portals*



### *Identity provider wizard*

With other identity providers the feature provides guidance and an intuitive configuration experience. For example, for OAuth 2.0 based login providers, the setup provides links to provider documentation, easy-to-copy portal redirect URLs, and instructions to obtain and configure Client ID and Client Secret settings.

**Configure identity provider**

**Select provider**

**Set up Facebook**

**1. Create Facebook app**  
To use Facebook as an identity provider, you'll need to create an app in Facebook for developers. [Learn more](#)  
Add the redirect URL below to your Facebook app configuration.

**Redirect URL**   
`https://portal.powerappsportals.com/signin-facebook` **Copy**

**2. Configure site settings**  
You can add, edit and manage additional site settings from the portal management app.

**Client ID** \*

**Client secret** \*

**Additional options**

**Back** **Create** **Cancel**

*Configure OAuth 2.0 login provider*

## Sophisticated apps on a unified platform

### Overview

Power Apps combines the flexibility of a blank canvas that can connect to any data source with the power of rich forms, views, and dashboards modeled over data in the Common Data Service. As we continue to combine the strengths of both canvas and model-driven applications, users of both app types will benefit with greater control and flexibility.

## Build responsive, reflowing canvas app pages

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Jun 2020	-	-

### Feature details

In Power Apps Studio, app makers can build pages that are fully responsive to changes in screen size and orientation and offer the same flexibility for custom UI and data binding as standard canvas app screens. These pages contain pre-built layouts with regions that automatically re-flow as the available real estate on the screen changes, and they also support all existing canvas concepts, such as reusable custom components. App makers can build these components in Power Apps Studio, or a professional developer can build them by using Power Apps component framework.

All app developers, including implementers of Common Data Service, can build fully custom and responsive experiences into their applications, thus improving experiences that are tailored to the needs of users and increasing their satisfaction. Many people in the Power Apps community have requested this important step on the journey toward unifying app types.

### Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

## Enabling printable pages in canvas apps

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Jul 2020	-	-

### Business value

This has been a top requested item from the Power Apps community and enables field service like scenarios.

### Feature details

Makers are able to configure a printable page in their canvas apps, taking the content on the screen and turning it into a printable format (PDF). This enables users to use components and concepts they already know to be able to create and capture a page to print. This has been a



top requested item from the Power Apps community to enable scenarios that require a document or file which can be printed or emailed.

### Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

### Auto generate web app on top of your existing data

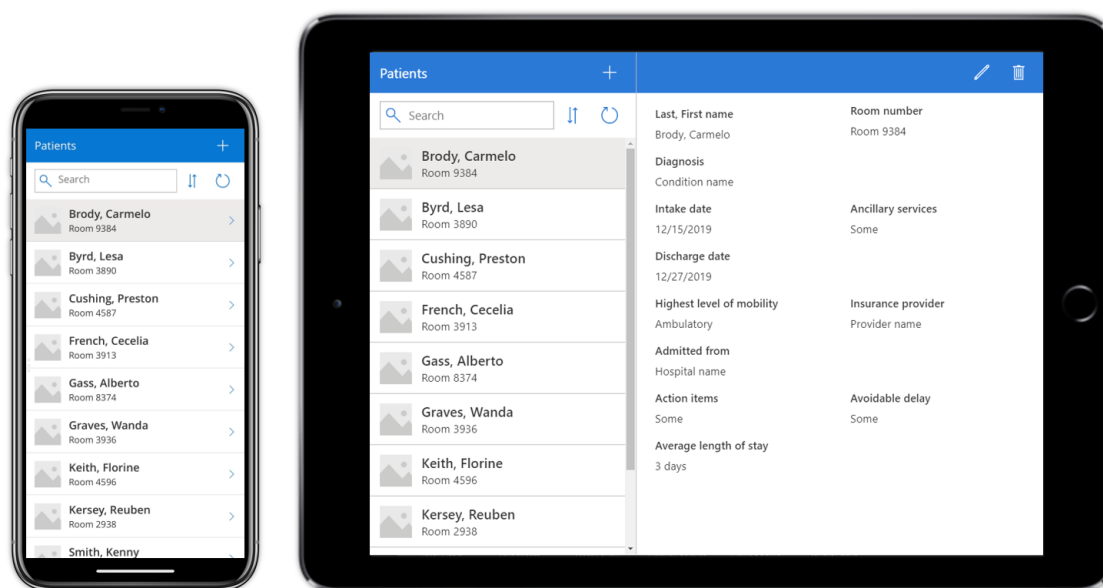
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Apr 2020

### Business value

As a maker, you can now create an app from data in a landscape format instead of just a phone layout. This makes it easier to build a canvas app for both web and tablet scenarios on top of your existing SharePoint, Excel, SQL, and Common Data Service data without having to build it from scratch.

### Feature details

The app from data templates we provide will now be responsive, so as a maker, you can generate the app once for both tablet and mobile form factors. For example, in the tablet layout, you will have a master-detail view so that you can easily switch between records without having to leave your current screen. On mobile, you can use the entire screen for the list and detail view.



*Responsive app from data template*

## Large file and image support in model-driven forms

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Apr 2020

### Business value

- File and image entity attribute can be added to any part of the form
- Files can be uploaded up to 128 MB
- Images can be uploaded up to 30 MB

### Feature details

Attachments in forms used to be limited to 5 MB, which limit the ability to add large files, such as PDF, images, and videos to items. New large file and image support in model-driven forms will allow users the ability to have large attachments in their apps—up to 128 MB for files and 30 MB for images.

The image shows two side-by-side form panels for a 'Section Title'. The left panel shows a standard form with fields: Account Name (with a red asterisk), Phone, Fax, Website, Document (with an 'Add file' button), Ticker Symbol, and Parent Account. The right panel shows the same form but with the 'Document' field replaced by a 'CDS Office Theme' dropdown menu with a close button (X).

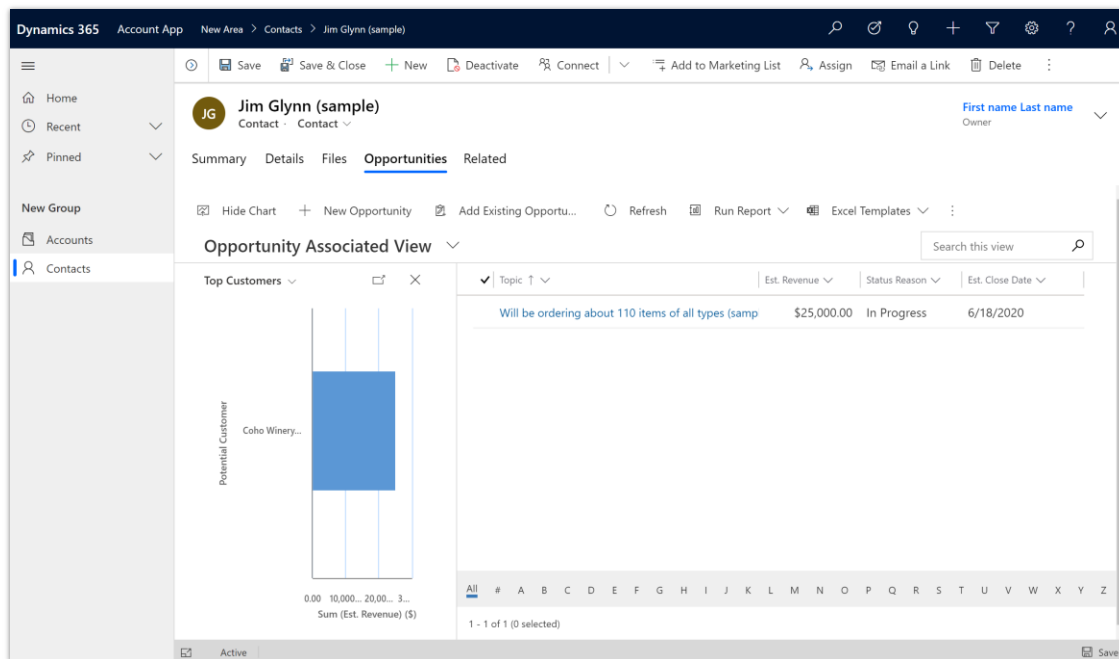
### *Large file control*

## Chart and dashboard styling improvements for model-driven apps

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Feature details

Dashboards and charts are updated in model-driven apps to improve visibility and provide a simpler interface. This includes updated dashboard selection with the user dashboards appearing above system dashboards and minor styling changes. In addition to dashboard updates the related entity grid on forms now includes a **Show Chart** button to match the main grid page.



*Chart control next to the associated grid in the form page*

## Enable creating and editing data in forms displayed as a modal dialog without navigating away

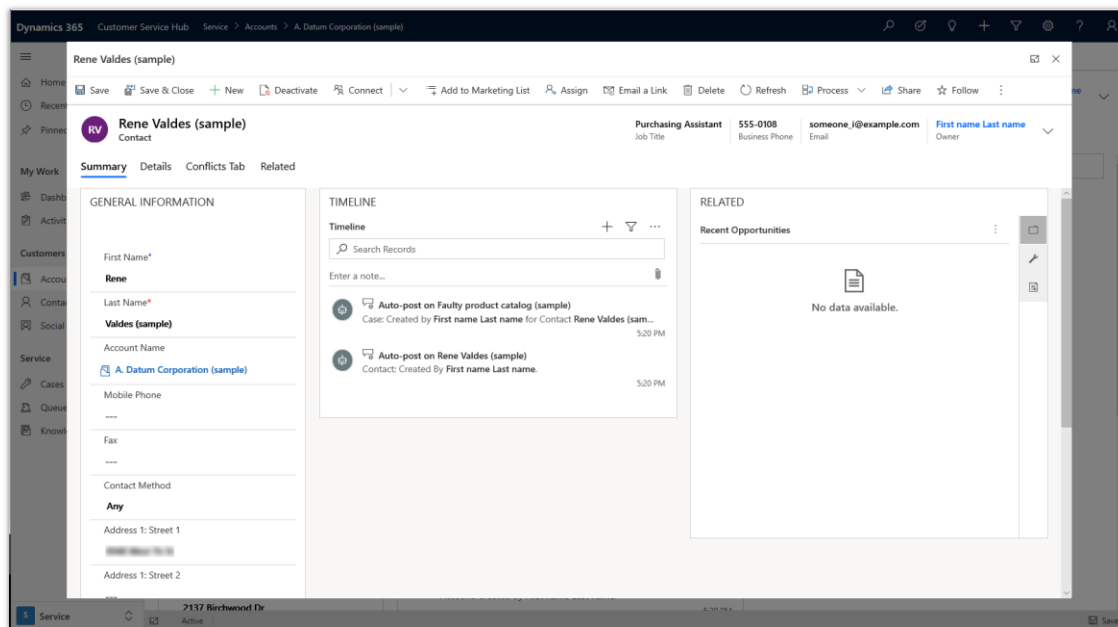
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Feb 2020	-	Apr 2020

### Business value

Users do not have to navigate away from a form to create or edit a related record. This greatly improves productivity by reducing clicks and eliminating the need to do unnecessary navigation back and forth across forms.

### Feature details

Users no longer have to navigate away to add or edit a related record. Makers will be able to open a main form in a dialog directly from another main form. This greatly improves overall productivity by reducing clicks and unnecessary navigation when working with related records. This feature will be available with the 'navigateTo' API and can be used from a command bar, event, or plugin to open a main form record in a dialog experience.



Main form dialog

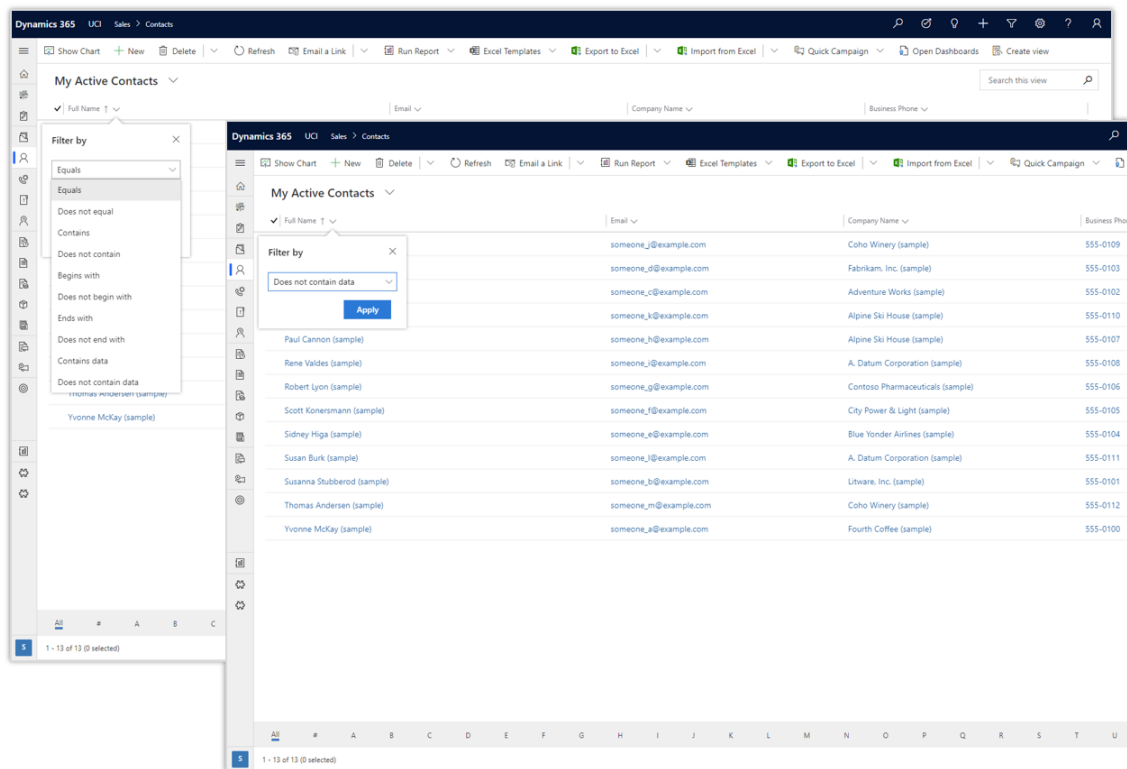
## Improved grid column filtering in Power Apps

