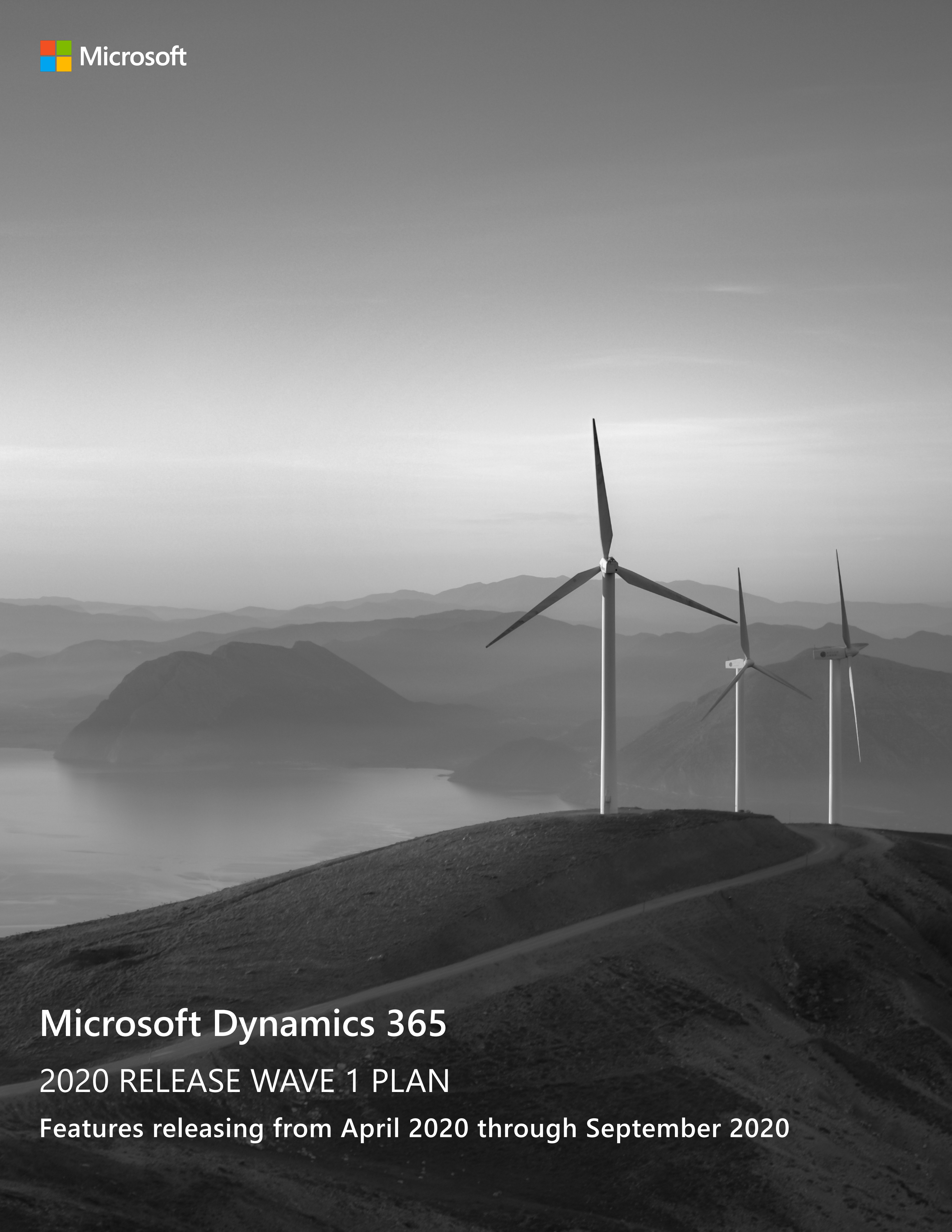
Microsoft



Microsoft Dynamics 365

2020 RELEASE WAVE 1 PLAN

Features releasing from April 2020 through September 2020

Last updated March 23, 2020.

Contents

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**. You can either browse the release plan online or download the document as a PDF file. The PDF file also includes information about Power Apps, Power Automate, Power Virtual Agents, Power Platform governance and administration, and Common Data Model and data integration.

The Power Platform features coming in the 2020 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

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.

NOTE Starting in February 2020, we will have a new business process application.

Dynamics 365 Project Operations unifies operational workflows to provide the visibility, collaboration, and insights needed to drive success across teams—from sales to finance.

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—it 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** helps 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

Milestone	Date	Description
		users. You can view the Dynamics 365 2020 release wave 1 early access features now.
Release plans available in additional 11 languages	Feb 12, 2020	The Dynamics 365 and Power Platform release plans are published in Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	April 1, 2020	Production deployment for the 2020 release wave 1 begins. Regional deployments will start on May 1, 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 in the Dynamics 365 community forums. We will use your feedback to make improvements.

Change history

This topic is updated when a feature's release date changes or when a feature is added or removed. You can see the full topic in the Dynamics 365 Change history online.

2020 release wave 1 features available for early access

This topic lists the Dynamics 365 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
Export marketing results data to Excel for further analysis	End users, automatically	✔ Feb 3, 2020	Apr 2020
Improved customer journey experience	End users, automatically	✔ Feb 3, 2020	Apr 2020
Improved email content designer	End users, automatically	✔ Feb 3, 2020	Apr 2020
Improved event management experience	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
Customize forecast models	End users, automatically	✔ Feb 3, 2020	Apr 2020
Easier selection of email templates	End users, automatically	✔ Feb 3, 2020	Apr 2020
Improve and adjust forecast accuracy	End users, automatically	✔ Feb 3, 2020	Apr 2020
License enforcement - users with new Team Member licenses	End users, automatically	✔ Feb 3, 2020	Apr 2020
Manage activities with ease	End users, automatically	✔ Feb 3, 2020	Apr 2020
Sales Team Member app module	End users, automatically	✔ Feb 3, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
Save standardized PDF documents to Dynamics 365 Sales or Microsoft SharePoint	End users, automatically	✔Feb 3, 2020	Apr 2020
Understand forecasts with precision pipeline management	End users, automatically	✔Feb 3, 2020	Apr 2020
Work with opportunities in the Kanban view	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
Agent productivity enhancements to knowledge capabilities	End users, automatically	✔Feb 3, 2020	Apr 2020
Configurable case resolution page	End users, automatically	✔Feb 3, 2020	Apr 2020
Customer Service app available for users with Team Member license	End users, automatically	✔Feb 3, 2020	Apr 2020
Customer Service Hub app is now available by default	End users, automatically	✔Feb 3, 2020	Apr 2020
Enhancements in service level agreements	End users, automatically	✔Feb 3, 2020	Apr 2020
Enhancements in the queue page	End users, automatically	✔Feb 3, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
Familiar, modern email experience for agents	End users, automatically	✓Feb 3, 2020	Apr 2020
License enforcement - users with new Team Member licenses	End users, automatically	✓Feb 3, 2020	Apr 2020
Rich text notes and keyword search in the timeline	End users, automatically	✓Feb 3, 2020	Apr 2020
Support for Site entity in the Unified Interface	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
Enhanced work hours calendar for resources	End users, automatically	✓Feb 3, 2020	Apr 2020
Integrated technician time tracking	End users, automatically	✓Feb 3, 2020	Apr 2020
Requirement dependency for efficient workflow	End users, automatically	✓Feb 3, 2020	Apr 2020
Resource scheduling dashboard	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
Allow filtering the Tax 1099 detail report by reporting year	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Budget planning query optimization for performance	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Credit management	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Date range for Posted transactions by journals report	End users, automatically	✔ Feb 3, 2020	Apr 2020
Electronic reporting advanced formula editor	Admins, makers, or analysts, automatically	✔ Feb 3, 2020	Apr 2020
Extended French localization ISO 20022 format for international payment and treasury transfer	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Extended Italian localization Advanced notes management	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Extended Italian localization bank account setup enhancement	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Extended Italian localization General ledger simulations	End users by admins, makers, or analysts	✔ Feb 3, 2020	Aug 2020
Extended Italian localization Improved inquiry on debit/credit	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
Extended Italian localization Intent letters - invoicing of usual exporters	End users by admins, makers, or analysts	✔ Feb 3, 2020	Aug 2020
Extended Italian localization Miscellaneous charges per kilogram in Intrastat declaration	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Extended Italian localization Posting invoices with zero amount	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Extended Italian localization Sales invoice lines sorting by packing slips	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Extended Italian localization Separate accounts for credit notes	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Extended Italian localization Tax invoice for goods delivered for free	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Extended Italian localization Unique Certification	End users by admins, makers, or analysts	✔ Feb 3, 2020	Aug 2020
Extended Swiss localization QR-bill implementation	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Prohibit submission to workflow when the invoice total and registered invoice total are not equal	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
Calculate PO delivery date based on lead times and working days (public sector)	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Catch weight product processing with warehouse management	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Compare item price storage	End users by admins, makers, or analysts	✔ Feb 1, 2020	Apr 2020
Country of origin enhancements	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
External catalog enhancements	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
Fixed assets integration with Asset Management lifecycle	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
Hazardous materials product information management	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
Hazardous materials shipping documentation	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
Improved job card device	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Inbound and outbound logistics improvements	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
Master planning includes items with on-hand inventory when pre-processing filters are enabled	End users by admins, makers, or analysts	✔ Feb 1, 2020	Apr 2020
Miscellaneous charges enhancements	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
Purchase order delivery via cXML	End users by admins, makers, or analysts	Feb 3, 2020	Apr 2020
Visual scheduling for work orders in Asset Management	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
Entity store data is available in Azure Data Lake	End users by admins, makers, or analysts	✔ Jun 1, 2019	Aug 2020
New task recorder capabilities for RSAT	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Recommended fields	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
Create leave rules to meet company and regulatory policies	Admins, makers, or analysts, automatically	✓Feb 3, 2020	Apr 2020
Enhanced benefit plan configuration	End users by admins, makers, or analysts	✓Feb 3, 2020	Apr 2020
Enhanced worker benefit inquiry	End users by admins, makers, or analysts	✓Feb 3, 2020	Apr 2020
Flex credit programs	End users by admins, makers, or analysts	✓Feb 3, 2020	Apr 2020
Leave calendar views	End users by admins, makers, or analysts	✓Feb 3, 2020	Apr 2020
Online benefit enrollment	End users by admins, makers, or analysts	✓Feb 3, 2020	Apr 2020
Qualified life event processing	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
Enable resetting of receipt numbers at the beginning of the fiscal year	End users by admins, makers, or analysts	✓Feb 3, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
Improved inbound and outbound inventory operations in store	End users by admins, makers, or analysts	✓Feb 3, 2020	May 2020
Set preferred payment methods for returns	End users by admins, makers, or analysts	✓Feb 3, 2020	Apr 2020
Support for bulk URL redirects	Admins, makers, or analysts, automatically	✓Feb 3, 2020	Apr 2020
Task management in HQ and POS for first-line workers and managers	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
AL interfaces	Admins, makers, or analysts, automatically	✓Feb 1, 2020	Apr 2020
Application version for aliasing base application	Admins, makers, or analysts, automatically	✓Feb 1, 2020	Apr 2020
Auto-insert recurring sales and purchase lines	End users, automatically	✓Feb 1, 2020	Apr 2020
Bank reconciliation improvements	End users, automatically	✓Feb 1, 2020	Apr 2020
Business Central integration with Common Data Service	End users, automatically	✓Feb 1, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
Camera/location AL API available in the browser	End users by admins, makers, or analysts	✔ Feb 1, 2020	Apr 2020
Collapse and expand document lines	End users, automatically	✔ Feb 1, 2020	Apr 2020
Disable export of data to Excel	Admins, makers, or analysts, automatically	✔ Feb 1, 2020	Apr 2020
Enable non-interactive printing in the cloud	End users, automatically	✔ Feb 1, 2020	Apr 2020
Enhanced customer and vendor document layout	End users, automatically	✔ Feb 1, 2020	Apr 2020
Enhanced mobile accessibility related to device orientation	End users, automatically	✔ Feb 1, 2020	Apr 2020
Enter data more easily	End users, automatically	✔ Feb 1, 2020	Apr 2020
Import profiles and UI customizations	Admins, makers, or analysts, automatically	✔ Feb 1, 2020	Apr 2020
Improved load time for pages	End users, automatically	✔ Feb 1, 2020	Apr 2020
Improved onboarding experience	End users, automatically	✔ Feb 2, 2020	Apr 2020
Long-running operations can be canceled from the web client	End users, automatically	✔ Feb 1, 2020	Apr 2020
Look up events and insert event subscriber in code	Admins, makers, or analysts, automatically	✔ Feb 1, 2020	Apr 2020
Manage direct-debit collections in Service Management	End users, automatically	✔ Feb 1, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
[Multiple variable declarations of the same type in the same line]()	Admins, makers, or analysts, automatically	✓Feb 1, 2020	Apr 2020
[Navigate trees more easily]()	End users, automatically	✓Feb 1, 2020	Apr 2020
[Notify requester about all changes for an approval request]()	Admins, makers, or analysts, automatically	✓Feb 1, 2020	Apr 2020
[Obsolete tag property]()	Admins, makers, or analysts, automatically	✓Feb 1, 2020	Apr 2020
[Optimized use of space on a page]()	End users, automatically	✓Feb 1, 2020	Apr 2020
[Print to attachment]()	End users, automatically	✓Feb 1, 2020	Apr 2020
[Receive more items than ordered]()	End users, automatically	✓Feb 1, 2020	Apr 2020
[Register capacity in units of seconds]()	End users, automatically	✓Feb 1, 2020	Apr 2020
[Revert Qty. to Invoice when canceling order]()	End users, automatically	✓Feb 1, 2020	Apr 2020
[Show and go to related records from a list]()	End users, automatically	✓Feb 1, 2020	Apr 2020
[Unhide parts on a page]()	End users, automatically	✓Feb 1, 2020	Apr 2020
[Use a Find function on the Role Explorer]()	End users, automatically	✓Feb 1, 2020	Apr 2020
[Use filters and views more easily]()	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
Contextual email messages	End users by admins, makers, or analysts	Aug 2020	-	-
Ability to test-send dynamic email messages	Admins, makers, or analysts, automatically	-	-	Apr 2020
Automated scheduler	End users by admins, makers, or analysts	-	-	Apr 2020
Compliance made easier	End users by admins, makers, or analysts	-	-	Apr 2020
Improved segment design and management	Admins, makers, or analysts, automatically	-	-	Apr 2020
Spam checker	End users by admins, makers, or analysts	-	-	Apr 2020
Improved event management experience	End users, automatically	-	✓ Feb 3, 2020	Apr 2020
Support for surveys using Microsoft Forms Pro	End users by admins, makers, or analysts	-	-	Apr 2020
Export marketing results data to Excel for further analysis	End users, automatically	-	✓ Feb 3, 2020	Apr 2020
Improved email content designer	End users, automatically	-	✓ Feb 3, 2020	Apr 2020

Feature	Enabled for	Public preview	Early access*	General availability
Improved customer journey experience	End users, automatically	-	✔ Feb 3, 2020	Apr 2020
In-place editing of email and forms	End users by admins, makers, or analysts	-	-	May 2020
Discover and use segments from Customer Insights in marketing campaigns	End users by admins, makers, or analysts	-	-	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.

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	-	-

Business value

With this release, Dynamics 365 Marketing can send context-rich email messages triggered by business transactions such as purchases, returns, payments, and more. Marketers can personalize messages, leveraging data from transactions such as order number or product purchased.

You can create customer journeys that target contacts associated with a recent record creation (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.

Feature details

- **Context-based journeys**: Create customer journeys that target contacts associated with a recent record creation (such as a purchase).
- **Updated messages based on context**: Send email messages to the same contact multiple times throughout the customer journey as the context changes.

Ability to test-send dynamic email messages

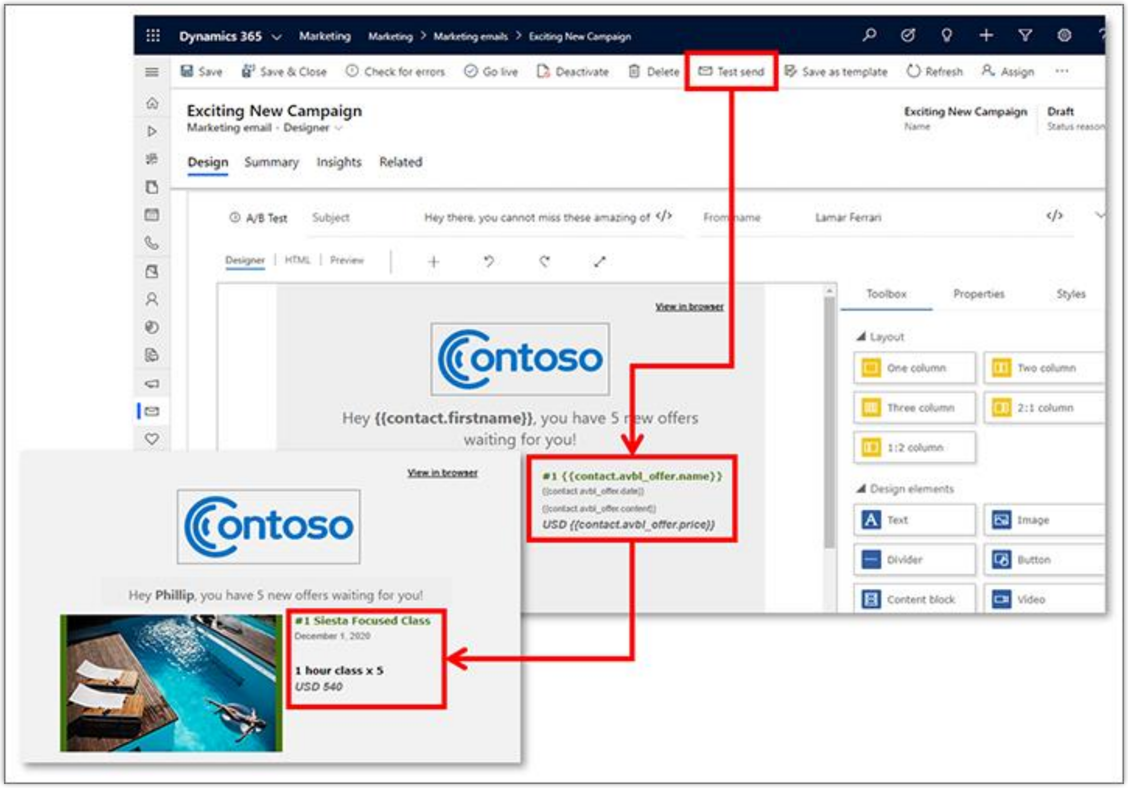
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Apr 2020

Business value

Dynamics 365 Marketing enables marketers to design visually rich marketing email messages that include personalized dynamic content. Careful testing is necessary, however, to account for variation in email client rendering and to confirm that dynamic content is accurate. Improved test-send functionality enables you to preview and test your messages before going into production, ensuring that your messages are consistent.

Feature details

- **Upgraded error detection**: Improved error checking for outgoing test messages.
- **Test-send dynamic content**: 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

Automated scheduler

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

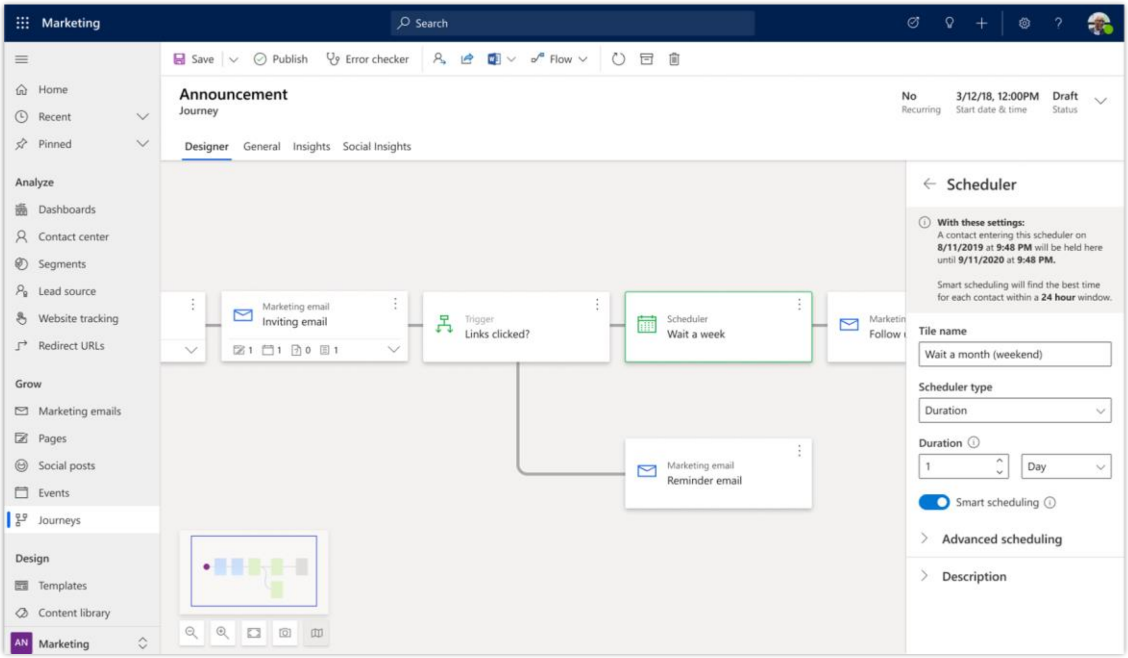
Business value

The automated scheduler uses AI to enable marketers to maximize customer engagement by sending email messages to their customers at the time when they're most likely to see and open the messages.

Feature details

- **Send email messages when contacts are likely to read them**: Based on past interactions with marketing email messages, the automated scheduler uses machine learning to find the days and times when each contact is most likely to be actively reading their email messages.

- **Automatically select the best time to send an email message**: By analyzing historical data, the automated scheduler automatically selects the best times to send the next email message for each contact, within a time window that you specify.



Customer journey with Smart scheduling option on

Compliance made easier

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

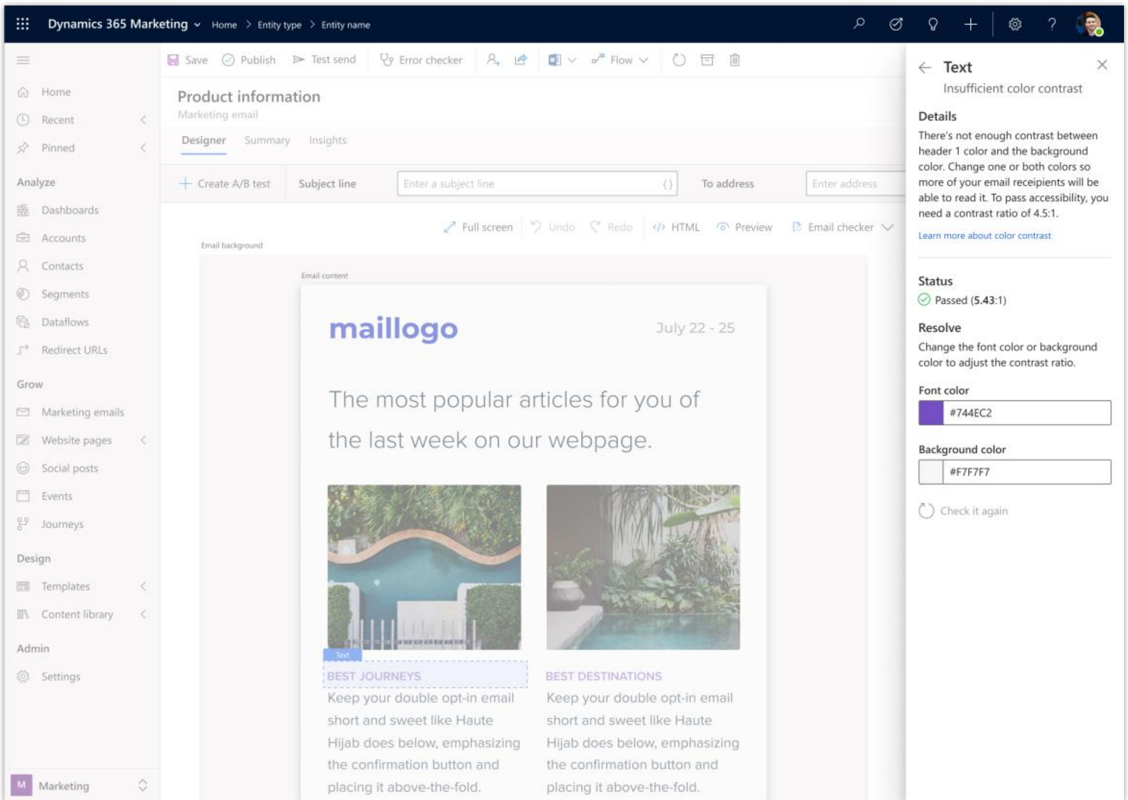
Business value

Business compliance with GDPR and accessibility guidelines is crucial. Improvements to Dynamics 365 Marketing help marketers meet compliance requirements, but some development work, consultancy assistance, or both, is still necessary.

Feature details

- **Consolidated opt-in confirmation messages**: New functionality combines multiple notifications and confirmation requests into a single message, such as combining updated GDPR consent together with multiple new subscriptions.

- **Historical view of subscription-list and GDPR consent-level changes**: Easily view the history of subscription-list and GDPR consent-level changes without building your own report.
- **Accessibility checker**: Check the accessibility of emails, forms, and pages created using the Marketing content designer and receive guidance on suggested fixes.



Email accessibility checker

Improved segment design and management

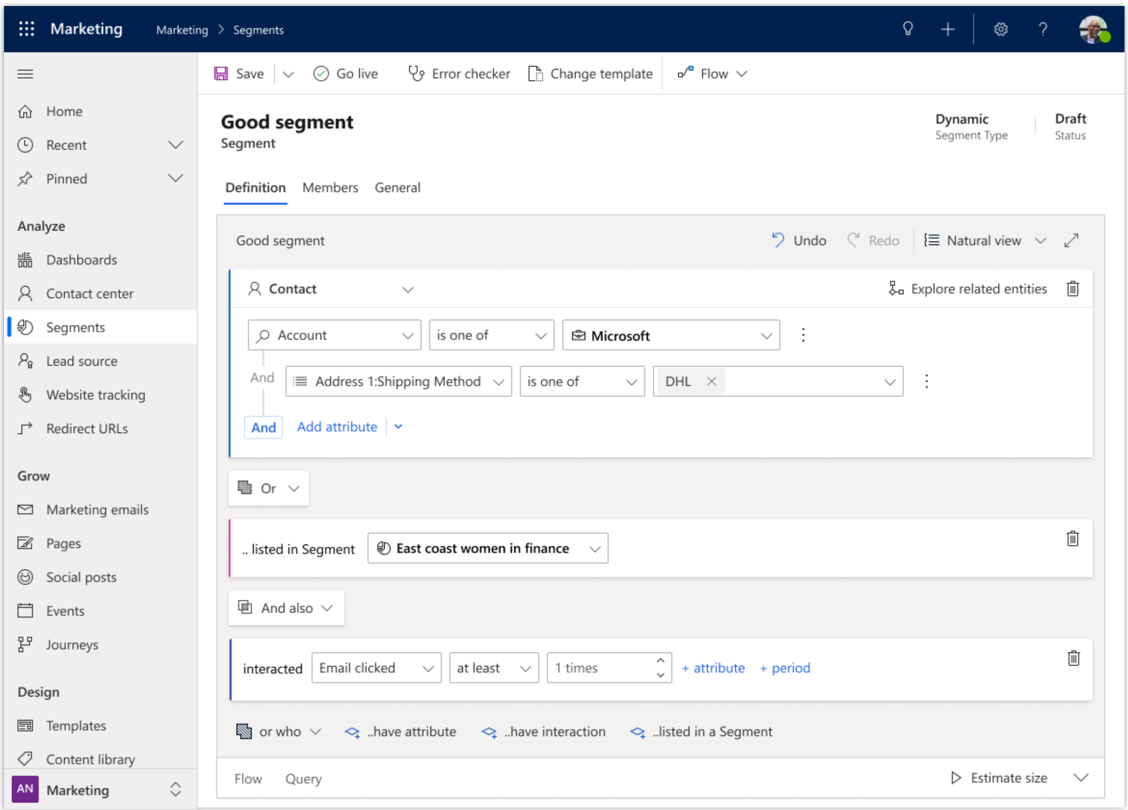
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Apr 2020

Business value

Improved segment management saves marketers time by simplifying segment creation and editing. You can create complex segments, targeting specific contacts, by combining behavioral and demographic data directly within the dynamic segment editor.

Feature details

- **Simplified segment creation**: Combine behavioral and demographic data directly within the dynamic segment editor.
- **Static segments are redesigned**: Static segments now handle an unlimited number of total contacts (up to 10,000 at a time) and allow rule-based addition to list members.
- **Query selection**: You can select static segment contacts based on query and segment data.
- **Time zone-aware segments**: Segments are time zone-aware, mirroring the time zone functionality in customer journeys.
- **New partial date operator**: Partial dates allow you to create segments for events such as "today" or based on people doing an action on the first day of the month, rather than specifying exact dates.



The segment designer

Spam checker

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

Business value

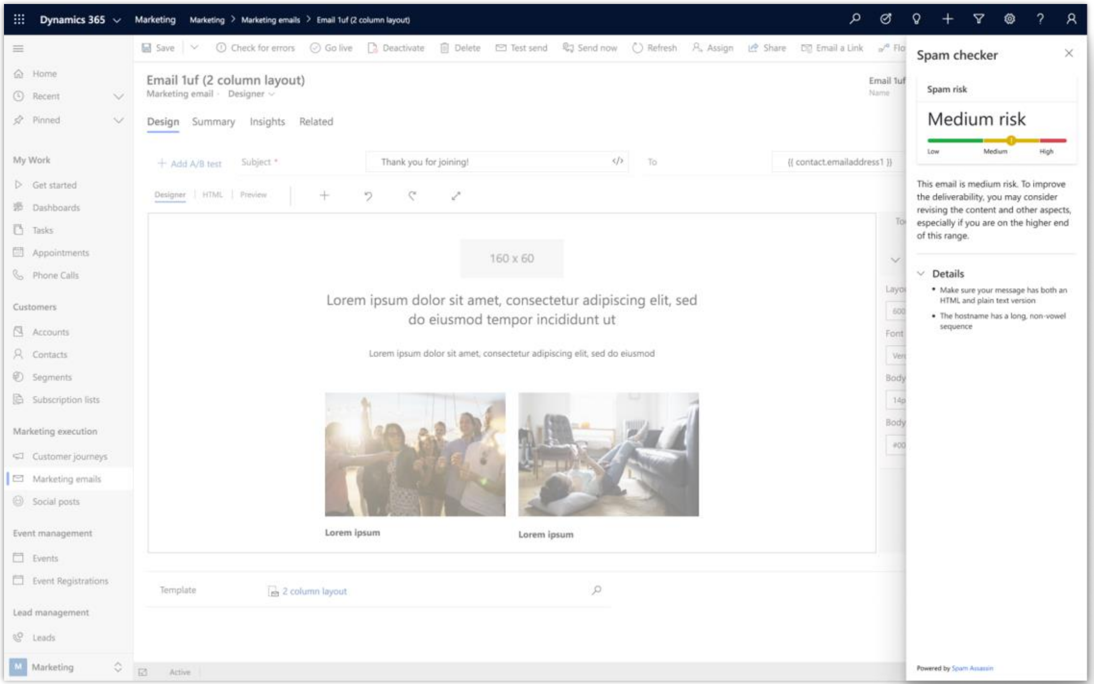
Spam checker allows marketers to maximize customer engagement with their emails by providing an AI-based assessment of the email content (a spam score) and suggesting ways to minimize the spam score.

Feature details

Today, marketers don't know if their email campaigns will land in a customer's inbox or be flagged as spam. The new spam checker feature in Dynamics 365 Marketing enables marketers to diagnose and mitigate any issues with email content that could potentially cause it to be flagged as spam. The spam checker feature also provides prescriptive guidance on what can be fixed. With this feature, marketers can confidently create emails and use them for campaigns, while maximizing the chance that emails will land in their customers' inboxes.

Spam checker enables you to:

- **Assess spam risk**: Determine how likely it is for an email to be caught by spam filters through a risk assessment score of high, medium, or low.
- **Get recommendations**: View what changes need to be made to improve the spam score and increase the chance for your email to land in your recipient's inbox.



Spam score showing medium risk

Improved event management experience

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✓ Feb 3, 2020	Apr 2020

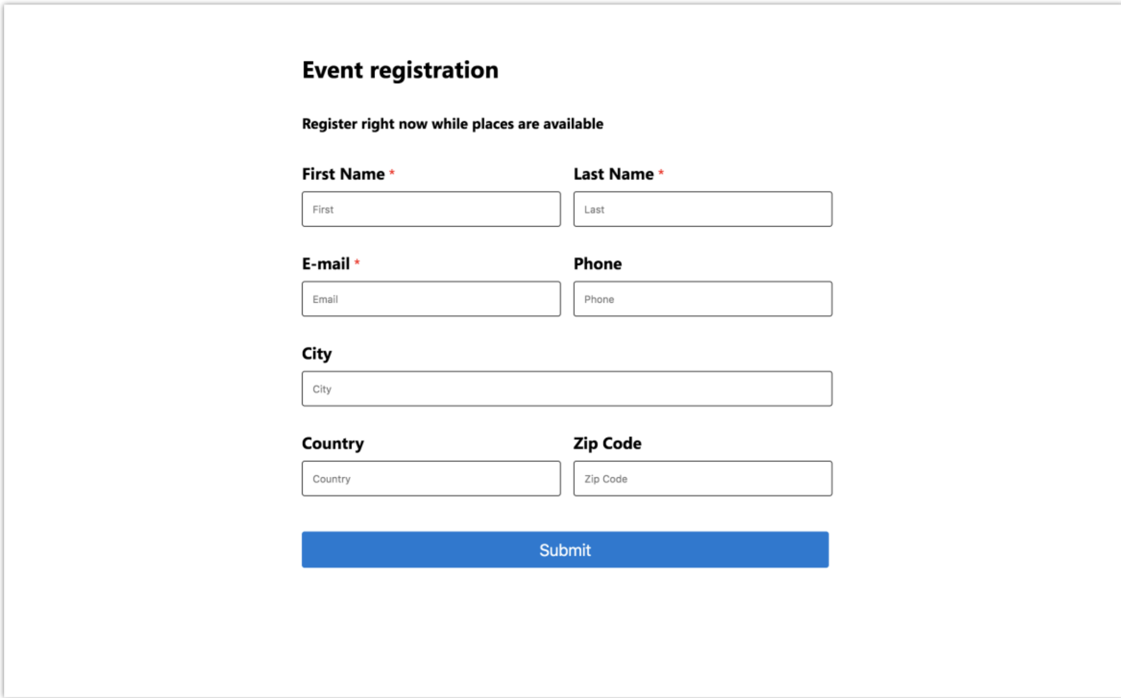
Business value

With this release, the event registration experience is undergoing a major overhaul to increase the speed and concurrency of the registration process.

Feature details

- **Use marketing forms in events**: 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.

- **Embed registration forms into any CMS**: 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.
- **Design forms within the event**: Event planners can design event registration forms from the event entity without leaving the event.



Event registration using marketing forms

See also

What's new in Dynamics 365 Marketing (docs)

Support for surveys using Microsoft Forms Pro

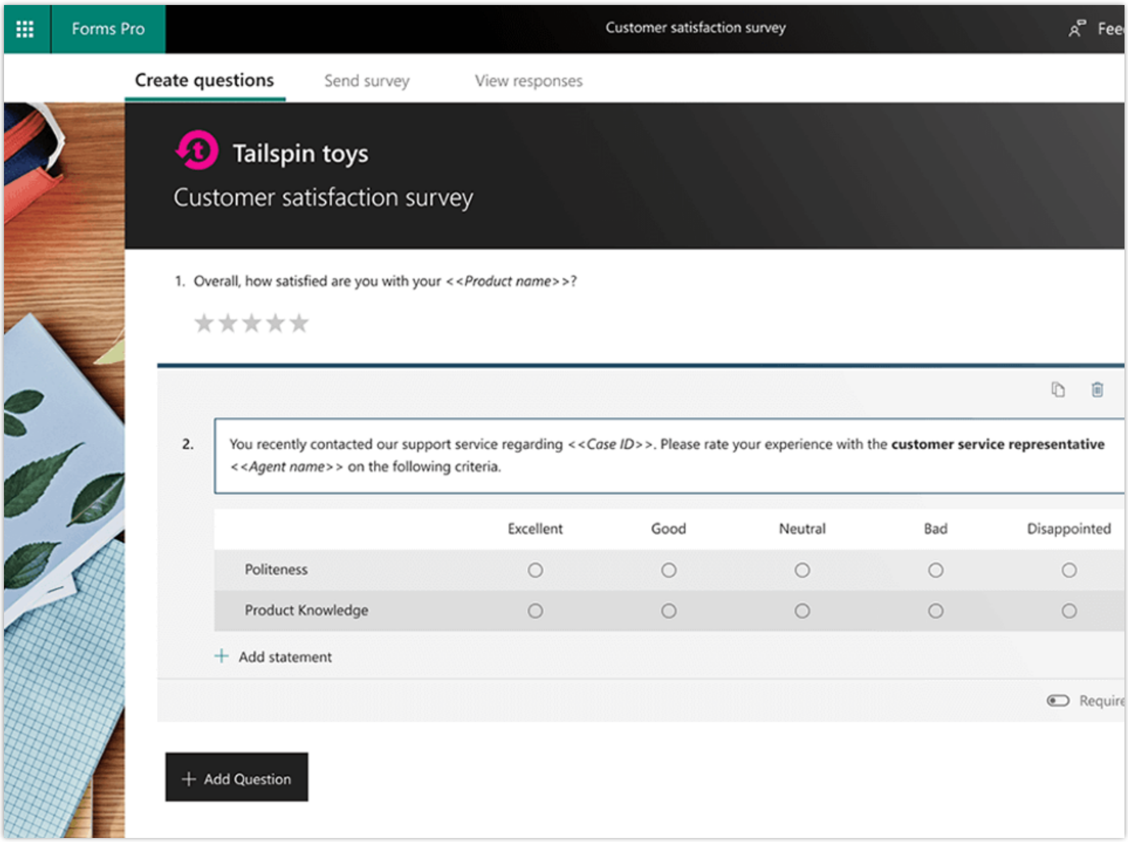
Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Apr 2020

Business value

Surveys are a critical feedback component for customer-obsessed organizations. Dynamics 365 Marketing with integrated Forms Pro brings a rich set of capabilities for asking for feedback about your customers' needs These survey capabilities help you make data-driven decisions and apply your findings to your marketing initiatives. Marketers can automate survey experiences and leverage data generated from surveys for advanced segmentation and customer profiling.