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

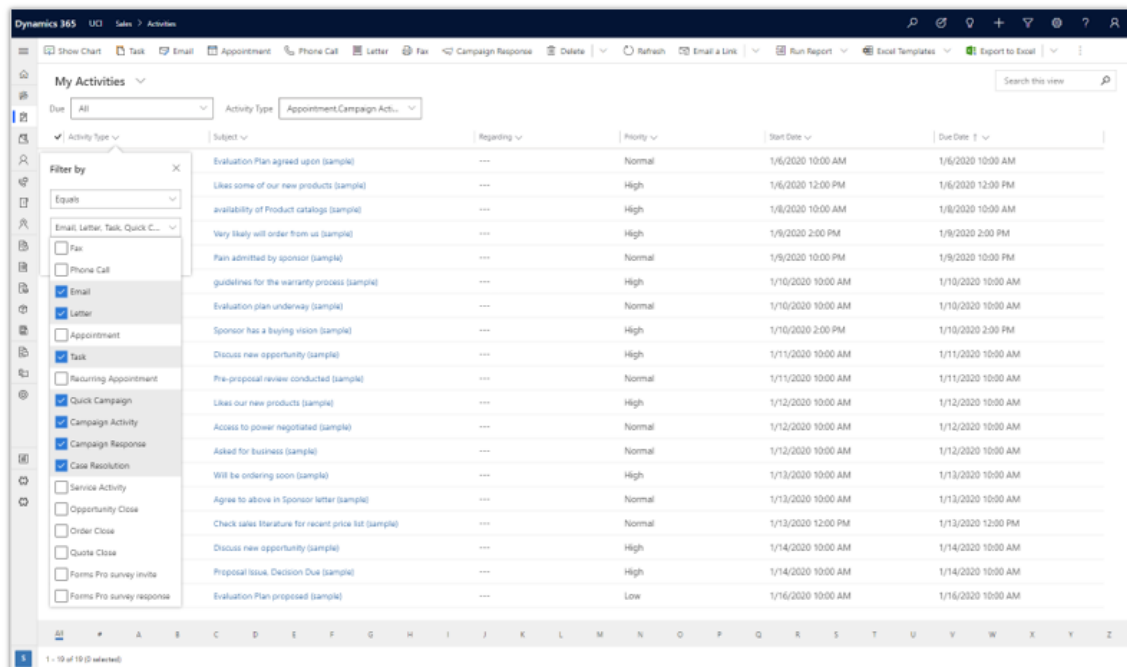
### Feature details

Tabular data manipulation is now easier with a whole range of advanced grid column filtering capabilities.

- String and numeric fields have operators to filters like: *begins with*, *ends with*, and *contains data*.
- Activity management is vastly improved with a new set of date filters. Absolute (before, after, on, etc.) and relative (last week, next year, older than X months, etc.) filters put powerful slicers at your fingertips.
- Filtering on option set columns is as easy as checking items off a list.
- Lookup columns also have an enhanced inline lookup experience for quick filtering.

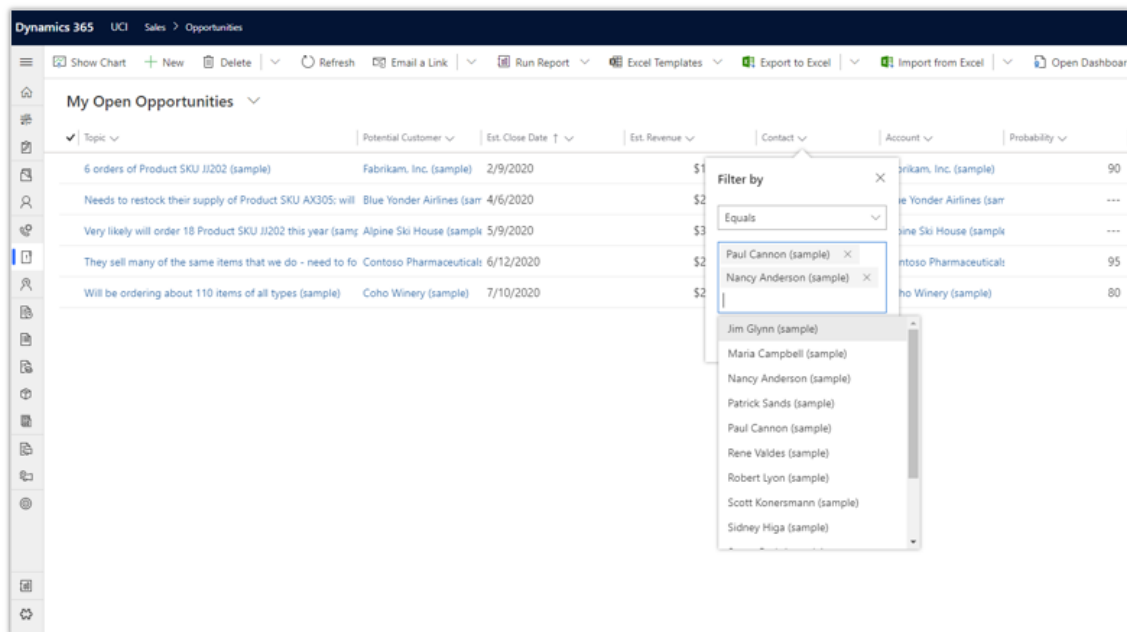


### Grid filtering

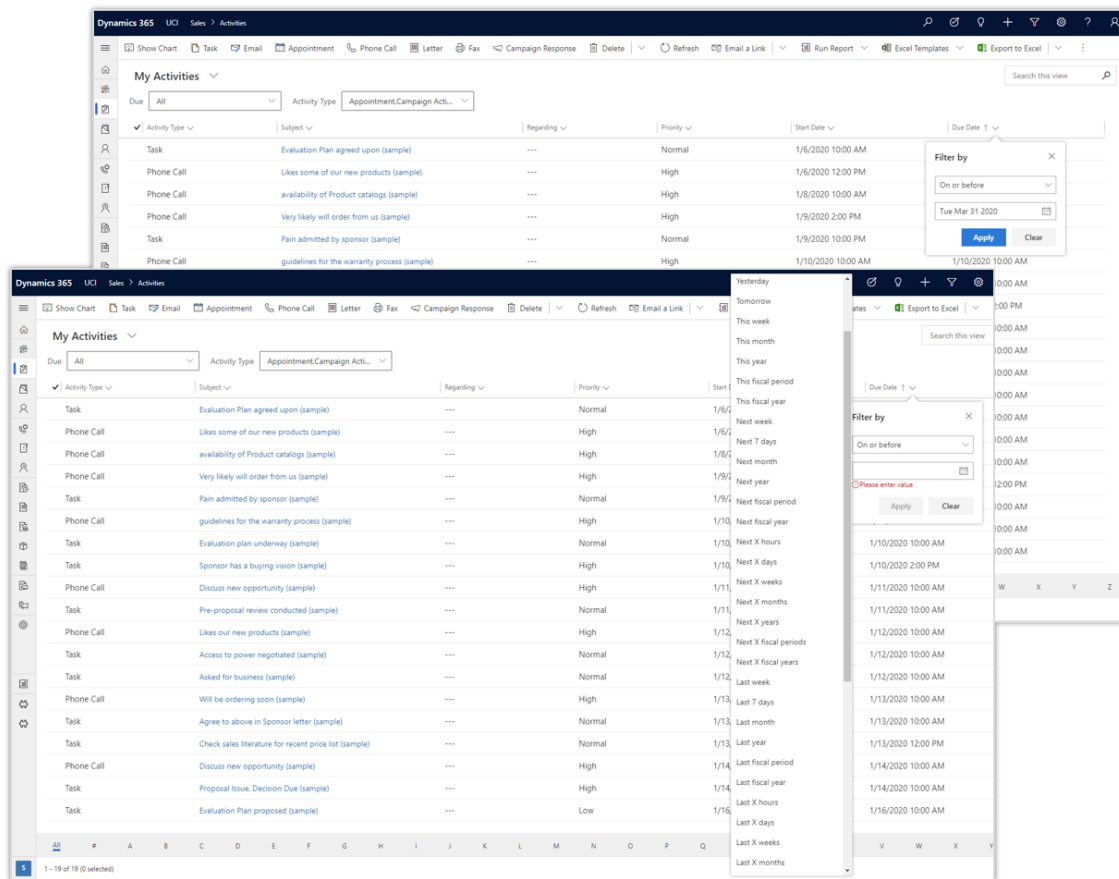


### Grid filters option set





*Grid filter lookup*



### Grid filter date

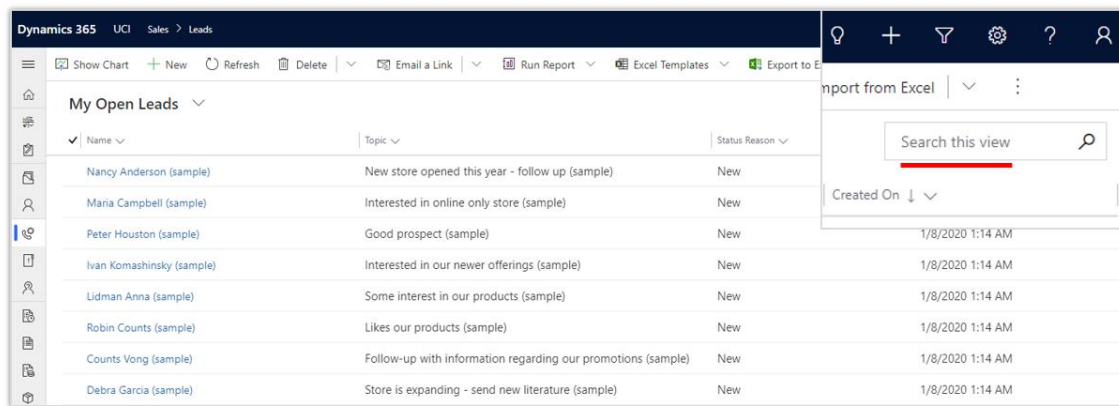
## Improvements to quick find search experience on a grid

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Feature details

Searching for records on a grid is more intuitive with the current view definition honored when performing search. The **Search this view** capability on the grid now applies the current view conditions and then searches on the fields that are configured in the quick find view definition. Enabled by default, administrators can switch back to quick find search experience easily, which targets an entity's quick find view definition for searching against and for displaying results.





## Search

### Save is always visible in the command bar on edit forms

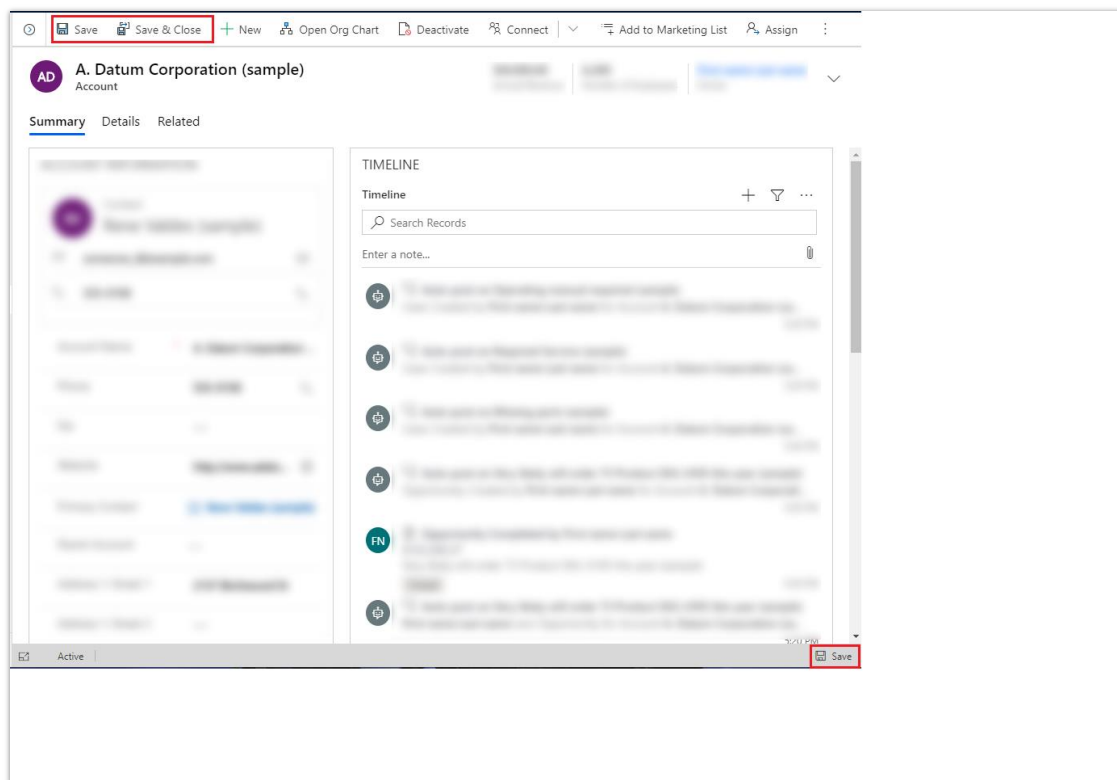
Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

## Business value

Improve usability and NSat based on direct feedback from customers, partners, and first-party app teams.

## Feature details

Customers using model-driven Power Apps will see the **Save** and **Save & Close** option on the out-of-box entity command bar when editing a record. Before this release, if the auto save option was turned on, both options were hidden and not available in the command bar. The save option was only visible in the footer.



*Save on command bar*

## See also

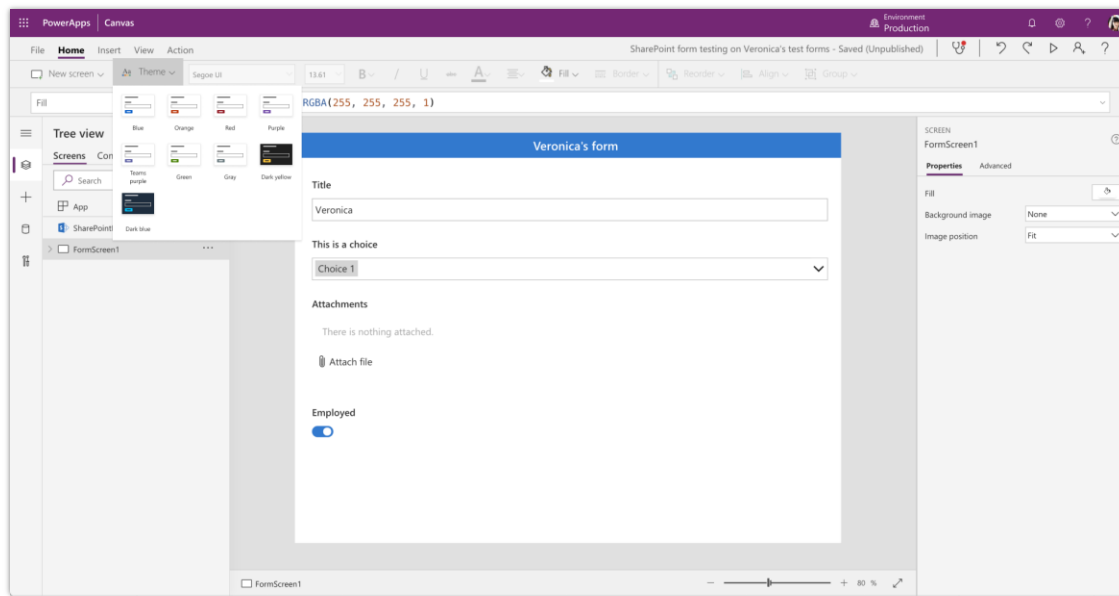
[Save and Save and Close options are always visible](#) (blog)

## Improved themes in Power Apps

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Mar 2020	-	Apr 2020

## Feature details

Introducing improved themes for both canvas and model-driven apps that reflect modern Microsoft Fluent themes. Canvas apps also have new control sizing introduced to allow makers to build apps with controls sized for web-based and mobile scenarios. New themes made available for model-driven app as a preview.



*Power Apps studio with new control styles and theme dropdown*

## Improved data source experience and Common Data Service view are generally available

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	✓ Aug 14, 2019	-	Apr 2020

### Business value

This feature provides a number of usability enhancements for accessing all data sources. Common Data Service entities are prominent. Speed of access to Common Data Service is now greater than 50% along with greater stability than previous releases. Makers can now work with Common Data Service views. The features and speed improvements make this way of connecting to Common Data Service preferable over the Dynamics 365 connector.

### Feature details

This update includes the following features:

**New data sources pane:** The sidebar now includes a **Data** sources panel icon and pane, which replaces many of the data panels that open over the right edge of the canvas area. This panel allows adding data sources into the app or creating new connections without inserting a control.

It provides an easy way to see the data source in your app and perform actions like refresh or delete.

**Entity view selection:** When a Common Data Service entity is used as a data source, a view can be selected in the property pane, and the **Items** property is updated. The property pane will update the **Items** property to add the **Filter** function taking the view name as the filter.

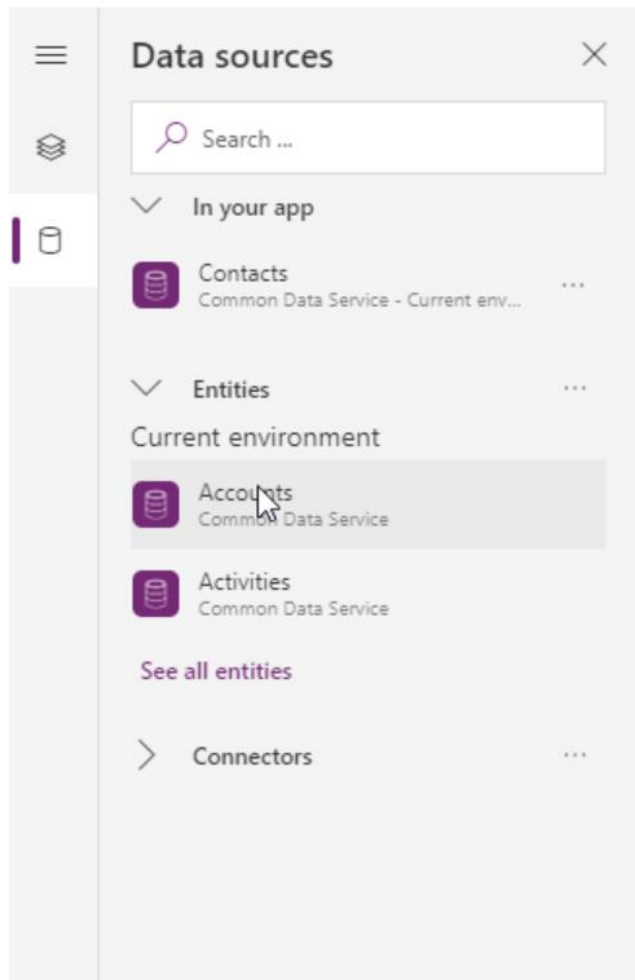
A big benefit of working with Common Data Service views is that the query for the view is run on the server—not locally on your device. This means you avoid delegation issues with the core query. In addition you have the flexibility to append other filter conditions that are delegated, if supported. For more advanced queries, just nest the **Filter** function within other functions using the formula bar.

**Combo box data source selection:** The combo box control also supports the data source selection call out and view selection. This is the same as the gallery and data table controls.

**Change Common Data Service environment:** Data source selection call out can change the environment to get a Common Data Service entity from another environment. This works within the same tenant. The current environment is the app's environment and changes when the app moves to a new environment. Other environment selections stay the same when the app moves to a new environment.

**Improved data field defaulting:** When a gallery or data table control is bound to an entity, the fields are defaulted using the default public view. This improves the initial fields used and can be controlled by editing that view. Field defaulting only happens when the entity is set as the data source and after that fields are managed with the data panel.

**Improved speed and reliability for connecting to Common Data Service:** Performance testing indicates a 2x (and better) speed improvement for connecting to Common Data Service. Reliability has significantly increased as well.



*Improved data experience*

### See also

[Preview for Improve data source experience and Common Data Service views](#) (blog)

### Canvas components are generally available

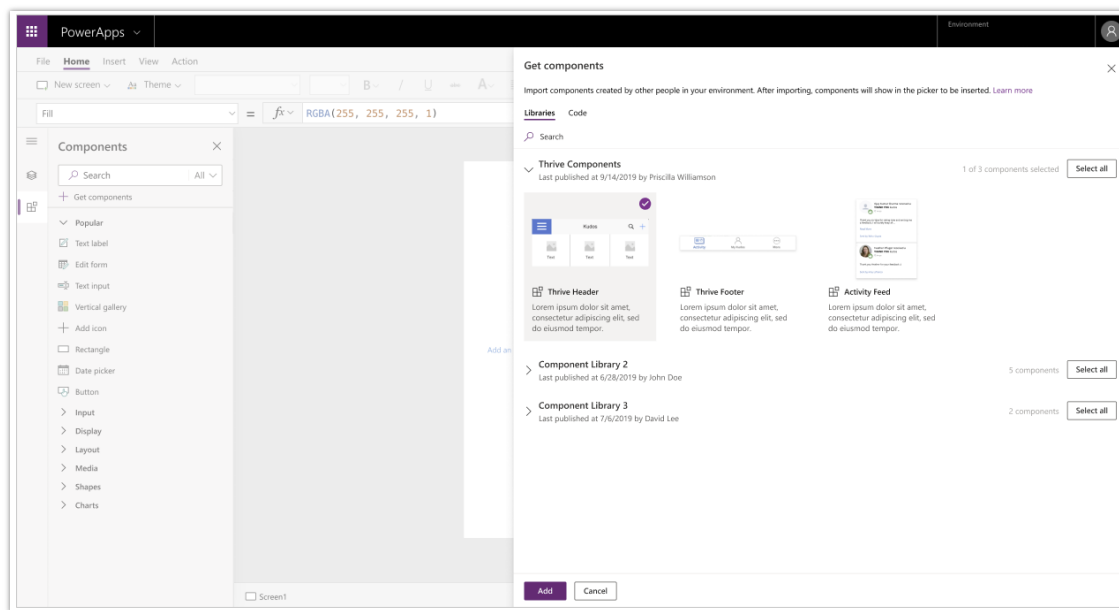
Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Feature details

Canvas components are generally available for app makers to use in production apps with improved experiences and quality. App makers can share and update components with other

makers by creating component libraries. Libraries are containers of component definitions that make it easy to discover and search for components, publish updates across environments, and notify app makers of available component updates. Data source references are also supported in components and several limitations of components, such as using components in gallery controls and forms, using collections in components, and exporting with related media files that have been removed.

Solution awareness of canvas components and apps that use them is also enabled through component libraries. Migrating an app and its dependencies across environments is now possible through Common Data Service solutions. Canvas apps and component libraries are handled very similarly and modeled under the same 'CanvasApp' entity.



*Add new components from libraries*

## Easily access and search for help while building apps

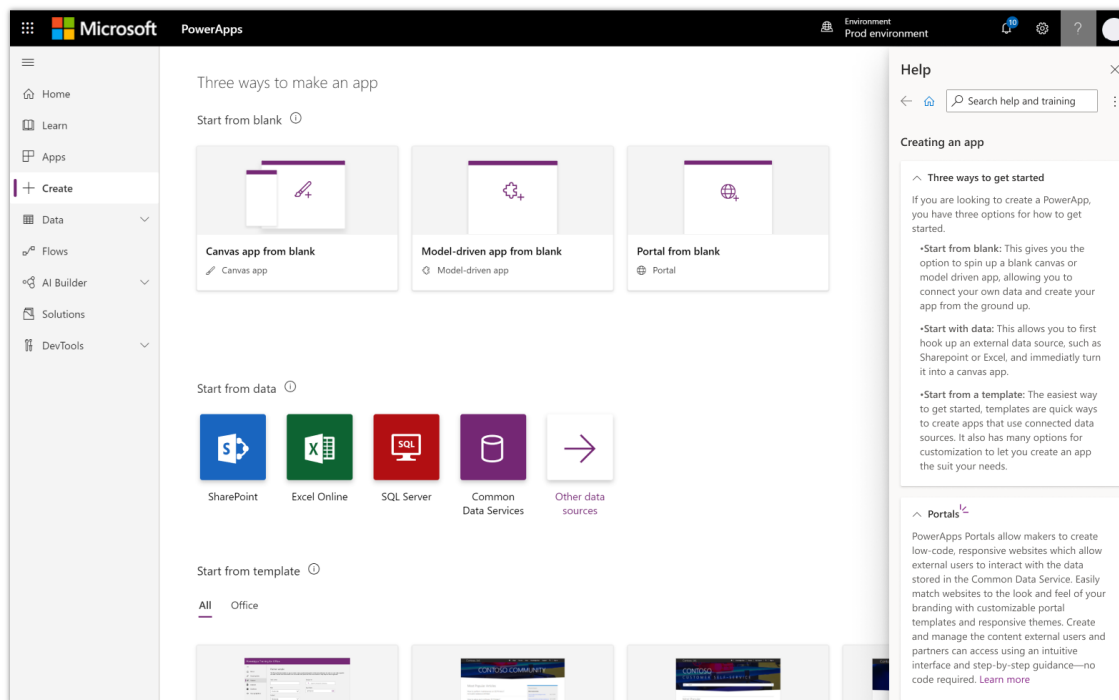
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	May 2020

## Business value

As a maker you no longer have to leave Power Apps in order to find the help you need. By opening the help pane, you can have instant access to all of our existing guides and docs.

## Feature details

With a new inline help experience, makers will be able to easily find relevant guides and docs for maker experiences within Power Apps. Makers can even search across all of our existing help [materials](#) within this inline experience so that they can easily answer their Power Apps questions without ever having to leave Power Apps.



*Inline help in the maker portal*

## Build apps on top of your existing data in SharePoint more easily

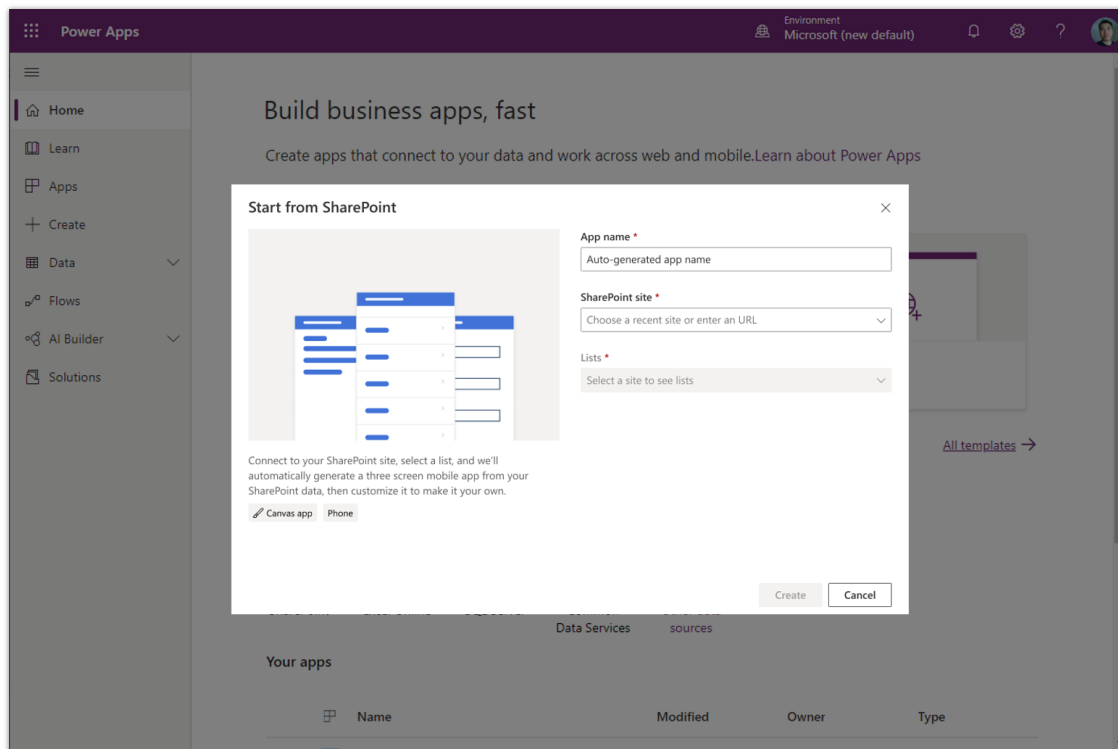
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	May 2020

## Business value

This feature improves the app from data funnel and encourages more users to get started.

## Feature details

As a maker, you can create a new app from SharePoint data using our more streamlined wizard within the maker portal. It's both faster and easier to use so that you can more quickly get started building an app on top of your existing tabular data.