Feature details

- **Survey integration**: Create surveys in Dynamics 365 Marketing using Microsoft Forms Pro.
- **Automated survey responses**: Automate survey responses by including them in the criteria for segmentation or lead scoring, or when branching a customer journey.



Forms Pro survey

Export marketing results data to Excel for further analysis

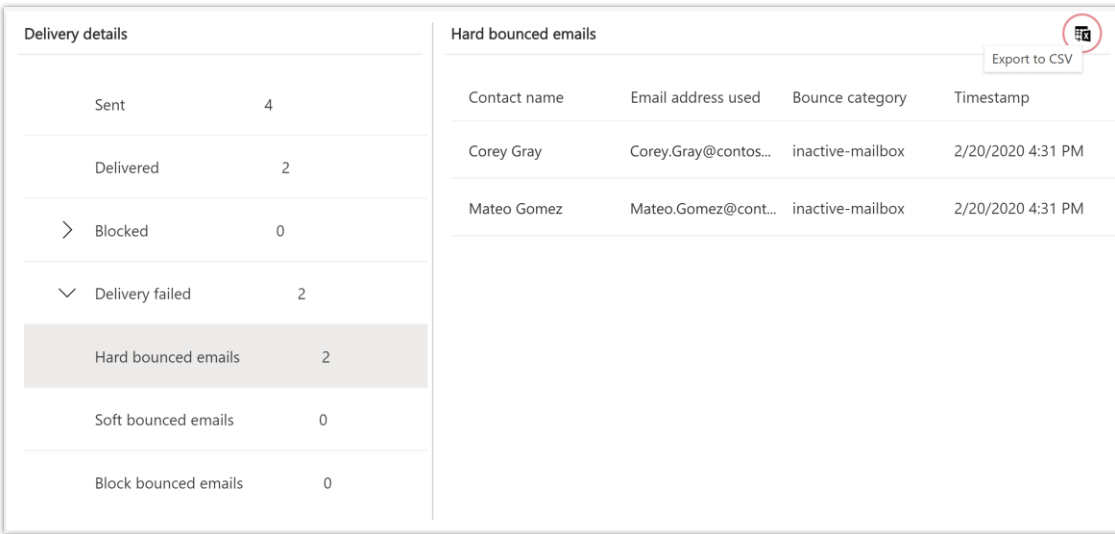
Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 2020	Apr 2020

Business value

Dynamics 365 Marketing tracks how your contacts interact with marketing initiatives and provides detailed analytics. You can use your contact analytics to understand the impact of marketing campaigns. Marketing now allows you to export your marketing data to Excel, providing more options to determine your contacts' responses to your campaigns.

Feature details

- **Analyze marketing data in Excel**: Export marketing results directly to Excel.
- **View data on your terms**: View marketing results in Marketing or Excel.



Export icon shows at the top right corners

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.

See also

February 2020 update (docs)

Improved email content designer

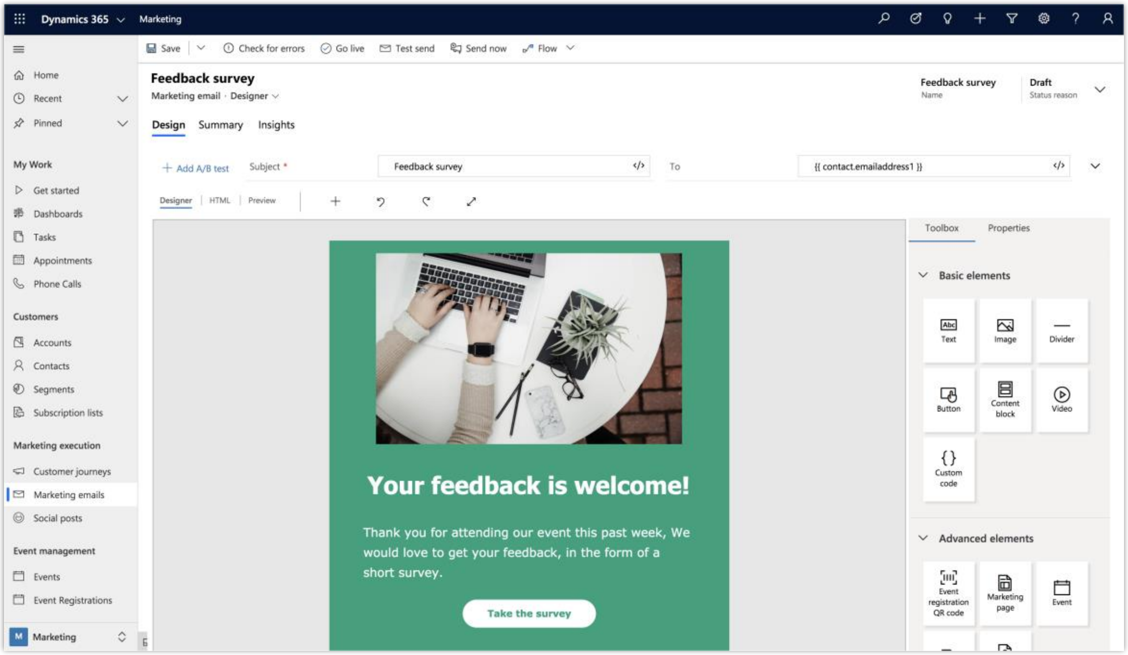
Enabled for	Public preview	Early access	General availability
End users, automatically	-	✓ Feb 3, 2020	Apr 2020

Business value

New features allow marketers to create attractive and sophisticated email messages, capturing customer attention more effectively. Interface updates and advanced preview capabilities ensure that email creation is quick and consistent.

Feature details

- **New and improved email templates**: New email templates with updated layout capabilities give you a head start on the design process.
- **Drag to resize elements**: More intuitive controls enable you to drag and resize email content elements including images, dividers, and buttons.
- **Improved color picker**: Improved color picker controls offer support across browsers and mobile devices.
- **Email-wide property controls**: Updated property controls allow you to set email-wide properties, creating a consistent look with just a few clicks.
- **More customization options**: Picture-over-picture and button-over-picture capabilities add flexibility to your designs. To help boost email open rates, you can now add custom preheaders with tailored email message preview text. Options such as rounded corners and individually customizable columns offer even more design possibilities.
- **Improved email preview**: You can now preview fields with resolved dynamic text. The enhanced preview means you'll see exactly how your messages will look when customers receive them. The built-in accessibility checker helps you ensure that all recipients can view your messages.
- **Updated forms and pages designers**: The email content designer improvements are also available in the forms and pages designers.



Attractive email design with button over picture

See also

[What's new in Dynamics 365 Marketing](#) (docs)

Improved customer journey experience

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 2020	Apr 2020

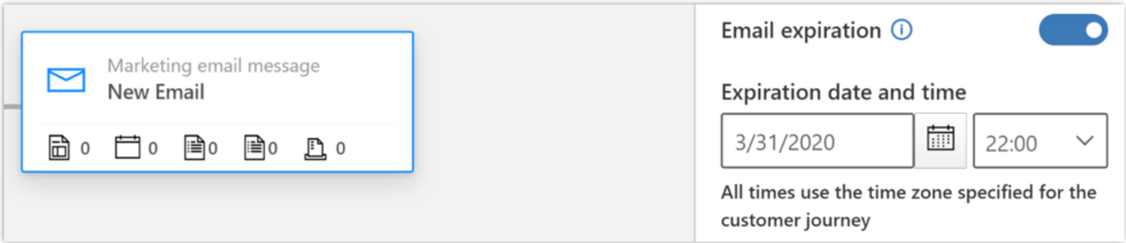
Business value

Some of your customer journeys might include email messages with time-sensitive content. Time-sensitive emails could include time-limited offers, holiday promotions, or a two-week reminder for an upcoming event. Because contacts might join the journey at any time, you can now prevent delivering outdated information by setting an expiration date for one or more selected email messages.

Feature details

- **Expiration dates and times for time-sensitive content**: Set a static expiration date and time—for example, March 31, 2020, at 10:00 PM in the customer's time zone.

- **No outdated messages**: Any contact who enters an email tile after its expiration date doesn't receive the email message.
- **Determine who didn't receive your message**: Information on who didn't receive a message due to an expiration date is captured and available from email and journey insights.
- **Warning when stopping live records**: Before stopping email messages, forms, or segments used by live customer journeys, the user sees a warning message to help prevent the user from inadvertently corrupting an entity used in a live journey.



Add an expiration date and time to customer journeys

See also

What's new in Dynamics 365 Marketing (docs)

In-place editing of email and forms

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

Business value

Marketers no longer have to navigate away from a customer journey to an email, page, form, or segment record to create or update content. In-place editing simplifies creating and managing journeys, allowing you to create and edit underlying elements within the context of the journey itself.

Feature details

- **Simplified content editing and creation**: Navigate to a journey, create the relevant flow, select a tile, and create or edit the content directly from the customer journey.
- **Full editing and creation capabilities**: All the capabilities of the email, page, form, and segment designers are preserved when accessed from the customer journey.

- **Edit and create marketing forms within events**: You can now create or edit event-related marketing forms from the event itself.

Discover and use segments from Customer Insights in marketing campaigns

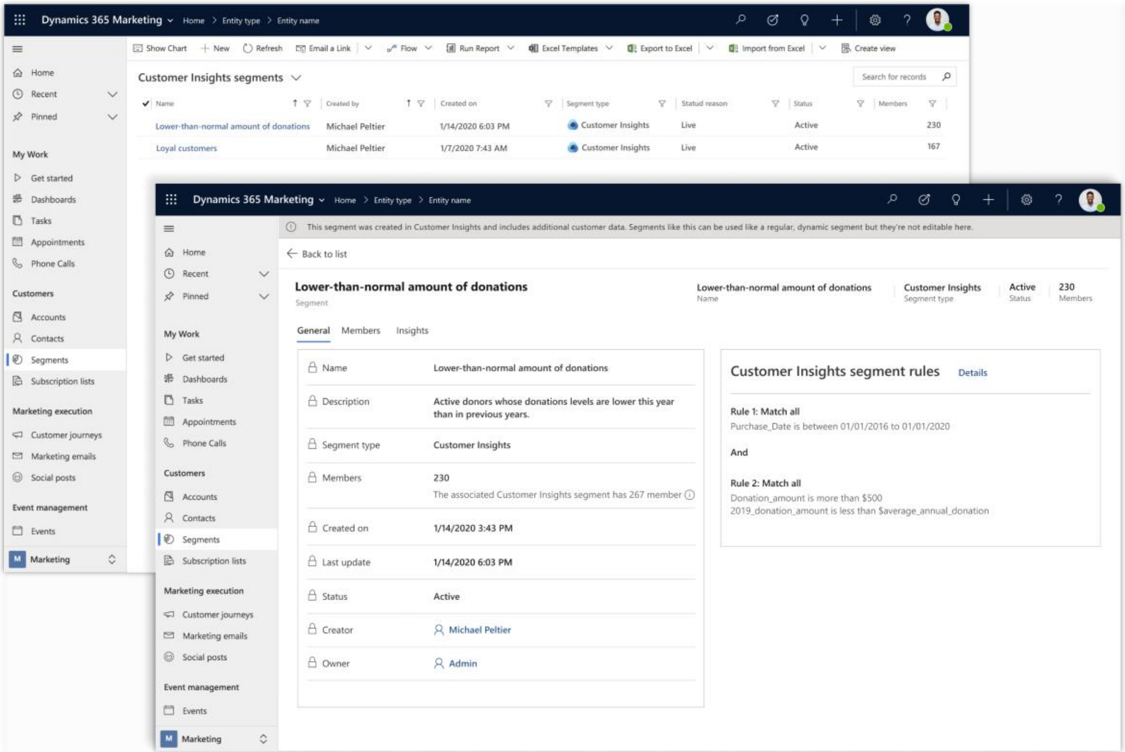
Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	May 2020

Business value

Customer Insights provides access to aggregated data from various sources and segments computed by analysts and data scientists using that data. By using these segments, marketers can better target their audience and increase campaign effectiveness.

Feature details

- **Customer Insights integration**: Access aggregated data and segments computed by analysts and data scientists using that data.
- **Use segments created with customer data from sources beyond marketing**: Customer Insights integration with Dynamics 365 Marketing provides instant access to aggregated demographic, psychographic (interests, attitudes), and behavioral (intent, interactions) data that would often have otherwise been locked in siloed databases.
- **Use specialized Customer Insights segments**: Instantly view specialized Customer Insights segments in Marketing. Examples include segments based on lifetime value, churn propensity, affinities, and interests based on search activity and more.
- **Improve your targeting**: Customer Insights segments enable you to target your customers with the right message at the right time.



Segments from Customer Insights showing in the Marketing app's segmentation view

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 release wave 1 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 release wave 1, 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 release wave 1 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 uses 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.

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 at 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 Sales 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
Customize forecast models	End users, automatically	-	✔ Feb 3, 2020	Apr 2020

Feature	Enabled for	Public preview	Early access*	General availability
Improve and adjust forecast accuracy	End users, automatically	-	✓ Feb 3, 2020	Apr 2020
Understand forecasts with precision pipeline management	End users, automatically	-	✓ Feb 3, 2020	Apr 2020

Licensing

Dynamics 365 Sales is a highly adopted sales tool that brings value to sales teams around the globe with out-of-the-box capabilities tailor-made for key sales scenarios. It is an entire system that is much more than a mere sales application.

Feature	Enabled for	Public preview	Early access*	General availability
License enforcement – users with new Team Member licenses	End users, automatically	-	✓ Feb 3, 2020	Apr 2020

Simplified experiences

To make Dynamics 365 Sales better, we are continually introducing enhancements that remove unnecessary friction and make features easier to use.

Feature	Enabled for	Public preview	Early access*	General availability
Contextual email communication	End users by admins, makers, or analysts	✓ Feb 3, 2020	-	Apr 2020
Easier selection of email templates	End users, automatically	-	✓ Feb 3, 2020	Apr 2020

Feature	Enabled for	Public preview	Early access*	General availability
Enhanced experience for adding products to opportunities	End users by admins, makers, or analysts	-	✔ Feb 3, 2020	Apr 2020
Manage activities with ease	End users, automatically	-	✔ Feb 3, 2020	Apr 2020
Manage feature settings and configure the Sales Hub application from a centralized location	Admins, makers, or analysts, automatically	-	✔ Feb 3, 2020	Apr 2020
Sales Team Member app module	End users, automatically	-	✔ Feb 3, 2020	Apr 2020
Save standardized PDF documents to Dynamics 365 Sales or Microsoft SharePoint	End users, automatically	-	✔ Feb 3, 2020	Apr 2020
Work with opportunities in the Kanban view	End users, automatically	-	✔ Feb 3, 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 make 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 Sales 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

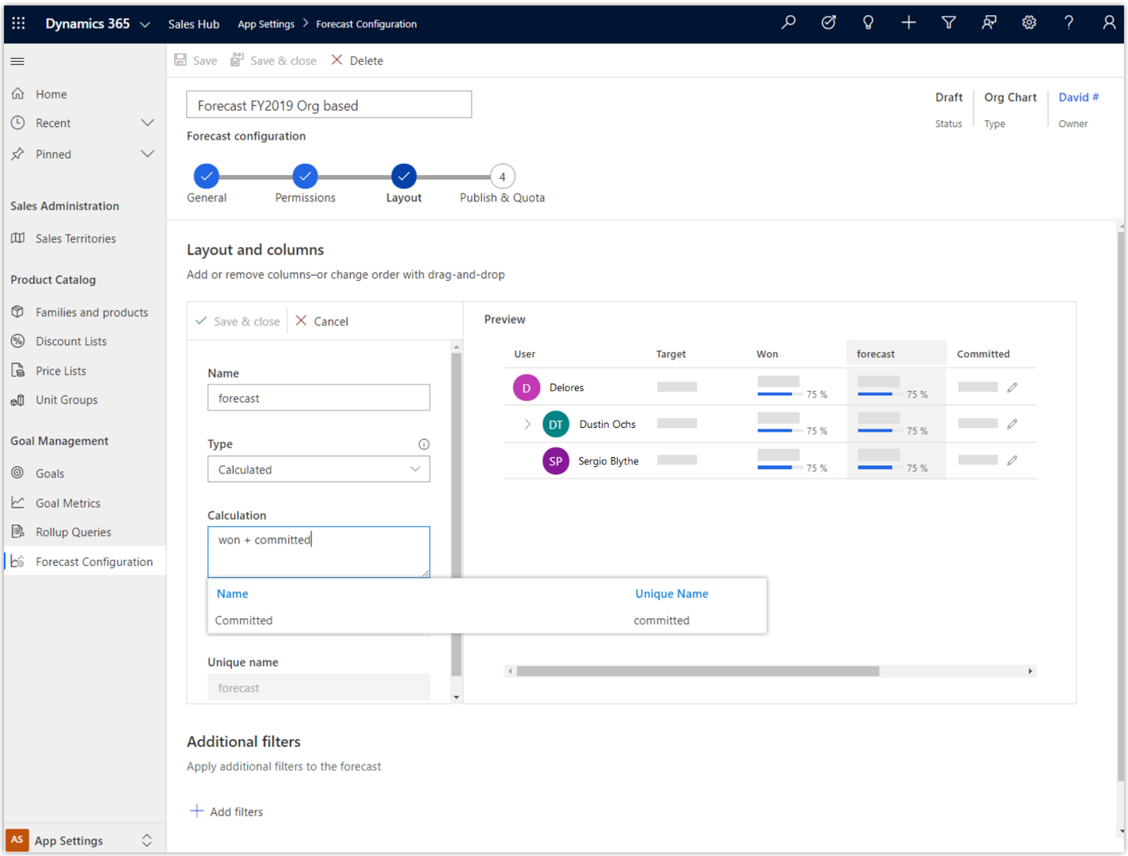
Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 2020	Apr 2020

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 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.



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.

See also

[Driving accountability with advanced forecasting in Dynamics 365 Sales] (blog)

[Configure forecasts in your organization] (docs)

Improve and adjust forecast accuracy

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 2020	Apr 2020

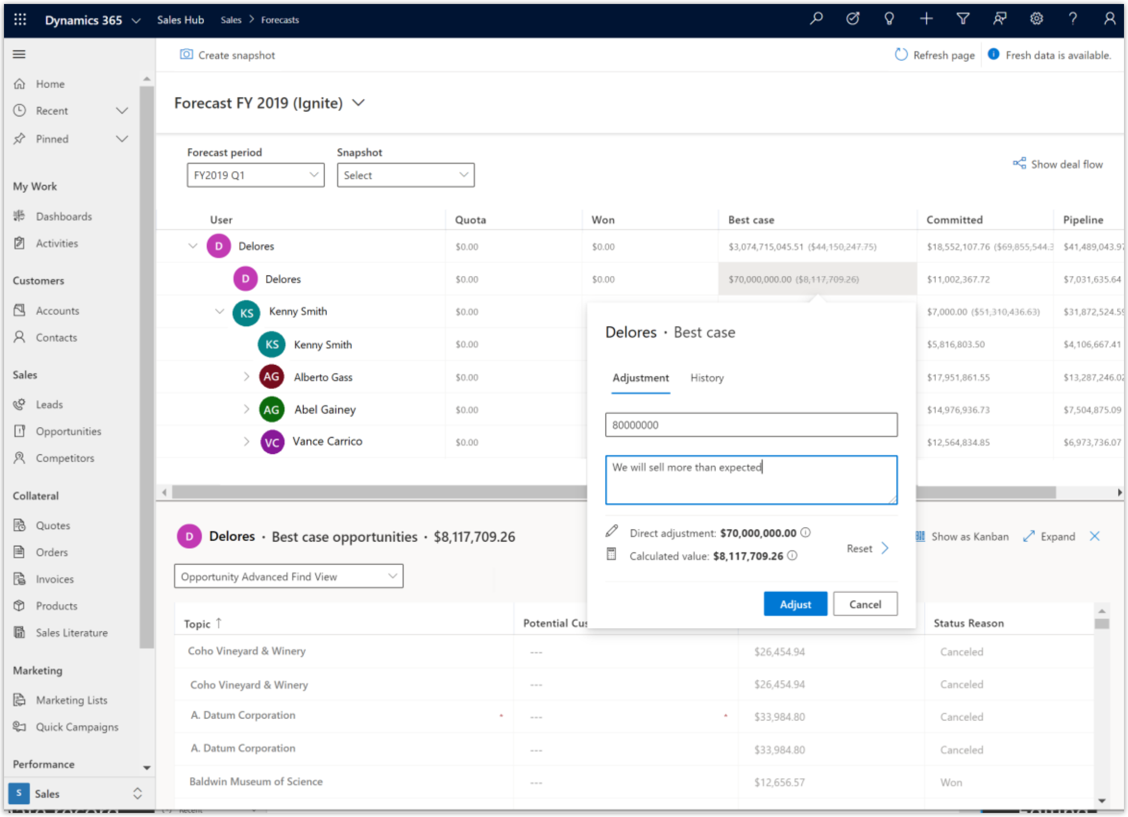
Business value

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.

See also

[Driving accountability with advanced forecasting in Dynamics 365 Sales](#) (blog)

[Adjust values in a forecast](#) (docs)

Understand forecasts with precision pipeline management

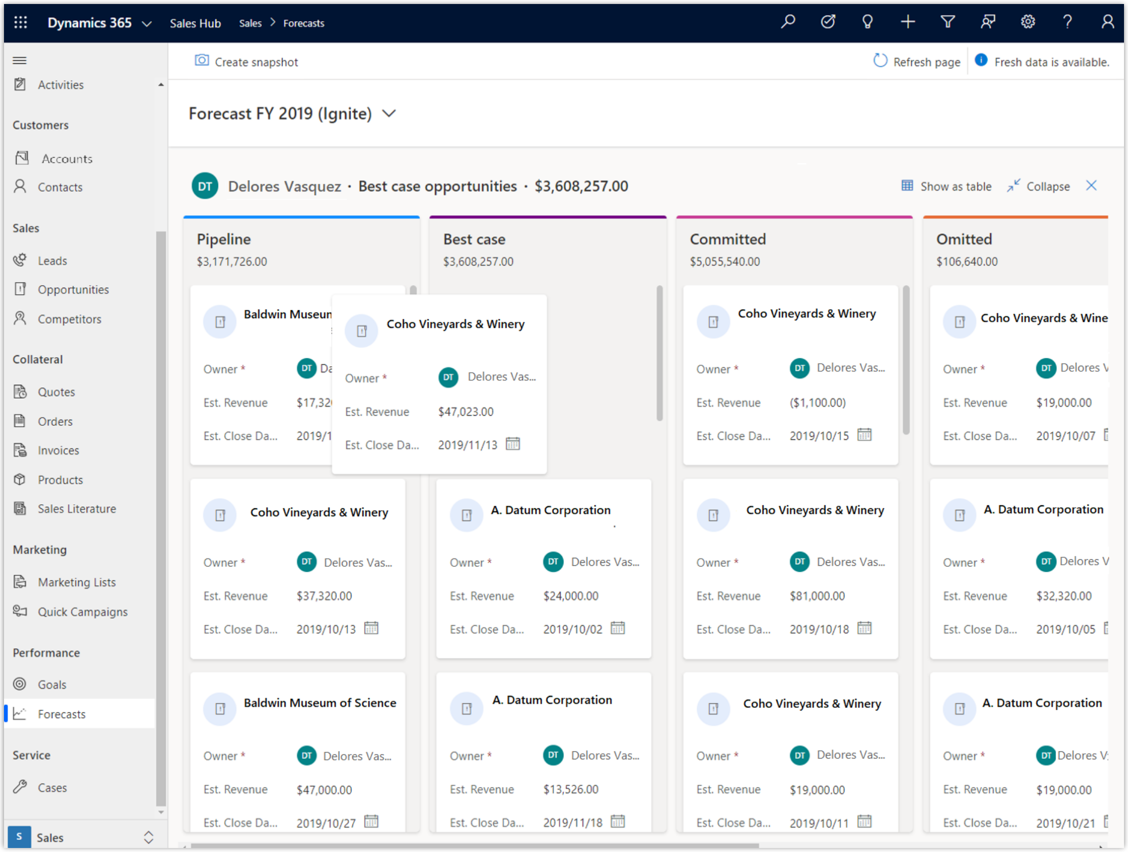
Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 2020	Apr 2020

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.

See also

[Driving accountability with advanced forecasting in Dynamics 365 Sales](#) (blog)

[View and manage underlying opportunities](#) (docs)

Licensing

Overview

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With the 2020 release wave 1 of Dynamics 365 Sales, we have spent time listening to customers and empathizing with their experiences to learn 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 release wave 1, 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.

The opportunity is now to revolutionize sales engagements, increase productivity, and evolve to meet the ever-changing needs of customers.

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

2020 release wave 1 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.

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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 at https://aka.ms/SalesIdeas.

License enforcement – users with new Team Member licenses

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 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 can also proactively preview full enforcement before general availability. We recommend that the Team Member scenarios be tested and customizations migrated to the designated app modules, as needed.

NOTE This feature is available in the Unified Interface only.

See also

Sales Team Member app for users with Team Member license (docs)

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 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 features easier to use.

Contextual email communication

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	✔ Feb 3, 2020	-	Apr 2020

Feature details

With a rich text editor and a pop-up, non-blocking window, composing email has never been better in Dynamics 365 Sales. Salespeople will be able to write email with context of the record they are working on, navigate between records, have multiple active draft emails open simultaneously, preview the content before sending, add attachments, and use email templates to optimize commonly used tasks. The email opening up in a non-blocking window gives salespeople all the relevant content at a glance while they compose their email to the customer.

NOTE This feature was released for public preview in October 2019. More information: Contextual email communication in Dynamics 365: 2019 release wave 2 plan

NOTE This feature is available in the Unified Interface only.

This capability is available in Dynamics 365 Sales Enterprise and Dynamics 365 Sales Professional.

See also

[Contextual email communication](docs) (docs)

Easier selection of email templates

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 2020	Apr 2020

Business value

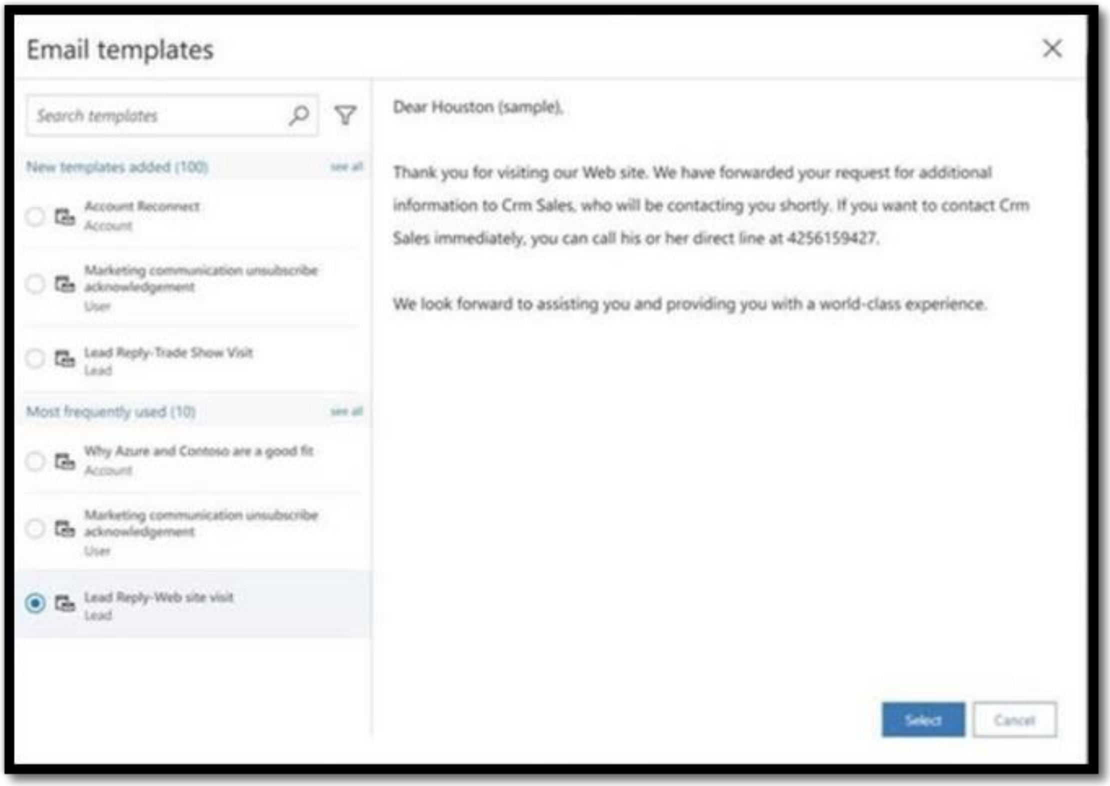
Sales organizations use email templates to ensure consistency and to create deeper engagement across customer communications.

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.



Email templates

NOTE This feature is available in the Unified Interface only.

This capability is available in Dynamics 365 Sales Enterprise and Dynamics 365 Sales Professional.

See also

[Insert an email template](docs) (docs)

Enhanced experience for adding products to opportunities

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	✔ Feb 3, 2020	Apr 2020

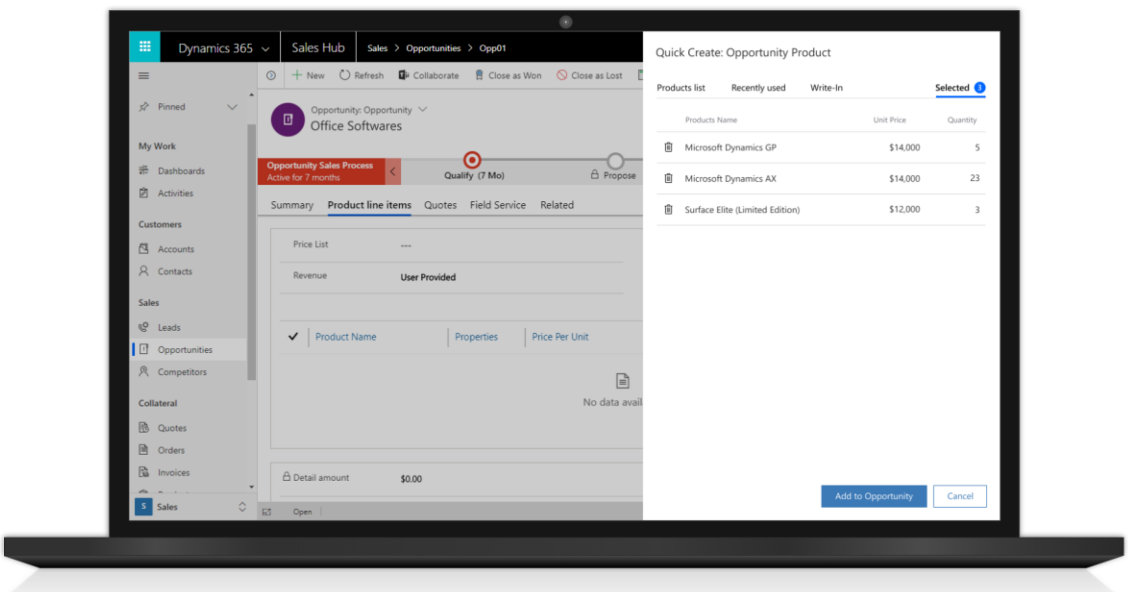
Business value

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.

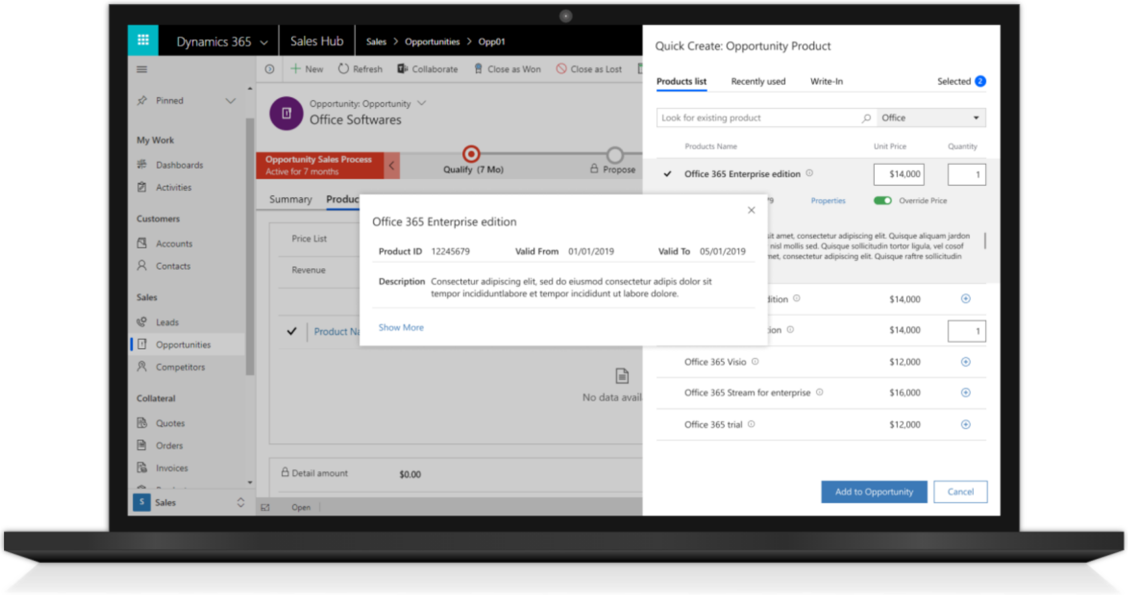
Keeping opportunities current competes with selling activities as well as many other repetitive tasks, which means oftentimes, product information is either excluded or not updated to reflect the latest customer interest. In the 2020 release wave 1, we simplify and expedite matching products to opportunities,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

Feature details

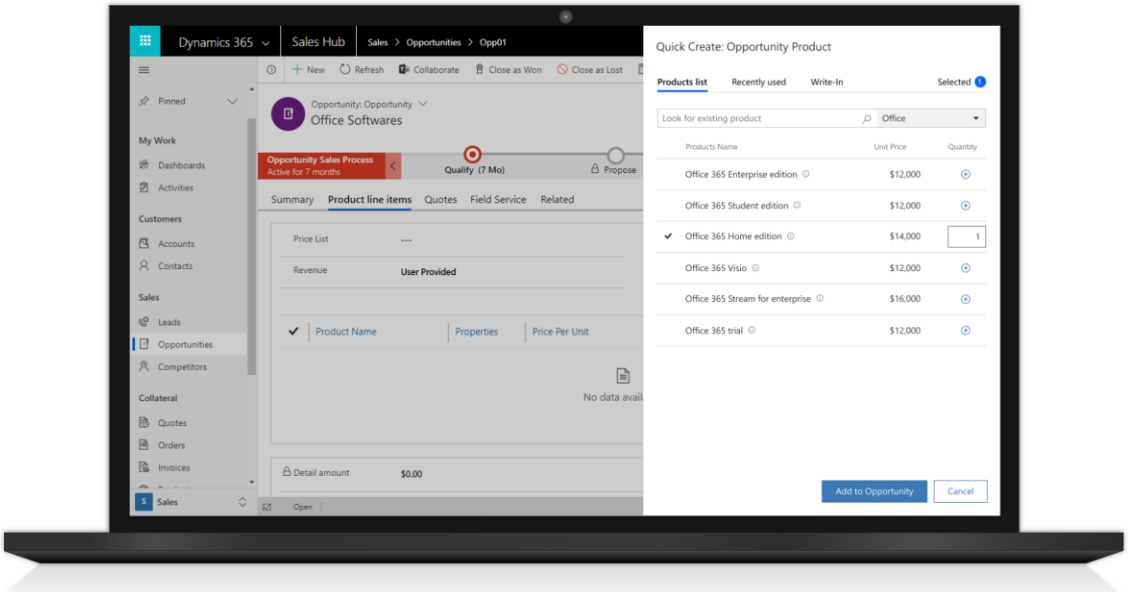
- **Look up products directly from the catalog**: Search and find products based on free text across name and description columns within the Product entity. Filter products based on product family or predefined views to simplify and expedite finding the right product.
- Explore product details inline 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 an 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.