*Streamlined data connection selection*



# Power Automate

## Overview of Power Automate 2020 release wave 1

Microsoft Power Automate makes it possible to grow your business productivity by automating repetitive, time-consuming tasks. Power Automate provides a better way to get things done across your organization through digital and robotic process automation. There are three major investment areas for the 2020 release wave 1 (April-September 2020).

First, it's easier than ever for citizen developers to build powerful automation across the **300+ connectors** in Power Automate. This includes new, intelligent experiences that build on AI Builder and integrated experiences in Microsoft Teams, Microsoft Azure, and the other services in Microsoft Power Platform.

Second, **UI flows**, a robotic process automation (RPA) feature, will be released to general availability in this release wave. UI flows automate mundane, rules-based tasks with point-and-click simplicity—whether the app is old or new, on-premises or in the cloud. This now includes both attended (where you're logged in to the machine) and unattended scenarios (where the flow runs in the background on a virtual machine).

Third, Power Automate enables modelling and running human-driven business process with the **modern approval** and **business process flow** features. There are new capabilities in this area, including an easier way to connect your business process flows with automated flows.

Use Power Automate [documentation](#) to get expert information and answers to address your needs, regardless of how you use Power Automate.

## What's new and planned for Power Automate

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

## More intelligent and powerful capabilities for Power Automate makers

The citizen developers of Power Platform now have richer capabilities when they are building out business processes inside of Power Automate.

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Common expressions simplified</a>	Admins, makers, or analysts, automatically	-	-	Apr 2020
<a href="#">Discover, learn, and create flows with seamless new experiences</a>	Admins, makers, or analysts, automatically	-	-	Apr 2020
<a href="#">Power Automate and Microsoft Teams productivity enhancements</a>	Admins, makers, or analysts, automatically	-	-	Apr 2020
<a href="#">Azure Integration with Power Automate</a>	End users, automatically	-	Feb 2020	Apr 2020
<a href="#">Building AI-infused workflows</a>	Admins, makers, or analysts, automatically	-	-	Jul 2020
<a href="#">Certified datasets in Power Automate</a>	Admins, makers, or analysts, automatically	-	-	Jul 2020
<a href="#">Copy and paste in Power Automate is generally available</a>	Admins, makers, or analysts, automatically	-	-	Jul 2020
<a href="#">Interactive adaptive cards</a>	Admins, makers, or analysts, automatically	-	-	Sep 2020
<a href="#">Power Automate is more accessible</a>	Admins, makers, or analysts, automatically	-	-	Sep 2020

## UI automation for applications and websites

Automate repetitive tasks across services and applications using UI flows in Microsoft Power Automate.

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Native support for commonly used applications</a>	Admins, makers, or analysts, automatically	Sep 2020	-	-
<a href="#">Advanced error handling for UI flows</a>	Admins, makers, or analysts, automatically	-	-	Jun 2020
<a href="#">Automate web-based applications</a>	Admins, makers, or analysts, automatically	✓ Nov 4, 2019	-	Jun 2020
<a href="#">Automate Windows applications</a>	Admins, makers, or analysts, automatically	✓ Nov 4, 2019	-	Jun 2020
<a href="#">Solutioning support for UI flows</a>	End users, automatically	-	Feb 2020	Jun 2020
<a href="#">IME Support for UI flows</a>	End users, automatically	-	Mar 2020	Jun 2020
<a href="#">Retry for desktop UI flows</a>	End users by admins, makers, or analysts	Mar 2020	-	Jun 2020
<a href="#">Run UI automation scripts on virtual machines</a>	Admins, makers, or analysts, automatically	Mar 2020	-	Jun 2020
<a href="#">Unattended automation in UI flows</a>	Admins, makers, or analysts, automatically	Mar 2020	-	Jun 2020
<a href="#">Secrets management</a>	Admins, makers, or analysts, automatically	-	-	Sep 2020
<a href="#">Advanced editor capabilities</a>	Admins, makers, or analysts, automatically	Sep 2020	-	Sep 2020

## World-class business process capabilities

Power Automate provides world-class business process capabilities for its users that span endpoints and experiences.

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Contextual automations in Power BI</a>	Admins, makers, or analysts, automatically	-	-	Apr 2020
<a href="#">Cohesive Microsoft Teams file experiences</a>	Admins, makers, or analysts, automatically	-	-	Jul 2020
<a href="#">Flow steps in business process flows are now generally available</a>	Admins, makers, or analysts, automatically	-	-	Jul 2020
<a href="#">Use business process flows in Office 365 apps</a>	Admins, makers, or analysts, automatically	-	-	Jul 2020

\* Some features are available for you to opt-in as part of early access on February 3, 2020, including all mandatory changes that impact end users. Learn more about [early access](#).

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **End users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their end users.

For more information about geographic areas, data centers (regions), data storage, and replication, click **expand all** on the [Where your data is located page](#) and find the Microsoft cloud service for this feature.

## More intelligent and powerful capabilities for Power Automate makers

### Overview

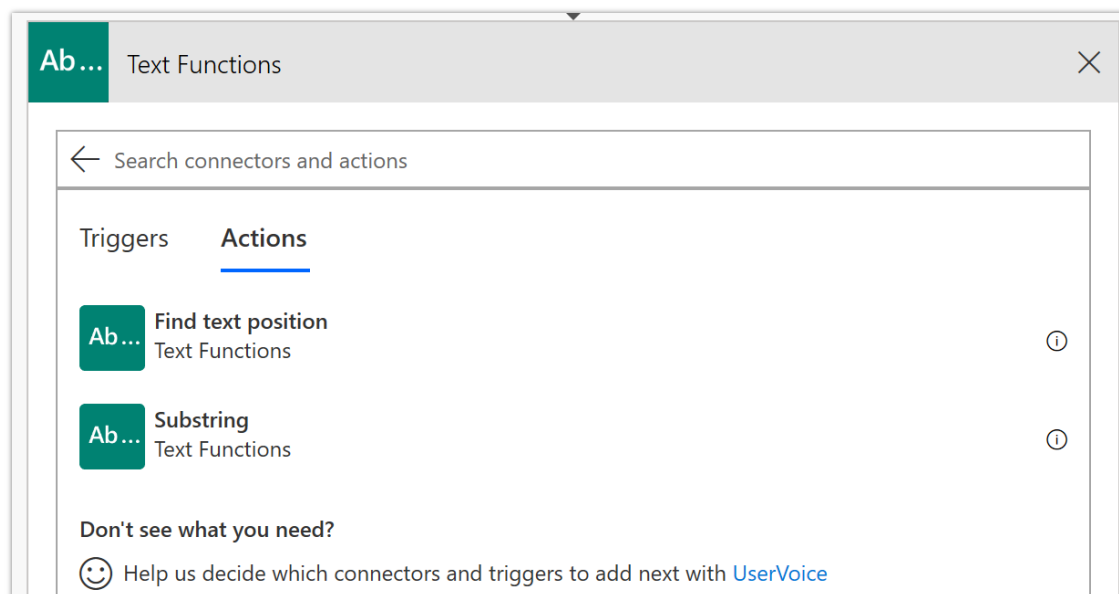
The citizen developers of Power Platform now have richer capabilities when they are building out business processes inside of Power Automate.

## Common expressions simplified

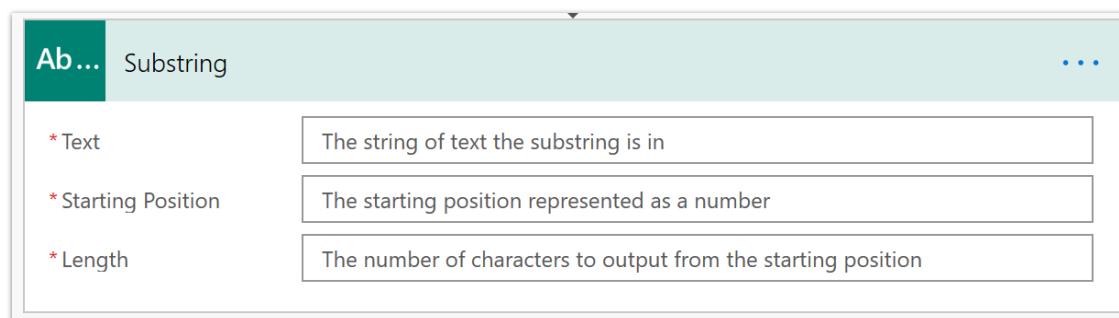
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Apr 2020

### Feature details

In order to enable all personas to leverage the value of Logic Apps advanced expressions, complexity at every level needs to be removed. During 2020 release wave 1, we will be adding five new text expression actions, making text manipulations and formats significantly easier to configure.



### List of expression actions



### Expressions card

## Discover, learn, and create flows with seamless new experiences

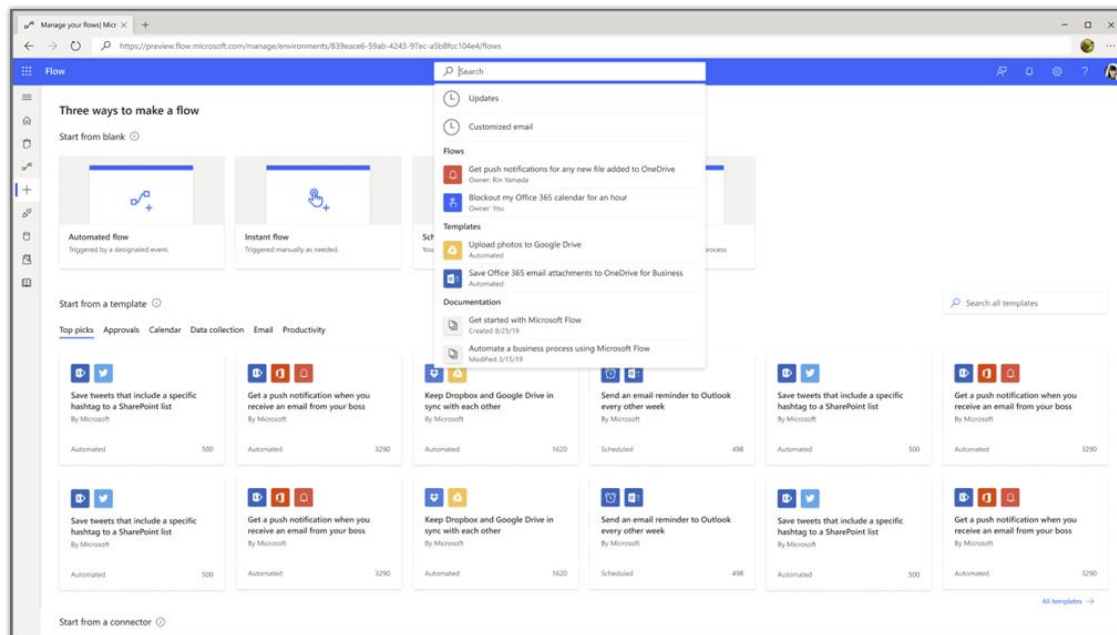
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Apr 2020

### Feature details

In 2020 release wave 1, we are creating entirely new experiences that will make it easier for you to discover everything you can do with Power Automate. Whether you're searching for a flow across environments, help for building your first approval flow, or guided learning tutorials to get started, universal search will help you get there in a few steps.

We are also revamping the Power Automate designer by adding:

- Discovery experiences to help users find and use new features, templates, and connectors.
- In-product help and guided learning.
- Improved creation experiences for template-based flows as well as flows created from scratch.



### Search experience

## Power Automate and Microsoft Teams productivity enhancements

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Apr 2020

### Business value

Extends services available out of the box, reduces learning curve, and encourages early adoption of Microsoft Teams and Office 365. Results in consistently better outcomes in alignment with digital transformation goals.

### Feature details

Embedded workflow scenarios for collaboration and productivity within Microsoft Teams continues to be a priority. Power Automate is working behind the scenes of everyday activities to offer process assistance without requiring you to learn Power Automate.

Here are some examples:

- Remind me about a message.
- Notify me when a file is modified.
- Notify me when I get a new meeting invitation.
- Notify me when a keyword is mentioned in a channel message.
- Notify me when someone's presence information changes.

## Azure integration with Power Automate

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Apr 2020

### Feature details

In our continuous effort to improve the experience for Azure developers on the Power Platform, we've streamlined the experience for creating flows by using a template from the Azure portal.

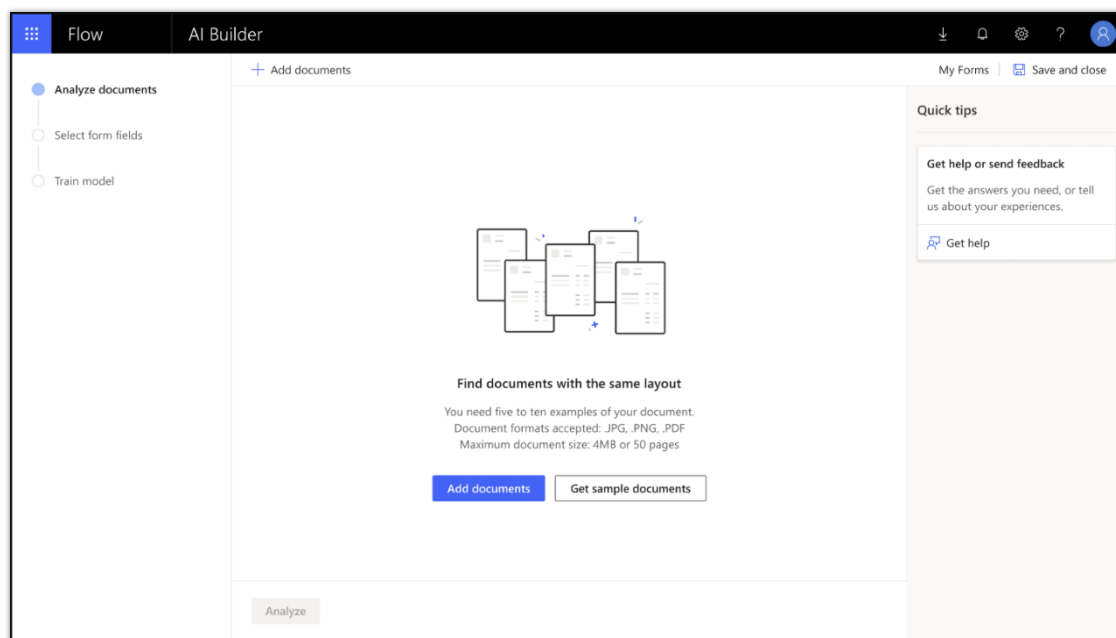
We also added templates to support common enterprise scenarios. For example, one of these templates gives the ability for someone to receive a notification when their costs increase by 10% day over day.