See also

[Add products to an opportunity by using the enhanced experience](#) (docs)

Manage activities with ease

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 2020	Apr 2020

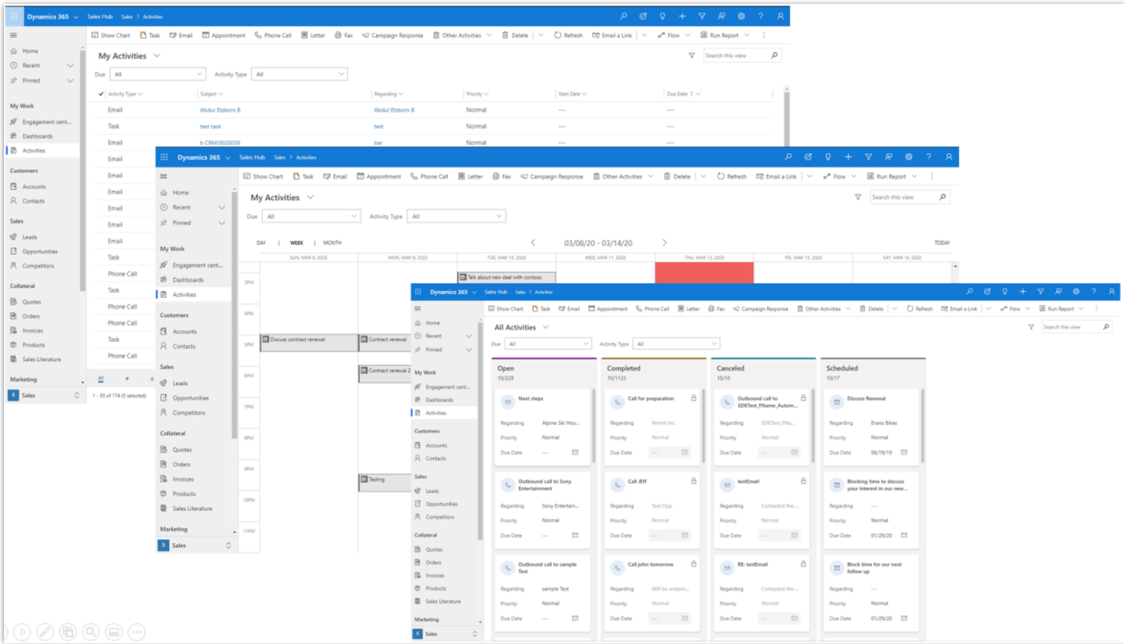
Business value

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 a new activity, edit an existing activity, or complete or delete an activity without having to navigate away from the main page.
- **Update activities intuitively**: Once the Kanban control is added to the Activity entity, use drag-and-drop pipeline management with a Kanban board to drag and move activities and instantly update the status. Ideal for managing many activities.
- **Benefit from Calendar view**: Once the Calendar control is added to the Activity entity, see all activities in a visualized calendar view to easily get a clear understanding of daily to-dos .



Manage activities with ease

NOTE This feature is available in the Unified Interface only.

This capability is available in Dynamics 365 Sales Enterprise and Dynamics 365 Sales Professional.

See also

[Track and manage activities](#) (docs)

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 3, 2020	Apr 2020

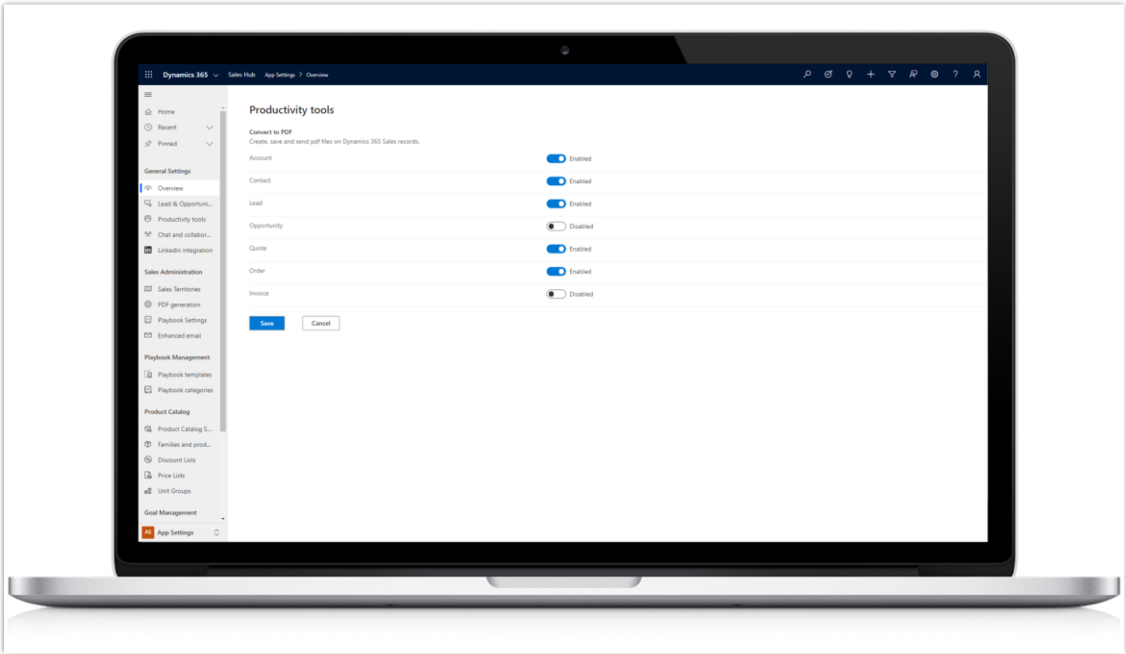
Business value

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.

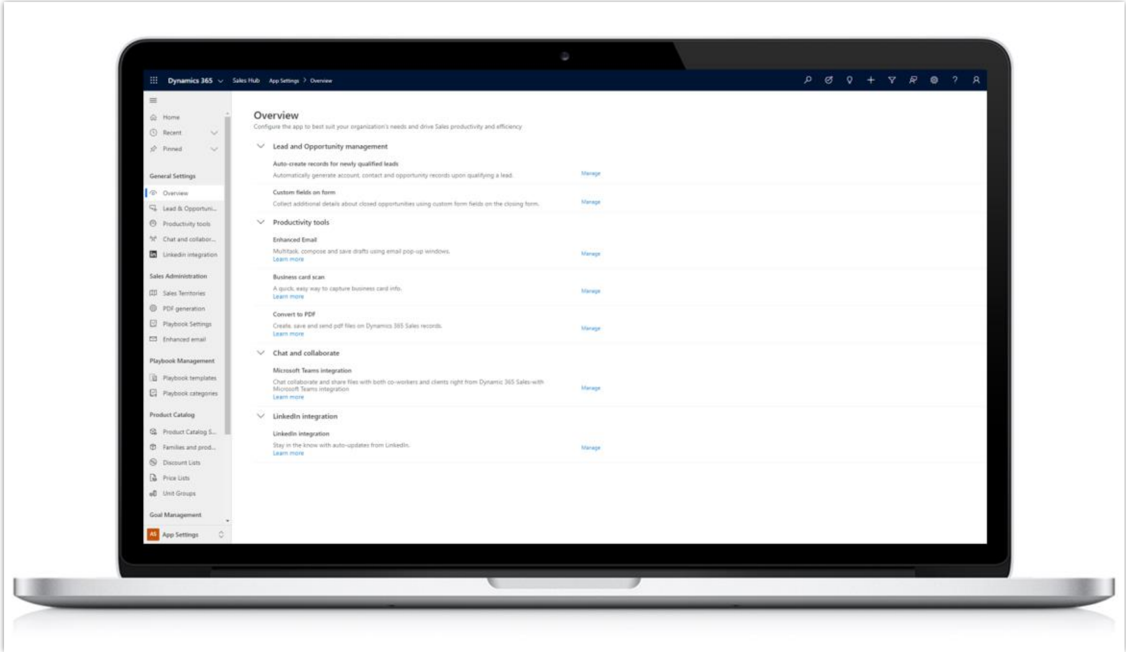
As part of our commitment to make Dynamics 365 Sales better, we are continually introducing enhancements that remove unnecessary friction and make features easier to use.

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.

See also

[Overview of admin settings](#) (docs)

Sales Team Member app module

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✓ Feb 3, 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.

See also

Sales Team Member app for users with Team Member license (docs)

Save standardized PDF documents to Dynamics 365 Sales or Microsoft SharePoint

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 2020	Apr 2020

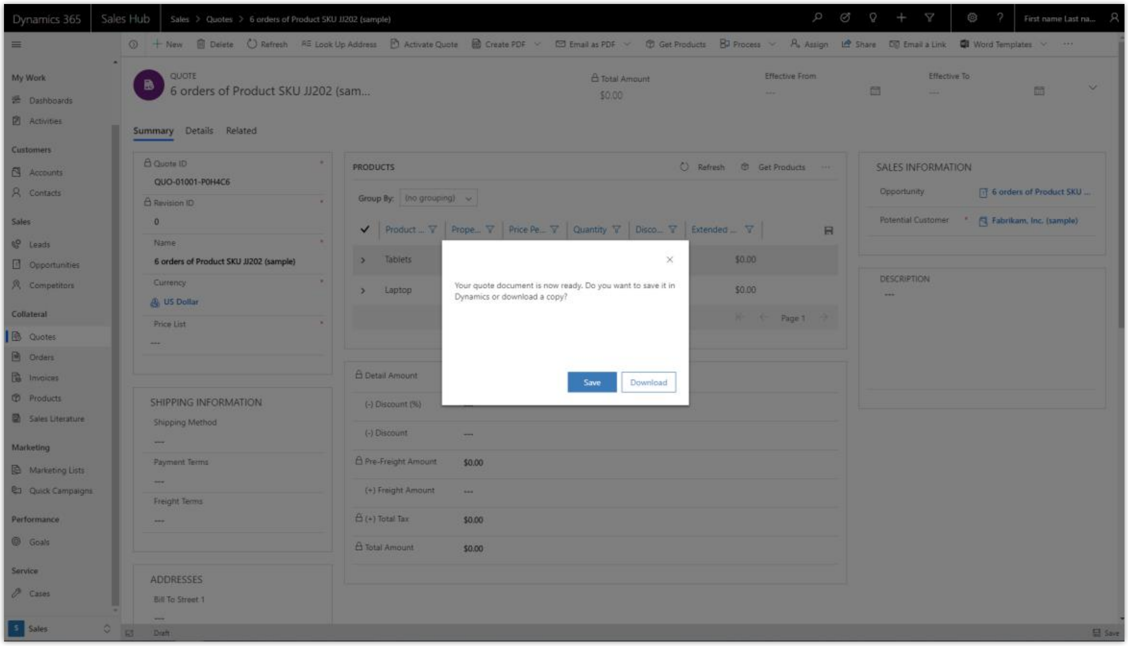
Business value

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.

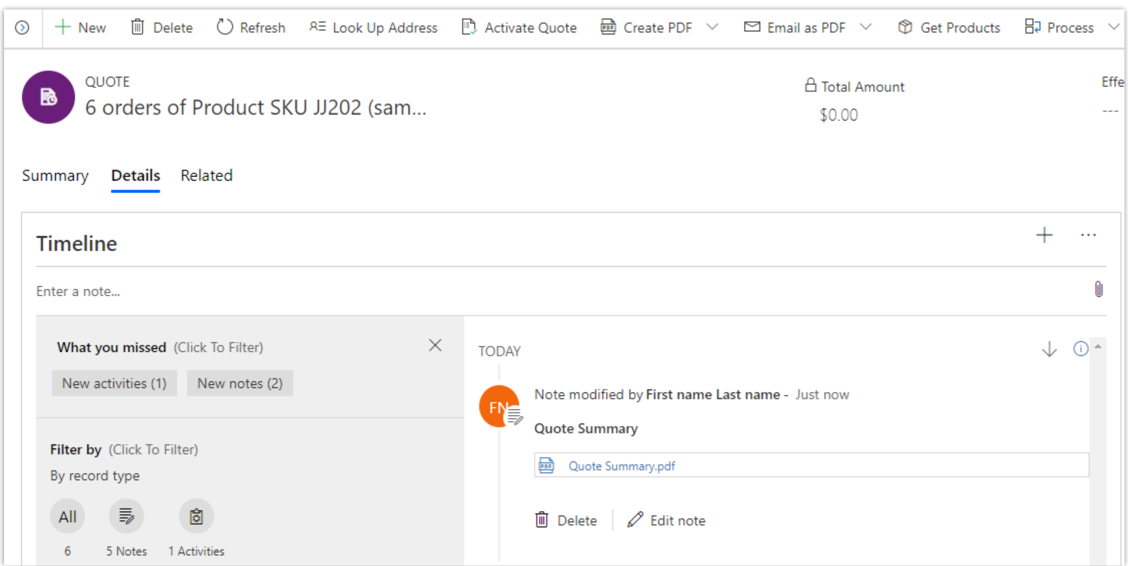
Feature details

With this enhancement, salespeople will be able to:

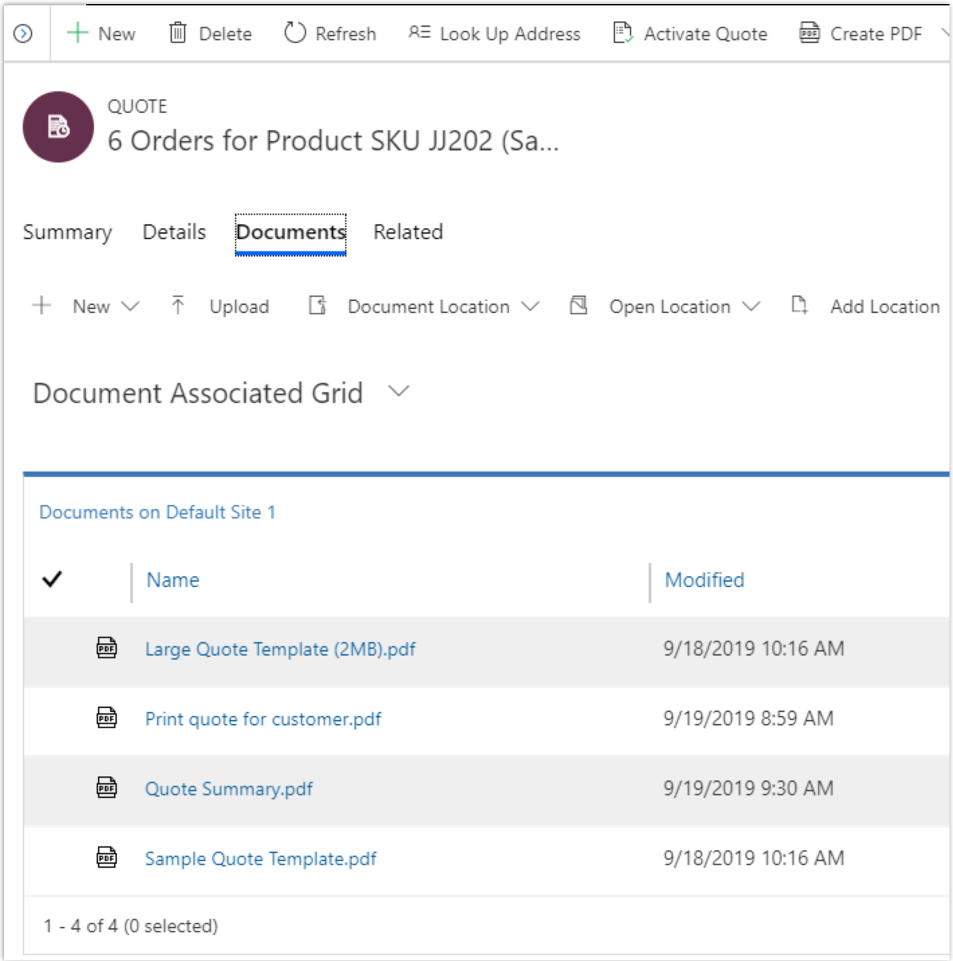
- More quickly save standardized PDF documents created from Word templates as attachments in Notes.
- Save standardized PDF documents based on Word templates in SharePoint.



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 the Unified Interface only.

This capability is available in Dynamics 365 Sales Enterprise and Dynamics 365 Sales Professional.

See also

Create PDF documents from sales records (docs)

Work with opportunities in the Kanban view

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✓ Feb 3, 2020	Apr 2020

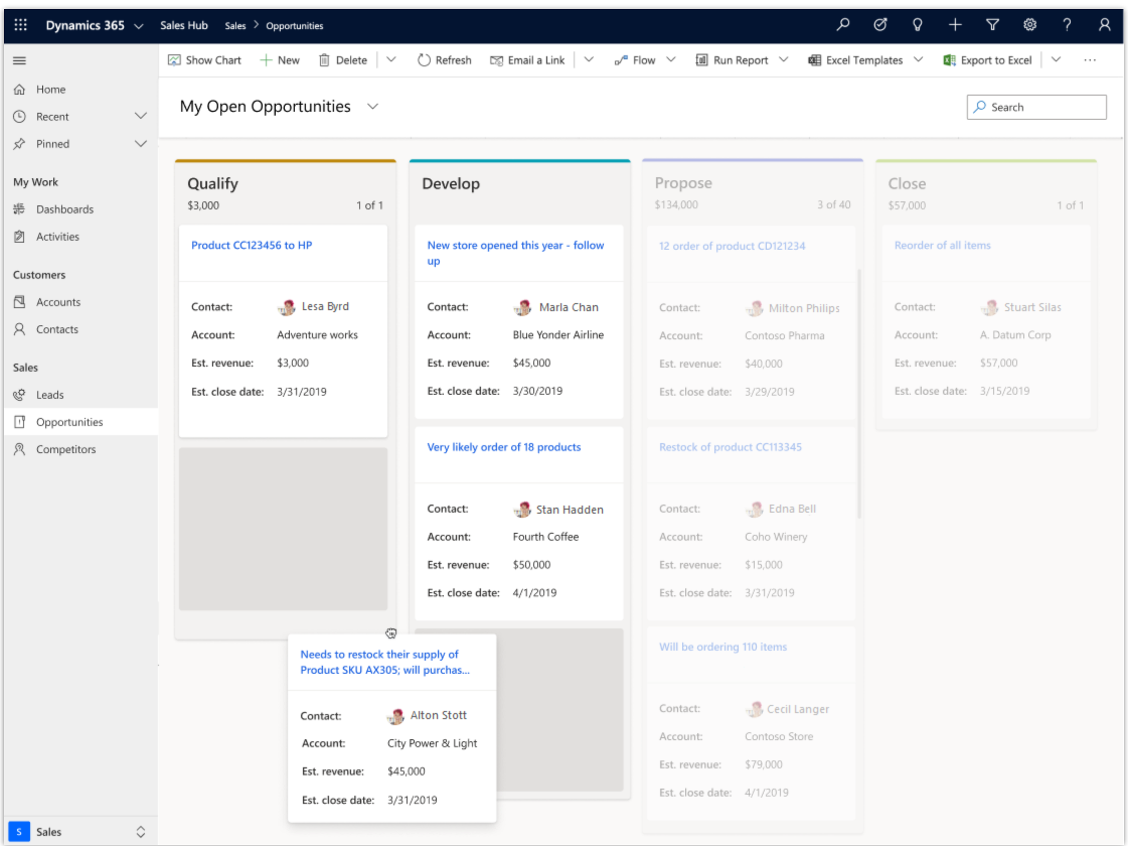
Business value

We are actively listening to our customers to learn 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 features 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 them.



Teams

NOTE This feature is available in the Unified Interface only.

This capability is available in Dynamics 365 Sales Enterprise and Dynamics 365 Sales Professional.

See also

Work with opportunities in the Kanban view (docs)

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
Benefit from more accurate pipeline predictions	Admins, makers, or analysts, automatically	Jun 2020	
Remove the guesswork with predictive forecasting	Admins, makers, or analysts, automatically	✔ Feb 3, 2020	Apr 2020
Uncover hidden insights in your forecasts	Admins, makers, or analysts, automatically	✔ Feb 3, 2020	Apr 2020

Conversation intelligence

Feature	Enabled for	Public preview	General availability
Better understand customers with advanced conversation insights	Admins, makers, or analysts, automatically	Apr 2020	
Boost seller productivity with conversation insights inside Dynamics 365 Sales	Admins, makers, or analysts, automatically	Apr 2020	

Dynamics 365 Assistant

Feature	Enabled for	Public preview	General availability
Benefit from enhanced insights	End users, automatically	✔ Feb 6, 2020	Apr 2020

Relationship analytics and Auto capture

Feature	Enabled for	Public preview	General availability
Who knows whom now available worldwide	End users by admins, makers, or analysts	-	May 2020
Improvements to automatic activity and contact suggestions	End users by admins, makers, or analysts	✔ Feb 1, 2020	Sep 2020

Sales acceleration

Sales acceleration aims to help inside sellers sell smarter. Building a strong pipeline, offering context, and surfacing automated recommendations throughout a sales cadence, helps to transform the sales process.

Feature	Enabled for	Public preview	General availability
Connect with customers across multiple channels	End users by admins, makers, or analysts	Apr 2020	-
Enforce best practices with sales sequences	End users by admins, makers, or analysts	Apr 2020	-
Gain full context on every customer in one place	End users by admins, makers, or analysts	Apr 2020	-
Work effectively with an intelligent queue	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	Jun 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 3, 2020	Apr 2020

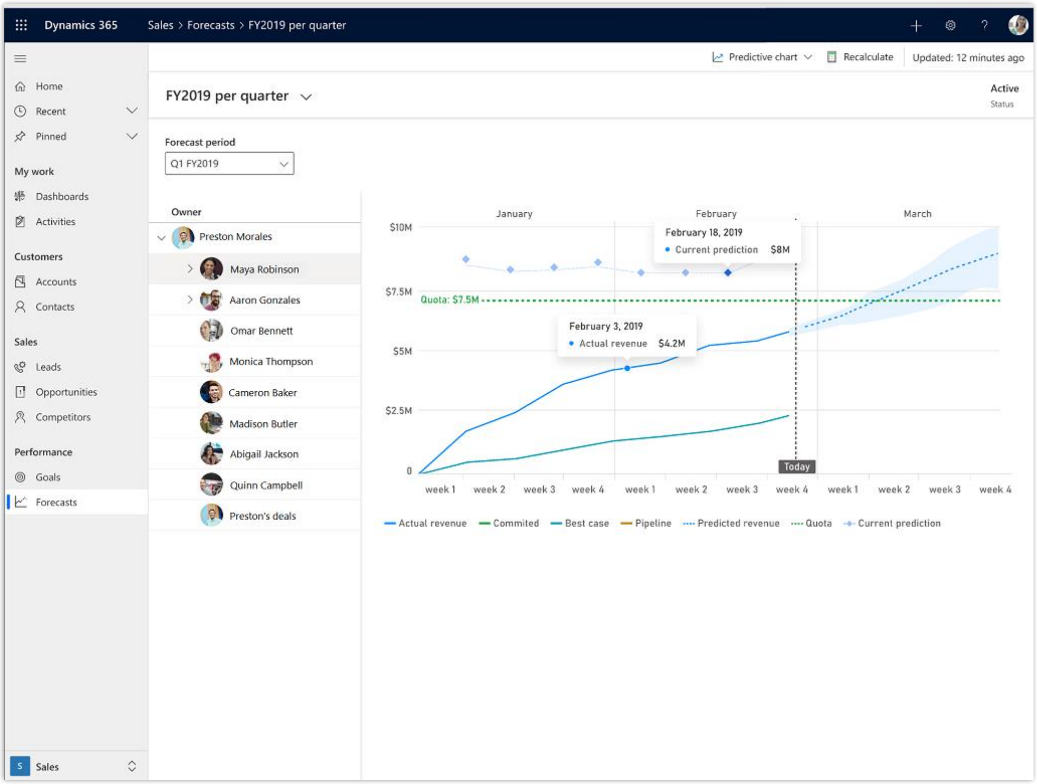
Business value

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

See also

[Driving accountability with advanced forecasting in Dynamics 365 Sales](#) (blog)

[Analyze revenue outcome by using predictive forecasting](#) (docs)

Uncover hidden insights in your forecasts

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✔ Feb 3, 2020	Apr 2020

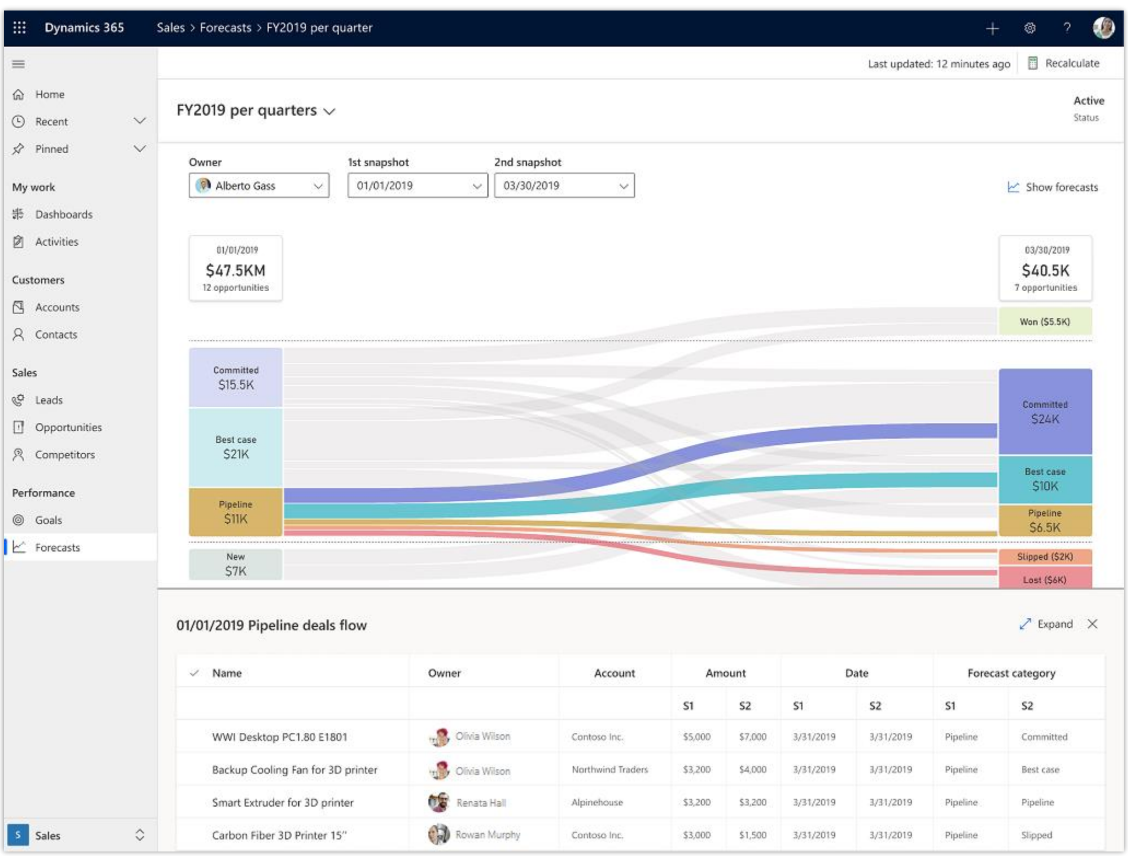
Business value

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

See also

Driving accountability with advanced forecasting in Dynamics 365 Sales (blog)

Analyze deals flows between snapshots (docs)

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	-

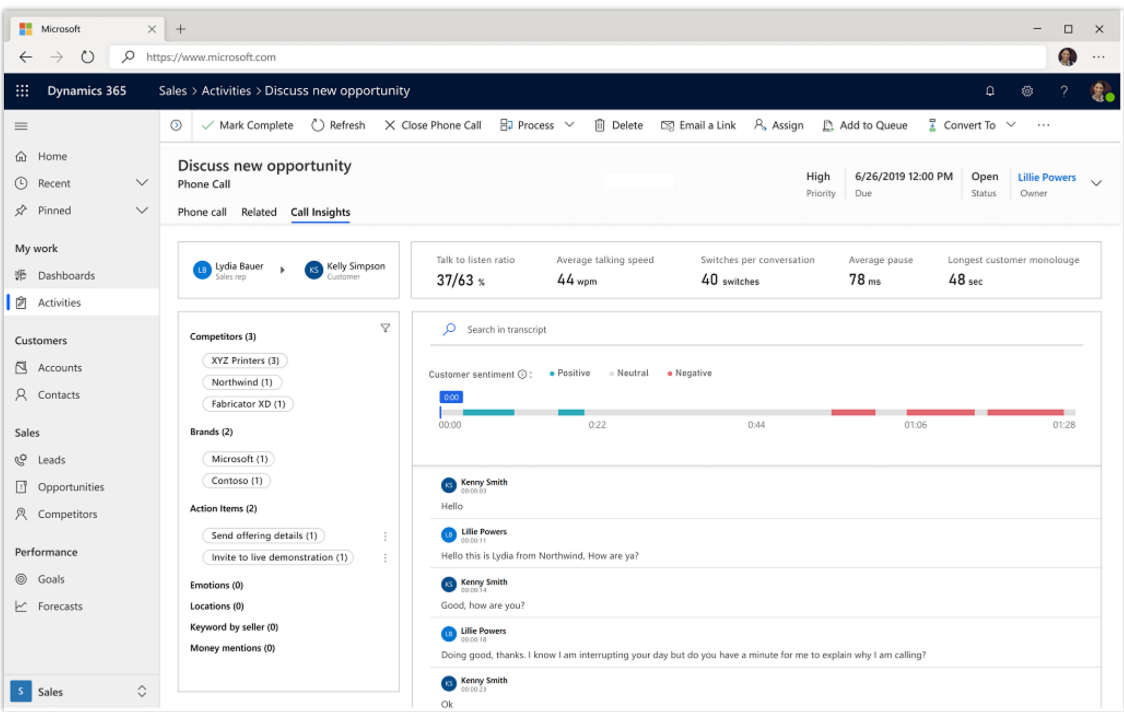
Business value

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.

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.

Benefit from enhanced insights

Enabled for	Public preview	General availability
End users, automatically	✓ Feb 6, 2020	Apr 2020

Business value

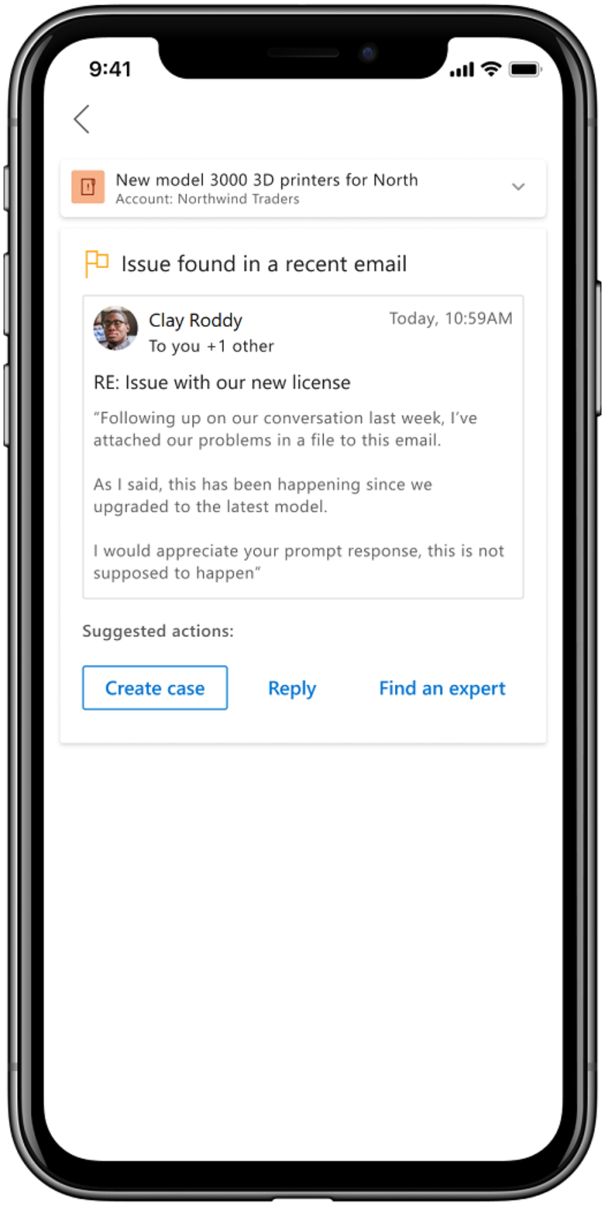
Companies deliver guided selling to keep sellers on track and to enforce successful selling strategies. Sellers often struggle to get the information they need to achieve successful outcomes. This means valuable steps that are key to achieving success might be overlooked. Sales Studio empowers sales 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

- **Improved user interface**: Have a new and modern layout for insight cards based on the adaptive cards' infrastructure. With the new layout, the content of the card is better organized and supports the option to perform advanced actions directly from within the cards, so sellers are more productive without changing context.

- **Group insights by sections**: Group cards by card type. Cards with 100% confidence, like task due today or opportunity due soon or upcoming meeting will be in the notification section while cards with a lower level of confidence that are based on predictive models and heuristics will be in the insight sections. The separation into these two sections helps organizations to provide better guidance and focus to their sellers through cards.
- **Drill down to receive more context**: Benefit from the flexibility to drill down into cards to receive more information so sellers can always have all the information they need to choose the best course of action.



Benefit from enhanced insights

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.

Who knows whom now available worldwide

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

Business value

Previously released in North America in October 2018, **Who knows whom** will be making a worldwide debut in 2020 release wave 1.

Feature details

Global Availability: Who knows whom is now available worldwide.

User controls: Sellers can independently opt in and opt out from the connection graph without requiring involvement from the tenant admin.

Improvements to automatic activity and contact suggestions

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 1, 2020	Sep 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.

Sales acceleration

Overview

Sales centers are focused on high-velocity selling. Inside sellers receive long lists of prospective buyers from multiple sources, then rush to go through these lists so they can meet their quotas.

Inside sellers manage customer lists. Sales organizations vary—some manage leads that need to be converted, others manage opportunities that need to be won. Our vision is to tailor Sales acceleration to meet specific business needs, whether managing leads, opportunities, or any custom entity. This can be managed via the Sales Studio. With the 2020 release wave 1, we are taking the first step in this direction for tailored solutions, supporting leads and opportunities. Customer lists are managed via an intelligent work queue. The intelligent queue helps sellers prioritize effortlessly. When coupled with pertinent information in one single place, every conversation becomes that much more meaningful.

With rigorous quotas to meet, it is imperative to spend time prioritizing and focusing on the best leads (those most likely to convert), or the best opportunities (those most likely to close as won). To make every conversation count, inside sellers need to collect relevant information across multiple systems—examining past engagements, reading through notes logged, getting up to speed on the latest news, and leveraging the most up-to-date sales materials and best practices. Time spent on researching information to identify the best lead or opportunity is time that could be spent engaging with the next valuable customer.

Sales acceleration aims to help inside sellers sell smarter. Building a strong pipeline, offering context, and surfacing automated recommendations throughout a sales cadence, helps to transform the sales process.

Dynamics 365 Assistant will offer just-in-time actionable insights to keep sellers on the right path. Powered by sales cadence, these suggestions will help sellers to better align with organizational best practices. Altogether, selling smarter means selling faster—empowering sellers to achieve their sales potential.

Accelerating sales is relevant to everyone on the team:

- **Inside sellers** need a fast and easy way to prioritize their customer list via the intelligent queue, so that they can reach out to the next best lead or opportunity. Having relevant sales information and customer context available at a glance helps make every communication more successful.

- **Managers** need a comprehensive view to understand where the team stands in terms of meeting their quota. They need to quickly identify who is waiting for assignments and who needs assistance to sell faster.
- **Sales enablement managers** need a seamless way to promote sales cadence and to enforce best practices. Using Sales Studio and Dynamics 365 Assistant, they can ensure selling across the team is consistent and reflects business strategy.

Connect with customers across multiple channels

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

Business value

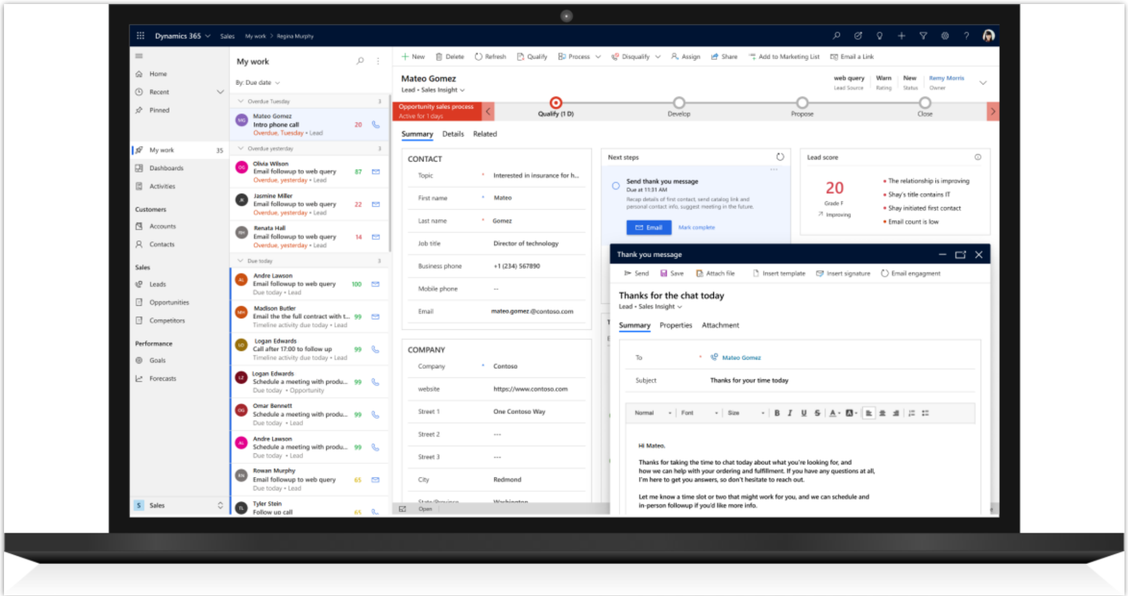
Inside sellers are focused on high-velocity selling. This means they are always looking for ways to save time, so they can focus on converting more leads and winning more opportunities faster.

With Sales Acceleration, our commitment to helping sellers save time goes a step further. Sellers can communicate with contacts without leaving Dynamics 365 Sales, benefiting from integrated communications across multiple channels by leveraging Microsoft Dynamics 365 Channel Integration Framework.