## Building AI-infused workflows

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Jul 2020

### Feature details

Last year, we introduced two new technologies to Power Automate; AI Builder being one of them. This year, we are making it easier to use the power of AI in workflows. For instance, you can now create a workflow that processes invoices, forms, or images with the power of AI that you helped trained in few steps. This new turnkey experience will help you get your job done without the complexity of training and modeling your data. With just a few clicks, you can have a workflow running against a trained AI model that processes forms and invoices.



### AI Builder flows

## Certified datasets in Power Automate

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Jul 2020



## Business value

Creates collaboration between Power Automate and Power BI to ensure security policies for data usage are respected, and risks are mitigated. Providing a cohesive platform for better process outcomes in Power Platform.

## Feature details

To support enterprise security policies around data usage, Power BI offers [certified datasets](#) which are used to classify sensitive content within promoted datasets. In order to enable Power Automate makers to integrate certified datasets within process definitions, Power Automate will be adding a new trigger and actions in support of these datasets.

Endorsement

Help your colleagues find, learn about, and connect to your dataset.

☐ Default

This dataset can be searched for and used by others.

☒ Promoted

Promote this dataset with a badge to show it's ready to be used by others.

☐ Certified

Request certification from experts in your org to get a badge that shows it's recommended for use by others. [Learn more](#)

Description

Describe the contents of this dataset.

500 characters left

Apply

Discard

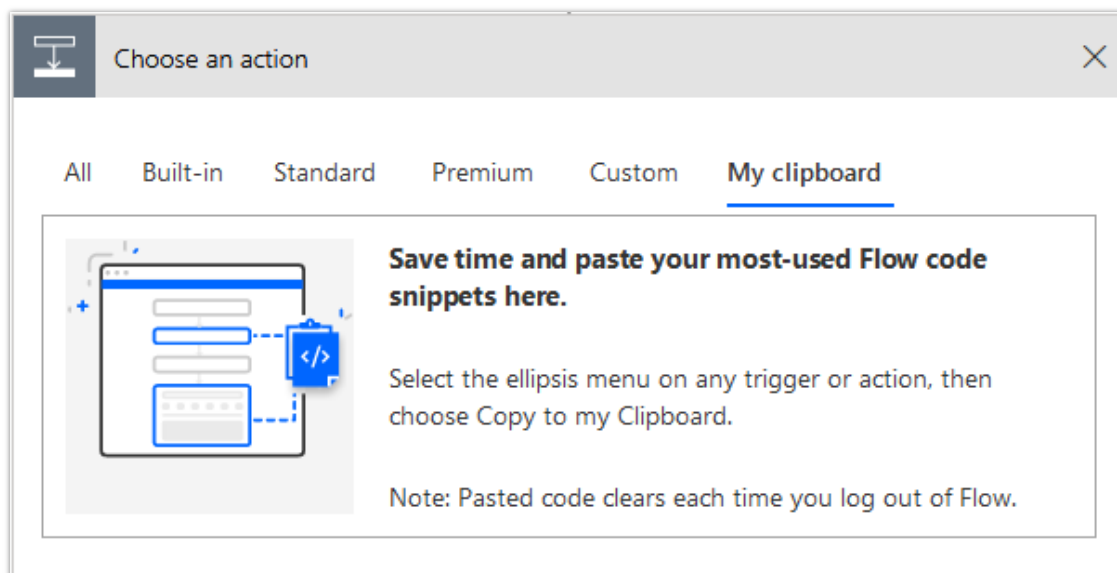
### *Certified datasets*

## Copy and paste in Power Automate is generally available

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Jul 2020

## Feature details

If you want to duplicate actions in the Power Automate designer, you can now copy and paste them. For example, if you are building a condition and want similar actions in the **If yes** side and the **If no** side, instead of creating both actions from scratch, you can build the first action in one side and then copy it to the other side. This feature is now generally available.



### Clipboard

## Interactive adaptive cards

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Sep 2020

## Business value

Extended capabilities for contextual process-driven information share and facilitated input collection for Power Automate flow makers in business, developer, or IT pro scenarios.

## Feature details

Adaptive cards are a developer favorite for building beautiful card scenarios that work in context and adapt to user configurations, such as dark or light chrome. Power Automate opens this opportunity to citizen developers by providing an embedded WYSIWYG designer action within Power Automate for Microsoft Teams. This feature significantly extends frontline worker scenarios within a Microsoft Teams channel, as it further enables flow makers to target data

interactions based on the business process and in context with the Microsoft Teams channel or member. Adaptive cards will expedite knowledge share and collaboration by removing the need for interface design skills.

### Power Automate is more accessible

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Sep 2020

#### Feature details

Power Automate is now fully compliant with the latest WCAG 2.1 requirements. This means that users with a diverse set of abilities can now leverage Power Automate for their workflow automation needs.

## UI automation for applications and websites

### Overview

We are introducing **UI flows**, a new feature that helps you automate applications that can only be automated from their front end and do not have APIs. With this release, we are supporting UI automation across services and applications running on-premises and in the cloud.

With **UI flows** in Power Automate, you can record mouse clicks, keyboard use, and data entry to automate manual, repetitive, and time-consuming tasks to improve workplace productivity. **UI flows** enable you to create, manage, and execute UI automation scripts in a secure, centralized environment.

### Native support for commonly used applications

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Sep 2020	-	-

#### Feature details

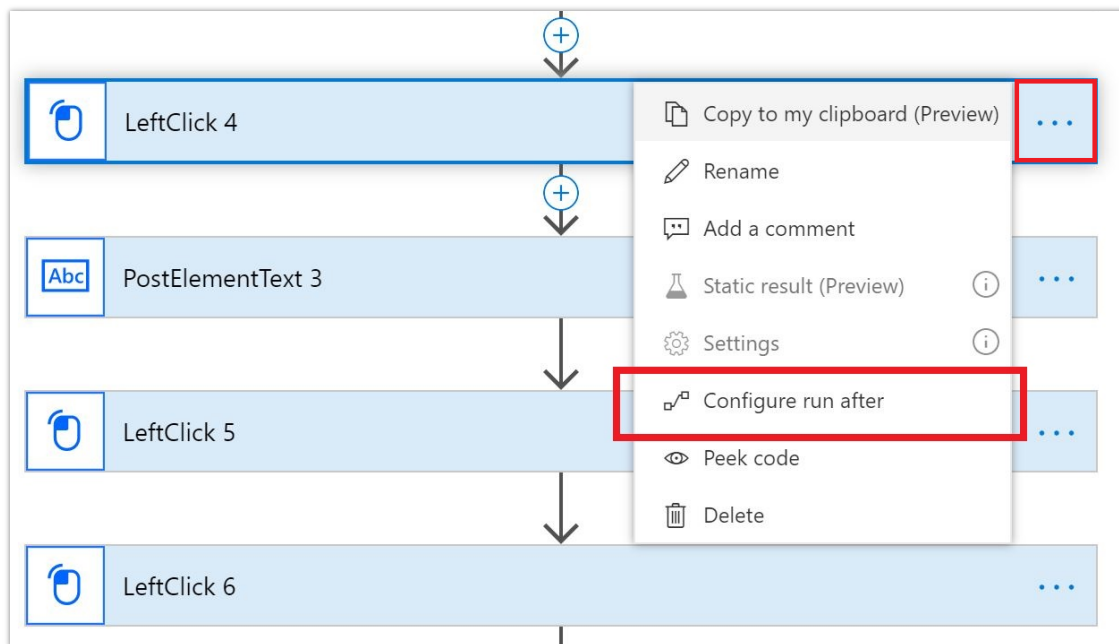
We are adding built-in automation support for some Windows applications. This feature enables users to use libraries for commonly used applications in frequently used scenarios, making automation faster and more robust.

## Advanced error handling for UI flows

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Jun 2020

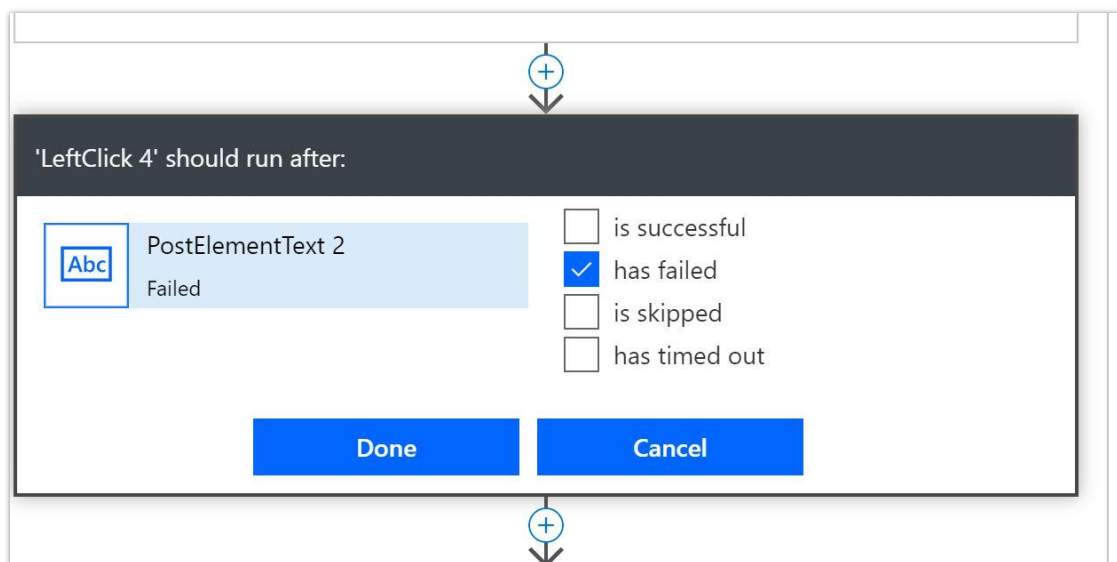
### Feature details

Users can enable error handling capabilities within UI automation scripts to prevent the flow run from failing if a particular step fails. The editor will have the capability to handle such expected errors and let the automation finish its execution. This can be done by selecting the **Configure Run After** option.



### Configure run after

The user can then select an alternate condition to start the next step, instead of the default case.



### Error handling

## Automate web-based applications

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	✓ Nov 4, 2019	-	Jun 2020

### Feature details

Power Automate customers can use the Selenium Integrated Development Environment (IDE) to automate web-based applications.

**NOTE** UI flows for web apps supports the latest version of Google Chrome and the beta release of Microsoft Edge (Chromium) browsers.

### See also

[Create and test your web UI flows](#) (docs)

## Automate Windows applications

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	✓ Nov 4, 2019	-	Jun 2020

## Feature details

Users can automate many Windows desktop applications with a no-code, point-and-click approach. Users can easily record actions on a Windows desktop and turn manual, repetitive steps into automated workflows.

Follow these steps to automate a Windows desktop application:

1. Select **My flows**.
2. Select the **UI flows (preview)** tab.
3. Select **New > Desktop app > Next**.
4. Give your app a name and then select **Next**.
5. Select the **Recording** card and then select **Launch recorder**.
6. Select **Record** and then perform the steps you want to automate.
7. Select **Done**.

The UI flows recorder captures mouse clicks and the keyboard input while the recorder runs.

You can then test your UI flow and use it instead of performing the recorded steps manually.

## See also

[Create and test desktop UI flows](#) (docs)

## Solutioning support for UI flows

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Feb 2020	Jun 2020

## Business value

Makers are now able to import and export their UI flows. This feature will help you better manage the application lifecycle of your UI flows and its dependencies through a seamless and user-friendly experience.

## Feature details

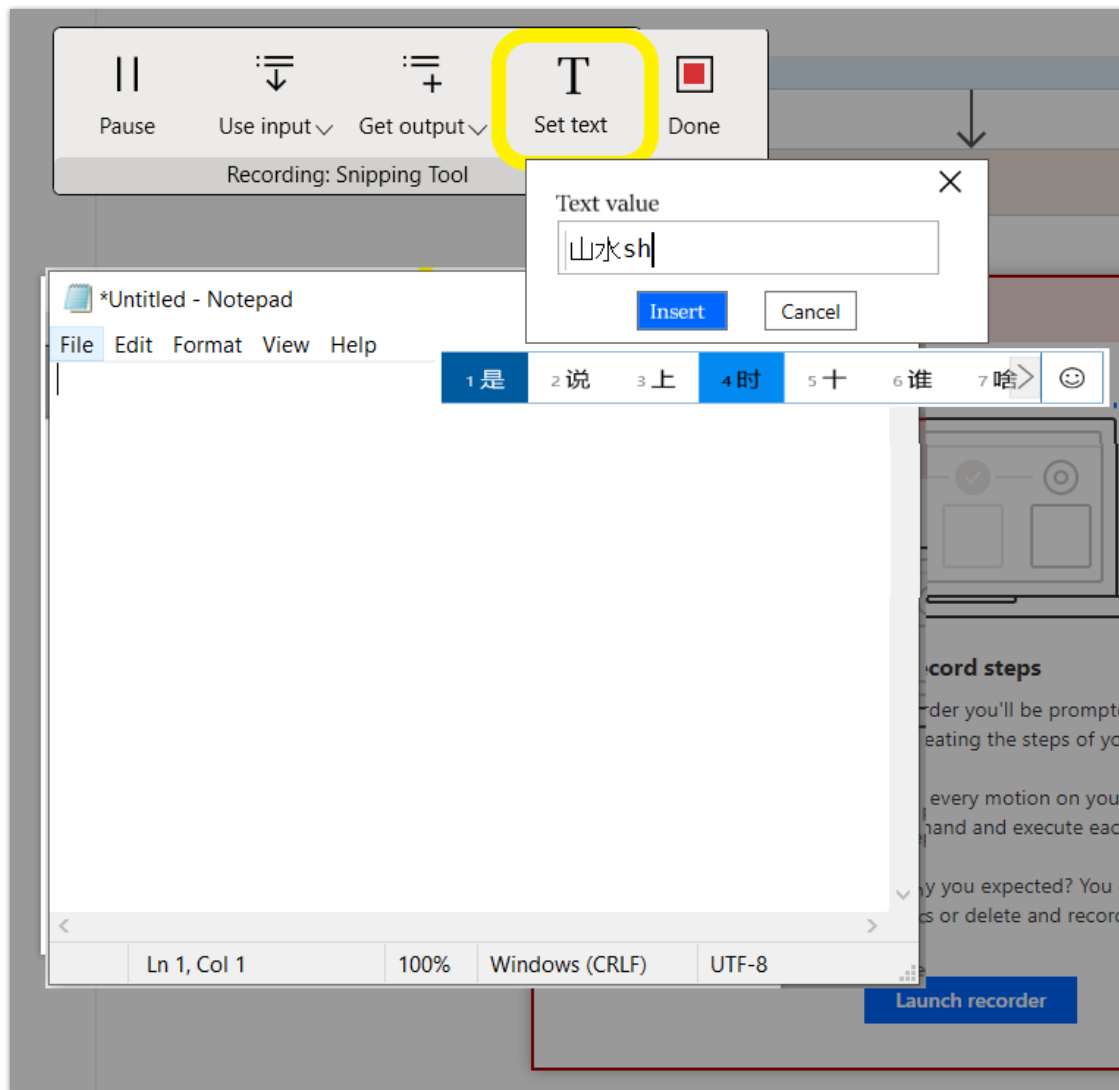
With this feature, you can create your UI flows in solutions, easily export them into a package, and then import them across different environments for your ALM needs.

## IME support for UI flows

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Mar 2020	Jun 2020

### Feature details

UI flows will support recording and playback actions that use Input Method Editors (IMEs). A **Set text** mode is added into the UI flows recorder. When users need to record an action that contains strings in any language, they select the **Set text** button to bring up an input box and then enter string values into the box. The value will be recorded and played back accordingly, independent of the keyboard layout or IME used during recording time.



*Use IME through 'Set text' option during recording*

## Retry for desktop UI flows

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Mar 2020	-	Jun 2020

### Feature details

In UI automation, there could be delays before some elements display. This delay can cause intermittent automation failures. Retry logic can help improve the reliability of UI automation;



however, retrying slows performance. With this release, we're giving users more granular controls to perform retry at different levels (including per machine or agent and per individual step). This will allow users to properly apply retry logic where the automation will most likely fail, without sacrificing the overall performance.

### Run UI automation scripts on virtual machines

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Mar 2020	-	Jun 2020

#### Feature details

This feature enables you to use the UI flows record and playback feature to automate applications that run on virtual machines including Microsoft Remote Desktop.

### Unattended automation in UI flows

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Mar 2020	-	Jun 2020

#### Feature details

With this release, we are adding a feature that allows UI flows to run without user supervision (unattended). Unattended UI flows is the best option for application and website automations that do not need human intervention before or after the UI flow runs. Here are a few usage scenarios for unattended mode:

- Use AI Builder and UI flows to insert PDF invoices or purchase orders that you receive via email into legacy systems.
- Onboard new employees across multiple legacy systems in finance, HR, and business tools.
- Perform custom reconciliations across different finance systems.
- Build weekly reports from data sources only available within legacy applications and then send a notification based on threshold values.

When running unattended, UI flows automatically signs into target devices running Windows 10, Windows Server 2016, or Windows Server 2019. Once the automation completes, UI flows signs out from the device and reports its activity in Power Automate.

Users can then view the flow run history with the associated target device. If there are runtime errors, screenshots allow users to analyze what went wrong to improve their flows.

## Secrets management

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Sep 2020

### Feature details

Users need secure strings, such as passwords or connection information, to sign into applications that they automate with UI flows. This is useful when applications require user names and passwords to authenticate users. With secret strings, you can securely save your secure string and reuse it to automate applications with UI flows. You can also share secure strings without revealing them to other users. This is convenient when multiple users need to automate the same application without revealing the credentials.

## Advanced editor capabilities

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Sep 2020	-	Sep 2020

### Feature details

We'll improve the experience when building UI flows by including support to embed advanced business logic directly into the UI automation script. Users would be able to add scopes, conditions, loops, etc. to make their UI automation scripts resilient and sophisticated. The design experience for these new features would be similar to the control actions available within Power Automate for makers.

## World-class business process capabilities

### Overview

Power Automate provides world-class business process capabilities for its users that span endpoints and experiences. These include significant experience improvements for users so that they can now accomplish basic scenarios with business processes offline.

## Contextual automations in Power BI

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Apr 2020

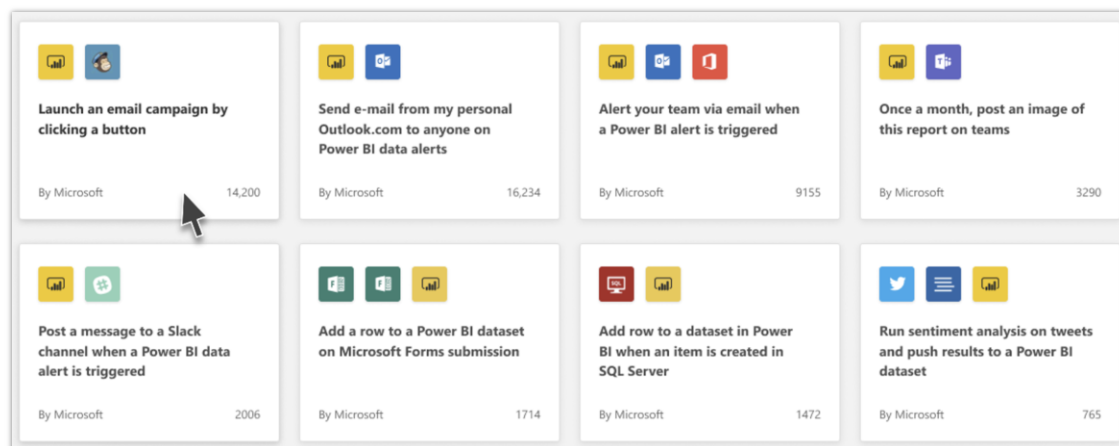
### Business value

Improves discovery and ideation for data-driven process refinements, both in context of templates, reports, and dashboards as well as via external connections to datasets in Power BI.

### Feature details

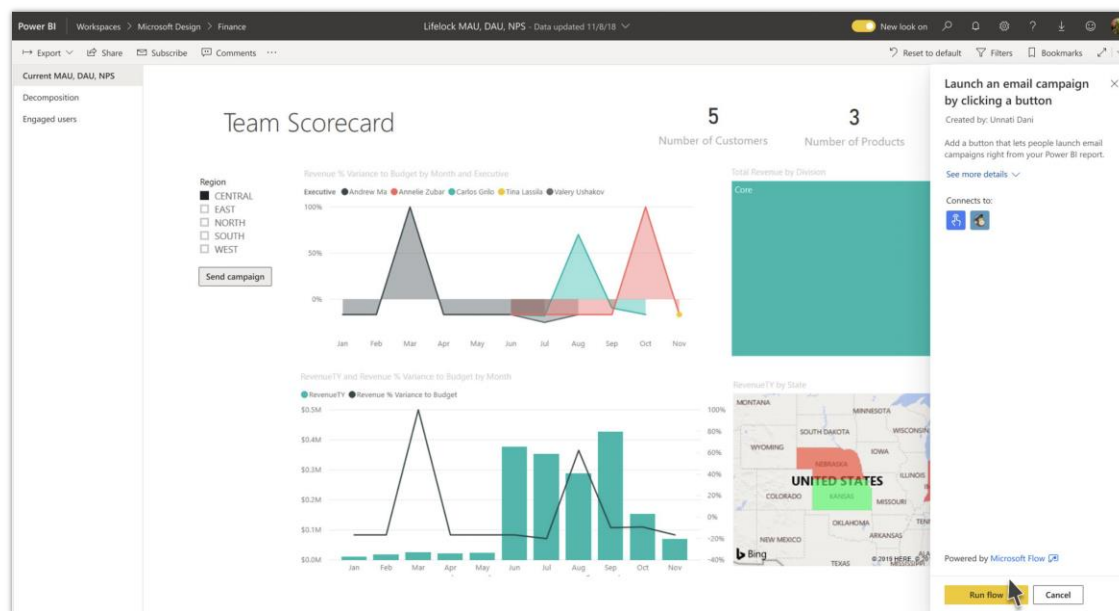
Power Automate is progressively extending its integrations with Power BI scenarios, which will enable users to discover and to quickly adopt workflow and automation services for business-relevant datasets, reports, and dashboards.

First, the user will choose a template:



### Templates

Then they can run the flow from their dashboard:



*Run panel*

## Cohesive Microsoft Teams file experiences

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Jul 2020

### Business value

Ensures consistency across OneDrive, SharePoint, and Microsoft Teams for file experiences and supports common patterns in document management and collaboration.

### Feature details

OneDrive and SharePoint Online integrations are coming to Microsoft Teams to provide a consistent experience for business scenarios that involve files. These scenarios include embedded workflows, such as **Request sign off**, approval templates, and other enhancements that are driven by customer ideas for embedded workflows in Microsoft Teams.



### *Cohesive files*

## Flow steps in business process flows are now generally available

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Jul 2020

### Feature details

In the previous release, we previewed instant flow steps in business process flows to automate tasks and approvals right from inside a stage of a business process. You can even mark instant flow steps as complete/incomplete right from your flow!

## Use business process flows in Office 365 apps

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Jul 2020

### Feature details

With business process flows available in Office 365 apps, Power Automate makes it easier to adopt best practices when working with documents.

# Power Virtual Agents

## Overview of Power Virtual Agents 2020 release wave 1

Power Virtual Agents enables anyone in your organization to create AI-powered bots that can chat with users about specific topics. They can answer routine questions, resolve common issues, or automate tasks that take up valuable customer or employee time.

Creating a bot is typically a complex and time-intensive process, requiring long content update cycles and a team of experts. Power Virtual Agents gives anyone in your organization the ability to create powerful custom bots using an easy, code-free graphical interface, without the need for AI experts, data scientists, or teams of developers. A bot can interact with users, ask for clarifying information, and ultimately answer a user's questions.

With deep integration with Power Automate and the Microsoft Bot Framework, authors can extend their bots to integrate with API back ends, which will enable the bots to handle additional topics, limited only by the author's imagination. You can deploy bots to many channels including websites, Microsoft Teams, and Facebook. As users interact with a bot, the author can see which topics are performing well, and which need improvement.

## What's new and planned for Power Virtual Agents

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.

### Bot configuration

Configure the bot to suit the business needs.

Feature	Enabled for	Public preview	General availability
<a href="#">Add a Power Virtual Agents bot into Power Apps canvas app</a>	Admins, makers, or analysts, automatically	-	Apr 2020
<a href="#">Create and manage Power Virtual Agents directly from Power Apps</a>	Admins, makers, or analysts, automatically	-	Apr 2020
<a href="#">Customizable bot behavior when no topic is triggered</a>	Admins, makers, or analysts, automatically	-	Apr 2020
<a href="#">Single Sign-On</a>	Admins, makers, or analysts, automatically	-	Jun 2020

## Core authoring

Utilize the Power Virtual Agents conversational editor to construct your dialogs, add variables or synonyms, and incorporate Power Automate flows that enable you to connect to other systems.

Feature	Enabled for	Public preview	General availability
<a href="#">Import and export bots or their content</a>	Admins, makers, or analysts, automatically	Apr 2020	-
<a href="#">Improved Power Automate flow integration in Power Virtual Agents</a>	Admins, makers, or analysts, automatically	-	Apr 2020
<a href="#">Multiple users can edit topics at the same time within a bot</a>	Admins, makers, or analysts, automatically	-	Apr 2020
<a href="#">Pass context to a bot from the calling site</a>	Admins, makers, or analysts, automatically	-	Apr 2020
<a href="#">Use global variables across topics within a bot</a>	Admins, makers, or analysts, automatically	-	Apr 2020

Feature	Enabled for	Public preview	General availability
<a href="#">Add images and videos to topics</a>	Admins, makers, or analysts, automatically	-	May 2020
<a href="#">Support for additional languages</a>	Admins, makers, or analysts, automatically	May 2020	Jul 2020
<a href="#">Adaptive Cards</a>	Admins, makers, or analysts, automatically	Jun 2020	Sep 2020

## Enable voice interactions

Feature	Enabled for	Public preview	General availability
<a href="#">AI-assisted authoring - Topic suggestions from bot sessions</a>	Admins, makers, or analysts, automatically	-	Jul 2020
<a href="#">Connect bots to voice and phone call interactions</a>	Admins, makers, or analysts, automatically	Jul 2020	Sep 2020

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **End users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their end users.

## Bot configuration

### Overview

The bot can be configured to suit the individual needs of an organization and to provide further extensibility with other services and features. This includes authentication provider support, the use of Microsoft Bot Framework Skills to augment the bot's capabilities, integration with Teams and Facebook channels, and the direct embedding of a bot in web-based mobile apps.



### Add a Power Virtual Agents bot into Power Apps canvas app

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Apr 2020

#### Feature details

Power Apps app makers will be able to add a Power Virtual Agents bot into their existing [canvas app](#). They can select which bot should be included in the app and theme or customize the chat canvas.

### Create and manage Power Virtual Agents directly from Power Apps

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Apr 2020

#### Feature details

Power Apps app makers will be able to create and manage their bots directly from the [Power Apps maker portal](#). They'll be able to see a list of all the bots they have access to in the selected environment, see basic information about the bots, and quickly go to Power Virtual Agents to make changes to their bot.

### Customizable bot behavior when no topic is triggered

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Apr 2020

#### Feature details

When a topic can't be matched or triggered based on what the user types, bot authors will be able to customize how the bot behaves (such as what it says or what actions it should take) by using a dedicated system topic.

## Single Sign-On

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Jun 2020

### Feature details

When using **User authentication** with Single Sign-On, users will be automatically signed into the bot if they are signed into the hosting website. This removes the need for users to type their username and password multiple times.

### See also

[User authentication](#) (docs)

## Core Authoring

### Overview

Use the authoring canvas in Power Virtual Agents to create and edit topics, and add trigger phrases and variables. Extend your bot's conversational capabilities with Power Automate.

### Import and export bots or their content

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 2020	-

### Feature details

Enterprise customers need to set up different environments (such as testing or production environments) for their bots to manage change control, governance, data residency, and latency requirements. With this feature, admins will be able to move bots or their content across multiple environments.