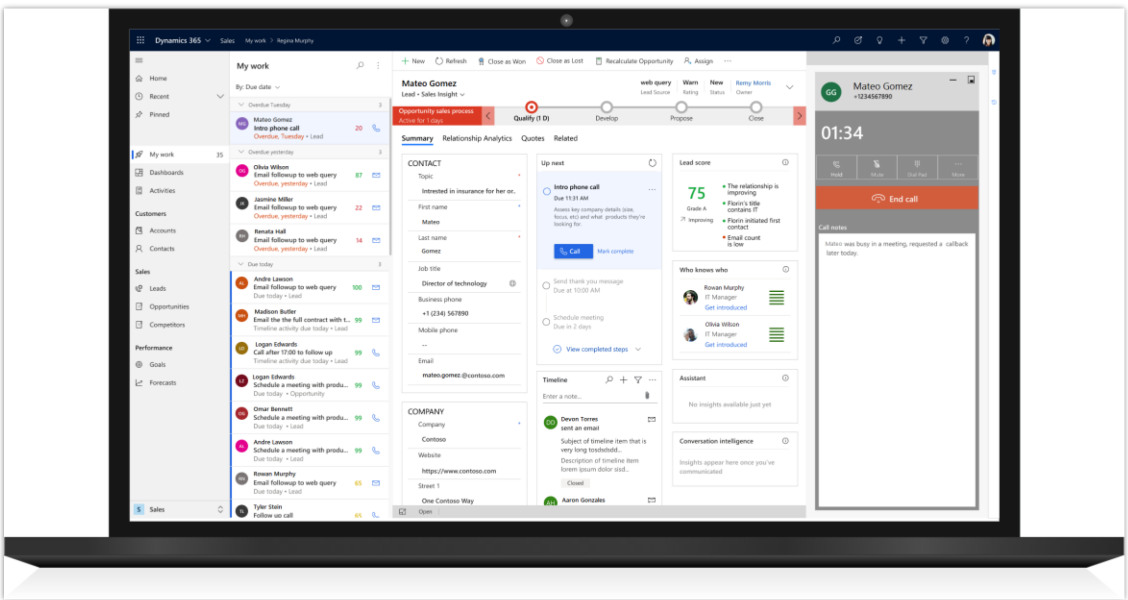
Time saved on switching between apps or looking up contact information is time spent calling the next customer.

Feature details

- **Connect with customers easily**: Benefit from multichannel communications, connecting with customers via email or phone with an integrated dialer, without switching context.
- **Compose emails effortlessly**: Take advantage of email templates, aligned with sales cadences, to communicate simply and consistently with customers.



Email channel



Phone channel

Enforce best practices with sales sequences

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

Business value

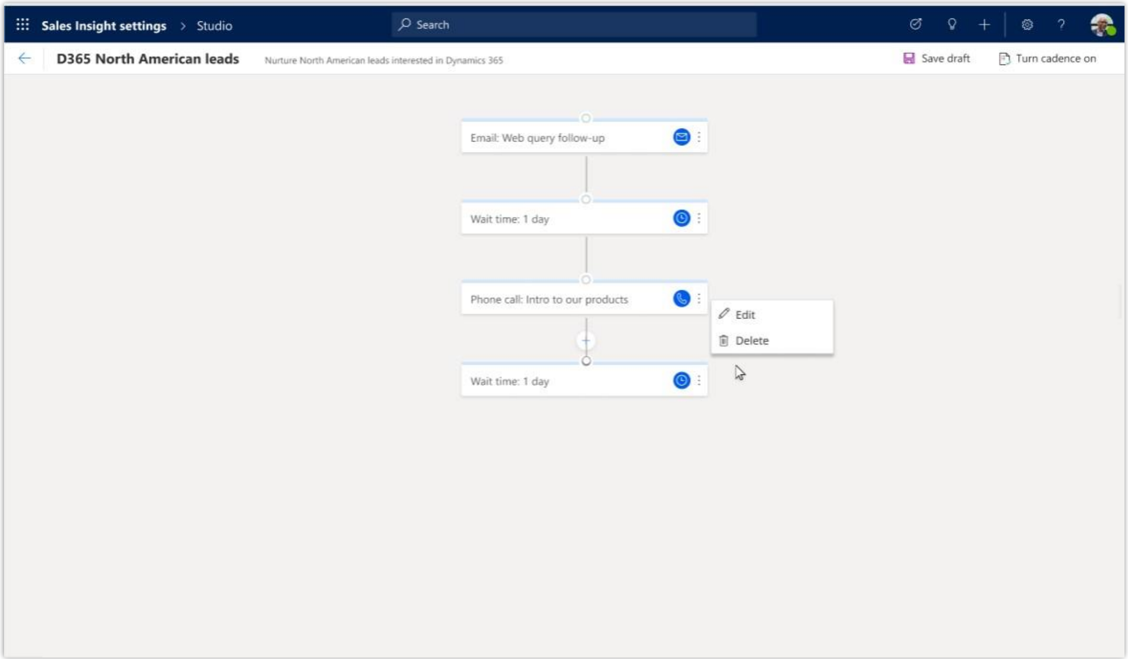
Consistent experiences and clear communications are a critical aspect of achieving successful outcomes. Best practices from sales enablement managers help to propagate and reinforce winning selling strategies. Infusing suggestions and insights throughout the sales motion helps to keep inside sellers on track, makes the most out of every customer interaction, and increases the likelihood of successful outcomes.

Sales sequences help sales organizations develop and enforce winning strategies. Sales enablement managers can create, monitor, and improve standard interaction strategies, defining sequences of a sale that optimize lead conversion and closing of deals and inspire consistency across the sales team.

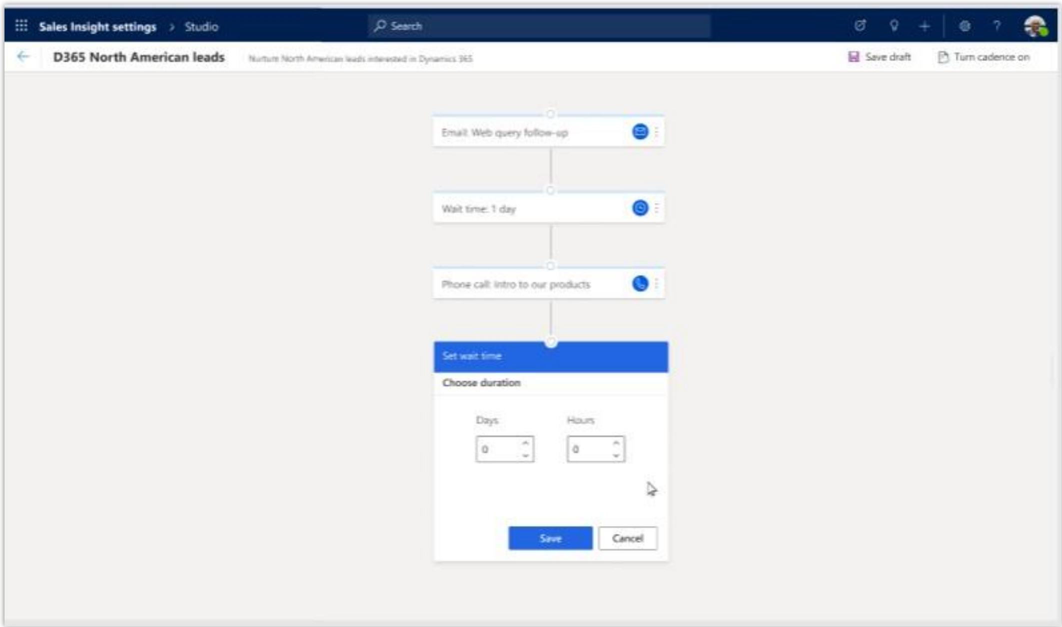
With sequences, sellers receive in-the-moment guidance, guided toward the correct activity, on time using an appropriate communication channel with the necessary content. Everyone on the team adheres to organizational best practices, while sales enablement managers are empowered to optimize sales practices for better outcomes through a frictionless cycle and can easily distribute sales strategies.

Feature details

- **Build sales sequences**: Build sales sequences that reflect organizational best practices and sales strategies to help inside sellers in the moment.
- **Guide inside sellers in the moment**: Offer guidance to direct sellers toward the next step they need to take. Guidance includes recommending the most suitable channel to reach out to the customer and the best time.



Cadence designer manager view



Cadence designer edit capabilities

Gain full context on every customer in one place

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

Business value

Every communication with a customer is an opportunity to win them over. As inside sellers run through a long list of potential customers, they often struggle to gain a holistic view, including history of communications, customer needs, and specific circumstances. This view is necessary for crafting the right pitch most relevant to the customer and likely to achieve a positive outcome.

To help inside sellers make the most out of every customer conversation, Sales Acceleration brings together relevant context across multiple entities, including past activities, product, account, relationship scores and more—all made available in a dedicated form. This at-a-glance summary helps sellers make the most out of every communication, without switching context—saving time, converting leads, and closing deals, faster.

Feature details

- **Get all the information you need in a single place**: Benefit from a multitab experience that collects and surfaces customer information from related entities to help craft winning messages for every communication.
- **Receive historical context for every customer**: View present and past activities via the timeline, note, and additional data through integrated data across the system, all available with internal tabs on the entity form.

NOTE This feature is available in the Unified Interface only.

Work effectively with an intelligent queue

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

Business value

Inside sellers need to work efficiently to meet their daily quota. To do this, they spend significant time exploring long lists of potential customers. With Sales Acceleration, inside sellers can trust that they are handling the lead or opportunity that is most likely to qualify or close successfully. Immediate access to relevant information helps to make every communication more effective.

Sales Acceleration offers flexibility across multiple dimensions, tailoring the order of the intelligent queue to meet immediate needs. Being able to filter, sort, or group by multiple attributes quickly empowers inside sellers to reach relevant customers, applicable to a specific need—that is, reach out to all customers from social media.

To ensure inside sellers never miss the next best customer, notifications are sent whenever a new prospect enters the queue—because that prospect expressed the most recent interest in your product or service.

Feature details

- **Benefit from a prioritized list of customers**: With a prioritized work queue, identify the next best lead, customers likely to convert, and opportunities likely to close as won. The intelligent queue surfaces a sorted list of assigned customers with associated next tasks due. The queue is organized based on definitions made in Sales Studio. Default sorting is based on a composite scoring, presenting the next best action based on organizational sales cadences.
- **Tailor the intelligent queue to meet specific needs**: Sort, filter, or group by entity attributes (main fields) to meet specific needs like reaching out to customers from a specific source or geography, or reaching out to customers interested in a specific product offering.
- **Receive online notification**: Get notified whenever a new lead or opportunity enters the intelligent queue or is reassigned to you, so nothing falls between the cracks.

NOTE This feature is available in the Unified Interface only.

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
Attach a PDF file to a 3D model	Users, automatically	Apr 2020	Jun 2020
Attach a video to a 3D model	Users, automatically	Apr 2020	Jun 2020
Offline mode	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

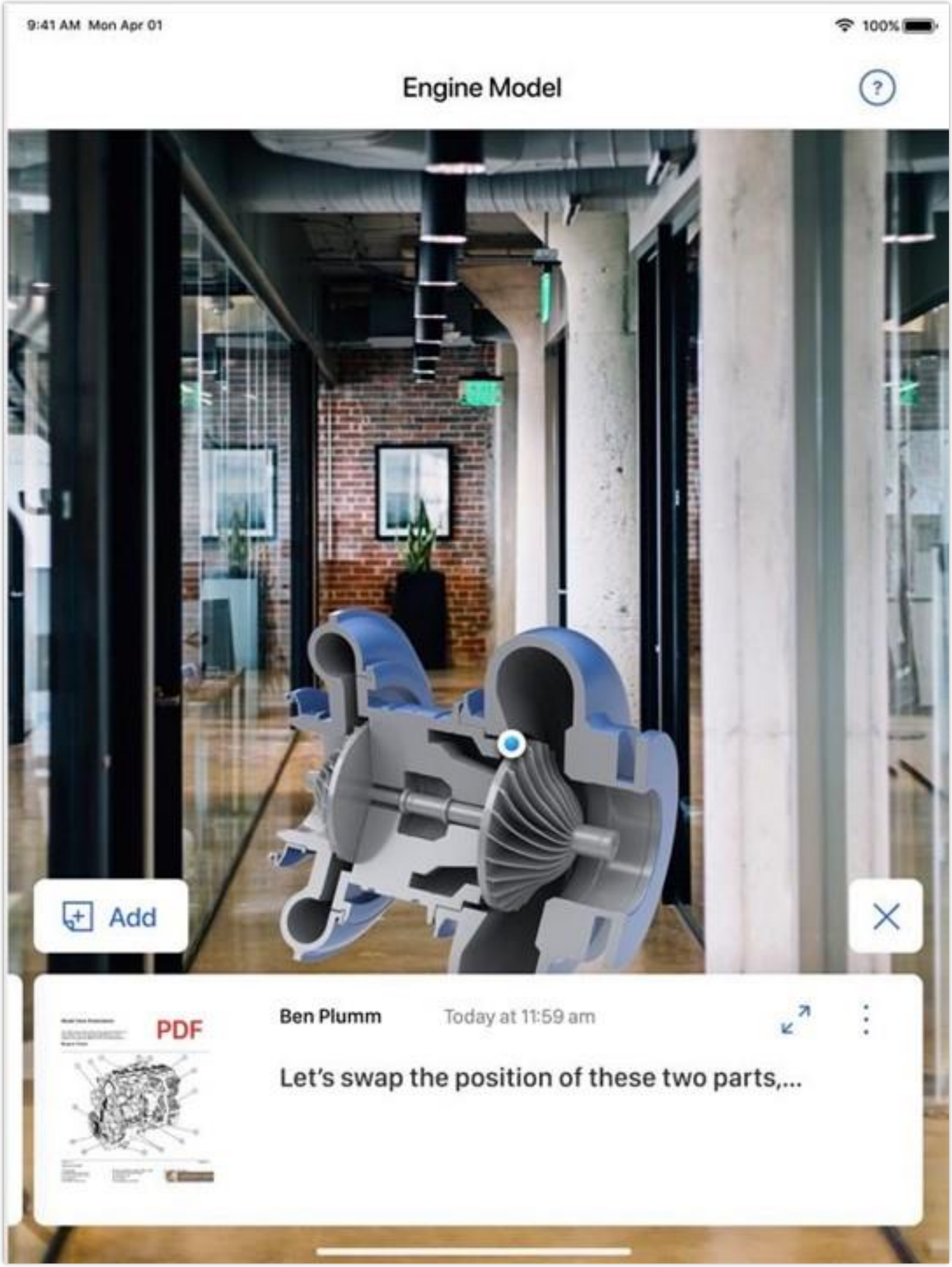
Enabled for	Public preview	General availability
Users, automatically	Apr 2020	Jun 2020

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.


9:41 AM Mon Apr 01
100%
Engine Model
Add
PDF
Ben Plumm
Today at 11:59 am
Let's swap the position of these two parts,...

PDF notes

Attach a video to a 3D model

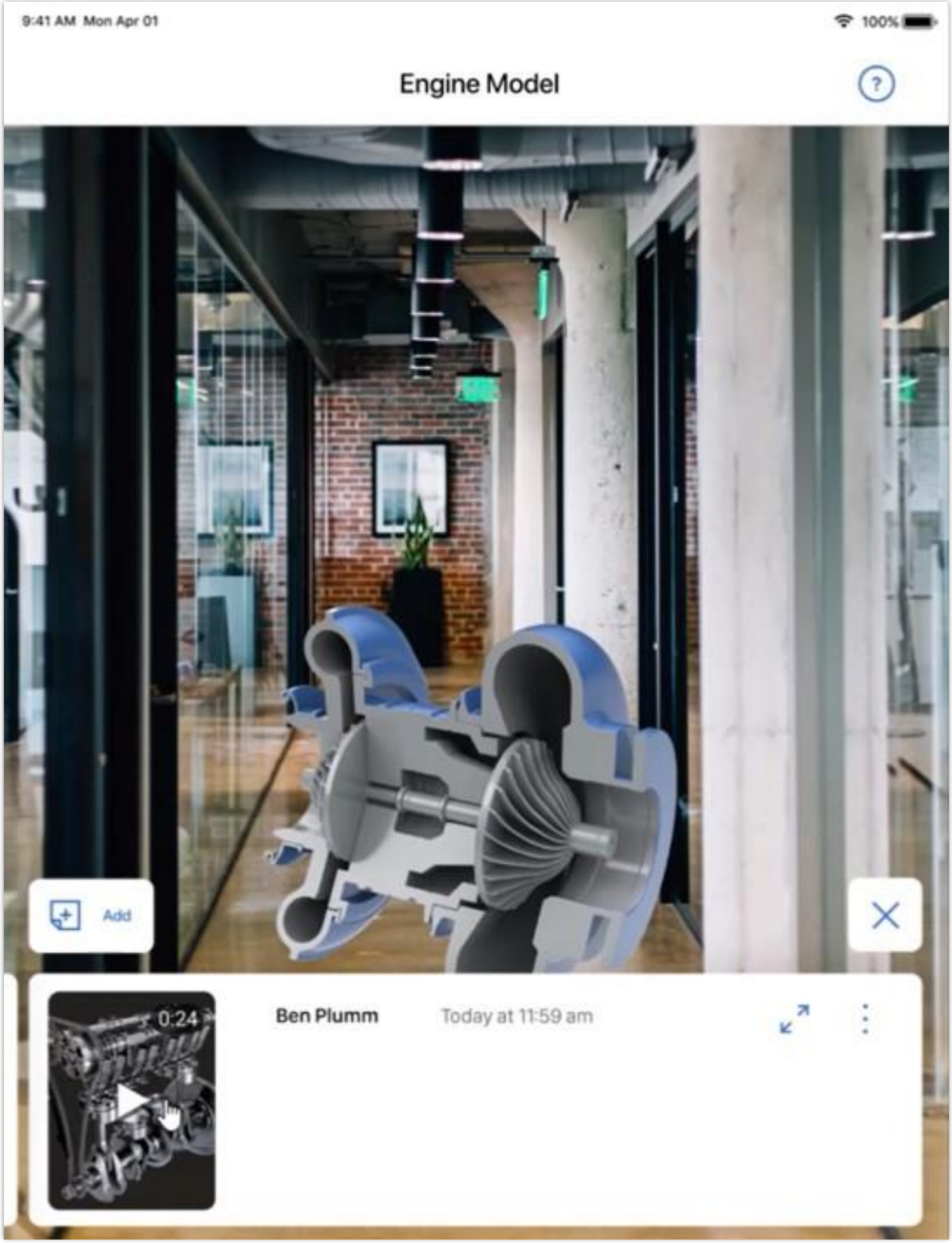
Enabled for	Public preview	General availability
Users, automatically	Apr 2020	Jun 2020

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

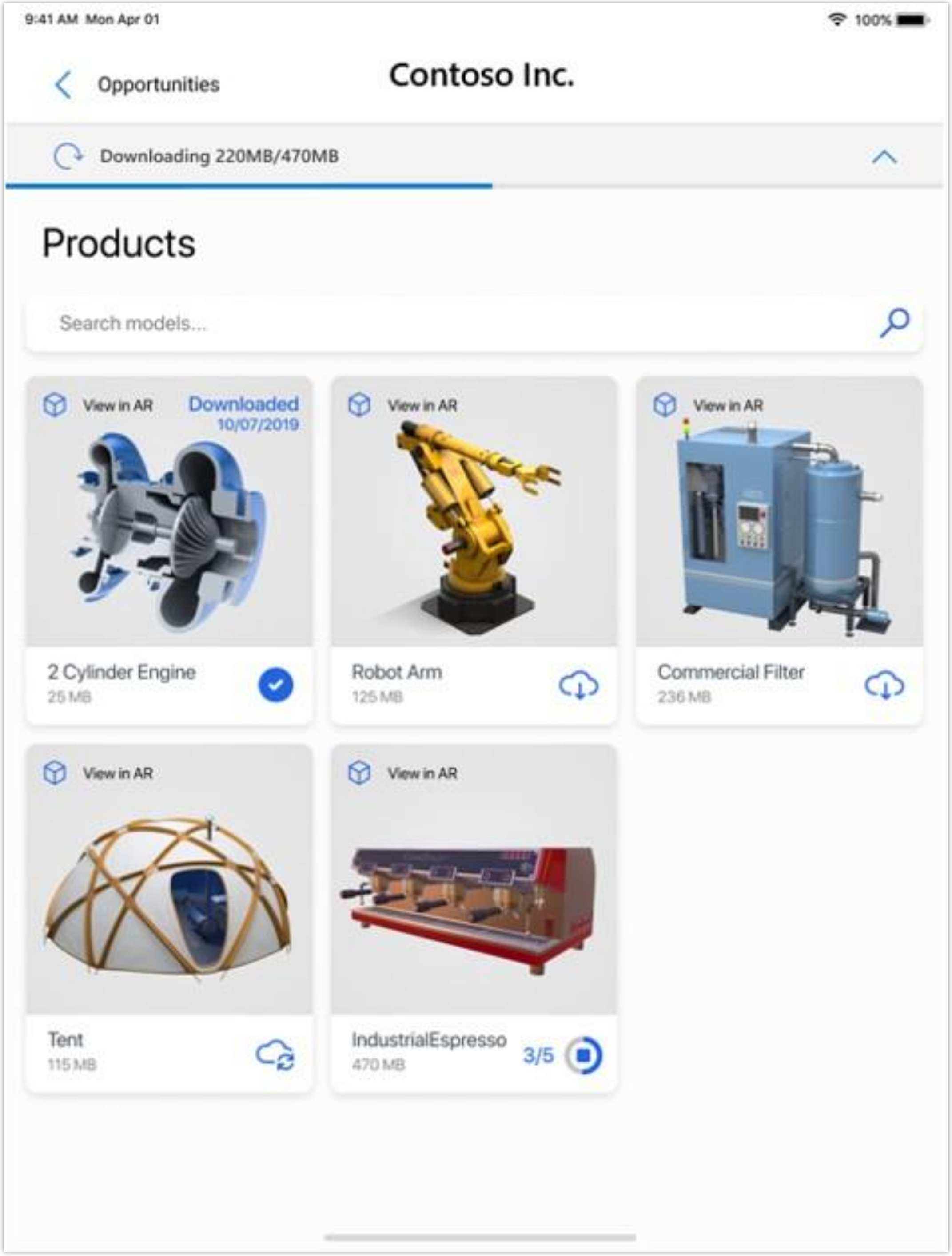
Enabled for	Public preview	General availability
Users, automatically	Apr 2020	Jun 2020

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
Connected Customer Service (IoT + Customer Service)	End users by admins, makers, or analysts	-	✔ Feb 1, 2020	Apr 2020
Agent productivity enhancements to knowledge capabilities	End users, automatically	-	✔ Feb 3, 2020	Apr 2020
Configurable case resolution page	End users, automatically	-	✔ Feb 3, 2020	Apr 2020
Customer Service app available for users with Team Member license	End users, automatically	-	✔ Feb 3, 2020	Apr 2020
Customer Service Hub app is now available by default	End users, automatically	-	✔ Feb 3, 2020	Apr 2020
Enhancements in case routing rules	Admins, makers, or analysts, automatically	-	✔ Feb 3, 2020	Apr 2020
Enhancements in service level agreements	End users, automatically	-	✔ Feb 3, 2020	Apr 2020
Enhancements in the queue page	End users, automatically	-	✔ Feb 3, 2020	Apr 2020
Familiar, modern email experience for agents	End users, automatically	-	✔ Feb 3, 2020	Apr 2020
License enforcement – users with new Team Member licenses	End users, automatically	-	✔ Feb 3, 2020	Apr 2020
New work hour calendar in Service Scheduling	End users by admins, makers, or analysts	-	✔ Feb 3, 2020	Apr 2020

Feature	Enabled for	Public preview	Early access*	General availability
Rich text notes and keyword search in the timeline	End users, automatically	-	✓ Feb 3, 2020	Apr 2020
Support for Site entity in the Unified Interface	End users, automatically	-	✓ Feb 3, 2020	Apr 2020
Automatically create and update records	Admins, makers, or analysts, automatically	-	✓ Feb 1, 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
Digital messaging support for Microsoft Teams	End users by admins, makers, or analysts	Apr 2020	-	-
Digital messaging support for WhatsApp through Twilio	End users by admins, makers, or analysts	Apr 2020	-	-
Agent macro enhancements	End users by admins, makers, or analysts	-	-	Apr 2020
Agent quick reply categorization	End users by admins, makers, or analysts	-	-	Apr 2020
Conversation message and message sentiment shift notification	End users by admins, makers, or analysts	-	-	Apr 2020
Desktop notifications for incoming conversations	End users by admins, makers, or analysts	-	-	Apr 2020

Feature	Enabled for	Public preview	Early access*	General availability
Digital messaging support for LINE	End users by admins, makers, or analysts	-	-	Apr 2020
Digital messaging support for SMS through Twilio	End users by admins, makers, or analysts	-	-	Apr 2020
Digital messaging support for Twitter	End users by admins, makers, or analysts	-	-	Apr 2020
Digital messaging support for WeChat	End users by admins, makers, or analysts	-	-	Apr 2020
Elevate live chat conversations to a voice/video call	End users by admins, makers, or analysts	-	-	Apr 2020
Omnichannel supervisor experience enhancements	End users by admins, makers, or analysts	-	-	Apr 2020
Routing and work distribution enhancements	End users by admins, makers, or analysts	-	-	Apr 2020
Co-browse capabilities through third-party providers	Admins, makers, or analysts, automatically	✔ Jan 31, 2020	-	Apr 2020
Remote assistance capabilities through third party	Admins, makers, or analysts, automatically	✔ Jan 31, 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

Customer Service provides comprehensive and efficient case routing and management for agents with productivity tooling as well as authoring and consumption of knowledge management articles, all designed to help streamline customer issue resolution, consistent with service level agreements.

Connected Customer Service (IoT + Customer Service)

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	✔ Feb 1, 2020	Apr 2020

Business value

Leveraging Connected 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.

See also

Connected Customer Service (docs)

Agent productivity enhancements to knowledge capabilities

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 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.)
- Use a modern toolbar with more font choices and the ability to cut and paste formatted content from Office documents such as Word and Excel while maintaining formatting. Meanwhile, use the enhanced inline table capabilities that allow quick tables and adding or deleting rows and columns.

See also

Knowledge Base Search control (docs)

Configurable case resolution page

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✓ Feb 3, 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 (generally available on April 1, 2020).
- Choose between the non-customizable modal dialog experience (default setting) and the customizable form experience.

See also

Modify Case Resolution Dialog (docs)

Customer Service app available for users with Team Member license

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✓ Feb 3, 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.

See also

Customer Service Team Member app (docs)

Customer Service Hub app is now available by default

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✓ Feb 3, 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.

See also

Availability of Customer Service Hub (docs)

Enhancements in case routing rules

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	✔ Feb 3, 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.

See also

Routing rule set (docs)

Enhancements in service level agreements

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 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-on 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.

NOTE Even though the Service Level Agreement Unified Client experience is enabled via a separate package, admins would need to configure the feature, and it will not automatically impact the end user.

See also

Configure SLAs in Customer Service Hub (docs)

Enhancements in the queue page

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✓ Feb 3, 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.

See also

Navigate through records and pages (docs)

Familiar, modern email experience for agents

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✓ Feb 3, 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.

See also

View and create email (docs)

License enforcement – users with new Team Member licenses

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 2020	Apr 2020

Business value

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

Feature details

For Team Member licenses purchased during or after October 2018, the license-based access feature will restrict users to the following set of designated app modules:

- Customer Service Team Member

- Sales Team Member
- Project Resource Hub

During the early access phase, users with the Team Member licenses will be able to use the designated app modules alongside all existing apps. After the licenses are enforced (starting April 1, 2020), restricted apps, such as Customer Service Hub, Sales Hub, and custom apps, will not be accessible to users with the Team Member licenses. Customers can also proactively preview full enforcement before general availability. We recommend that the Team Member scenarios be tested and customizations migrated to the designated app modules, as needed.

See also

Customer Service Team Member app (docs)

New work hour calendar in Service Scheduling

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	✔ Feb 3, 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.

See also

Create customer service schedule and define the work hours (docs)

Rich text notes and keyword search in the timeline

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✓ Feb 3, 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.

See also

Timeline (docs)

Support for Site entity in the Unified Interface

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✓ Feb 3, 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.

See also

Understand Site (docs)

Automatically create and update records

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	✔ Feb 1, 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.

See also

Automatically create or update records in Customer Service Hub (docs)

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.

Agent macro enhancements

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

Business value

Macros enhance agent productivity by automating a series of common and repetitive tasks, helping to ensure consistency and quality of these tasks across large teams. This enhancement to macros enables more complex logic to be applied to the automation process to reduce the burden on agents, increase the consistency of optimal service experiences, and decrease the amount of time taken to help customers.

Feature details

This feature allows administrators to create decision branches in macros to add logical conditions for evaluating the context variables as macro steps. Subsequently, when users run the macros, the logical conditions will be evaluated and appropriate steps that are defined in the macros will be run. Some example conditions are as follows:

- If a conversation has a case attached, open the existing case form; otherwise, open a new case form.
- If the priority of a customer is high, use the "high-priority email template"; otherwise, use the "normal acknowledgement template".

Agent quick reply categorization

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

Business value

In their daily conversations with customers, agents need to repeat some common tasks, such as use welcome scripts and greetings, and ask questions. This feature enables administrators to configure and group the common elements as “Quick Replies” and empowers the agents to leverage them as part of their conversations, reducing the amount of time spent typing repetitive messages.

Feature details

In this release, the enhancements to Quick Replies allow administrators to classify and tag Quick Replies into categories to enable quick discovery of an appropriate reply, in addition to the existing keyword search. The categorization capability can also be leveraged to group quick replies into logical chunks that represent key conversational states for agents. These logical chunks help agents select appropriate messages corresponding to the problems.

Conversation message and message sentiment shift notification

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

Business value

Customers can be highly emotional in their engagement with support when the severity and impact of the issue is high. Understanding customer sentiment and the rapid shifts that might occur during the support engagement enables service delivery to quickly tune messaging to improve customer sentiment and provide the best support.

Feature details

This feature allows administrators to define thresholds for sentiment shift from positive to negative so that agents and supervisors get timely alerts to indicate sentiment shift and allows them to take actions.

This feature allows the following:

- Set up alerts and display them to agents and supervisors when a conversation is drifting toward a negative sentiment.
- Configure notifications for the sentiment drifts.
- Indicate the conversational sentiment shift appropriately in the session tab so that an agent (who is working on multiple conversations) is drawn toward the conversation that is trending low on sentiment and must be addressed with immediate remedial steps.

Desktop notifications for incoming conversations

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

Business value

The Omnichannel desktop notifications allow agents to quickly respond to customers and not miss the in-app notifications when they are using other applications and the Omnichannel application is running in the background.

Feature details

When enabled by the administrator, this feature allows agents to freely work across multiple applications on their desktop without missing out on incoming conversations. The Omnichannel notifications display as operating system-level notifications when the Omnichannel app is out of focus, in the background, or minimized.

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 is 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.

Omnichannel supervisor experience enhancements

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

Business value

Businesses need to monitor and manage the efficiency levels of agents in their ongoing conversations with customers. The enhanced supervisor experience provides supervisors with timely insights and metrics on the efficiency of the service delivery of agents and opportunities to help agents deliver better support to customers.

Feature details

In this enhancement to the supervisor experience in Omnichannel for Customer Service, supervisors can:

- Drill down to specific agents and look at their operational metrics.
- Manage agent availability remotely.

Routing and work distribution enhancements

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

Business value

Manual intervention in automated systems can be necessary when the volume of support issues fluctuates unexpectedly. The configuration of routing rules based on extended attributes and manual selection of additional work are important capabilities for achieving operational efficiency in a push-based work distribution model.

Feature details

The following capabilities are added to routing and work distribution in Omnichannel for Dynamics 365 Customer Service:

- Agents and supervisors can pick cases manually, thereby allowing for self-regulation and decompression of the backlog in environments that are configured for automated push workstreams.
- Agents can pick urgent work items even when their capacity is full.
- Agents can pick work items without having to wait for the system to automatically assign.
- Organizations can define rules based on related level 1 attributes when configuring skill attachment or other routing rules.

Co-browse capabilities through third-party providers

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	✓ Jan 31, 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.

See also

[Omnichannel for Customer Service Guide] (docs)

Remote assistance capabilities through third party

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	✔ Jan 31, 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.

See also

Omnichannel Channel for Customer Service Guide (docs)

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
Data access for custom analysis and reporting	Admins, makers, or analysts, automatically	Apr 2020	-

Feature	Enabled for	Public preview	General availability
Highlighting topics as automation candidates for Power Virtual Agents	Admins, makers, or analysts, automatically	Apr 2020	
Enable robust customer service insights in the Customer Service Hub	End users by admins, makers, or analysts	May 2020	
Improve topic generation by excluding unnecessary phrases	Admins, makers, or analysts, automatically	Jun 2020	
Focused insights highlight relevant information	Admins, makers, or analysts, automatically	✔ Feb 3, 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.

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.

See also

Export data from Dynamics 365 Customer Service Insights (docs)

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 3, 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 more than 100 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.

See also

Discover key insights from your customer service data (docs)

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
Incident type AI-based suggestions	End users by admins, makers, or analysts	Apr 2020	-	
IoT alert AI-based suggestions	End users by admins, makers, or analysts	Apr 2020	-	-
IoT alert measures and service history	End users by admins, makers, or analysts	✓ Feb 3, 2020	-	Jun 2020

Proactive service delivery

Feature	Enabled for	Public preview	Early access*	General availability
Leveraging Power Automate flows	End users by admins, makers, or analysts	Apr 2020	-	
Combined asset capabilities across Dynamics 365 Supply Chain Management and Field Service	End users by admins, makers, or analysts	✓Feb 3, 2020	-	Apr 2020
Integration with Dynamics 365 Supply Chain Management	End users by admins, makers, or analysts	✓Feb 3, 2020	-	Apr 2020
Intune support for Field Service Mobile	End users by admins, makers, or analysts	✓Feb 3, 2020	-	Apr 2020

Scheduling

Feature	Enabled for	Public preview	Early access*	General availability
Next generation schedule board experience	End users by admins, makers, or analysts	Apr 2020	-	
Enhanced work hours calendar for resources	End users, automatically	-	✓Feb 3, 2020	Apr 2020
Requirement dependency for efficient workflow	End users, automatically	-	✓Feb 3, 2020	Apr 2020
Resource scheduling dashboard	End users, automatically	-	✓Feb 3, 2020	Apr 2020

Technician success

Feature	Enabled for	Public preview	Early access*	General availability
Field Service inspections	End users by admins, makers, or analysts	Apr 2020	-	
Integrated technician time tracking	End users, automatically	-	✔ Feb 3, 2020	Apr 2020
Technician time-capture precision	Admins, makers, or analysts, automatically	-	✔ Feb 3, 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.

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 3, 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.

See also

Visualizing device readings (docs)

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 3, 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.

See also

[Integrate Dynamics 365 Field Service and Supply Chain Management] (docs)

Integration with Dynamics 365 Supply Chain Management

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Integrate Dynamics 365 Field Service and Supply Chain Management (docs)

Intune support for Field Service Mobile

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Manage Field Service Mobile with Microsoft Intune (docs)

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

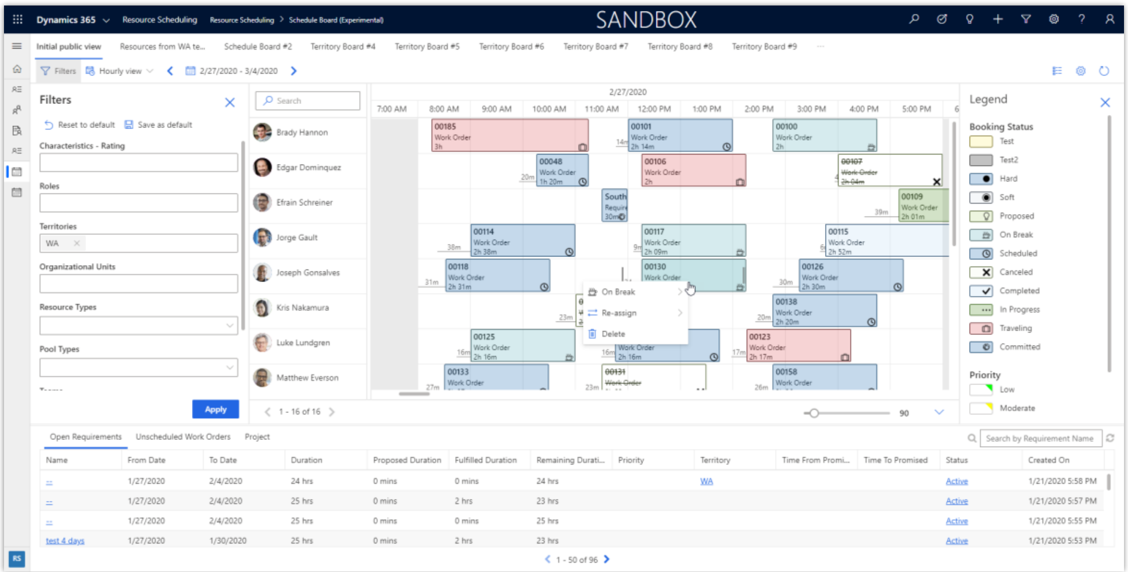
The reimagined schedule board experience makes it faster and easier for dispatchers to manage scheduling and better ensure effective use of valuable resources.

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.



Next generation schedule board experience

NOTE This feature is available in the Unified Interface only.

A new solution will be installed for the new schedule board experience

Enhanced work hours calendar for resources

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 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 control, meaning that partners and customers can enable scenarios to modify resources' working hours from outside entity forms and views, like with a canvas app.

NOTE This feature is available in the Unified Interface only.

See also

Add work hours (docs)

Requirement dependency for efficient workflow

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 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.

See also

[Schedule in sequence with requirement dependencies] (docs)

Resource scheduling dashboard

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 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.

See also

[Resource scheduling and optimization analytics dashboard] (docs)

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 3, 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 enables you 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.

See also

[Time entries for Dynamics 365 Field Service](#) (docs)

Technician time-capture precision

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	✔ Feb 3, 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.

See also

Timestamp frequency setting (docs)

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
Capture asset condition through spatial markup	End users by admins, makers, or analysts	Jun 2020	-
Capture session history through call recordings	End users by admins, makers, or analysts	-	Apr 2020
Share files between technicians and experts to improve collaboration	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.

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
End 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 scenario:

- 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.

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

This release focuses on automating common tasks to reduce the number of processes that users complete manually. It also introduces credit management capabilities that help an organization manage risk and automate downstream processes. It also enhances usability.

Feature	Enabled for	Public preview	General availability
Automatic collection task creation	End users by admins, makers, or analysts	Jul 2020	-
Automatic vendor payment proposal	End users by admins, makers, or analysts	Jul 2020	-

Feature	Enabled for	Public preview	General availability
Add Vendor ID, Customer ID, Vendor Name, and Customer Name to the voucher transactions list page	End users by admins, makers, or analysts	-	Apr 2020
Allow filtering the Tax 1099 detail report by reporting year	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
Budget planning query optimization for performance	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
Credit management	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
Date range for Posted transactions by journals report	End users, automatically	✓ Feb 3, 2020	Apr 2020
Prohibit submission to workflow when the invoice total and registered invoice total are not equal	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
Improve performance when copying charges to vendor invoice lines	End users by admins, makers, or analysts	-	May 2020
Require 'Recalculate ledger periods' when changing fiscal calendar on Ledger	End users by admins, makers, or analysts	-	May 2020
Vendor invoice batch posting	End users by admins, makers, or analysts	-	May 2020
Retained earnings calculation enhancements for financial reporting when using currency translation	End users by admins, makers, or analysts	-	Jun 2020

Feature	Enabled for	Public preview	General availability
Advanced ledger settlement: Settlement and reverse settlement processed separately	End users by admins, makers, or analysts	-	Jul 2020
Trial balance with transactional detail report	End users by admins, makers, or analysts	-	Jul 2020
Touchless email reminders to customer	End users by admins, makers, or analysts	-	Aug 2020

Finance Insights

AI-powered capabilities coming in the form of Finance Insights

Feature	Enabled for	Public preview	General availability
Customer payment predictions	End users by admins, makers, or analysts	May 2020	-
External data for cash flow forecasting	End users by admins, makers, or analysts	May 2020	-
Forecast bank balance	End users by admins, makers, or analysts	May 2020	-
Intelligent budget proposal	End users by admins, makers, or analysts	May 2020	-
Treasurer workspace	End users by admins, makers, or analysts	May 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 on 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
Electronic reporting advanced formula editor	Admins, makers, or analysts, automatically	✓ Feb 3, 2020	Apr 2020
Extended French localization ISO 20022 format for international payment and treasury transfer	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
Extended Italian localization Advanced notes management	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
Extended Italian localization bank account setup enhancement	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
Extended Italian localization Improved inquiry on debit/credit	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
Extended Italian localization Miscellaneous charges per kilogram in Intrastat declaration	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
Extended Italian localization Posting invoices with zero amount	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
Extended Italian localization Sales invoice lines sorting by packing slips	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
Extended Italian localization Separate accounts for credit notes	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
Extended Italian localization Tax invoice for goods delivered for free	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020

Feature	Enabled for	Public preview	General availability
Extended Swiss localization QR-bill implementation	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
Use fiscal data from an invoice account	End users by admins, makers, or analysts	✓ Mar 6, 2020	Apr 2020
Extended Italian localization General ledger simulations	End users by admins, makers, or analysts	✓ Feb 3, 2020	Aug 2020
Extended Italian localization Intent letters - invoicing of usual exporters	End users by admins, makers, or analysts	✓ Feb 3, 2020	Aug 2020
Extended Italian localization Unique Certification	End users by admins, makers, or analysts	✓ Feb 3, 2020	Aug 2020
Extended Italian localization commission settlement on payments	End users by admins, makers, or analysts	May 2020	Aug 2020
Extended Italian localization Configurable posting profiles for banks and remittance types	End users by admins, makers, or analysts	May 2020	Aug 2020
Extended Italian localization Protest handling for bills of exchange	End users by admins, makers, or analysts	May 2020	Aug 2020
Extended Italian localization Tax plafond	End users by admins, makers, or analysts	Jul 2020	Aug 2020
Configurable business documents conversion to PDF	End users by admins, makers, or analysts	Apr 2020	To be announced
Configurable business documents direct printing	End users by admins, makers, or analysts	Apr 2020	To be announced

Public sector

This release focuses on improvements to budgeting, accounts payable, and Canadian tax.

Feature	Enabled for	Public preview	General availability
Daily statement of treasurer's accountability	End users by admins, makers, or analysts	-	Apr 2020
Update bank balances when posting transactions using advanced ledger entry	End users by admins, makers, or analysts	✔ Mar 2, 2020	Apr 2020
Allow interest distribution and escheatment to update bank balances when posting	End users by admins, makers, or analysts	-	May 2020
A-133 Circular Report for Grants (SEFA)	End users by admins, makers, or analysts	-	Jul 2020
Remove option to replace budget plan	End users by admins, makers, or analysts	-	Jul 2020
Vendor details to bridged transactions and check forms	End users by admins, makers, or analysts	-	Jul 2020
Canadian Harmonized Sales Tax	End users by admins, makers, or analysts	Jun 2020	Jul 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.

Core financials

Overview

This release focuses on automating common tasks to reduce the number of processes that users complete manually. It also introduces credit management capabilities that help an organization manage risk and automate downstream processes. In addition, it enhances usability in a number of ways.

Automatic collection task creation

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

Business value

Currently, identifying the invoices and customer orders that collections agents should focus on is a labor-intensive task. This feature automates this process using predefined rules.

Feature details

The process of creating collection tasks automatically begins with your organization defining rules that are based on invoice attributes including payment prediction, due dates, and amounts due. The tasks that are based on these rules let collections agents focus their activities in areas that have the highest value for your organization.

Automatic vendor payment proposal

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

Business value

Organizations typically pay vendors according to a set of rules that apply to their specific circumstances. For example, they might rank vendors in order of importance and pay their most important vendors first. Other organizations might use one or more different methods of categorizing their vendors and pay vendors in specific categories on specific days. Automating this process helps organizations apply their own rules to create vendor payment proposals more consistently and efficiently than is possible using a manual process.

Feature details

A "rules engine" lets treasurers and accounts payable managers define rules within the product to help the system learn which vendors to pay, and then determine when to pay them. The system then uses this information to generate payment proposals automatically and send them through a workflow process for approval.

Add Vendor ID, Customer ID, Vendor Name, and Customer Name to the voucher transactions list page

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

Business value

This feature adds columns to the **Voucher transactions** list page, so that information you need is more readily available.

Feature details

The new columns that will be added include **Vendor ID**, **Customer ID**, **Vendor name**, and **Customer name**. These columns will be added to the **Voucher transactions** list page.

Allow filtering the Tax 1099 detail report by reporting year

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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. For more information about 1099 reporting at the end of a reporting year, see Year-end 1099 reporting.

See also

Year-end 1099 reporting (docs)

Budget planning query optimization for performance

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Configuring budget planning (docs)

Credit management

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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. To learn more, refer to the Credit and collections in Accounts receivable.

Feature details

Credit management's capabilities will include:

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

See also

Credit and collections in Accounts receivable (docs)

Date range for Posted transactions by journals report

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 3, 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. For more information about processing a journal in the General ledger, see General journal processing.

See also

General journal processing (docs)

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 3, 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.

See also

Submitting a vendor invoice for review (docs)

Improve performance when copying charges to vendor invoice lines

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

Business value

Improving the performance makes the invoice readily available to clerks and staff who approve invoices and who have responsibility for the accuracy of the information the invoices contain.

Feature details

You'll most likely notice this enhancement when creating an invoice or changing the Default quantity for lines option on an invoice document. Improving the performance makes the invoice readily available to clerks and approvers who have responsibility for the accuracy of the invoice information.

Require 'Recalculate ledger periods' when changing fiscal calendar on Ledger

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

Business value

This feature requires that fiscal periods be recalculated after changing the fiscal calendar on the **Ledger** page. This requirement helps ensure that transactions are assigned to the correct periods in the new calendar.

Feature details

The fiscal calendar assigned to a ledger can be changed at any time. When you change the calendar, you must also run the Recalculate ledger periods process, although the process doesn't have to be run immediately. However, recalculating the periods later, or not running the process at all, can result in issues when reporting or in closing the year. Enabling this feature requires you to recalculate fiscal periods immediately when you change the fiscal calendar on the **Ledger** page.

Vendor invoice batch posting

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

Business value

Posting invoices in a batch lets the workflow process continue without having to wait for the posting to finish, which improves the overall performance of all the tasks submitted to the workflow.

Feature details

This feature lets you add an automated posting task to the Vendor invoice workflow so that the invoice is posted using a batch.

Retained earnings calculation enhancements for financial reporting when using currency translation

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

Business value

When generating financial reports that include currency translation, the retained earnings calculations now include rates and balances from the account's entire history, rather than only the year and rate.

Feature details

When you enable this feature, any retained earnings account that has the **Currency translation type** set to **Transaction date** will calculate the translated balance of the account using rates and balances from its entire history, rather than only the year and rate.

Advanced ledger settlement: Settlement and reverse settlement processed separately

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

Business value

The settlement process can now run successfully with only a warning, even if the process includes transactions that are marked for unsettlement and settlement.

Feature details

When the Advanced ledger settlement feature is enabled, both settled records and unsettled records can be marked. Previously when both settled and unsettled records were marked, both the Settle marked transactions and Reverse marked transactions processes would fail with an error, because each process is separate. Now, each process will run to completion but generate a warning. For example, if some records are marked to settle and some are marked to unsettle, and the Settle marked transactions process is run, the records marked for settlement will be settled and a message will let you know that the records marked for unsettlement were not processed.

Trial balance with transactional detail report

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

Business value

This report helps ensure that your accounts are in balance by listing information that can expose any errors in account balances. For example, all accounts that have debit balances should equal all accounts that have credit balances. The report includes detailed information posted to the general ledger.

Feature details

The trial balance with transaction detail report displays the details about each transaction for ledger accounts. The information in the report includes opening balances, debits, credits, and the resulting balances for a given date range. For transactions, the report information includes the transaction date, voucher number, transaction description, debits or credits, and a running balance for the year to date based on the current fiscal year.

Touchless email reminders to customer

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

Business value

Automating this process to send reminders of overdue invoices to customers meets a business need that collections managers have expressed, saving both labor and time.

Feature details

When enabled, email reminders will be sent automatically to customers, with the overdue invoices as attachments based on email templates.

Finance Insights

Overview

Finance Insights accelerates your digital transformation by bringing the power of AI into your finance processes. As organizations look to make decisions rapidly, reduce risk and focus on strategic initiatives, it is critical to free finance from repetitive, time-consuming, and low-value daily activities. Leveraging the power of AI, Finance Insights enables you to not only quickly understand and act on your company's cash position, but also to take proactive action to improve it. Menial tasks are automated or removed, the barrier of developing or hiring AI expertise is bypassed, and you're left with insights to move your business forward.

In 2020 release wave 1, Dynamics 365 Finance provides configurable and extensible models to help you accurately and intelligently predict your company’s cash flow. Customer payment predictions show which customers you can expect to pay on time or late and what factors are contributing to that prediction. Using your cash in and out including budget and external data, you can view a forecasted bank balance and cash flow over time. These new capabilities, paired with automation in vendor payments and collections, provide a rich and intelligent financial system to power your company’s success.

Customer payment predictions

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

Business value

Organizations often find it challenging to predict when customers will pay their invoices. This lack of insight can lead to inaccurate cash flow forecasts and inefficient collection processes. Customer payment predictions will use machine learning to predict when an invoice or sales order will be paid. Organizations will be able to use these payment predictions to make collections proactive and improve the accuracy of cash flow forecasting.

Feature details

Customer payment predictions helps answer and respond constructively to the following questions:

- When will an invoice or sales order be paid?
- What customers will pay on time or late?
- What invoices or orders will they pay?

External data for cash flow forecasting

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

Business value

Most organizations are complex and use a number of systems that help support their operations. Organizations also use data from external sources that are pertinent to their industry. This feature lets you include data from external sources in predictions of payments and cash receipts, thereby helping improve the accuracy of the predictions.

Feature details

This feature lets you include external data in cash flow forecasting.

Forecast bank balance

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

Business value

Organizations have multiple bank accounts and the balances of those accounts are affected by transactions that cause funds to flow in and out of them. The Forecast bank balance feature helps organizations predict the cash that will be available to meet business commitments and if necessary, take additional action to meet them.

Feature details

Forecasts of bank balances will be based on recurring activities, as well as information from customer payment insights and vendor payments. The bank balance forecasts help treasurers more accurately understand the availability of funds at specific times.

Intelligent budget proposal

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

Business value

Customers increasingly find it beneficial to generate budgets more often than annually. However, creating a new budget typically requires a significant investment in time and energy. Intelligent budget proposal enables creation of an annual budget, along with periodic forecasts through an automated, intelligent process.

Feature details

The Intelligent budget proposal feature lets you create a draft budget automatically, but with a high degree of confidence from the use of historical data.

Treasurer workspace

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

Business value

A treasurer’s job is to manage cash efficiently. Treasurers must analyze information and take action using multiple pages in the product. This workspace is tailored to a treasurer's needs so that they can complete their entire day’s activities from a single location, which helps bring simplicity and efficiency to their work day.

Feature details

This feature adds a new workspace that includes all necessary elements for completing the analysis and activities that a treasurer needs to successfully manage an organization's cash.

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).

Electronic reporting advanced formula editor

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✔ Feb 3, 2020	Apr 2020

Feature details

In addition to the Electronic reporting formula editor, you can use the advanced Electronic reporting formula editor to improve the experience of configuring Electronic reporting (ER) expressions. The advanced editor is browser-based and powered by the Monaco editor. It allows the following new features for formula editor:

- Code autoformatting
- IntelliSense
- Code completion
- Code navigation
- Code structuring
- Find and replace
- Data pasting
- Syntax colorization

See also

Electronic reporting advanced formula editor (docs)

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 3, 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

See also

[Country-specific update for France: ISO 20022 Credit transfer format for international payment and treasury transfer](#) (docs)

Extended Italian localization: Advanced notes management

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✓ Feb 3, 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. There is no need to apply the Extended Italian Localization (EXIL) add-in or any other add-in with similar features that are 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.

See also

Advanced notes management (docs)

Extended Italian localization: bank account setup enhancement

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Bank data usability enhancement (docs)

Extended Italian localization: Improved inquiry on debit/credit

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Improved inquiry on debit/credit settlement (docs)

Extended Italian localization: Miscellaneous charges per kilogram in Intrastat declaration

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Miscellaneous charges per kilogram in an Intrastat declaration (docs)

Extended Italian localization: Posting invoices with zero amount

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✓ Feb 3, 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.

See also

Posting invoices with zero amount (docs)

Extended Italian localization: Sales invoice lines sorting by packing slips

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✓ Feb 3, 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.

See also

Sort sales invoice lines by packing slip (docs)

Extended Italian localization: Separate accounts for credit notes

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Separate accounts for credit notes (docs)

Extended Italian localization: Tax invoice for goods delivered for free

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Tax invoice for goods delivered for free (docs)

Extended Swiss localization: QR-bill implementation

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

A country specific update to support Swiss QR-bills (docs)

Use fiscal data from an invoice account

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

Business value

This feature provides flexibility in how fiscal data, such as the tax exempt number, is defined for business operations in the Accounts payable and Accounts receivable modules.

Feature details

You can use fiscal data, such as the customer or vendor name, or the sales tax group and tax exempt numbers from an invoice account on sales orders, free text invoices, or purchase orders to be updated automatically based on information from the invoice account.

Extended Italian localization: General ledger simulations

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

General ledger simulations (docs)

Extended Italian localization: Intent letters – invoicing of usual exporters

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

[Intent letters - Invoicing of usual exporters](#) (docs)

Extended Italian localization: Unique Certification

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Unique certification (docs)

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	Jul 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 features 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.

For more information, see Output conversion to PDF.

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).

For more information, see [Printer destination].

Public sector

Overview

The release includes improvements in Public sector around budgeting, accounts payable, and Canadian tax.

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.

Update bank balances when posting transactions using advanced ledger entry

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

Business value

This features adds flexibility to organize your accounts in a way that's optimal for your organization and business situation by letting you associate a bank account with one or more main accounts.

Feature details

The bank account must have an account number and routing number associated with it.

Allow interest distribution and escheatment to update bank balances when posting

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

Business value

This feature enhances the interest distribution and escheatment processes by letting you update the banking portion of the Advanced ledger entry in a single step in the posting process.

Feature details

This enhances two previously released features, **Interest distribution** and **Escheatment**, which use the Advanced ledger entry to post the affected transactions. This feature lets you update bank balances when posting advanced ledger entries that are associated with one or more banking main accounts.

A-133 Circular Report for Grants (SEFA)

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

Business value

A variety of information related to federal grants is available in a single place through this report.

Feature details

The A-133 Circular report for grants includes the Catalogue Of Federal Domestic Assistance (CFDA) title and number, award number, year of award, name of the federal agency providing the funds, and name of the pass-through entity for a selected period of time.

Remove option to replace budget plan

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

Business value

You can improve the security of your organization's budget planning by specifying who can replace existing budget plans.

Feature details

Now you can specify the users who can replace existing budget plans. To use this feature, open the **Parameters** tab from the **Budget planning configuration** page. Then select the **Prevent replacement of budget plan scenarios** check box to hide the **Replace the existing budget plan scenario** option in the **Budget plan generation processes** list. Selecting this option will remove the option for all users when generating a budget plan, including the system administrator.

Vendor details to bridged transactions and check forms

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

Business value

In the earlier version, the Bridged transactions page didn't display any vendor details. The Accounts payable Checks page didn't display the bridging status or vendor details. The Bank transactions page did not display any bridging status, either. This feature addresses these shortcomings by displaying more information on the Bridged transactions, Bank transactions, and Checks pages.

Feature details

This feature introduces the following changes:

- Updates the **Bridged transactions** page to display the vendor number, name, address, and pay-to information in the inquiry.
- Updates the **Bank transactions** page to display the **Cleared date**.
- Updates the existing **Checks** form to display the vendor name, address, and pay-to name and whether the check has cleared along with the **Cleared date**.

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 2020 release wave 1 includes:

- **Planning**: The Planning Optimization service will become generally available for distribution scenarios, while support for generating planned production orders will be going into public preview.
- **Asset management**: Enables integration with fixed assets to provide a comprehensive asset view that includes both physical and financial information.
- **IoT intelligence**: Connected manufacturing and quality scenarios will become generally available, and the connected assets scenario will be enabled for public preview.
- **Sales and procurement**: Several enhancements have been made in these areas, thereby enabling country of origin, hazardous materials management, and e-procurement vendor collaboration.
- **Warehouse management**: Enables mass deployment support for warehouse mobile applications, catch weight improvements, improved material handling, and improvements in inbound and outbound logistics.
- **Manufacturing**: Job card device experiences have been enhanced to improve productivity for manufacturing operations.

Also, several miscellaneous enhancements are being introduced throughout Supply Chain Management to support Common Data Service 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
Manufacturing resource scheduling based on asset availability	End users by admins, makers, or analysts	Jul 2020	-
Integration with new Project module changes related to project type	End users by admins, makers, or analysts	Sep 2020	-
Fixed assets integration with Asset Management lifecycle	End users by admins, makers, or analysts	Feb 2020	Apr 2020
Visual scheduling for work orders in Asset Management	End users by admins, makers, or analysts	Feb 2020	Apr 2020
IoT integration with asset management maintenance requests from IoT intelligence	End users by admins, makers, or analysts	May 2020	Jul 2020

Costing

Feature	Enabled for	Public preview	General availability
Compare item price storage	End users by admins, makers, or analysts	✓ Feb 1, 2020	Apr 2020
Multiple inventory asset representations (preview)	End users by admins, makers, or analysts	May 2020	Jul 2020

Inventory

Feature	Enabled for	Public preview	General availability
Inventory on-hand service	End users by admins, makers, or analysts	May 2020	

IoT intelligence

Feature	Enabled for	Public preview	General availability
IoT intelligence core insights	End users by admins, makers, or analysts	-	Apr 2020

Manufacturing

Feature	Enabled for	Public preview	General availability
Improved job card device	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
New data entities for the manufacturing area	End users, automatically	✓ Mar 1, 2020	May 2020
Manufacturing intelligence	End users by admins, makers, or analysts	May 2020	Jul 2020

Planning

Feature	Enabled for	Public preview	General availability
Master planning includes items with on-hand inventory when pre-processing filters are enabled	End users by admins, makers, or analysts	✓ Feb 1, 2020	Apr 2020

Portals

Feature	Enabled for	Public preview	General availability
Customer self-service experiences	End users by admins, makers, or analysts	May 2020	Jun 2020

Trade and source

Feature	Enabled for	Public preview	General availability
Enterprise scale – purchase system performance	End users by admins, makers, or analysts	Jul 2020	-
Enterprise scale – sales system performance	End users by admins, makers, or analysts	Jul 2020	-
Calculate PO delivery date based on lead times and working days (public sector)	End users by admins, makers, or analysts	✓ Feb 3, 2020	Apr 2020
Country of origin enhancements	End users by admins, makers, or analysts	Feb 2020	Apr 2020
External catalog enhancements	End users by admins, makers, or analysts	Feb 2020	Apr 2020
Hazardous materials product information management	End users by admins, makers, or analysts	Feb 2020	Apr 2020
Hazardous materials shipping documentation	End users by admins, makers, or analysts	Feb 2020	Apr 2020
Miscellaneous charges enhancements	End users by admins, makers, or analysts	Feb 2020	Apr 2020
Purchase order delivery via cXML	End users by admins, makers, or analysts	Feb 2020	Apr 2020
Sales process control via enhanced order holds	End users by admins, makers, or analysts	May 2020	Jul 2020
Delegation of multiple purchasing work items	End users by admins, makers, or analysts	Jul 2020	Sep 2020

Feature	Enabled for	Public preview	General availability
Sales order operator efficiency – distribution	End users by admins, makers, or analysts	Jul 2020	To be announced

Warehouse management and transportation

Feature	Enabled for	Public preview	General availability
Catch weight product processing with warehouse management	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Inbound and outbound logistics improvements	End users by admins, makers, or analysts	Feb 2020	Apr 2020
Mass deployment for Warehouse mobile app	Admins, makers, or analysts, automatically	Mar 2020	Apr 2020
Enhancement to use existing catch weight tags with warehouse management	End users by admins, makers, or analysts	✔ Mar 6, 2020	Apr 2020
Warehouse management – inbound load management enhancement	End users by admins, makers, or analysts	Apr 2020	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.
- **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

Manufacturing resource scheduling based on asset availability

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

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.

Costing

Compare item price storage

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 1, 2020	Apr 2020

Business value

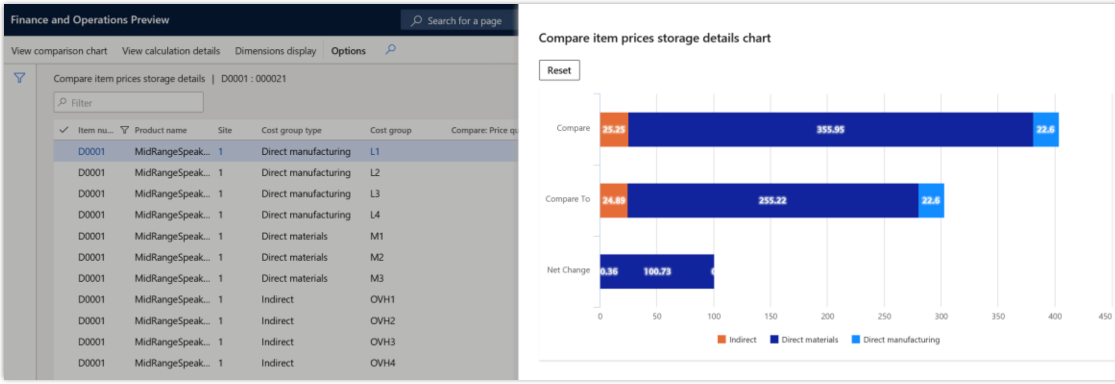
This new way of executing the Compare item price report is useful in cases where the output contains a large number of lines. For example, requesting a comparison of the current active standard cost against next year's pending standard cost for 60,000 items would yield a very long report, where data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

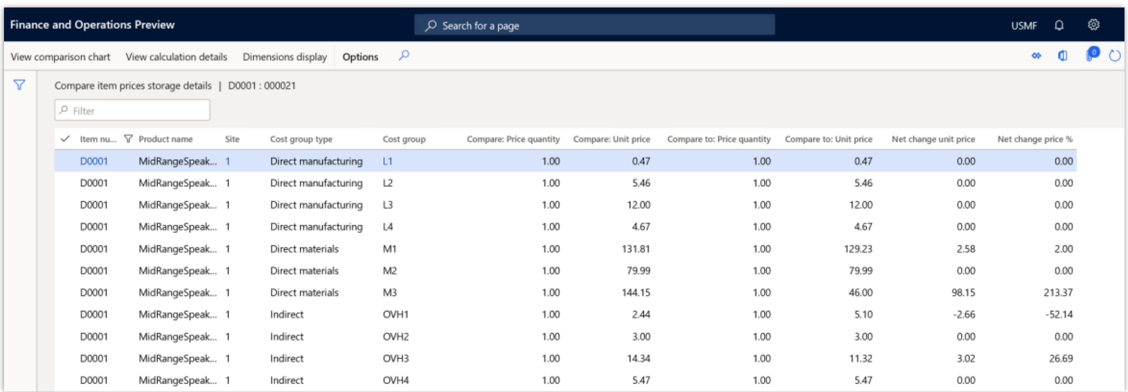
We are introducing new functionality for comparing item price storage. When you execute the "Compare item price" report, you must provide a unique name for the specific execution, and the results of the report will be stored under this name.

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 are listed at 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



Item nu...	Product name	Site	Cost group type	Cost group	Compare: Price quantity	Compare: 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

See also

[Compare item prices storage report](#) (docs)

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 might be in direct conflict. International organizations having subsidiaries in countries with a hyper-fluctuation of local currency might 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 for 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 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 orders, sales orders, transfer orders, and so on) 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 with 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

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	-	Apr 2020

Feature details

Internet of things (IoT) intelligence supports the following core insights and action scenarios:

- **Delayed orders**: Provides notification services and actions for managing delayed production orders. Displays impacted operations. Provides users with the ability to define order-delay metrics for combinations of resources and products, and notifies users when exceptions to these thresholds occur. Enables users to take relevant business actions for delayed orders, including the ability to view impact or create a maintenance request.
- **Equipment down**: Provides notification services and actions for managing equipment-down scenarios. Displays impacted operations. Provides users with the ability to define metrics for machine-down thresholds and notifies users when an exception to these thresholds occurs. Enables users to take relevant business actions for delayed orders, including the ability to view impact or create a maintenance work order.
- **Quality anomaly**: Provides notification services and actions for managing quality anomalies. Provides users with the ability to define quality attributes for products and get notified when exceptions to these attributes occur.
- **Automated inventory updates**: Provides automated inventory updates from the shop floor. Provides the ability to define batching/grouping rules for automatic inventory update journals and report as finished (RAF) creation based on part-out signals received from the IoT Hub.

Seamless onboarding experience:

- **No-code capability**: Provides a fast, code-free method for users to connect their machines to IoT intelligence service and get started with actionable insights.

Manufacturing

Improved job card device

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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

We are enhancing the job card device by adding capabilities that have so far been available only on the job card terminal. This will provide shop floor workers with a more intuitive and touch-friendly experience toward managing production jobs. Enhancements include:

- Improvements to the user interface of the **Report progress** dialog box, which will provide a more intuitive, touch-friendly, and workflow-driven experience.
- The ability to print labels for license plates when using a mobile device to report as finished.

These enhancements to the job card device represent the first steps toward 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 internet of things (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.

New data entities for the manufacturing area

Enabled for	Public preview	General availability
End users, automatically	✔ Mar 1, 2020	May 2020

Feature details

We are expanding the collection of data entities for the manufacturing area of Supply Chain Management, thus opening new possibilities for admins, system integrators, and system developers. For example, some of these entities will let you extract data for building analytics and visualizations, while others will help you to migrate master and reference data when preparing new instances of Dynamics 365 Supply Chain Management.

Release	Entity	Purpose
10.0.9	Capacity reservation	Enables users to export capacity reservations, which can be useful (for example) for building capacity overview visualizations.
10.0.9	Batch order formula lines	Enables users to import and export batch order formula lines. The import option can be useful when migrating data.
10.0.9	Batch order co- and by-product	Enables users to import and export batch order co- and by-products. The import option can be useful when migrating data.
10.0.9	Production route transaction	Enables users to export production route transactions. This can be useful for building analytics for manufacturing performance.
10.0.10	Production jobs	Enables users to export production jobs. This can be useful for building visualizations of the production plan.
10.0.10	Indirect activities (JmgIpcActivity)	Enables users to import and export indirect activities. This can be useful when preparing data for new instances.
10.0.10	Indirect activity categories (JmgIpcCategory)	Enables users to import and export categories for indirect activities. This can be useful when preparing data for new instances.

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.

Planning

Master planning includes items with on-hand inventory when pre-processing filters are enabled

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✓ Feb 1, 2020	Apr 2020

Feature details

This feature ensures that items with on-hand inventory will always be included in the master planning run when the **Pre-processing: Automatically filter by items with direct demand** setting is enabled on the **Master planning parameters** page.

To use this capability, you must enable the **Include items with on-hand when pre-processing filters are enabled** feature in Feature management.

IMPORTANT If you are relying on *Explosion* or *Net change update* functionality for manufacturing planning processes, then this feature must be enabled. Otherwise, incorrect on-hand data might show up in the **Net requirements** form for the items without direct demand, and incorrect planned orders might be generated during explosion.

See also

Automatically filter by items with direct demand (docs)

Portals

Customer self-service experiences

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

Feature details

The customer portal template is a Power Apps portals template that will be available in the Power Apps template gallery. It allows companies to create an externally facing website that is connected to a Dynamics 365 Supply Chain Management environment.

The template doesn't provide an entire end-to-end solution, but instead provides guidance and a starting point for creating custom websites for business-to-business (B2B) sales-order processing and related scenarios. It helps companies bring dual-write, Power Apps portals, and Dynamics 365 Supply Chain Management together to create a self-service experience for their enterprise customers.

Out of the box, the template provides the following functionality:

- View order history
- View account information
- Create orders
- Preconfigured web roles and entity permissions for Power Apps portals users

Because this is a Power Apps portals template, system customizers can use all features and customization capabilities that Power Apps portals offers. They will also be able to extend the functionality to the extent supported by dual-write.

Trade and source

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.

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 3, 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 **SupplierPartIAuxiliary** 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.

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.

Sales order operator efficiency – distribution

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

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.

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 3, 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) (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.

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.

Enhancement to use existing catch weight tags with warehouse management

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Mar 6, 2020	Apr 2020

Feature details

This feature adds support for using a mobile device to report a production order as finished when catch weight tags have been registered in advance for the appropriate order.

Use the **Mobile device menu items** page to add this feature to any mobile-device menu item that uses the *Report as finished and put away* work creation process. The feature requires that the **Generate catch weight tag** setting be disabled for the used menu item, and also that you are using catch weight tag tracking for **Product, tracking, and all storage dimensions** as part of the **Catch weight item handling policy** setup.

To use this capability, you must enable the *Use existing catch weight tags when reporting production orders as finished* feature in Feature management.

See also

Catch weight product processing with warehouse management (docs)

Warehouse management – inbound load management enhancement

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

Feature details

This feature consists of:

- A new association of the purchase order inventory transactions (Inventtrans) with the load ID when receiving from the Warehouse Mobile device.
- Enhancements on the calculation of the purchase order quantity left to load that is now using registered quantities.
- An update to the inbound load warehouse handling operations. The feature is called "Multiple product receipt postings per load." It adds flexibility to the load receiving process by allowing multiple product receipt postings for the same load. It lets warehouse managers keep a load open even after running the *Update product receipts* job for that load, thereby allowing additional quantity registrations for the same load. Thereafter, product receipts are updated to the ledger on an ongoing basis.

These enhancements will allow ISVs to build more robust solutions when integrating with the load entity.

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
Embed third-party apps – phase 2	End users by admins, makers, or analysts	Apr 2020	

Feature	Enabled for	Public preview	General availability
Expanded chart types supported by embedded Chart control now include Line and Area ranges	Admins, makers, or analysts, automatically	Apr 2020	
Finance and Operations licensing	End users by admins, makers, or analysts	Apr 2020	-
Grouping with subtotals in grids	End users by admins, makers, or analysts	Apr 2020	
User productivity – new grid control – phase 2	End users by admins, makers, or analysts	Apr 2020	
User productivity – Saved views – phase 2	End users by admins, makers, or analysts	Apr 2020	
Connect your Finance and Operations apps with back-end systems using BarTender labeling system integration	End users by admins, makers, or analysts	Jun 2020	-
Spotlight your brand using modern designs for business-critical documents	End users by admins, makers, or analysts	Jun 2020	
Usability improvements for filtering and personalization	End users by admins, makers, or analysts	Aug 2020	
New task recorder capabilities for RSAT	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Recommended fields	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Embed actions in the message bar	End users by admins, makers, or analysts	-	May 2020

Data and process integration

All your data is available in your own Azure Data Lake Storage Gen2 data lake.

Feature	Enabled for	Public preview	General availability
Create and trigger instant flows	End users by admins, makers, or analysts	Apr 2020	
Data in Common Data Service – phase 1 & 2	End users by admins, makers, or analysts	✓ Feb 19, 2020	Apr 2020
Tables in a customer's Data Lake Storage Gen2 data lake	End users by admins, makers, or analysts	Mar 2020	Apr 2020
Finance and Operations apps data is described in the Common Data Model	End users by admins, makers, or analysts	-	May 2020
Finance and Operations entities in a customer's data lake	End users by admins, makers, or analysts	May 2020	Jun 2020
Entity store data is available in Azure Data Lake	End users by admins, makers, or analysts	✓ Jun 1, 2019	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.

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.

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.

See also

Personalize the user experience (docs)

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.

Finance and Operations licensing

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	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
- Dynamics 365 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 might be rolled out earlier than license enforcement.

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.

10.0.10 / Platform update 34

- Added task recorder support for views. Recordings should be done on published views or the standard view.

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.

New task recorder capabilities for RSAT

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Task recorder resources (docs)

Recommended fields

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Personalize the user experience (docs)

Embed actions in the message bar

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

Feature details

Starting in version 10.0.10/Platform update 34, the Message::AddAction() method can be used to embed an action within a message sent to the message bar. This method supports adding a single action that is associated with a display or action menu item, which is then visualized as a link button. This API is meant to serve as a replacement for the SysInfoAction class from Dynamics AX 2012.

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.

Create and trigger instant flows

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.

Data in Common Data Service – phase 1 & 2

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✓ Feb 19, 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 model-driven apps in Dynamics 365. This allows businesses to exchange near real-time data in a synchronous, bidirectional fashion beyond application boundaries, giving users a unified 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.

See also

Dual-write home page (docs)

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.

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	Aug 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

Make Entity store available as a Data Lake (docs)

Overview of Dynamics 365 Project Operations 2020 release wave 1

Today's project-based services businesses operate in a highly competitive market, where winning new deals, accelerating project delivery, and increasing profit margins are significant challenges. Teams within these organizations are using disconnected systems for sales, project management, collaboration, and financials when success in this environment requires unifying teams around actionable data.

We are excited to announce a new Dynamics 365 application that unifies operational workflows to provide the visibility, collaboration, and insight needed to drive success across teams—from sales to finance. Microsoft Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams within a single application to win more deals, accelerate delivery, empower employees, and maximize profitability.

As we see phenomenal growth in the services economy, bringing together these products is key to our vision. We're very excited for the innovation Dynamics 365 Project Operations delivers in this space and are looking forward to the value that Microsoft and its partners can bring to our customers.

Delivering service organization success

This new application builds on our depth of expertise and existing applications across all functional pillars of service-based businesses and teams. Powered by Microsoft Power Platform, we provide customers an unmatched set of capabilities that enable everyone to analyze, act, and automate across their organization to transform their services-business from the ground up.

- **Leaders get business insights** to increase visibility across all teams, data, and processes, plus AI capabilities for better, faster business decisions.
- **Sales is enabled** to win more deals and accelerate the sales cycle with fast accurate quotes, flexible pricing, and seamless transitions from estimate to execution.
- **Resourcing** is set up to optimize resource utilization by aligning the right people, with the right skills, to the right projects—improving quality and helping to retain top performers.
- **Project managers can accelerate** project delivery with state-of-the-art, built-in project management that uses familiar, easy-to-use Microsoft Project capabilities.
- **Team members** can improve productivity, collaboration, and visibility with integration to Microsoft Teams, as well as submit time and expenses from anywhere.
- **Finance** can simplify project accounting with time and expense tracking governance, project costing, budgeting, invoicing, revenue recognition, compliance, and visibility into key business health metrics such as gross margin and project profitability.

Project Operations is powerful on its own, but it is also expandable by our customers who require additional capabilities from Dynamics 365, including Marketing, Human Resources, Customer Service, and more. Whether you want the additional functionality of another Dynamics 365 application or to add on a custom application built with Power Apps, everything works together and like you'd expect because they share a common foundation as well as the security, privacy, and compliance of a cloud-delivered solution.