### See also

[Environments](#) (docs)

## Improved Power Automate flow integration in Power Virtual Agents

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Apr 2020

### Feature details

Bot authors will be able to refresh and replace flows in a **Call an action** node.

They'll also be able to see changes made in Power Automate being reflected in the Power Virtual Agents authoring canvas. Additionally, from within Power Automate, they'll see notifications on changes like flows being turned off or deleted and changes to input and output parameters.

### See also

[Call an action node](#) (docs)

## Multiple users can edit topics at the same time within a bot

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Apr 2020

### Feature details

Multiple users will be able to edit different conversation topics within a bot, which helps organizations ensure that employees with the right domain expertise implement conversation improvements.

For example, one author can be editing a topic about networking issues while another author is editing a topic about store hours.

## Pass context to a bot from the calling site

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Apr 2020

### Feature details

Bot authors will be able to specify parameters using the URL query string from the host website so that the bot can take in extra context information.

### Use global variables across topics within a bot

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Apr 2020

### Feature details

Bot authors will be able to pass variables from one topic to another and use bot-level variables across all topics. This allows authors to keep the conversation context within an entire bot conversation rather than just within a single topic. It will also help the bot avoid asking unnecessary questions.

### Add images and videos to topics

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	May 2020

### Feature details

Enhance bot conversations by adding images and online-hosted videos to your topics. By including an image or video in a bot's response, instead of a long textual description, you can handle complex scenarios while also keeping messages concise.

### Support for additional languages

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	May 2020	Jul 2020

### Feature details

Power Virtual Agents is scaling up to support a larger set of languages. In addition to English, bots will be able to understand and converse in French, German, Spanish, Italian, Portuguese, and Chinese (a bot will only support one language). We will continue to increase support for

additional languages over time. Note that the exact order and timing of language availability remain subject to change.

## Adaptive Cards

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Jun 2020	Sep 2020

### Feature details

Easily author rich content without needing to write code by using [Microsoft Adaptive Cards](#) directly from within the authoring experience. Adaptive Cards will be displayed consistently wherever your customers are and tailored to their screen size and device capability.

## Enable voice interactions

### Overview

Use Power Virtual Agents voice capabilities to connect your bot to a phone line and enable voice interactions for your users. Expand your bot's conversational capabilities with Microsoft Cognitive Services.

### AI-assisted authoring – Topic suggestions from bot sessions

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Jul 2020

### Feature details

In addition to suggestions from websites and support cases, with [Dynamics 365 Customer Service Insights integration](#) support is being added for suggestions from bot sessions using chat transcripts.

As people interact with a bot, the system surfaces suggestions to the author about topics and trigger phrases people are using that the bot doesn't yet know how to answer, and the more users that interact with a bot, the better it gets. The author can then act on those suggestions to create new topics or add additional trigger phrases to existing topics to increase the bot's usability.

## Connect bots to voice and phone call interactions

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Jul 2020	Sep 2020

### Feature details

Bot authors will be able to add voice-based interactions by connecting bots to a phone line or integrating them with call centers. Bots will be able to use Microsoft Cognitive Services (such as text-to-speech and speech recognition) when calling a phone number, and the bot can pass along what it has learned from the conversation so that a human agent will not need to repeat questions the bot has already asked.

# Power Platform governance and administration

## Overview of Power Platform governance and administration 2020 release wave 1

Microsoft Power Platform offers a range of governance and administration capabilities that span across Power Apps, Power Automate, and Common Data Service. These capabilities are designed to help the administrators and IT Professionals in the organization set up, secure, manage, govern, and monitor the use and adoption of the platform and its components across the enterprise.

In addition to the [Power Platform admin center](#), which is the unified user experience we aim to provide for administrators of Power Platform, rich tooling experiences, such as PowerShell cmdlets and Management Connectors, are also available to provide additional, fully-automatable management capabilities for use beyond the out-of-the-box portal experiences.

## What's new and planned for Power Platform governance and administration

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for General availability.

### An enhanced, unified Power Platform admin center

The Power Platform admin center is now offering a unified experience to manage environments, deployments, users, and capacity as well as to analyze usage and performance of your apps and components.

Feature	Enabled for	Public preview	General availability
<a href="#">Environment lifecycle supports Power Apps, Power Automate, Common Data Service, and more</a>	Admins, makers, or analysts, automatically	Apr 2020	
<a href="#">User access diagnostic experience</a>	Admins, makers, or analysts, automatically	Apr 2020	
<a href="#">Unified service health experience in Power Platform admin center</a>	Admins, makers, or analysts, automatically	-	Apr 2020
<a href="#">Retry experience for early access opt-in updates</a>	Admins, makers, or analysts, automatically	Feb 2020	Apr 2020
<a href="#">Early access updates</a>	End users, automatically	Feb 2020	Apr 2020

## Automation and tooling for administrators

Rich tooling experiences providing additional management capabilities for administrators and IT professionals for a fully-automatable management experience.

Feature	Enabled for	Public preview	General availability
<a href="#">Bring your lake: export Power Apps canvas usage and adoption to your data lake</a>	Admins, makers, or analysts, automatically	Apr 2020	
<a href="#">Power Platform Advisor</a>	Admins, makers, or analysts, automatically	-	Apr 2020
<a href="#">PowerShell cmdlets for Power Automate admins are generally available</a>	Admins, makers, or analysts, automatically	-	Apr 2020
<a href="#">Admin connectors for Power Automate are generally available</a>	Admins, makers, or analysts, automatically	-	Jul 2020



Feature	Enabled for	Public preview	General availability
<a href="#">PowerShell cmdlets for Power Apps admins are generally available</a>	Admins, makers, or analysts, automatically	✓ May 21, 2018	Jul 2020
<a href="#">Admin connectors for Power Apps</a>	Admins, makers, or analysts, automatically	✓ Aug 30, 2018	Jul 2020

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **End users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their end users.

For a list of the countries or regions where Dynamics 365 business applications are available, see the [International availability guide](#).

For more information about geographic areas, data centers (regions), data storage, and replication, click **expand all** on the [Where your data is located page](#) and find the Microsoft cloud service for this feature.

## An enhanced, unified Power Platform admin center

### Overview

The [Power Platform admin center](#) is now the single admin experience for Power Apps and Power Automate. It is offering unified experience to manage environments, deployments, users, capacity, and usage. Powerful analytics helps admins to investigate and diagnose issues with their deployments, and the integrated help and support experience allows them to find the help they need and escalate to Microsoft Support when necessary.

## Environment lifecycle supports Power Apps, Power Automate, Common Data Service, and more

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 2020	-

### Feature details

Environments support lifecycle operations, such as copy, restore, and backup. These operations will now support various resources present in the environment. For example, when you copy an environment, the apps and flows present will also get copied over to the target environment.

### User access diagnostic experience

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 2020	-

### Business value

Managing user access often requires troubleshooting across the Dynamics 365 portal, Microsoft 365 admin portal, and the Power Platform admin center with information on users' access statuses. New features enable the administrator to determine an access issue and take required action across the various portals.

### Feature details

The set of features to help an administrator troubleshoot user access issues will include the following:

- Sign-in and in-app access issue error screens with more context on the cause of the issue will be surfaced to the user.
- One-click "Send Error Report" functionality from error screens to inform admins about the user's access issue.
- Admins can view the details of the error that the user encountered with the context of the error including: user's email, environment URL, error code, error string, and a link to troubleshooting instructions.
- Improved deflection to cover more scenarios, including an option to on-demand sync a user for any access issue.

- Ability to on-demand sync users in an environment, see results, and see information on how to troubleshoot any failure.
- Ability to prioritize adding users to an environment and see results.
- A consolidated view in Power Platform admin center showing the set of users present in an environment, their enablement status, and diagnosis information.
- Power Platform admin center will also list any environment-wide user sync failures due to plug-ins owned by customers with troubleshooting guidance.

### Unified service health experience in Power Platform admin center

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Apr 2020

#### Feature details

Power Platform admins can view a unified service health experience for model-driven apps in Dynamics 365 (such as Dynamics 365 Sales and Dynamics 365 Customer Service), Power Apps, and Power Automate in the Power Platform admin center. Admins can also set up alerts to stay on top of the status of service outages.

### Retry experience for early access opt-in updates

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Feb 2020	Apr 2020

#### Business value

Admins can try to restart a failed update for an app on their own before reaching out to Microsoft Support.

#### Feature details

During early access of a release, admins can opt in to updates to preview early access features. If an update fails for an app, there will be a retry button available to restart the update process for the failed apps. This will allow admins to restart the update process for the failed app without being stuck in the failed state.

## Early access updates

Enabled for	Public preview	General availability
End users, automatically	Feb 2020	Apr 2020

### Business value

Try to validate these new features before they are automatically enabled to your users.

### Feature details

Customers and partners can validate the upcoming features and capabilities months in advance before they're enabled automatically during major releases. From the Power Platform admin center, admins can enable the early access update that allows you to try to validate these new features in a non-production environment and get ready to roll out the changes to users.

## Automation and tooling for administrators

### Overview

Rich tooling experiences, such as PowerShell cmdlets and Management Connectors, are available for administrators and IT professionals to provide additional management capabilities for use beyond the out-of-the-box portal experiences and to allow for a fully-automatable management experience.

### Bring your lake: export Power Apps canvas usage and adoption to your data lake

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 2020	-

### Business value

Empowering customers to slice and dice data and build reporting unique to their needs.

### Feature details

Power Apps customers (admins) will be able to opt-in to receive usage and adoption for canvas apps into their own Azure Data Lake. The data will be made available once a day. Since the data resides with the owner, customers will be able to store data over longer periods of time without GDPR and other issues. Customers will have the flexibility to meet their own unique reporting

requirements including quarterly and yearly trends on app usage and adoption using tools like Power BI.

### Power Platform Advisor

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Apr 2020

#### Feature details

Power Platform Advisor will enable admins and makers to more effectively troubleshoot some of the most commonly occurring issues by surfacing self-help solutions in the Power Platform admin center.

### PowerShell cmdlets for Power Automate admins are generally available

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Apr 2020

#### Feature details

With the preview launch of the [PowerShell cmdlets for administrators](#) last year, admins are able to automate many of the monitoring and management tasks that were only possible through the [Power Automate admin center](#).

We are now announcing the General availability of these cmdlets, as well as the addition of new cmdlets around:

- Capacity management
- Permission and user management
- Environment lifecycle management

### Admin connectors for Power Automate are generally available

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Jul 2020

## Feature details

With the preview launch of the [Admin connectors for Power Apps and Power Automate](#) last year, Power Platform admins found new and powerful ways to improve their productivity by using the same tools that they manage.

We are now announcing the General availability of these connectors and the addition of some templates and samples that outline common use cases for canvas apps and flows that are built with these connectors:

- [Power Platform for Admins](#)
- [Power Automate for Admins](#)

## PowerShell cmdlets for Power Apps admins are generally available

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✓ May 21, 2018	Jul 2020

## Feature details

With the preview launch of the [PowerShell cmdlets for administrators](#) last year, admins are able to automate many of the monitoring and management tasks that were previously only possible through the [Power Apps admin center](#).

In 2020 release wave 1, we will be announcing the General availability of these cmdlets.

## See also

[PowerShell support for Power Apps](#) (docs)

## Admin connectors for Power Apps

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✓ Aug 30, 2018	Jul 2020

## Feature details

With the preview launch of the [Admin connectors for Power Apps and Power Automate](#) last year, Power Platform admins found new and powerful ways to improve their own productivity by using the same tools that they manage.

In April 2020, we will be announcing the General availability of these connectors, as well as the addition of a series of templates and samples outlining common user cases for canvas apps and flows built for these connectors:

- [Power Platform for Admins](#)
- [Power Apps for Admins](#)

**See also**

[Announcing new Admin and Maker Connectors for PowerApps and Flow](#) (blog)

# Common Data Model and data integration

## Overview of Common Data Model and data integration 2020 release wave 1

Citizen Data Integration team's vision is to democratize data integration for business users so it is seamless to extract, transform and load data into Common Data Service and Azure Data Lake Storage from any data source, and to provide structure and meaning to that data through the Common Data Model. We are investing in three key pillars:

- **Common Data Model** establishes industry wide structure and semantics of underlying data so that customers can then reason about that data through various business application solutions, analytics & ML algorithms. In this milestone we will extend the reach of Common Data Model through SDKs and language-specific object models to support developers and partners, better in-product experiences and beyond.
- **Power Platform Dataflows**. Power Query is the industry leading smart data prep tool and evolves by infusing AI/ML into data transformations and by extending dataflows to all of Power Platform.
- Enhanced **Data Integration** by enabling analytics on Common Data Service data, Office data integration to enable new insights, new and enhanced connectors, improvements in connectivity platform, extending dual-write, improving Data Export Service, and enhancing Gateway for enterprises and Robotics Process Automation (RPA).

## What's new and planned for Common Data Model and data integration

This topic lists features that are planned to release from April 2020 through September 2020. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released** (see [Microsoft policy](#)).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the day of release.

This check mark (✓) shows which features have been released for public preview or early access and for general availability.



## Common Data Model

Feature	Enabled for	Public preview	General availability
<a href="#">New Common Data Model entity definitions</a>	Admins, makers, or analysts, automatically	-	Sep 2020
<a href="#">New Common Data Model standard entity definitions</a>	Admins, makers, or analysts, automatically	-	Sep 2020
<a href="#">Enhanced Common Data Model SDK functionality</a>	Admins, makers, or analysts, automatically	Jun 2020	Sep 2020
<a href="#">Empower out-of-the-box analytics</a>	Admins, makers, or analysts, automatically	Jun 2020	To be announced
<a href="#">Common Data Model visualization and management experience</a>	Admins, makers, or analysts, automatically	Jul 2020	To be announced

## Power Platform connectors

A critical part of data integration and the suite of products it supports — Power Apps, Power Automate, Power BI, and Power Query — is connectivity to external data sources. The connector platform has two key objectives – providing a platform that allows partners and customers to develop connectors.