What's new and planned for Dynamics 365 Project Operations

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
Enhanced Project Accounting capabilities for resource-based projects in Dynamics 365 Project Operations	End users by admins, makers, or analysts	Jun 2020	To be announced
Project Management capabilities	End users by admins, makers, or analysts	Jun 2020	To be announced
Project Sales enhancements	End users by admins, makers, or analysts	Jun 2020	To be announced
Enhanced Project Accounting capabilities for inventory-based projects in Dynamics 365 Project Operations	End users by admins, makers, or analysts	Sep 2020	To be announced

Description of **Enabled for** column values:

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- **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.

Enhanced Project Accounting capabilities for resource-based projects in Dynamics 365 Project Operations

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

Feature details

Fixed-price and **Time and material** billing arrangements with customers for project-based contracts are often supported by one or more revenue recognition processes and accounting concepts to track Project work-in-process (WIP) balances. Customers of Dynamics 365 Projects Operations will be able to leverage the rich accounting and revenue recognition capabilities to complete their project management processes from Sales to Project Accounting.

Project Management capabilities

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

Feature details

Built on Common Data Service, Microsoft Project for Web was released in the third quarter of 2019. This solution introduced the Project Scheduling Service, a cloud-based version of Microsoft Project's highly performant scheduling engine. We have designed a set of core project entities based on the intersection of key Project Service Automation entities and Microsoft Project capabilities. The feature represents investments that bring together the core capabilities from Project for Web and Project Service Automation as a new product offering called Dynamics 365 Project Operations. This will represent the comprehensive project management capabilities, such as resource bookings, sales, pricing, costing, approvals, and project actuals. The value of this feature will help project managers plan projects with visibility and awareness of the financial impact of the changes they make to their project plans.

Project Sales enhancements

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

Feature details

We have combined the capabilities of Microsoft Project for Web and Dynamics 365 Project Service Automation with the Project Financials capabilities in Dynamics 365 Finance as a single product offering called **Dynamics 365 Project Operations**. This will provide a comprehensive set of capabilities for project-based organizations.

The following additions to the existing functionalities for Project Sales and Financials are targeted for this release wave:

- **Ability to set up split-billing for project contracts**: With this feature, customers using the project-quoting and contracting capabilities of Projects Operations will be able to set up multiple customers for each contract with a percentage split of the billings for each of those customers. This setup for billing will help in scenarios where there is a manufacturer or product vendor involved who is willing to pay a portion of the cost of a customized implementation or value-add, as required by the customer.
- **Ability to set up "not-to-exceed" limits for project contracts and quotes and enforce them during invoicing**: For Time and material (T&M) project contract types, there is often a cap negotiated between the customer and the service provider (vendor) to prevent overages and inefficiencies in service delivery. With this feature, customers of Projects Operations will be able to set up a cap or monetary limit on T&M project contracts that will be enforced by the system during invoicing.
- **Ability to set up billing and chargeability options for work breakdown structure (WBS) tasks**: In project organizations, it is common to have different contractual agreements for different phases of work. For example, a vendor could negotiate a fixed-price billing setup for the prototype phase of a project and a T&M type of arrangement for the actual implementation. Certain tasks on the project could also be categorized as chargeable while others could be non-chargeable or complimentary. With this feature, it will be possible for Project Operations customers to associate project tasks with project contract lines, thereby

subjecting them to the same billing method on that contract line. The feature will also allow for a project manager to mark certain tasks as chargeable, non-chargeable, or complimentary, which will then be enforced when recording sales values and creating invoices for the costs incurred on those project tasks.

- **Support for retainers on project contracts**: Retainer-type contracts are those that will allow the customer to have a predictable cash outflow. The customer will have a standard monthly payment that will be used by the services provider to draw down against for the cost of services delivered in that period. Any services in that period in excess of the retainer will be invoiced at the end of that period or pushed to the next period's billings until the end of the project. With this feature, Project Operations customers will be able to draw up a contract with their customers that will have a set retainer schedule and retainer billings by period. These retainers will be used during invoicing to draw down against the cost of services delivered. This feature will also work to support advances and prepayments that represent one-off requests but can be used and reconciled much like a scheduled retainer payment.
- **Project accounting and Financials in Dynamics 365 Project Operations**: Fixed-price and Time and material billing arrangements with customers for project-based contracts are often supported by one or more revenue recognition processes and accounting concepts for tracking Project Work in Process (WIP) balances. Project Operations customers will be able to leverage the rich accounting and revenue recognition capabilities to complete their project management processes from Sales to Project Accounting.

Enhanced Project Accounting capabilities for inventory-based projects in Dynamics 365 Project Operations

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

Feature details

- **Remove project type dependency from project**: When this feature is enabled, an inventory-based project will no longer have a type of **Fixed-price**, **Time and material**, **Cost**, **Time**, **Internal**, or **Investment**. The project contract line will determine whether a project is **Fixed-price** or **Time and material**, allowing for the same project to have both a fixed-price component and a time and material component. Projects that do not have a contract will track costs but will not track revenue.
- **Remove project group dependency from project**: This feature will remove the dependency of **Project group** for inventory-based projects. Project group will become an

optional grouping mechanism for these projects. A new entity, **Project revenue profile**, will be created and will contain the configuration related to work-in-progress (WIP)/revenue accrual and revenue recognition for fixed-price projects. The project revenue profile will be set on the contract line.

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
Access Dynamics 365 Guides content through Common Data Service entities	Admins, makers, or analysts, automatically	Aug 2020	-
Extend analytics capabilities with Guides Insights	Admins, makers, or analysts, automatically	Aug 2020	-
Create guides that support branching flows	End users, automatically	-	Sep 2020
Restrict access to guides that aren't ready to use through publishing process	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, Dynamics 365 Talent: Core HR is now Dynamics 365 Human Resources, with expanded capabilities.

Dynamics 365 Human Resources helps businesses empower and engage their workforce, provide modern benefits packages, and stay compliant. It provides a comprehensive personnel management solution, including performance, leave and absence, and payroll integration. Self-service programs help HR professionals and employees manage time off and benefits. Human Resources connects people and operations data to help you optimize workforce costs and take better care of employees.

For the 2020 release wave 1, we're focused on the following areas to help you expand your offerings and extend your solutions:

- **Leave and absence**: Providing greater flexibility in developing new leave plans for your workforce.
- **Benefits management**: Delivering enhanced benefits plans to help you attract and retain your best employees.
- **Data access via Common Data Service**: Adding entities to improve data integration, extensibility, and reporting.

The next sections provide details about the specific features we're releasing across these areas.

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
Create leave rules to meet company and regulatory policies	Admins, makers, or analysts, automatically	✔ Feb 3, 2020	Apr 2020
Enhanced benefit plan configuration	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Enhanced worker benefit inquiry	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Flex credit programs	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Leave calendar views	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Online benefit enrollment	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Qualified life event processing	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Suspend leave for employees meeting certain criteria	Admins, makers, or analysts, automatically	Apr 2020	May 2020
Allow employees to buy and sell leave	End users by admins, makers, or analysts	May 2020	Jun 2020
Enable an absence manager to manage leave	End users by admins, makers, or analysts	May 2020	Jun 2020
Manage employee sick leave	End users by admins, makers, or analysts	Jun 2020	Jul 2020

Feature	Enabled for	Public preview	General availability
Ongoing additions to Human Resources data in Common Data Service	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 3, 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.

See also

Improve the leave and absence experience across the organization (blog)

Dynamics 365 Human Resources leave and absence overview (docs)

Enhanced benefit plan configuration

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Benefits management overview (docs)

Enhanced worker benefit inquiry

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

[Benefits management overview](#) (docs)

Flex credit programs

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

[Benefit management overview](#) (docs)

Leave calendar views

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Improve the leave and absence experience across the organization (blog)

Dynamics 365 Human Resources leave and absence overview (docs)

Online benefit enrollment

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Benefits management overview (docs)

Qualified life event processing

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 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.

See also

Benefits Management overview (docs)

Suspend leave for employees meeting certain criteria

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

Feature details

This feature provides 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	May 2020	Jun 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	Jun 2020	Jul 2020

Feature details

This feature provides 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.

Ongoing additions to Human Resources 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 data across solutions. We are continuing our ongoing effort to bring additional data to Common Data Service to support these needs.

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
Commerce product recommendations add-in	End users by admins, makers, or analysts	Jun 2020	
Auto-charges improvements to support fees based on channel	End users by admins, makers, or analysts	✓ Feb 24, 2020	May 2020
Azure AD support for POS sign-in	End users by admins, makers, or analysts	✓ Feb 24, 2020	May 2020
Change mode of delivery operation for POS	End users by admins, makers, or analysts	✓ Feb 24, 2020	May 2020
Financial reconciliation of retail transactions in the store	End users by admins, makers, or analysts	Feb 2020	May 2020
POS sign-in page improvements	End users by admins, makers, or analysts	Apr 2020	Jul 2020
Commerce data sizing improvements	End users, automatically	May 2020	Jul 2020
Efficiency and reliability of data synchronization and storage	End users by admins, makers, or analysts	May 2020	Jul 2020
POS and headquarters extensions	Admins, makers, or analysts, automatically	May 2020	Jul 2020
Seamless and reliable connectivity loss management	End users by admins, makers, or analysts	May 2020	Jul 2020

Globalization

In 2020 release wave 1, we will extend the out-of-the-box Commerce localization by delivering fiscal service integration for Germany and moving the digital signing of retail transactions for France and Norway to the fiscal integration framework.

Feature	Enabled for	Public preview	General availability
Digital signing of retail transactions for France based on the fiscal integration framework	End users by admins, makers, or analysts	-	Jul 2020
Digital signing of retail transactions for Norway based on the fiscal integration framework	End users by admins, makers, or analysts	-	Jul 2020
Fiscal service integration for Germany	End users by admins, makers, or analysts	May 2020	Aug 2020

Industry excellence

Investments in core retail business processes and industry requirements and capabilities.

Feature	Enabled for	Public preview	General availability
Enable resetting of receipt numbers at the beginning of the fiscal year	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Task management in HQ and POS for first-line workers and managers	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Improved inbound and outbound inventory operations in store	End users by admins, makers, or analysts	✔ Feb 3, 2020	May 2020
Channel-side calculations for available physical inventory for stores	End users by admins, makers, or analysts	✔ Feb 24, 2020	May 2020
Email a receipt from the journal	End users by admins, makers, or analysts	✔ Feb 24, 2020	May 2020

Feature	Enabled for	Public preview	General availability
External gift card support in e-commerce and call center	End users by admins, makers, or analysts	Feb 2020	May 2020
Improved order recall for omnichannel orders in Customer Service	End users by admins, makers, or analysts	Apr 2020	Jul 2020
Improved support for serial number tracking dimension in store inventory processes	End users by admins, makers, or analysts	Apr 2020	Jul 2020
New events and placeholders for transactional emails	Admins, makers, or analysts, automatically	Apr 2020	Jul 2020
Support for mini-cart on e-commerce site	Admins, makers, or analysts, automatically	Apr 2020	Jul 2020
Enhanced customer record creation and edit capabilities in POS	End users by admins, makers, or analysts	May 2020	Jul 2020
Warranty setup and sell	End users by admins, makers, or analysts	May 2020	Jul 2020
Consistency in payments management across retail channels	End users by admins, makers, or analysts	May 2020	Aug 2020
No-code site styling	Admins, makers, or analysts, automatically	May 2020	Aug 2020

Unified commerce

Feature	Enabled for	Public preview	General availability
Set preferred payment methods for returns	End users by admins, makers, or analysts	✔ Feb 3, 2020	Apr 2020
Support for bulk URL redirects	Admins, makers, or analysts, automatically	✔ Feb 3, 2020	Apr 2020
In-store health check for POS peripherals	End users by admins, makers, or analysts	Feb 2020	May 2020
Define and utilize inventory buffers to drive inventory level displays in e-commerce	End users by admins, makers, or analysts	Apr 2020	Jul 2020
Upsell and cross-sell using available discounts by enabling store associates to view promotions in POS	End users by admins, makers, or analysts	Apr 2020	Jul 2020
Editing of partially fulfilled customer orders in POS	End users by admins, makers, or analysts	May 2020	Jul 2020
POS payments flows improvements	End users by admins, makers, or analysts	May 2020	Aug 2020

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Fundamentals

Commerce product recommendations add-in

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

Business value

Provisioning product recommendations as an add-in for Dynamics 365 Commerce allows customers to acquire and leverage the functionality when aligned as needed. The add-in is fully integrated in the Dynamics 365 licensing platform and is seamlessly made available to customers who have the appropriate entitlements.

Feature details

Customers can leverage add-in flows in Dynamics 365 Lifecycle Services (LCS) to provision product recommendations in a completely automated fashion.

Auto-charges improvements to support fees based on channel

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 24, 2020	May 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 channels. 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 24, 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.

See also

Enable Azure Active Directory authentication for POS sign-in (docs)

Change mode of delivery operation for POS

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔Feb 24, 2020	May 2020

Business value

Retailers need the flexibility to make changes specifically to the mode of delivery on customer order sales lines at any time prior to the fulfillment of the line.

Feature details

Change Mode of Delivery can be added to a point of sale (POS) screen layout. It will only be applicable to lines that were previously configured using the "ship all" or "ship selected" order-creation methods in POS. After the original mode of delivery is set for a transaction line, a user might want to modify the mode of delivery for one or more eligible lines without having to go through the entire "ship all" or "ship selected" flows. The mode of delivery operation will provide this convenience. It can be used during the initial order creation processing of the POS customer order, or during the editing of a customer order. It is not applicable to lines that are not configured as shipping lines, and the operation will not work for lines that are released to fulfillment or invoiced.

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 by admins, makers, or analysts	Apr 2020	Jul 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 by admins, makers, or analysts	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

Overview

In 2020 release wave 1, we will extend the out-of-the-box Commerce localization by delivering fiscal service integration for Germany and moving the digital signing of retail transactions for France and Norway to the fiscal integration framework.

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	May 2020	Aug 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.

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 3, 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.

See also

Reset receipt numbers (docs)

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 3, 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.

See also

Task management (docs)

Improved inbound and outbound inventory operations in store

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 3, 2020	May 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 user productivity and data processing reliability.

Feature details

This feature will create new user interfaces in POS to support workflows common to store inventory receiving and transfer order creation and transfer order fulfillment scenarios. A new "Inbound operation" and a new "Outbound operation" will be available to add to your screen layouts with the intent that they can replace the existing picking/receiving POS operation.

These new operations will have user interfaces that are 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. An asynchronous document framework has also been added; this framework will allow for postings of receipts or outbound transfer shipments to HQ to process efficiently and eliminate previous issues that occurred in the picking/receiving operation with time-outs and processing errors when attempting to post large documents to HQ.

This feature will be available for preview and use in sandbox/training environments in 10.0.9. It will be further stabilized in 10.0.10 and it is recommended to consider adding these new operations to your POS layout in a production environment after 10.0.10.

Channel-side calculations for available physical inventory for stores

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 24, 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.

See also

Calculate inventory availability for retail channels (docs)

Email a receipt from the journal

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 24, 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:

- Send the receipt to the email address in the text field.
- Change the destination email address for sending the receipt.

NOTE This capability is disabled by default. To enable it in Commerce Headquarters, go to the **Feature Management** workspace and enable the **Email receipts from the Journal** feature.

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	Apr 2020	Jul 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 by admins, makers, or analysts	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 POS users with the ability to register serial numbers during receiving of purchase or transfer orders.

New events and placeholders for transactional emails

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

Business value

Customers who make online and in-store purchases expect to receive email notifications for key events during the transaction. These events include confirmation of the order, notification that the order is ready for in-store pickup, and shipping confirmation. Transactional notifications also offer the retailer an opportunity to engage with the customer, providing timely and useful feedback about their order.

Feature details

Transactional events

With this release, retailers can automatically send an email to customers when an order is ready for in-store pickup, and when an order ships.

Event	Description
Order ready for in-store pickup	Triggered when an order with modeofdelivery set to "Customer pickup" is marked as packed.
Order shipped	Triggered when an order whose modeofdelivery is "Standard" is invoiced.

New placeholders

Additional placeholders will also be made available for use by HTML email templates for creating a richer and more informative email for the customer.

Header

Placeholder name	Placeholder description
%ordernetamount%	Order subtotal including discounts, before tax, shipping, or gift card deductions are applied.

Placeholder name	Placeholder description
%storename%	Name of the retail store for in-store pickup.

Line

Placeholder name	Placeholder description
%productid%	ID of the product. The ID can be used to assemble a URL that opens the product description page on your e-commerce site.
%linequantity_withoutunit%	Quantity of product without the unit of measure (UOM) appended.
%linequantitypicked_withoutunit%	Quantity of product picked without UOM.
%linequantitypacked_withoutunit%	Quantity of product packed without UOM. Use this placeholder with the 'Order Ready For Pickup' event to indicate the quantity that is ready for pickup (which might differ from the quantity ordered).
%linequantityshipped_withoutunit%	Quantity shipped for the line without UOM. Use this placeholder with the 'Order Shipped' event to indicate the quantity that was actually shipped (which might differ from the quantity ordered).

Support for mini-cart on e-commerce site

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

Business value

On an e-commerce site, we want to ensure a customer's shopping journey is continuous and there are minimal disruptions to the shopping process. When a customer adds a product to the cart from the product page, we want the customer to be able to continue browsing on the product page. When browsing on the site, the customer should be able to get a cart summary without navigating to the cart page. This experience provides more cross-selling opportunities for a retailer. In Dynamics 365 Commerce, we will enable this functionality by supporting notifications and a mini-cart experience.

Feature details

The mini-cart is a module that will be supported on the header module of the e-commerce page. The module can be invoked on hover. It shows items added to the cart, a quick summary of the order total, and provides a way for the customer to check out. In addition, in Dynamics 365 Commerce, the site builder will expose new site settings that allow the retailer to show notifications when items are added to the cart, without the user navigating to the cart page.

Enhanced customer record creation and edit capabilities in POS

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	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 3, 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.

See also

Create and update a returns and refunds policy for a channel (docs)

Support for bulk URL redirects

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✔ Feb 3, 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

Business value

This feature enables basic out-of-the-box validation for retail peripherals to allow retailers to ensure that devices are working properly outside of transactional flows. The ability to proactively detect issues helps to avoid customer and retail associate confusion at the time of sale. The health check can also be extended to check specific peripheral services or custom devices so that retailers can tailor the health check to meet their individual needs.

Feature details

The health check is a new operation for the point of sale that can be run ad hoc or customized to run as part of certain flows such as shift opening. Specific errors can be customized to provide the cashier or store associate specific information for how to resolve the issue on their own or to provide detailed information on how to report the issue.

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 assessment of stock on hand. Instead of viewing actual 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.

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.

Editing of partially fulfilled customer orders in POS

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

Business value

POS users often need to be able to work with and manage a customer order from the point of sale (POS) application and make changes and adjustments to sales lines that are still unprocessed.

Feature details

In the current in-market application, POS customer orders are only editable if the order is still fully open (no quantities on the order have been released to order fulfillment or invoicing processes). This feature will unblock users in POS by allowing them to edit orders that were originally created in POS or an e-commerce application and are partially fulfilled. Users will be able to add additional lines to partially fulfilled customer orders, edit or void lines where the full quantity is still unprocessed, and in some cases make limited changes to lines where some of the quantity on the line has already been fulfilled or invoiced.

This feature does not provide POS users the ability to edit orders created by the call center channel. This capability is planned to be delivered sometime in 2020.

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
Expanded coverage for transaction acceptance booster	End users by admins, makers, or analysts	May 2020	May 2020
Extend and tailor ontology and rules	Admins, makers, or analysts, automatically	May 2020	May 2020
Extend geographies and localization to languages beyond English	End users, automatically	✓ Jan 31, 2020	Jul 2020
Account protection	End users by admins, makers, or analysts	Mar 2020	Jul 2020
Loss prevention	End users by admins, makers, or analysts	✓ Mar 2, 2020	Jul 2020
Dynamics 365 Commerce integration with Fraud Protection	Admins, makers, or analysts, automatically	May 2020	To be announced

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.

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 31, 2020	Jul 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.

See also

Fraud protection overview (docs)

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 2, 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
Checkout queue management	End users by admins, makers, or analysts	Apr 2020	To be announced
Foot traffic	End users by admins, makers, or analysts	Apr 2020	To be announced
Installation and deployment guide	Admins, makers, or analysts, automatically	Apr 2020	To be announced
Notifications	End users by admins, makers, or analysts	Apr 2020	To be announced
Scheduled reports	End users by admins, makers, or analysts	Apr 2020	To be announced

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.

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 flighting 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 aka.ms/bcideas site is a constant source for making improvements to the application. For this release, we have updated minor features based on the feedback in the ideas site and made several improvements to the bank reconciliation functionality.

Feature	Enabled for	Public preview	General availability
Extend ListPlus pages previously based on the Date virtual table	Admins, makers, or analysts, automatically	-	Apr 2020
Multiple languages	Admins, makers, or analysts, automatically	-	Apr 2020
QR-Bill management for Switzerland	End users, automatically	-	Apr 2020
Auto-insert recurring sales and purchase lines	End users, automatically	✔ Feb 1, 2020	Apr 2020
Bank reconciliation improvements	End users, automatically	✔ Feb 1, 2020	Apr 2020

Feature	Enabled for	Public preview	General availability
Enhanced customer and vendor document layout	End users, automatically	✔ Feb 1, 2020	Apr 2020
Manage direct-debit collections in Service Management	End users, automatically	✔ Feb 1, 2020	Apr 2020
Notify requester about all changes for an approval request	Admins, makers, or analysts, automatically	✔ Feb 1, 2020	Apr 2020
Print to attachment	End users, automatically	✔ Feb 1, 2020	Apr 2020
Receive more items than ordered	End users, automatically	✔ Feb 1, 2020	Apr 2020
Register capacity in units of seconds	End users, automatically	✔ Feb 1, 2020	Apr 2020
Revert Qty. to Invoice when canceling order	End users, automatically	✔ Feb 1, 2020	Apr 2020
Use resources in purchase documents	Admins, makers, or analysts, automatically	✔ Mar 1, 2020	Apr 2020

Country and regional availability

Availability of Dynamics 365 Business Central is expanding regularly; here we describe the plans for expansion going forward.

Feature	Enabled for	Public preview	General availability
Expanded country and regional availability	Admins, makers, or analysts, automatically	-	Apr 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
Enhanced Dynamics GP Chart of Accounts migration	End users by admins, makers, or analysts	✓ Mar 2, 2020	Apr 2020
Migrate all or only active customer master records from Dynamics GP	End users by admins, makers, or analysts	✓ Mar 2, 2020	Apr 2020
Migrate all or only active vendor master records from Dynamics GP	End users by admins, makers, or analysts	✓ Mar 2, 2020	Apr 2020
Enhanced Dynamics GP inventory data migration	End users by admins, makers, or analysts	Apr 2020	Apr 2020
Migrate data from Business Central 14.x on-premises to Business Central 15.x online	End users by admins, makers, or analysts	Apr 2020	Apr 2020

Modern clients

Feature	Enabled for	Public preview	General availability
Collapse and expand document lines	End users, automatically	✓ Feb 1, 2020	Apr 2020
Disable export of data to Excel	Admins, makers, or analysts, automatically	✓ Feb 1, 2020	Apr 2020
Enable non-interactive printing in the cloud	End users, automatically	✓ Feb 1, 2020	Apr 2020

Feature	Enabled for	Public preview	General availability
Enhanced mobile accessibility related to device orientation	End users, automatically	✓ Feb 1, 2020	Apr 2020
Enter data more easily	End users, automatically	✓ Feb 1, 2020	Apr 2020
Import profiles and UI customizations	Admins, makers, or analysts, automatically	✓ Feb 1, 2020	Apr 2020
Improved load time for pages	End users, automatically	✓ Feb 1, 2020	Apr 2020
Long-running operations can be canceled from the web client	End users, automatically	✓ Feb 1, 2020	Apr 2020
Navigate trees more easily	End users, automatically	✓ Feb 1, 2020	Apr 2020
Optimized use of space on a page	End users, automatically	✓ Feb 1, 2020	Apr 2020
Show and go to related records from a list	End users, automatically	✓ Feb 1, 2020	Apr 2020
Unhide parts on a page	End users, automatically	✓ Feb 1, 2020	Apr 2020
Use a Find function on the Role Explorer	End users, automatically	✓ Feb 1, 2020	Apr 2020
Use filters and views more easily	End users, automatically	✓ Feb 1, 2020	Apr 2020

Modern developer tools

Feature	Enabled for	Public preview	General availability
AL interfaces	Admins, makers, or analysts, automatically	✓ Feb 1, 2020	Apr 2020

Feature	Enabled for	Public preview	General availability
Application version for aliasing base application	Admins, makers, or analysts, automatically	✔ Feb 1, 2020	Apr 2020
Camera/location AL API available in the browser	End users by admins, makers, or analysts	✔ Feb 1, 2020	Apr 2020
Look up events and insert event subscriber in code	Admins, makers, or analysts, automatically	✔ Feb 1, 2020	Apr 2020
Multiple variable declarations of the same type in the same line	Admins, makers, or analysts, automatically	✔ Feb 1, 2020	Apr 2020
Obsolete tag property	Admins, makers, or analysts, automatically	✔ Feb 1, 2020	Apr 2020
Ability to refactor a field from a table to a table extension	Admins, makers, or analysts, automatically	Apr 2020	Apr 2020

Onboarding

Feature	Enabled for	Public preview	General availability
Improved onboarding experience	End users, automatically	✔ Feb 2, 2020	Apr 2020

Partner acceleration

Feature	Enabled for	Public preview	General availability
API for continuous delivery of the AppSource apps via Azure DevOps services	Admins, makers, or analysts, automatically	Apr 2020	Jul 2020

Power Platform

Feature	Enabled for	Public preview	General availability
Business Central integration with Common Data Service	End users, automatically	✔ Feb 1, 2020	Apr 2020

Service fundamentals

Feature	Enabled for	Public preview	General availability
Ability to see current database locks	Admins, makers, or analysts, automatically	Apr 2020	Apr 2020
Ability to see table sizes	Admins, makers, or analysts, automatically	Apr 2020	Apr 2020
Ability to view a list of sessions and cancel one or more of them	Admins, makers, or analysts, automatically	Apr 2020	Apr 2020
Performance of web service requests and reports added to Application Insights telemetry for partners	End users by admins, makers, or analysts	Apr 2020	Apr 2020
Read scale-out	Admins, makers, or analysts, automatically	Apr 2020	Apr 2020
Resource limits for reports and web service calls	End users, automatically	Apr 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) 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.

Extend ListPlus pages previously based on the Date virtual table

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

Business value

Extending ListPlus pages that contain subpages based on the **Date** virtual table is relevant if a customer has specific requirements or wants to analyze additional measurements on pages, such as **Item** and **Resource Availability**.

Feature details

You can now extend ListPlus pages such as the **Item** and **Resource Availability** pages that were based on the **Date** virtual table by extending the underlying buffer table and subscribing to the OnAfterCalcLine event. All such pages in the base application now support this extensibility model.

Multiple languages

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

See also

Supported languages (docs)

QR-Bill management for Switzerland

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

Business value

Easily generate, send, and import QR Bills in Dynamics 365 Business Central.

Feature details

The QR Bill allows for easier processing and payment of received invoices from vendors. The QR-Bill management app for Switzerland allows you to generate QR Bills that are compliant with Swiss standard, and to receive QR Bills either via file import or direct input scan. You manage all received QR Bills in the Incoming Documents page and can create purchase journals directly from the imported QR Bills. Finally, this app ensures that all payment references from the QR Bill get carried through SEPA files to and from the bank back to the issuer of the QR Bill for easy reconciliation. With this app you can easily comply with the Swiss requirements for the QR Bill.

See also

Documentation (docs)

Auto-insert recurring sales and purchase lines

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 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.

See also

Create Recurring Sales and Purchase Lines (docs)

Bank reconciliation improvements

Enabled for	Public preview	General availability
End users, automatically	✓ Feb 1, 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.

NOTE For the **Bank Acc. Reconciliation** page, the changes are only UI improvements, such as more space and closer columns.

For the **Payment Reconciliation Journal** page, the changes are mainly about better matching information in a FactBox and better naming of the totals fields at the bottom.

Tell us what you think

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See also

Reconcile Bank Accounts (docs)

Enhanced customer and vendor document layout

Enabled for	Public preview	General availability
End users, automatically	✓ Feb 1, 2020	Apr 2020

Business value

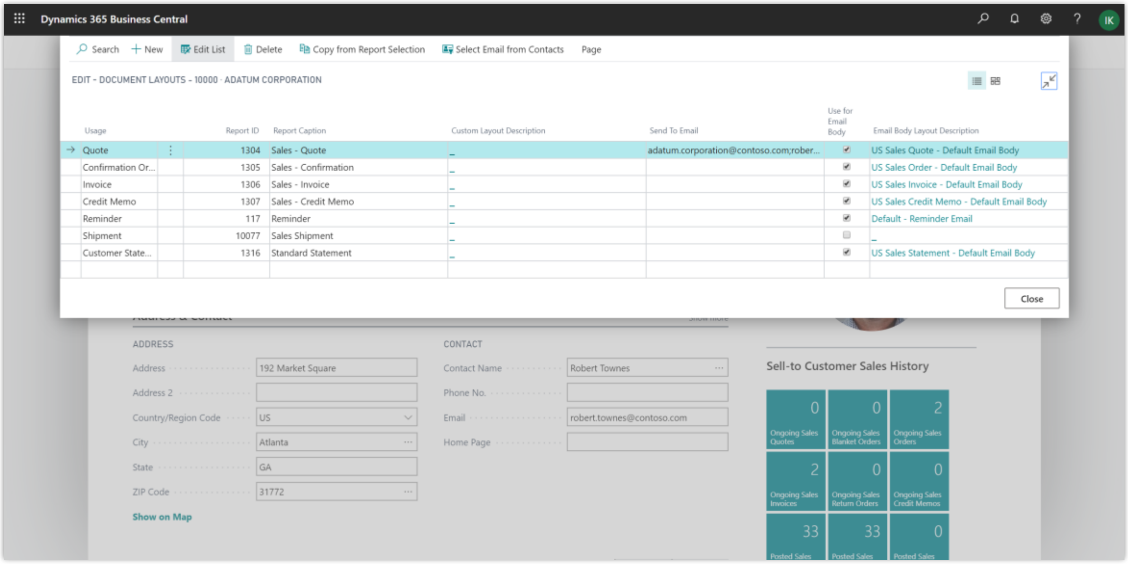
Businesses deal with multiple customer and vendor contacts who are responsible for different areas of operation, such as accountants, purchasers, and warehouse people. Each of these contacts must be sent different sets of documents generated by Business Central.

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, 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

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See also

Define Document Layouts for Customers and Vendors (docs)

Manage direct-debit collections in Service Management

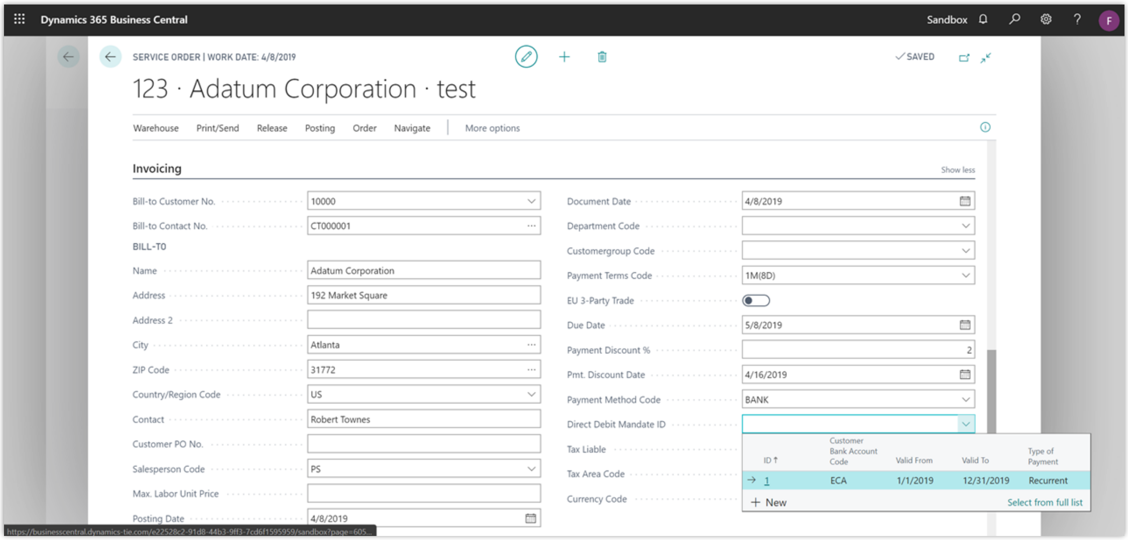
Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 2020	Apr 2020

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.



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.

See also

Collect Payments with SEPA Direct Debit (docs)

Notify requester about all changes for an approval request

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✔ Feb 1, 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.

See also

To create a workflow (docs)

Print to attachment

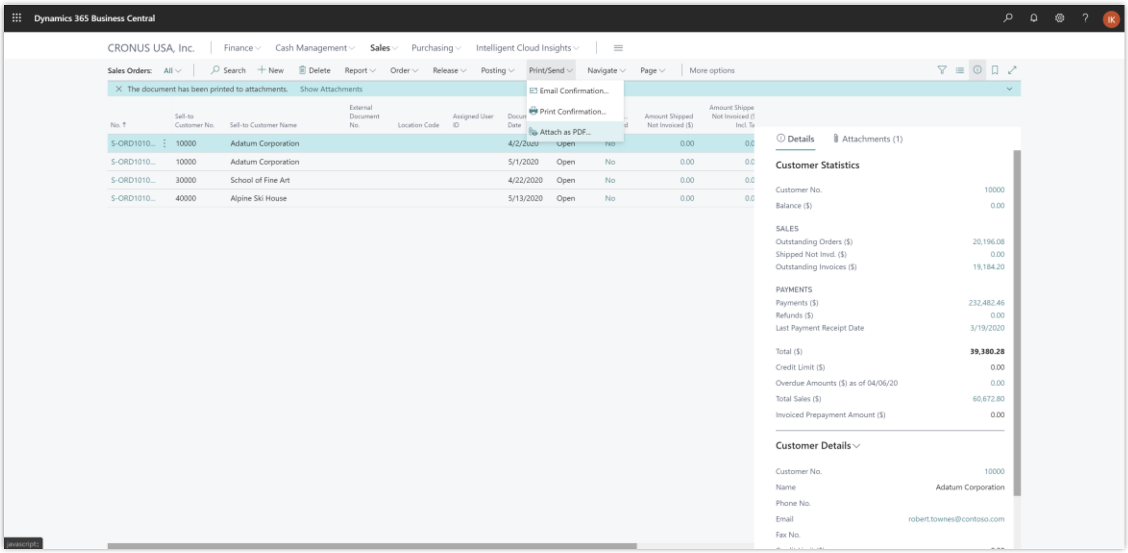
Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 2020	Apr 2020

Business value

When documents follow multiple steps in a process, such as a sales process or an approval workflow, it is useful to have a printout from the previous step added to the next step as a document attachment. Business Central allows you to print documents to document attachments using the **Attach as PDF** action.

Feature details

You can now add document printouts to the **Attachments** FactBox using the **Attach as PDF** action.



Shows Attach as PDF action on Sales Orders list 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.

Receive more items than ordered

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 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.

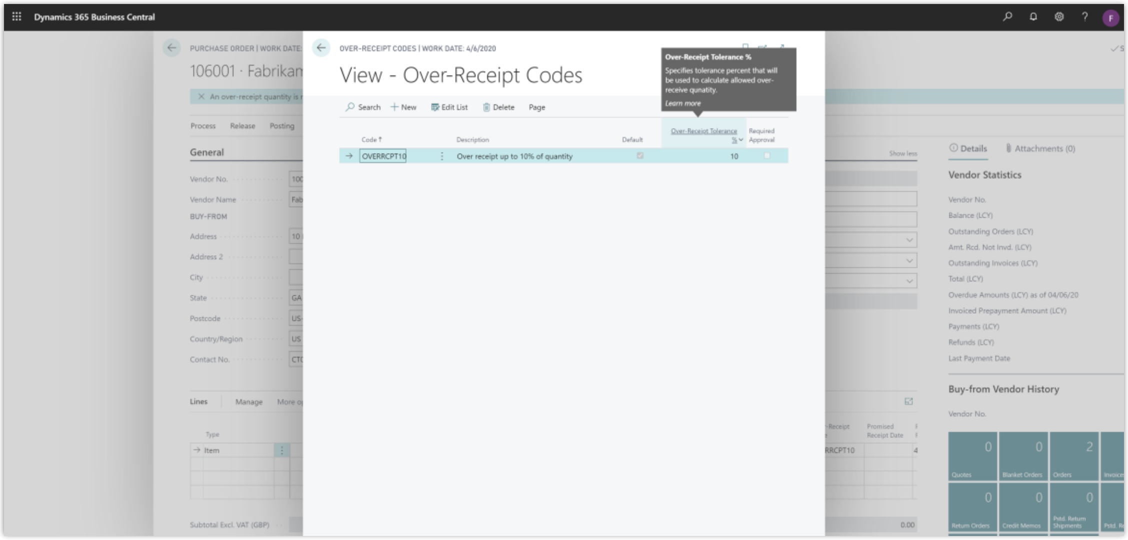
Feature details

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.

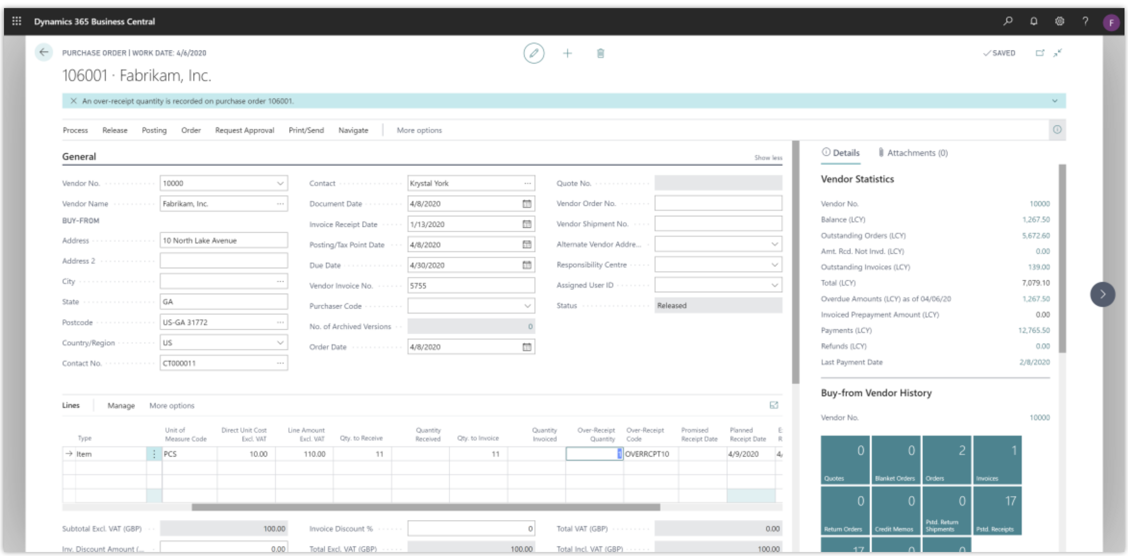
If your company uses purchase order approval, over-receiving can trigger a reapproval. You define this on the **Over-Receipt Codes** page. The **Approve Over-Receipt** workflow response is available in the workflow engine for this purpose.

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.



Shows over-receipt codes with over-receipt tolerance field highlighted



Shows 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.

See also

Receive Items (docs)

Register capacity in units of seconds

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 2020	Apr 2020

Business value

Some manufacturing operations require work center capacity to be measured in units of less than a minute.

Feature details

You can now define the capacity on work centers in units of seconds. By extending the Capacity Unit of Measure Type field, a developer can even enable milliseconds or another unit of measure.

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	✔ Feb 1, 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.

See also

To cancel a posted sales invoice (docs)

Use resources in purchase documents

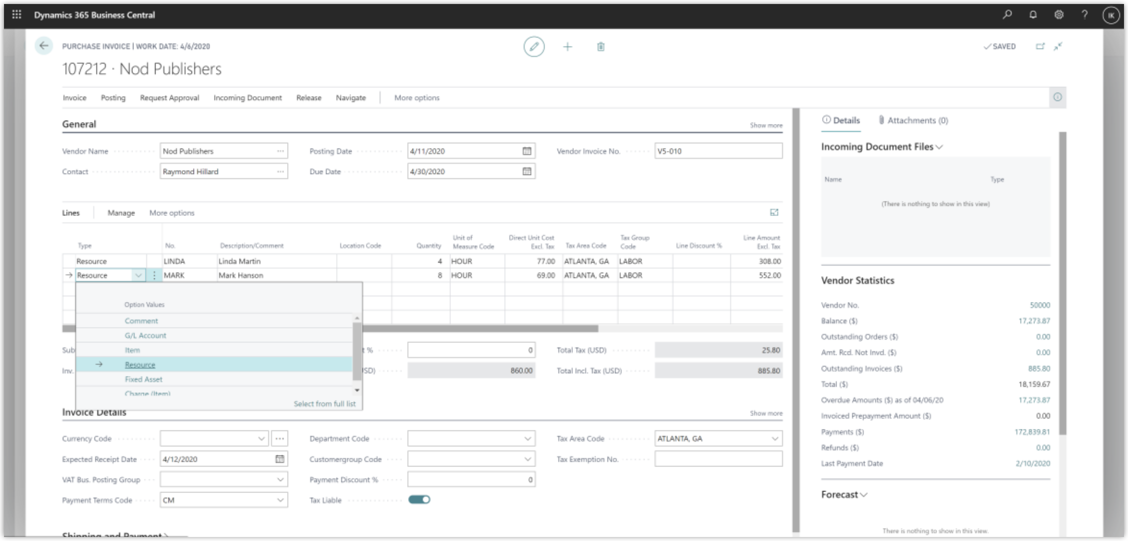
Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✔ Mar 1, 2020	Apr 2020

Business value

Most businesses tend to outsource or hire external, named resources on a temporary basis, such as for a particular project or job. The ability to purchase resources allows you to track and process such transactions.

Feature details

You can now use **Resource** as a line type of purchase documents. For example, you can add resources on purchase orders, invoices, and credit memos and post purchase transactions for them. You can correct purchase documents with resource lines, copy them, or use resource extended text.



Purchase invoice with resource lines

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.

See also

[Record Purchases]() (docs)

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
Admins, makers, or analysts, automatically	-	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 midsized 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.

See also

Country and regional availability (docs)

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.

Enhanced Dynamics GP Chart of Accounts migration

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Mar 2, 2020	Apr 2020

Business value

Customers can see the segments from Dynamics GP assigned to the migrated 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 will build out the migration tool 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 by admins, makers, or analysts	✔ Mar 2, 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 by admins, makers, or analysts	✔ Mar 2, 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.

Migrate data from Business Central 14.x on-premises to Business Central 15.x online

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

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.

Collapse and expand document lines

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 2020	Apr 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.

See also

Working with Business Central (docs)

Disable export of data to Excel

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✔ Feb 1, 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.

See also

Viewing and Editing in Excel (docs)

Enable non-interactive printing in the cloud

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 2020	Apr 2020

Business value

Users can print reports directly from the desktop using the predefined printers configured on the **Printer Management** 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 can have 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 to 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 Management** 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, by creating a friendly name for each and setting defaults. Additionally, for on-premises installations, any network printer that the server has access to will be available on the **Printer Management** page.

In addition, a predefined **Email Printer** extension is installed and ready for customers to use. This supports major printer manufacturers that enable email printing scenarios.

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.

See also

Specify Printer Selection for Reports (docs)

Enhanced mobile accessibility related to device orientation

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 2020	Apr 2020

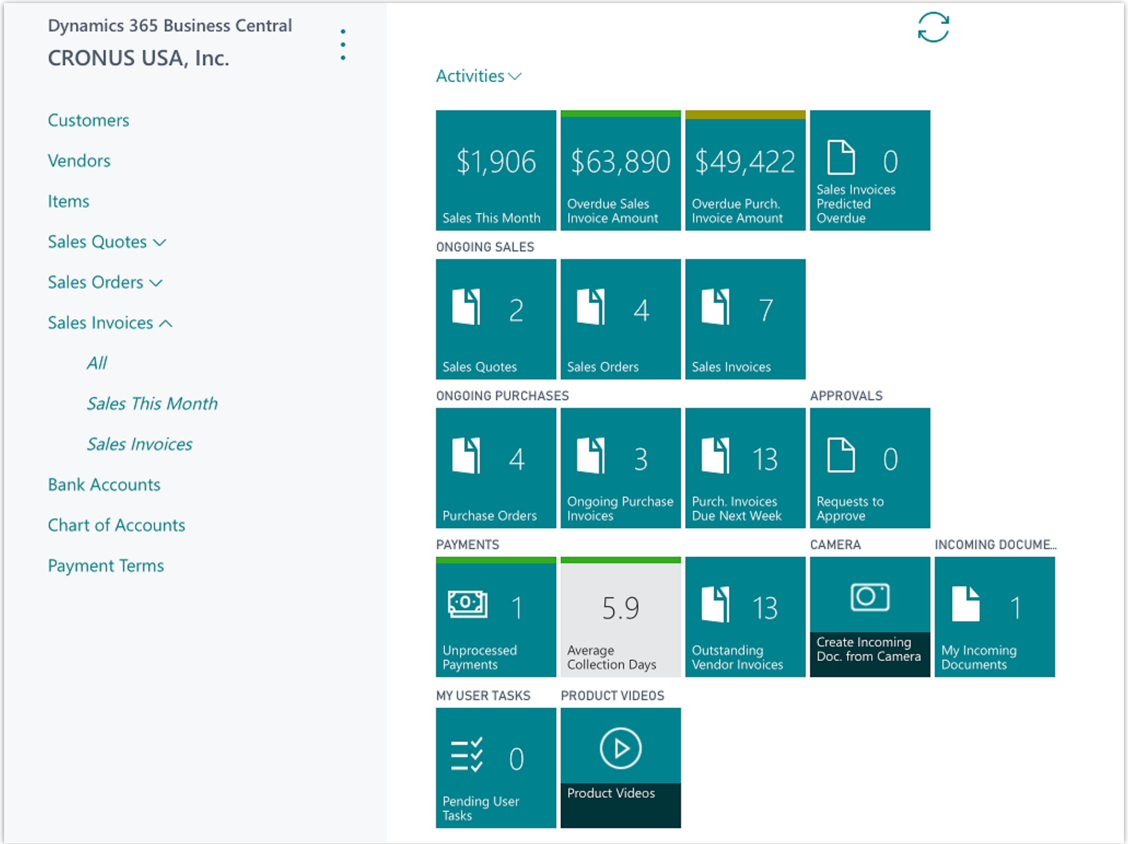
Business value

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.



Role Center on a tablet in landscape mode

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.

See also

[Business Central documentation](https://docs.microsoft.com/dynamics365/business-central/) (docs)

Enter data more easily

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 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 adjustments that enhance typing or navigating fields in a list.

- In editable lists, users will be able to use the left and right arrow keys to navigate to the previous or next cell in a row. This provides a consistent experience between editable and non-editable lists, and increases the speed and agility of exploring data in a list or worksheet.
- Similar to Microsoft Excel, we've introduced the F2 key that toggles between selecting the entire value of a field and placing the cursor at the end of the value. This allows users to quickly replace the value or add to it. The F2 key is available for editable fields and editable cells in lists.
- When typing to fill in a row of data, the Tab key no longer sets focus to the ellipses that bring up the context for the row. This improves efficiency when rapidly entering data and ensures that Tab key presses are predictable. The context menu remains reachable using the left or right arrow keys.

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.

See also

Entering Data (docs)

Import profiles and UI customizations

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✔ Feb 1, 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.

See also

Managing Profiles (docs)

Improved load time for pages

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 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.

See also

Performance Topics for Developers (docs)

Long-running operations can be canceled from the web client

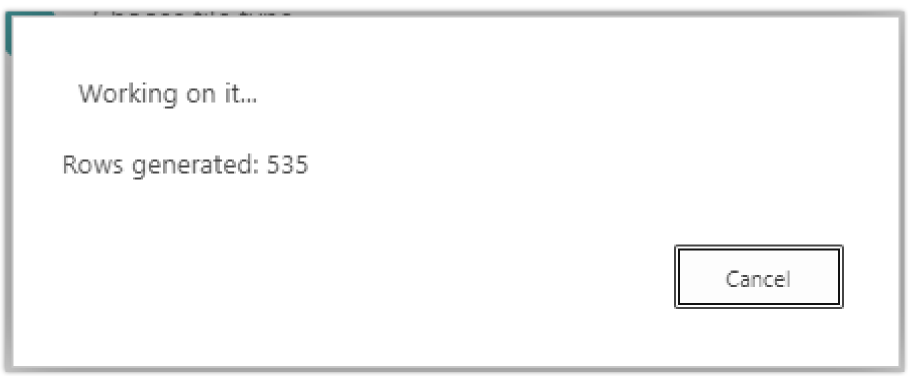
Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 2020	Apr 2020

Business value

Flexibility related to long-running operations is essential in modern business systems even when you work with large amounts of data.

Feature details

You can now cancel long-running operations or application jobs. The user sees a progress window that shows the number of processed rows with the option to cancel the operation. A typical scenario is the ability to cancel long-running batch jobs, but this feature extends to canceling other long-running operations, such as bulk posting of invoices.



Canceling a report

See also

[Working with Reports, Batch Jobs, and XMLports](#) (docs)

Navigate trees more easily

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 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.

See also

[Working with Business Central](#) (docs)

Optimized use of space on a page

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 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

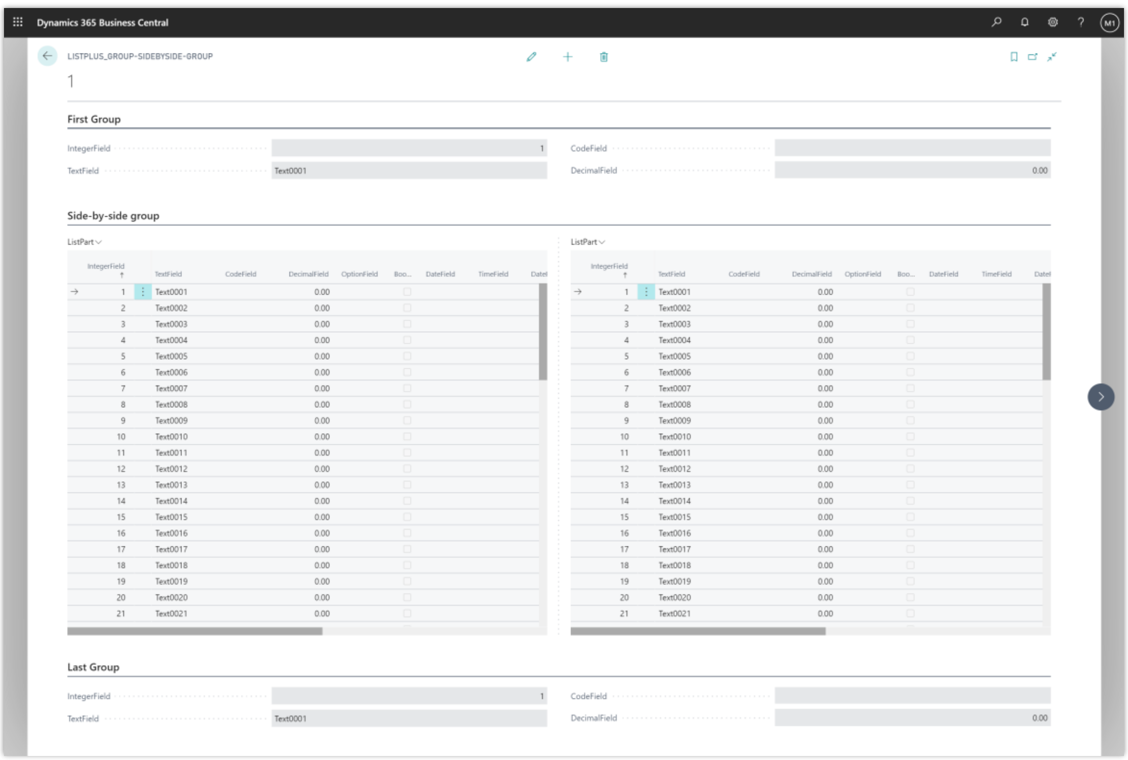
Improvements to pages composed of multiple parts

The desktop client adds full support for page objects that are composed of multiple parts, such as ListParts or CardParts. This capability was already possible on a Role Center or FactBox pane.

But the canvas of other page types wasn't optimal for displaying parts alongside other content, resulting in overlapping UI elements or unreachable data.

Developers are now able to implement pages by choosing from prescribed AL patterns that give predictable outcomes. For example, they can display two lists side by side on a ListPlus page. Or, have multiple dependent lists shown above each other on a Document page. Pages already using these control patterns will automatically benefit from this change with no further development effort needed.

- **Available April 2020**: Optimizations for ListParts as used on List pages, Document pages, Card pages, and ListPlus pages.
- **Available after April 2020**: Optimizations for ListParts as used on Worksheet pages, and CardParts as used on various page types.



Example ListPlus page displaying multiple ListParts

More content on screen

- When users display a page wide across the screen, they'll benefit from more compact page captions and reduced gray-space along the sides. Take a basic list page as an example. Compared to past versions of the Business Central Web client, it gains approximately 15% horizontal space and 5% vertical space for content. These gains result in two more columns and one more row being displayed.

- FastTabs with no specified caption are treated as groups that define the structure of a page. As a result, "caption-less" FastTabs have reduced whitespace and can no longer be collapsed by users.

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.

See also

Page Parts Overview (docs)

Show and go to related records from a list

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 2020	Apr 2020

Business value

Navigating through your business data, jumping from one context to the other or simply drilling through data is essential for a busy professional.

Feature details

We are adding capabilities for users to navigate via links to even more places than today. This allows you to open a related card from a list, such as a customer or item card from a sales order.

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.

See also

Business Central documentation (docs)

Unhide parts on a page

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 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.

See also

Personalize Your Workspace (docs)

Use a Find function on the Role Explorer

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 2020	Apr 2020

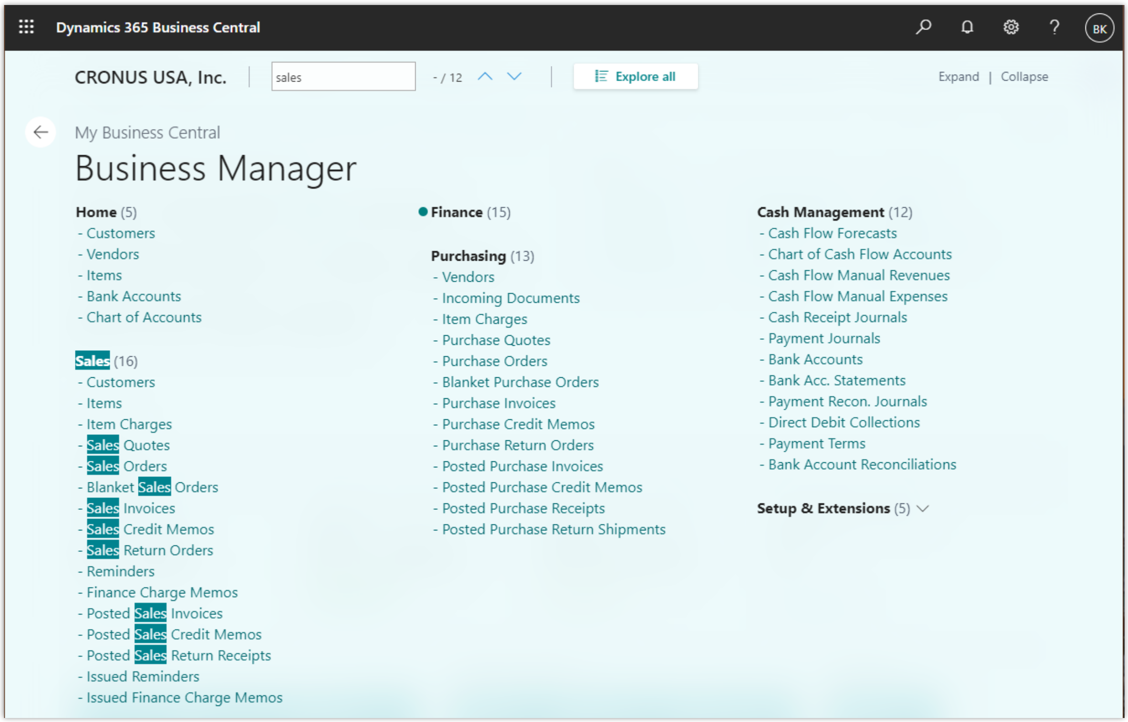
Business value

Your product functions might span several hundred options across different areas. Finding them in a visual format on the Role Explorer makes it easier for customers to navigate and go to the requested page or module. Also, finding reports is much easier now that users have a Find function in the Role Explorer.

Feature details

The Business Central Role Explorer has a new addition that complements manual navigation and expanding or collapsing menu groups. Users can now open the Role Explorer, with either the "hamburger" icon or the Shift-F12 keyboard shortcut, and then start typing what they are looking for.

The Role Explorer does not filter the results but instead highlights the hits, as shown in the next image. Also, when a result is contained in a collapsed group, the Find function annotates that group using a teal-colored circle. Users can browse through the results using arrows or Ctrl+Up/Down keyboard keys. The **Esc** key closes the Find box and removes the value typed, so that new searching or browsing can be started. Note also that switching to the **Explore all** view retains the find value making it easy to navigate.



Find function in the Business Central Role Explorer

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.

See also

Business Central documentation (docs)

Use filters and views more easily

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 1, 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 in the web client. 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. Note that the web client URL will only include views and filters that have been saved.
- 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.

See also

Save and Personalize List Views (docs)

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 1, 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.

See also

[AL Development Environment](#) (docs)

Application version for aliasing base application

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✔ Feb 1, 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.

See also

AL Development Environment (docs)

Camera/location AL API available in the browser

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Feb 1, 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.

See also

Incoming Documents (docs)

Look up events and insert event subscriber in code

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✔ Feb 1, 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.

See also

Al Development Environment (docs)

Multiple variable declarations of the same type in the same line

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✔ Feb 1, 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;"

See also

AL Development Environment (docs)

Obsolete tag property

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✔ Feb 1, 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 property 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.

See also

AL Development Environment (docs)

Ability to refactor a field from a table to a table extension

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

Business value

Together with other refactoring features, this feature will unblock the transition to Business Central online for customers who 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 2, 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.

See also

Setting up Business Central (docs)

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.

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 1, 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.

See also

Integrating with Dynamics 365 Sales (docs)

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, HIPPA 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.

Ability to see current database locks

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

Business value

To locate a locking issue, it is sometimes important for an administrator to see the current database locks in the system.

Feature details

A new page called **Database Locks** is available in the client.

The page shows a snapshot of all database locks. Where possible, it displays details on the AL session that is causing the database lock.

Ability to see table sizes

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

Business value

When troubleshooting performance issues, sometimes it is necessary to see the distribution of data size across tables. This feature makes it easy for an administrator to look up this information.

Feature details

A new page called **Table Information** shows the following:

- Company Name
- Table Name
- Table No.
- No. of Records
- Record Size
- Size (KB)

Information is shown for all companies for which the user has SUPER permissions.

Ability to view a list of sessions and cancel one or more of them

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

Business value

Sometimes, canceling a session is the only way to unblock a customer. For example, a long-running report is locking data in a table, preventing warehouse employees from working.

Prior to this feature, partners would need to contact support to locate and terminate the session.

Feature details

In the Business Central administration center, an administrator can see a list of active sessions on an environment and cancel one or more of them. All existing resources consumed by a session will also be canceled.

Performance of web service requests and reports added to Application Insights telemetry for partners

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

Business value

Partners can monitor performance of web service requests and reports.

Feature details

The Business Central server will emit telemetry about the execution time and timeouts of web service requests and reports.

Partners and customers can use this to monitor their environments for performance issues caused by web service requests and reports and be more proactive in preventing these issues from occurring.

Read scale-out

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Apr 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).

Resource limits for reports and web service calls

Enabled for	Public preview	General availability
End users, automatically	Apr 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.

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).

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
Additional predictive insights	Admins, makers, or analysts, automatically	Apr 2020	
Extensibility enhancements with new Power Automate connectors and Microsoft Teams add-in	End users by admins, makers, or analysts	Apr 2020	
Support for incremental and near real-time data ingestion	End users by admins, makers, or analysts	Apr 2020	
Data profiling capabilities	End users by admins, makers, or analysts	-	Apr 2020
Data unification improvements	End users by admins, makers, or analysts	-	Apr 2020
Enhancements to segments and measures	End users by admins, makers, or analysts	-	Apr 2020
System administration enhancements	End users by admins, makers, or analysts	-	Apr 2020
Customer Insights available in Microsoft Dynamics 365 Online Government	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.
- **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.

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.
- URL support for unified customer activity timelines.

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. With more and more channels for interactions, citizen data is scattered across myriad systems, leading to siloed data and a fragmented view of information about citizen interactions. Without a complete view of each citizen's interactions across channels, it's impossible for governments to modernize at scale. Microsoft is committed to supporting the technology needs of government to keep up with citizen expectations for consistent and responsive experiences.

With 2020 release wave 1, Dynamics 365 Customer Insights will be available for the Government Community Cloud (GCC), an environment built to meet the higher compliance needs of United States government agencies. Agencies gain a unified view of citizens and use prebuilt AI to derive insights that improve interactions, empower employees, and transform communities, while reducing IT complexity and meeting United States compliance and security standards. Dynamics 365 Government meets the demanding requirements of the US Federal Risk and

Authorization Management Program (FedRAMP), enabling United States federal agencies to benefit from the cost savings and rigorous security of the Microsoft Cloud.

Overview of Dynamics 365 Product Insights 2020 release wave 1

Dynamics 365 Product Insights enables companies to understand their customers’ usage, experiences, and journey across all channels of their products (web, mobile, and connected devices). With Product Insights, companies can easily, with little to no code, collect signals from all their products and services and gain actionable insights tailored to their industry and strategy.

Product Insights provides out-of-the-box insights and canned reports about the customer journey, usage, and experiences so businesses get value right away. Businesses want signals and insights tailored to their specific products and strategy. Product Insights makes it easy for business users to gain holistic insights about their business and customers’ usage from custom signals on web, mobile, and connected devices.

Product Insights integrates seamlessly with Dynamics 365 Customer Insights and the rest of the Dynamics 365 suite providing users the full understanding of their customers, their interests, and their activities.

Product Insights will be in Public Preview soon. Please stay tuned!

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 the 2020 release wave 1, 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
Customer feedback management solution template	Admins, makers, or analysts, automatically	-	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.
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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	-	Jul 2020

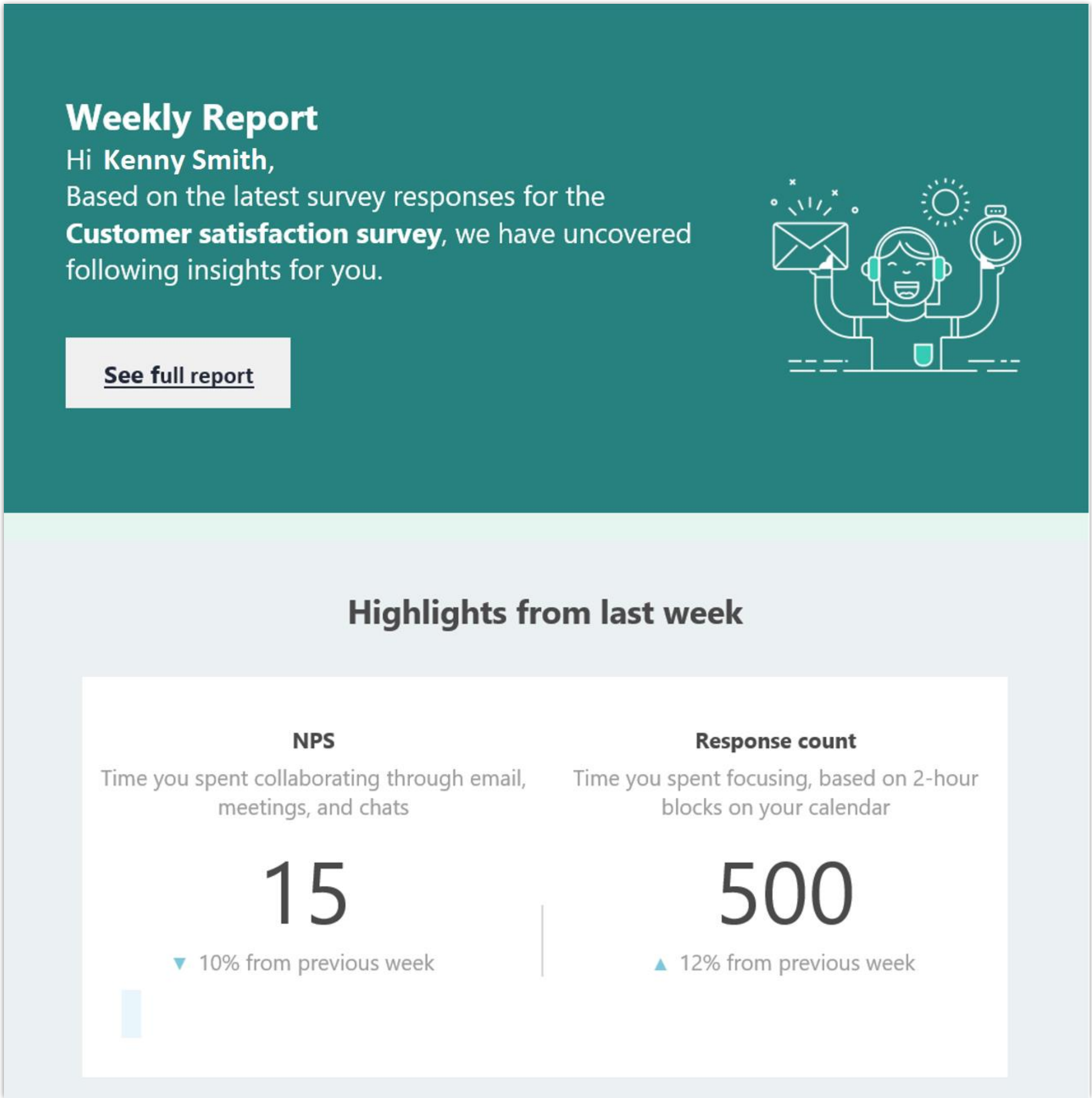
Business value

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.

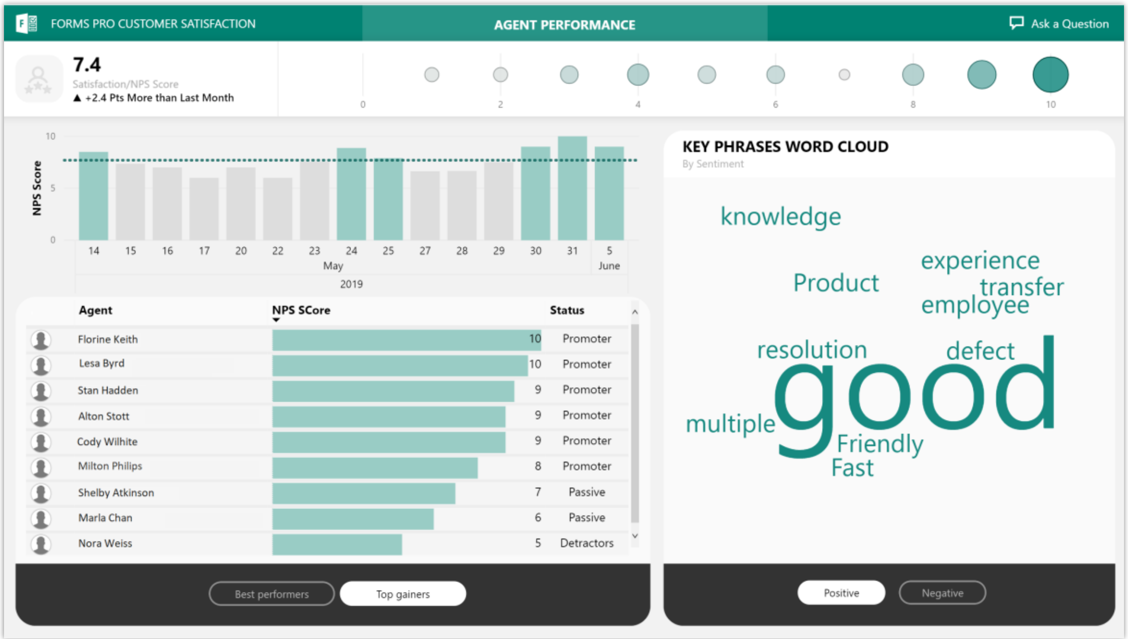
Forms Pro enables organizations to measure customer experience across channels, analyze customer feedback, share the insights with relevant people in the organization, and take timely action to close the loop with customers.

Feature details

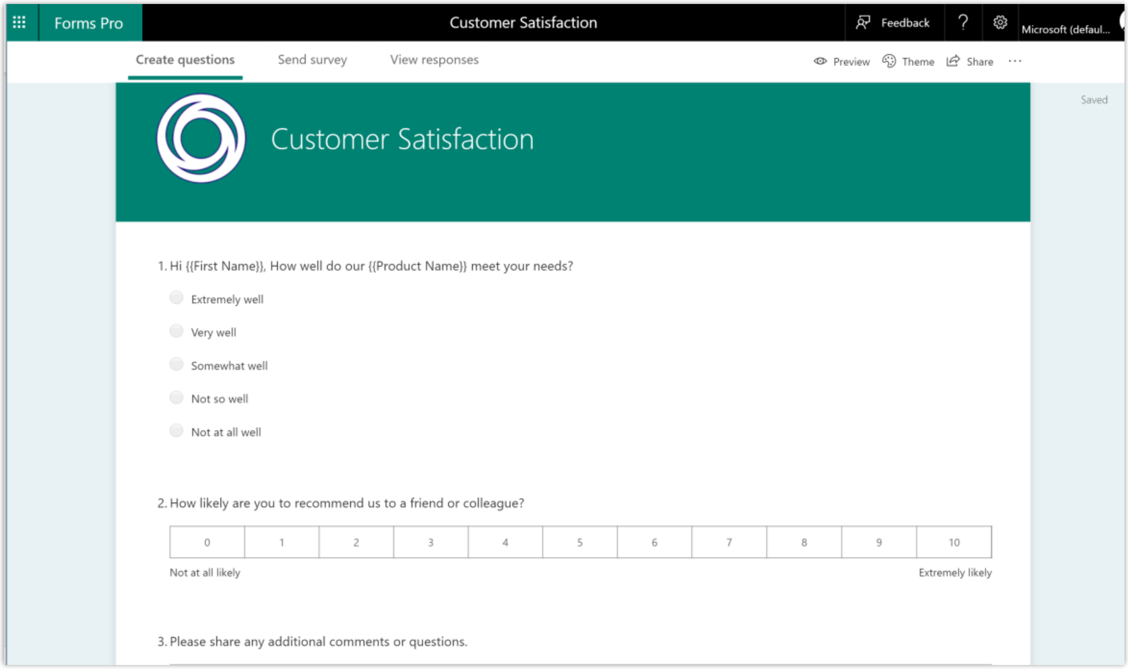
- **Survey templates**: Forms Pro now includes survey templates that you can customize to meet your specific business needs.
- **Integrated customer satisfaction insights dashboard**: The template includes a full dashboard that integrates survey results with customer records in Common Data Service.
- **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.