Feature	Enabled for	Public preview	General availability
<a href="#">Better enterprise connectivity to SQL Server with support for Windows authentication</a>	Admins, makers, or analysts, automatically	Sep 2020	
<a href="#">Office 365 Groups Mail connector for Power Apps and Power Automate</a>	Admins, makers, or analysts, automatically	Sep 2020	
<a href="#">Support for mapping to Common Data Service option sets</a>	Admins, makers, or analysts, automatically	Sep 2020	-

Feature	Enabled for	Public preview	General availability
<a href="#">Support for mapping to system fields within Common Data Service entities</a>	Admins, makers, or analysts, automatically	Sep 2020	-
<a href="#">Telemetry and feedback for certified connectors</a>	Admins, makers, or analysts, automatically	Sep 2020	-
<a href="#">Provide guidance for next steps when connectors and operators are deprecated</a>	Admins, makers, or analysts, automatically	-	Apr 2020
<a href="#">FAQs for the certification process</a>	Admins, makers, or analysts, automatically	-	Jun 2020
<a href="#">Give feedback directly from the documentation pages</a>	Admins, makers, or analysts, automatically	-	Jun 2020
<a href="#">SAP ERP connector for Power Apps and Power Automate</a>	Admins, makers, or analysts, automatically	-	Jun 2020
<a href="#">Support for multiple account owners in the connector certification portal</a>	Admins, makers, or analysts, automatically	-	Jun 2020
<a href="#">Submit documentation during the certification process.</a>	Admins, makers, or analysts, automatically	-	Jun 2020
<a href="#">Improved experience downloading connector artifacts</a>	Admins, makers, or analysts, automatically	-	Sep 2020
<a href="#">Improved landing page experience for connectors</a>	Admins, makers, or analysts, automatically	-	Sep 2020
<a href="#">Informative and consistent experience verifying the quality of connector artifacts</a>	Admins, makers, or analysts, automatically	-	Sep 2020

Feature	Enabled for	Public preview	General availability
<a href="#">Stronger integration of the open-source repository with custom connectors</a>	Admins, makers, or analysts, automatically	-	Sep 2020
<a href="#">Summary page with connectors and their metadata</a>	Admins, makers, or analysts, automatically	-	Sep 2020
<a href="#">Support for connection parameters when building custom connectors</a>	Admins, makers, or analysts, automatically	-	Sep 2020
<a href="#">Support for multi-auth when building custom connectors</a>	Admins, makers, or analysts, automatically	-	Sep 2020
<a href="#">Support for ordering operation parameters</a>	Admins, makers, or analysts, automatically	-	Sep 2020
<a href="#">Support for simultaneous connector versions</a>	Admins, makers, or analysts, automatically	-	Sep 2020
<a href="#">Support for smart polling triggers</a>	Admins, makers, or analysts, automatically	Jun 2020	Sep 2020
<a href="#">Support for testing OAuth connections in the custom connector building experience</a>	Admins, makers, or analysts, automatically	Jun 2020	Sep 2020

## Power Query Online

Feature	Enabled for	Public preview	General availability
<a href="#">Smart data preparation capabilities in Power Query Online</a>	End users by admins, makers, or analysts	Sep 2020	
<a href="#">New and enhanced connectors in Power Query Online</a>	Admins, makers, or analysts, automatically	-	Sep 2020

Description of **Enabled for** column values:

- **End users, automatically:** These features include change(s) to the user experience for end users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **End users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their end users.

## Common Data Model

### Overview

Common Data Model is the shared data language used by applications to enable consistency of the meaning of data across applications. It provides modular and extensible business entities (account, lead, opportunity, and so on) and also observational data concepts (such as link clicks and email opens). It unifies data in a well-known schema across data silos, applications, and deployments. Although Common Data Model started in Common Data Service and Dynamics 365, it is bringing the same semantic consistency to Azure Data Lake Storage with Common Data Model folders, allowing an organization to take advantage of AI and machine learning on a scale that wasn't previously possible. Common Data Model enables business and analytics applications to interoperate over a variety of areas, including sales, service, healthcare, higher education, and more. The span of products, platforms, and services that implement, produce, and consume data in Common Data Model form continues to grow both inside and outside of Microsoft.

### New Common Data Model entity definitions

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Sep 2020

### Feature details

With an increased focus on analytics, Common Data Model standard definitions are being extended to include subject area and core analytical entities. These new Common Data Model entities are not rooted in any specific business application or solution. They are subject matter and area specific entities targeted at enabling analytics at scale.

## New Common Data Model standard entity definitions

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Sep 2020

### Feature details

The set of Common Data Model standard entities that is published and open sourced on GitHub continues to grow as more applications and data producers contribute to the standard. New concepts submitted by subject matter experts are diligently reviewed before being publicly released. Similarly, extensions to existing concepts (like Account and Contact) are done with a careful review of the current semantics, which ensures alignment. With this release, we are extending the standard entity definitions to include observation and perception models as well as Industry Accelerators standard entities.

## Enhanced Common Data Model SDK functionality

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Jun 2020	Sep 2020

### Feature details

The Common Data Model SDK continues to be delivered as open source via GitHub. We plan to accelerate adoption of Common Data Model by having first and third parties build out-of-the-box and custom solutions. The plan is to add new functionality to the Common Data Model SDK, such as robust telemetry, the ability to use a customer's own Common Data Model entity definitions, and making Common Data Model semantic traits usable for Power BI and Power Query out of the box.

## Empower out-of-the-box analytics

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Jun 2020	To be announced

## Feature details

Common Data Model will continue to grow its semantic ontology to support out-of-the-box machine learning and AI models, such as the customer churn prediction model. This functionality will allow users to have a guided experience that provides an expected data source for machine learning and AI models and increases the accuracy of their results. It will also enable the preservation of valuable metadata and the capture of new semantics for data enrichment and insights scenarios.

## Common Data Model visualization and management experience

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Jul 2020	To be announced

## Feature details

Increased focus on growing the Common Data Model ecosystem requires enabling users to work with Common Data Model in their native data environments, such as Power Query, Insights Apps, Synapse, and Power BI. Having a standardized way to use Common Data Model across relevant products will increase adoption, lower barriers to entry, reduce support cost, and encourage contributions to the growing ontology of Common Data Model.

## Power Platform connectors

### Overview

A critical part of data integration and the suite of products it supports — Power Apps, Power Automate, Power BI, and Power Query — is connectivity to external data sources. The connector platform has two key objectives – providing a platform that allows partners and customers to develop connectors efficiently and providing a rich set of connectors for customers.

As part of platform investments, we provide a rich set of tools, samples, and documentation to help partners and customers build connectors. We also invest in our certification processes and tools for connectors so that partners can get their connectors certified and make it available on the platform. A key investment here is also geared towards leveraging the larger community by open sourcing connectors.

Along with strengthening the ISV community's ability to create their own connectors, we plan to continue to invest in enterprise-grade data connectors like SQL Server, SAP, Oracle Database, Outlook, and more.

## Better enterprise connectivity to SQL Server with support for Windows authentication

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Sep 2020	-

### Feature details

The SQL Server connector now supports connecting to an on-premises SQL Server database with Windows authentication without having to share the SQL Server connection when an app is shared. Previously, makers using Windows authentication had to share their connections when they shared their flows. Now, makers can select a non-shared Windows authentication. In this case, every user will now be able to connect to the SQL Server database with their own credentials. This feature improves the security in the flow since every user will be authenticated with the SQL Server directly.

## Office 365 Groups Mail connector for Power Apps and Power Automate

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Sep 2020	-

### Feature details

The Office 365 Groups Mail connector for Power Apps and Power Automate provides users the ability to connect with their Office 365 Groups mail. The connector allows the user to send email conversations to the group, responds to mail sent to a group, and automates based on mail in a group. Customers have frequently requested this connector.

## Support for mapping to Common Data Service option sets

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Sep 2020	-

### Feature details

This feature provides native support for mapping query output columns from a dataflow to Common Data Service option set fields.

## Support for mapping to system fields within Common Data Service entities

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Sep 2020	-

### Feature details

This feature enables users creating dataflows to map output fields from their queries to system fields within Common Data Service entities.

## Telemetry and feedback for certified connectors

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Sep 2020	-

### Feature details

We often receive requests from partners regarding feedback and telemetry of their certified connectors. Currently, we provide this information only after a partner asks. With this new feature, we'll have a process to proactively provide telemetry and feedback to owners through the connector certification portal.

## Provide guidance for next steps when connectors and operators are deprecated

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Apr 2020

### Feature details

When an owner deprecates a connector or operation, we want to provide a clean transition experience for users to move to the new version with minimal effort. To do this, we will provide documentation that clearly warns users that the connector or operation is deprecated. Additionally, we will recommend a supported connector or operation to replace the deprecated features.



## FAQs for the certification process

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Jun 2020

### Feature details

We see many frequently asked questions (FAQs) during and after the connector certification process. With this release, we will provide more helpful documentation in the form of a list of FAQs that partners ask. These FAQs cover topics, such as the requirements to make a connector generally available, marketing benefits, and more.

## Give feedback directly from the documentation pages

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Jun 2020

### Feature details

Currently, there is no easy procedure for users to provide feedback and raise issues regarding documentation. With this release, we will provide a way to provide feedback and report issues directly from the documentation page.

## SAP ERP connector for Power Apps and Power Automate

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Jun 2020

### Feature details

SAP is one of the largest providers of Enterprise Resource Planning (ERP) software in the market today. SAP's ERP software handles an enterprise's business applications like accounting, sales, payroll, finance, production, human resources, etc. It serves as a system of records for many critical transactions for an enterprise. As such, when enterprises develop any LoB (Line of Business) apps, they often need to connect to SAP's applications.

The SAP ERP connector for Power Automate and Power Apps allows you to connect your flows and apps to an SAP ERP system – either SAP ECC or SAP S/4HANA. By providing a first-class

connector for SAP ERP systems, users can now leverage Power Platform to develop modern apps and automate their business processes over data in SAP. The SAP ERP connector provides the following out-of-the-box functionality:

- Allows connection to an SAP ECC or S/4HANA system.
- Supports common authentication mechanism of connecting to SAP.
- Allows invocation of any standard BAPI and custom RFCs.
- Provides dynamic schemas for the input and output parameters for an RFC or BAPI.

### Support for multiple account owners in the connector certification portal

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Jun 2020

#### Feature details

Currently, only one account can manage a connector submission, so communication between a partner and our certification team depends on a single point of contact. We also do not support notifying multiple stakeholders of communication.

With this release, partners can now add other account owners to help manage a connector submission. All account owners will receive notifications and updates on the connectors and will be able to manage the connector certification process.

### Submit documentation during the certification process

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Jun 2020

#### Feature details

As part of an effort to improve the documentation for connectors, partners can now use the connector certification portal to submit documentation. Partners will be able to use this process to submit connector documentation in markdown and relevant files, including images. This will improve the user's experience, and they can now find better documentation for custom connectors.

### Improved experience downloading connector artifacts

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Sep 2020

#### Feature details

We will provide an easier and quicker experience when you download connector artifacts in addition to our command line interface tool. These artifacts can then be easily edited, shared, or submitted for certification.

### Improved landing page experience for connectors

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Sep 2020

#### Feature details

Currently, the landing page experience for our connectors documentation is a summary article. We will provide an improved landing page experience for the connectors documentation to help users quickly and efficiently get to the information they want.

### Informative and consistent experience verifying the quality of connector artifacts

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Sep 2020

#### Feature details

We will provide a cleaner experience in our validation tools to help connector developers verify the quality of their connectors. This will include clearly communicated requirements, clear error messages, and consistency across standards.

## Stronger integration of the open-source repository with custom connectors

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Sep 2020

### Feature details

We want to further develop and leverage the benefits of our open-source repository. Currently, the repository of open-sourced certified connectors and custom connectors is disconnected from the connector experience in Power Platform. We want to bring the experiences closer for a more cohesive and unified connector experience.

## Summary page with connectors and their metadata

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Sep 2020

### Feature details

Currently, you must go to each connector's documentation page to see metadata, such as whether the connector is in Preview or General availability and whether it's a premium or standard connector. To provide a friendlier, more efficient experience, we will have an easy-to-view summary page of connectors with key metadata for each connector.

## Support for connection parameters when building custom connectors

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Sep 2020

### Feature details

Currently, the addition and management of connection parameters can only be done by editing the connector artifacts after you download them with the command line interface tool. This feature will enable you to manage connection parameters within the custom connector building experience.

## Support for multi-auth when building custom connectors

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Sep 2020

### Feature details

With this feature, you will be able to configure multi-auth while building custom connectors.

## Support for ordering operation parameters

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Sep 2020

### Feature details

Currently, there is no way to enforce the order of the parameters for an operation. With this feature, we will provide a way of setting and enforcing the order in which operation parameters appear when using a connector. This new feature will give a more consistent and reliable user experience.

## Support for simultaneous connector versions

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Sep 2020

### Feature details

As part of the certification process, we will support simultaneous versions of a connector in the certification portal. This feature will improve the development experience for partners who may want to make frequent updates.

## Support for smart polling triggers

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Jun 2020	Sep 2020

### Feature details

Currently, there are limitations and tradeoffs in selecting the type of trigger to use. Polling triggers can be costly and noisy, and webhook triggers rely on a single point of communication. We will provide a *smart* polling trigger that leverages the best of the polling and webhook triggers. The smart polling trigger will provide a less costly and more simplistic experience without sacrificing reliability.

## Support for testing OAuth connections in the custom connector building experience

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Jun 2020	Sep 2020

### Feature details

Currently, we allow users to test a basic auth connection in the custom connector building experience; however, OAuth connectors are not tested until the first connection is made. With this feature, you will be able to test your OAuth connection while building your custom connector.

## Power Query Online

### Smart data preparation capabilities in Power Query Online

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Sep 2020	-

## Feature details

With this release, the following two smart data preparation features will be delivered in Power Query Online bringing it to parity with Power Query Desktop:

- **Add column from examples:** This feature allows users to transform, derive, or combine data from existing columns in the Power Query editor based on the given examples and automatic transformation inference.
- **Web by example:** This feature allows users to extract data from a webpage based on the given data values that they would like to obtain in order to compose a desired table.

## See also

[Power Query features](#)

## New and enhanced connectors in Power Query Online

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Sep 2020

## Feature details

We will improve existing connectors by including support for native database queries and other advanced options, including time-outs and hierarchical navigation.

Here's the list of the new database and cube connectors:

### Database connectors

- Vertica
- ADLS Gen 1
- HDFS
- Azure HDInsight HDFS
- Active Directory
- IBM Netezza
- Sybase
- Informix
- OLEDB

**Cube connectors**

- Essbase
- AtScale



Got feedback?

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