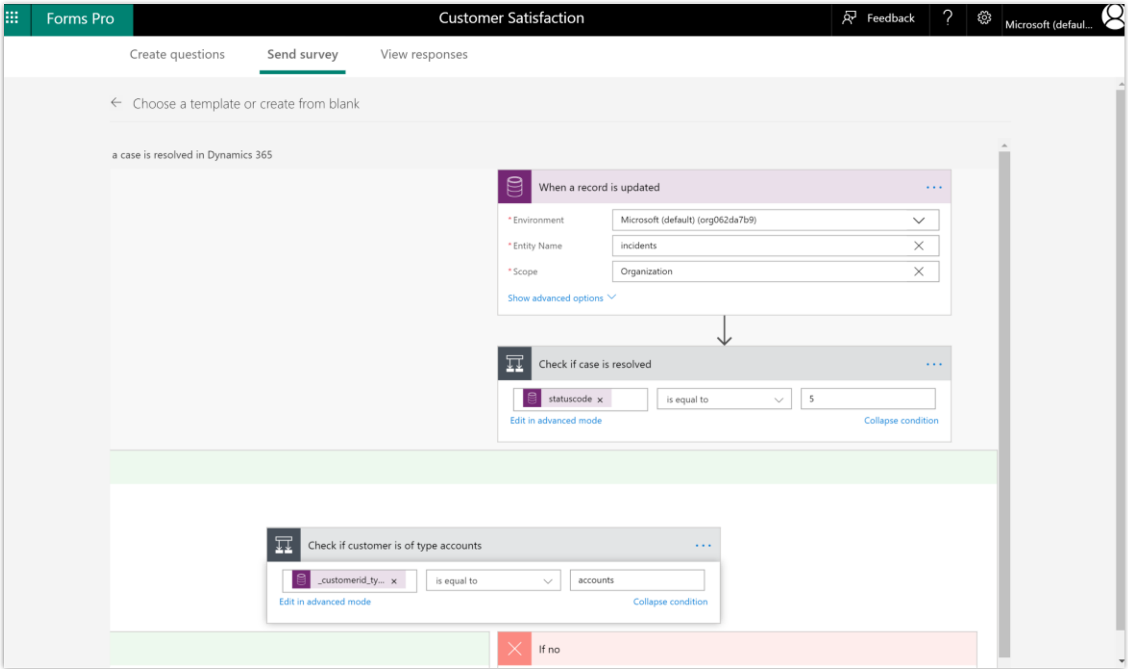
Customer satisfaction daily report



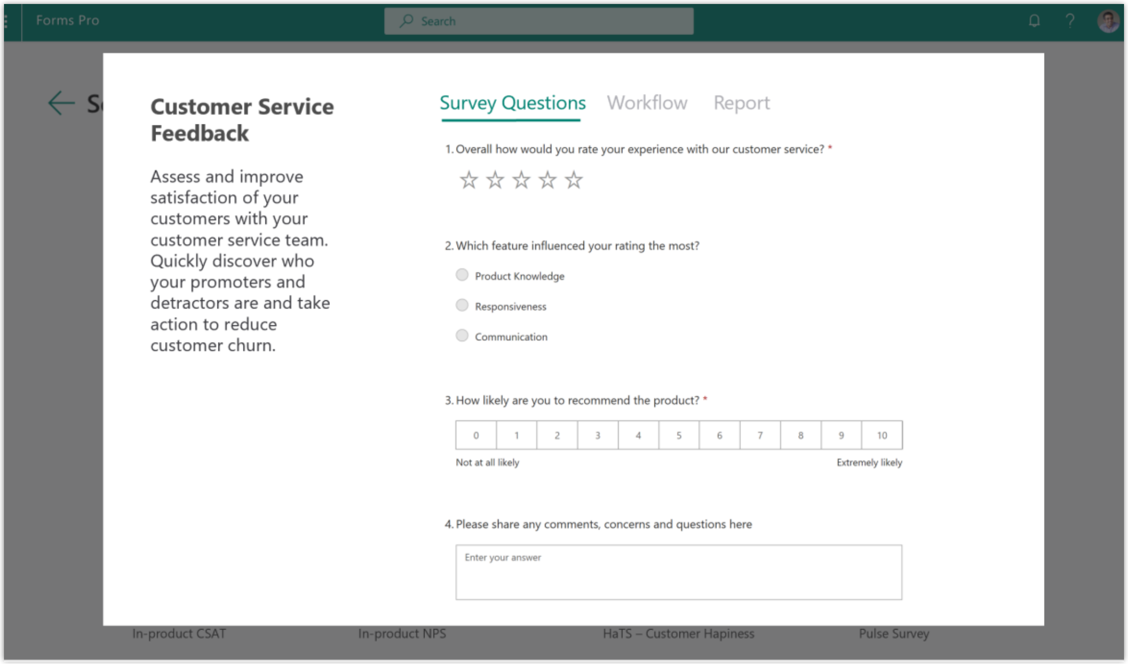
Customer satisfaction dashboard



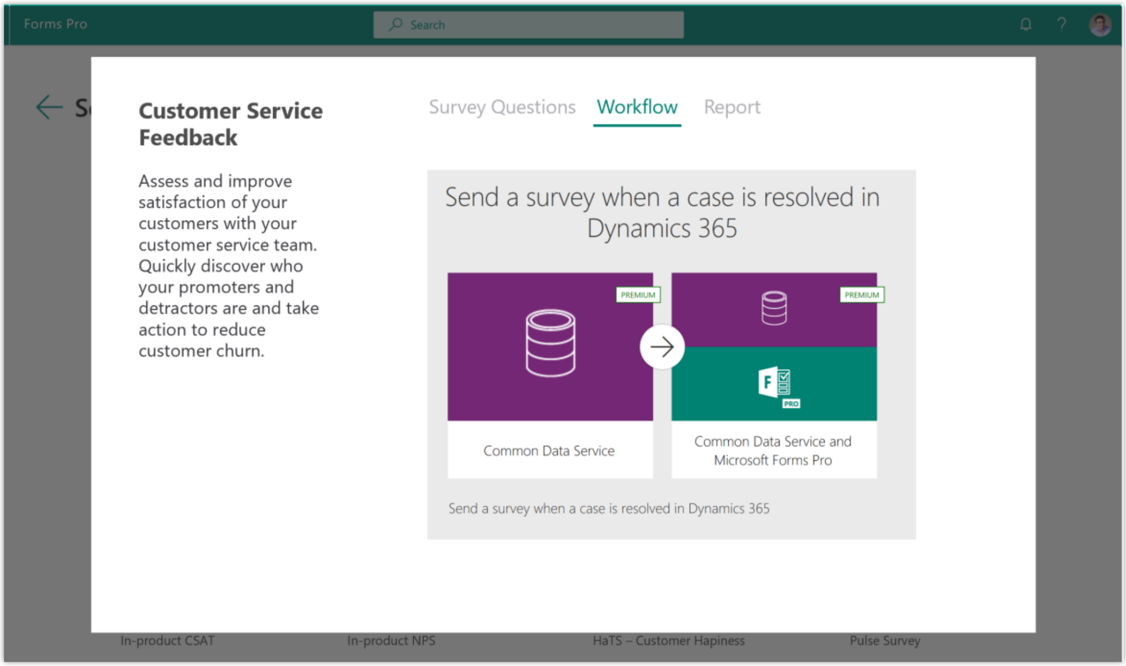
Customer satisfaction survey



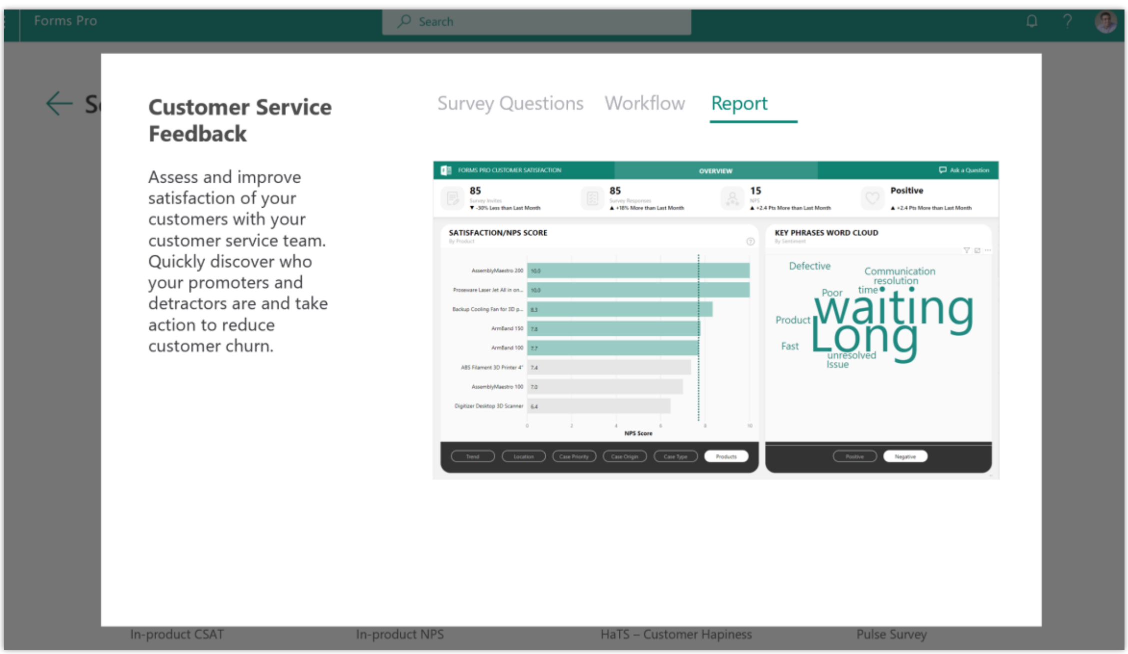
Customer satisfaction workflow



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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Feature	Enabled for	Public preview	General availability
Nonprofit Accelerator	End users by admins, makers, or analysts	-	May 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.

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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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
Financial Services Accelerator	End users by admins, makers, or analysts	-	Apr 2020

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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.

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).

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
Healthcare Accelerator	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.

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.

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).

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
Automotive Accelerator	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.
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- **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.

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)

Change history

This topic is updated when a feature's release date changes or when a feature is added or removed. You can see the full topic in the Power Platform Change history online.

2020 release wave 1 features available for early access

This topic lists Power Platform 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:

- 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
Chart and dashboard styling improvements for model-driven apps	End users, automatically	✓ Jan 29, 2020	Apr 2020
Improved grid column filtering in Power Apps	End users, automatically	✓ Feb 3, 2020	Apr 2020
Improvements to model-driven apps	End users, automatically	✓ Jan 29, 2020	Apr 2020
Improvements to quick find search experience on a grid	End users, automatically	✓ Feb 3, 2020	Apr 2020

Feature	Enabled for	Early access	General availability
Save is always visible in the command bar on edit forms	End users, automatically	Jan 29, 2020	Apr 2020
Usability enhancements to editable grid	End users, automatically	Feb 3, 2020	Apr 2020
View selector usability enhancements	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).

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.

Deep integration from Azure to Microsoft Teams

Feature	Enabled for	Public preview	Early access*	General availability
Start creating apps directly from Microsoft Teams using your existing SharePoint data	Admins, makers, or analysts, automatically	-	-	May 2020

Excellent mobile, including offline

Feature	Enabled for	Public preview	Early access*	General availability
Enhanced capabilities and experience in offline mode	End users by admins, makers, or analysts	-	-	Apr 2020
Canvas and model-driven apps run on a single mobile application	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
Instrument your canvas apps with Azure Application Insights	Admins, makers, or analysts, automatically	-	Apr 2020	
Modern solution import experience	Admins, makers, or analysts, automatically	Jun 2020	-	
Canvas app Monitor tool is now generally available	Admins, makers, or analysts, automatically	-	-	May 2020
Modern solution explorer gets a makeover	Admins, makers, or analysts, automatically	-	-	Jun 2020
Power Apps Test Studio for canvas apps is now generally available	Admins, makers, or analysts, automatically	-	-	Jun 2020

Power Apps portals improvements

Feature	Enabled for	Public preview	Early access*	General availability
Web APIs for CRUD operations on Common Data Service entities	Admins, makers, or analysts, automatically	Jun 2020	-	
Portal Checker enhancements	Admins, makers, or analysts, automatically	-	-	Apr 2020
Power BI Embedded component in portal designer	Admins, makers, or analysts, automatically	-	-	Apr 2020
Support for additional entities in global search	End users by admins, makers, or analysts	-	-	Apr 2020
Simplified themes in portals Studio	End users by admins, makers, or analysts	Apr 2020	-	May 2020
Support for Authorization Code flow for OpenID Connect based authentication providers	End users by admins, makers, or analysts	-	-	Jun 2020
Simplified portal identity provider configuration	Admins, makers, or analysts, automatically	Apr 2020	-	Jun 2020
Simplified web page and entity permissions for Power Apps portals	Admins, makers, or analysts, automatically	Apr 2020	-	Jun 2020

Sophisticated apps on a unified platform

Feature	Enabled for	Public preview	Early access*	General availability
Build responsive, reflowing canvas app pages	End users by admins, makers, or analysts	Jun 2020	-	

Feature	Enabled for	Public preview	Early access*	General availability
Enabling printable pages in canvas apps	End users by admins, makers, or analysts	Jul 2020	-	
Auto generate web app on top of your existing data	Admins, makers, or analysts, automatically	-	-	Apr 2020
Large file and image support in model-driven forms	End users by admins, makers, or analysts	-	-	Apr 2020
Chart and dashboard styling improvements for model-driven apps	End users, automatically	-	✓ Jan 29, 2020	Apr 2020
Enable creating and editing data in forms displayed as a modal dialog without navigating away	Admins, makers, or analysts, automatically	✓ Jan 29, 2020	-	Apr 2020
Improvements to model-driven apps	End users, automatically	-	✓ Jan 29, 2020	Apr 2020
Save is always visible in the command bar on edit forms	End users, automatically	-	✓ Jan 29, 2020	Apr 2020
Improved grid column filtering in Power Apps	End users, automatically	-	✓ Feb 3, 2020	Apr 2020
Improvements to quick find search experience on a grid	End users, automatically	-	✓ Feb 3, 2020	Apr 2020
Usability enhancements to editable grid	End users, automatically	-	✓ Feb 3, 2020	Apr 2020
View selector usability enhancements	End users, automatically	-	✓ Feb 3, 2020	Apr 2020

Feature	Enabled for	Public preview	Early access*	General availability
Improved themes in Power Apps	End users by admins, makers, or analysts	Mar 2020	-	Apr 2020
Improved data source experience and Common Data Service view are generally available	Admins, makers, or analysts, automatically	✔ Aug 14, 2019	-	Apr 2020
Canvas components are generally available	Admins, makers, or analysts, automatically	✔ Feb 26, 2020	-	Apr 2020
Build apps on top of your existing data in SharePoint more easily	Admins, makers, or analysts, automatically	-	-	May 2020
Easily access and search for help while building apps	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:

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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

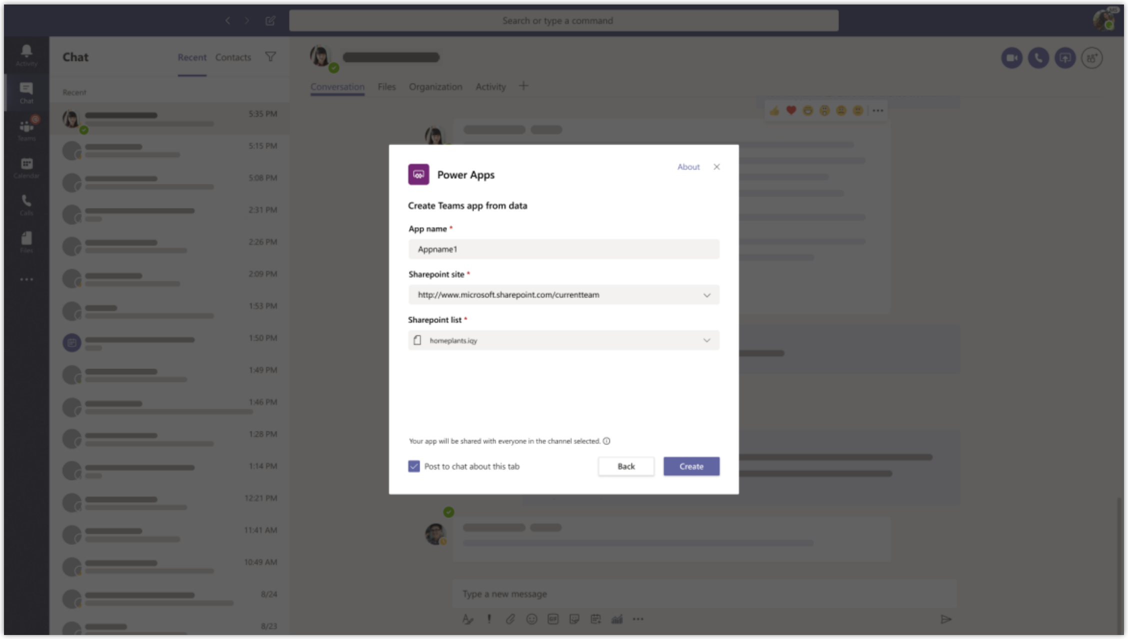
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	May 2020

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.

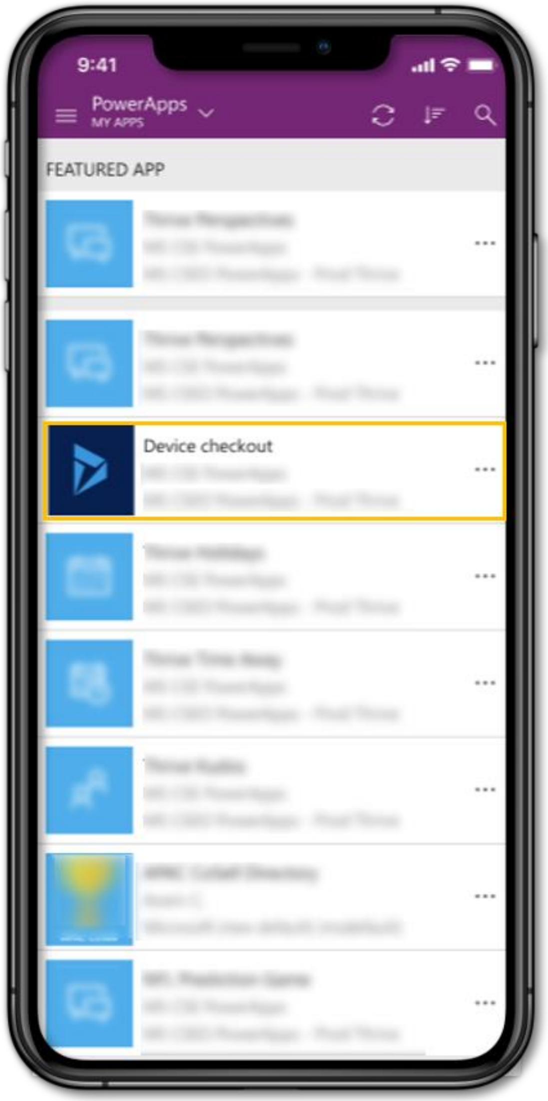
Canvas and model-driven apps run on a single mobile application

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 and model applications (highlighted) running side-by-side in a single mobile app

High velocity developers of all skill levels

Overview

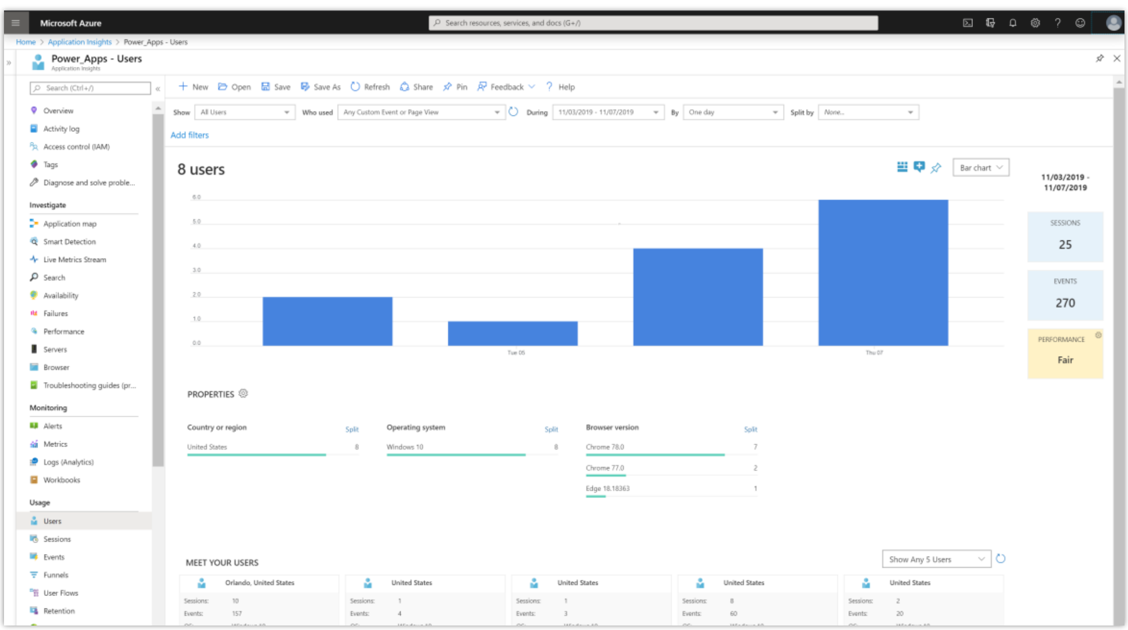
Power Apps empowers *every* developer. We're adding "full stack" low code capabilities that help makers of all backgrounds test their features, ensure performance, and monitor usage.

Instrument your canvas apps with Azure Application Insights

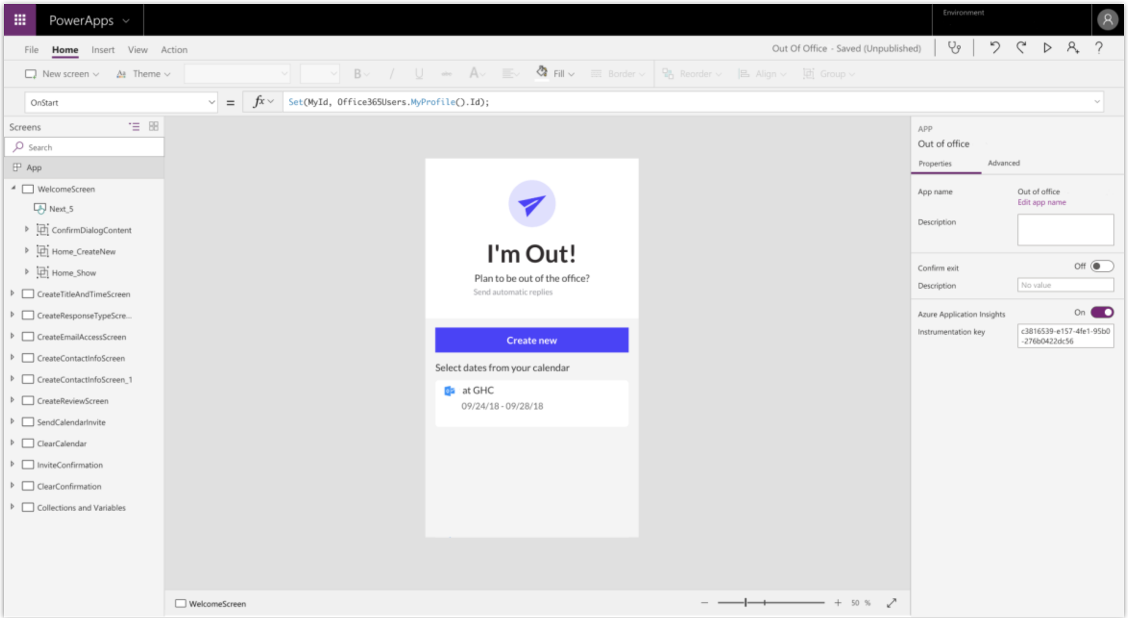
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	Apr 2020	-

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	-	-

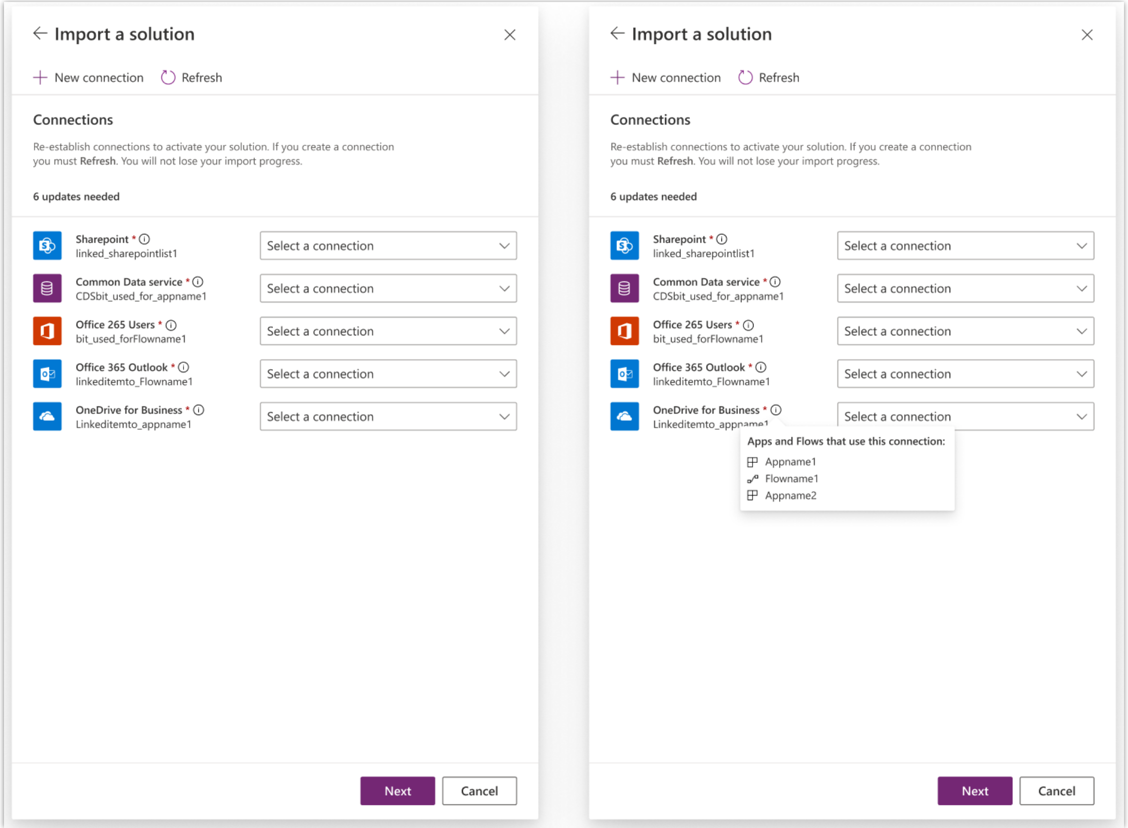
Business value

We've reimagined 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

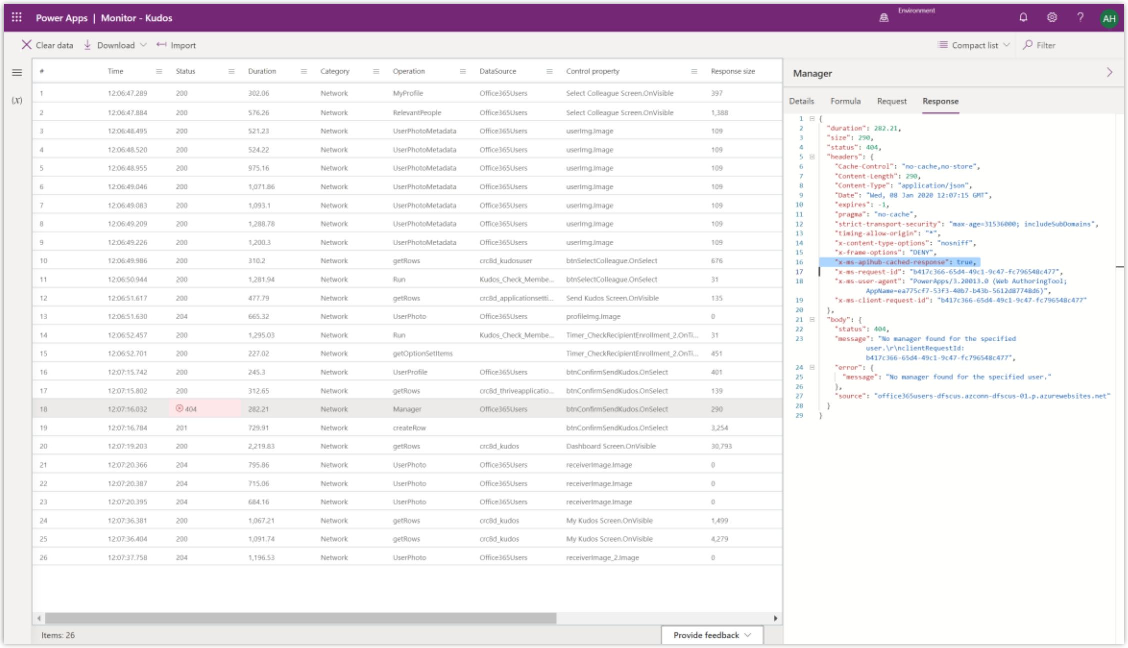
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	May 2020

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.



Canvas app Monitor

Modern solution explorer gets a makeover

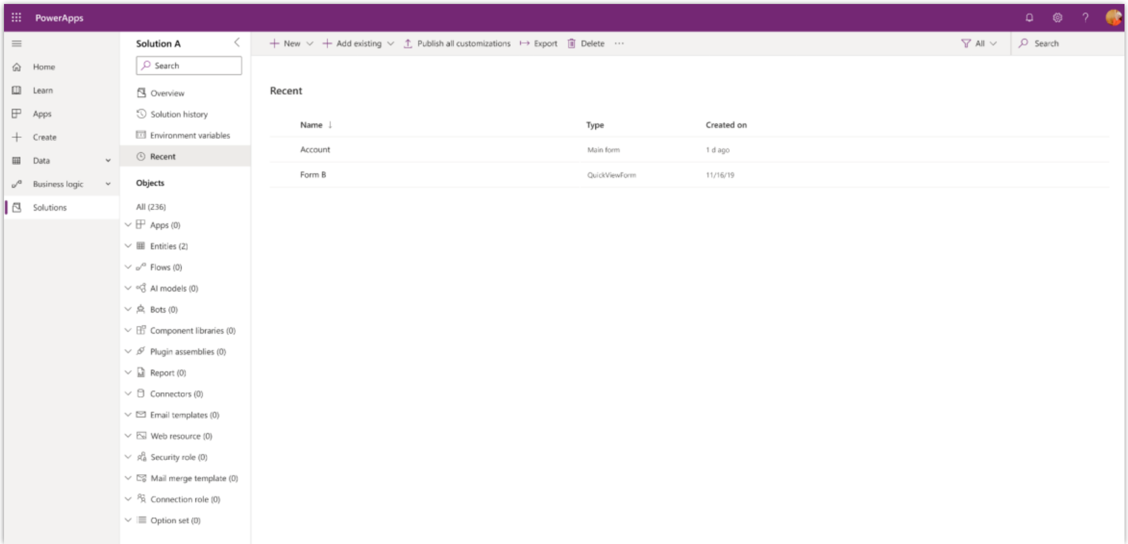
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Jun 2020

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

See also

[Solutions overview](#) (docs)

Power Apps Test Studio for canvas apps is now generally available

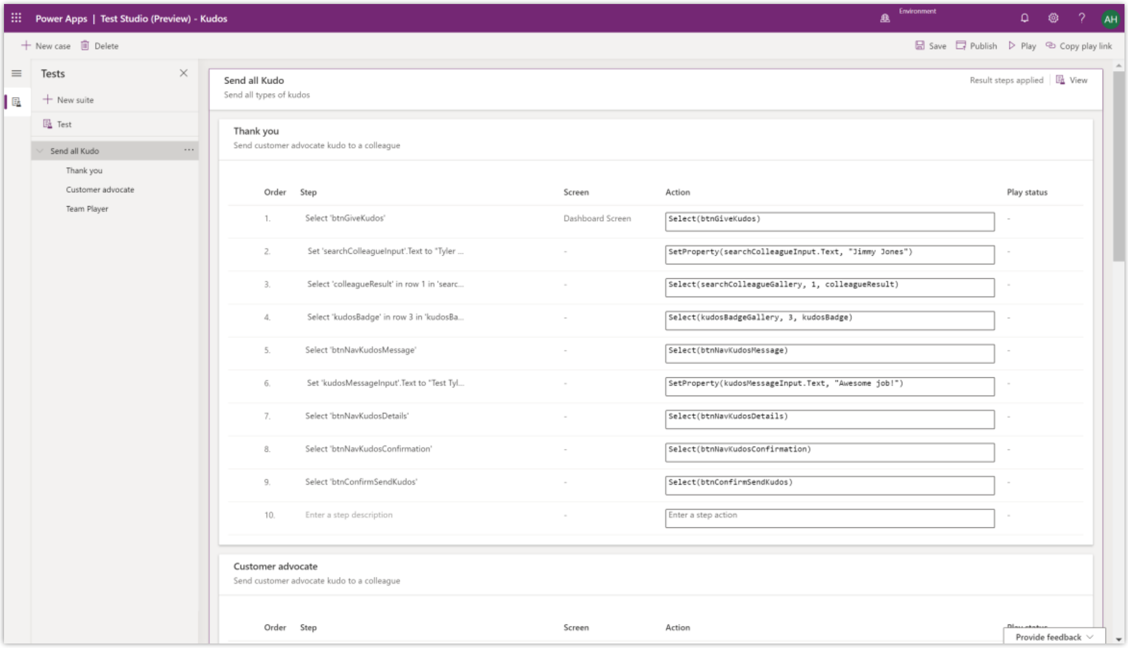
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Jun 2020

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	Jun 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

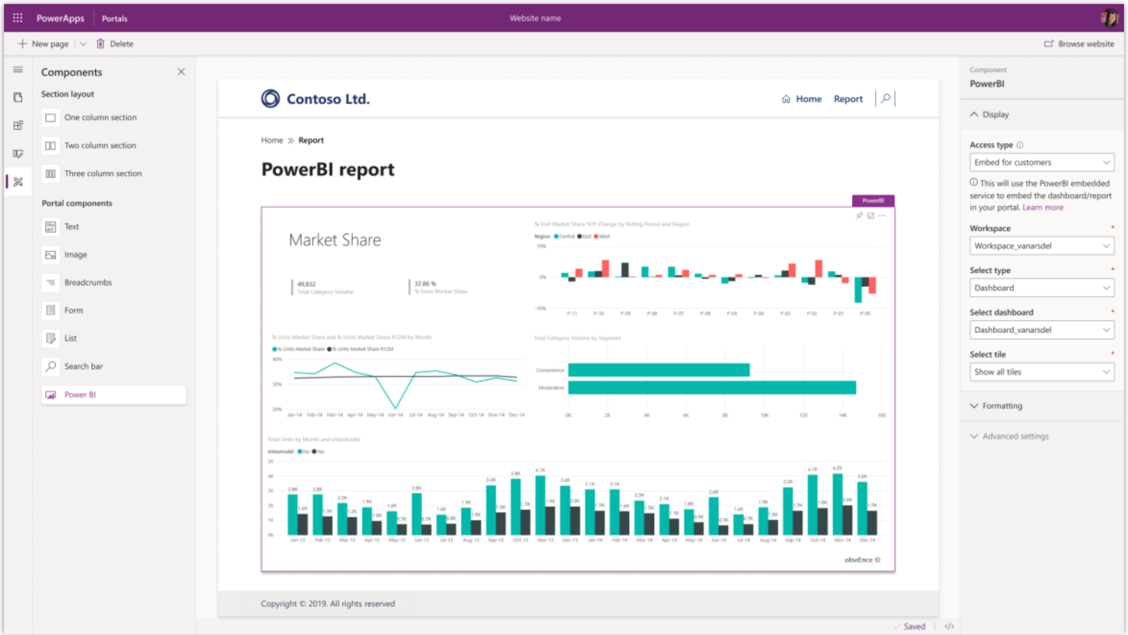
Business value

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

Support for additional entities in global search

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

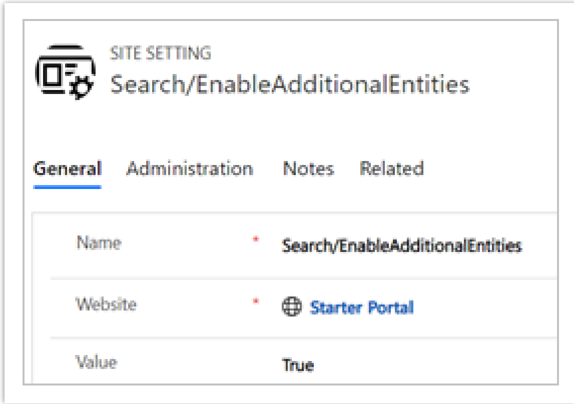
Business value

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

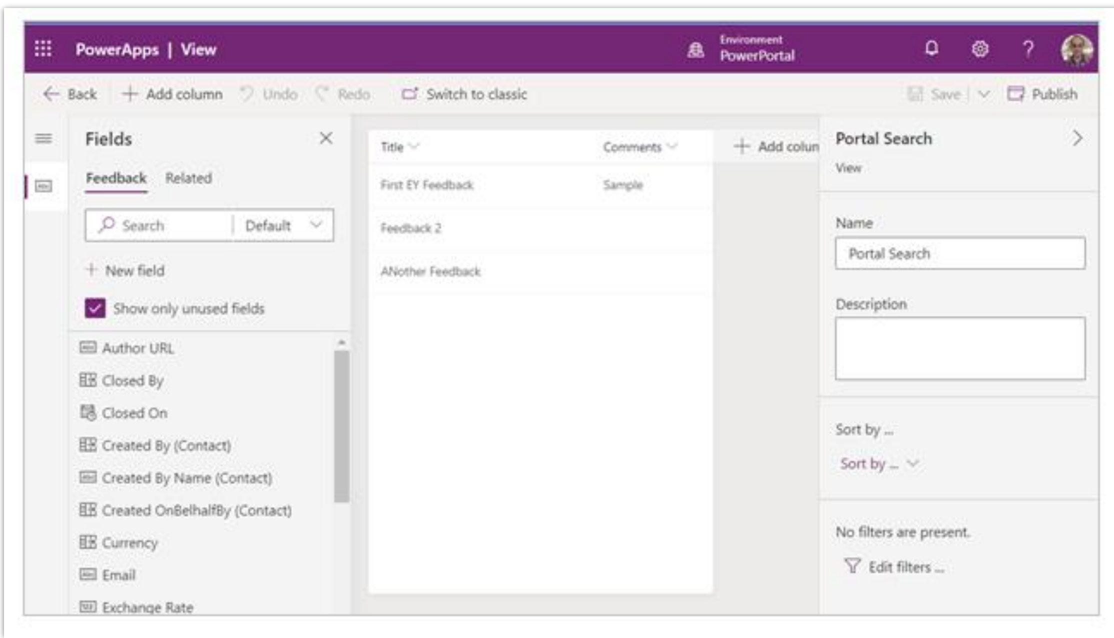
This feature aims at adding support for additional entities that can be searched within a portal in a configurable way.

The capability to enable search is controlled via settings:



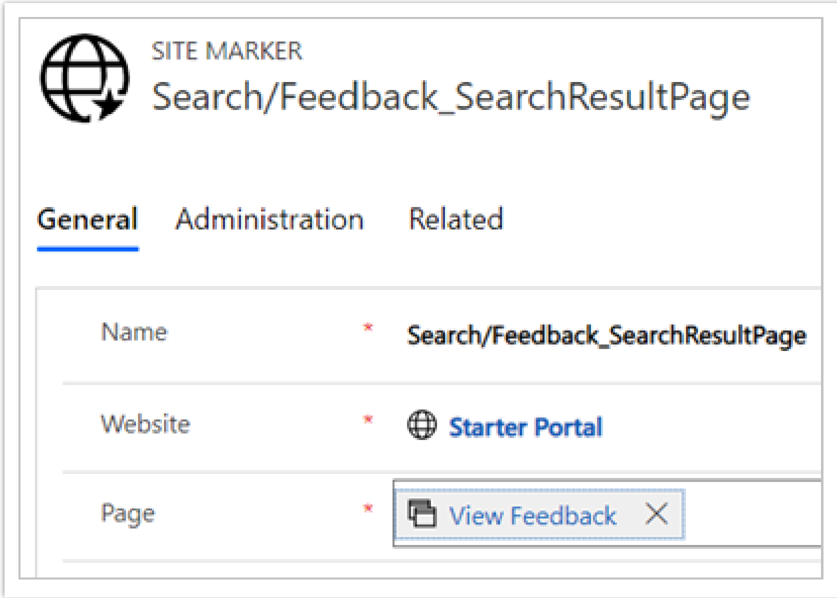
EnableAdditionalEntities search site setting

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.



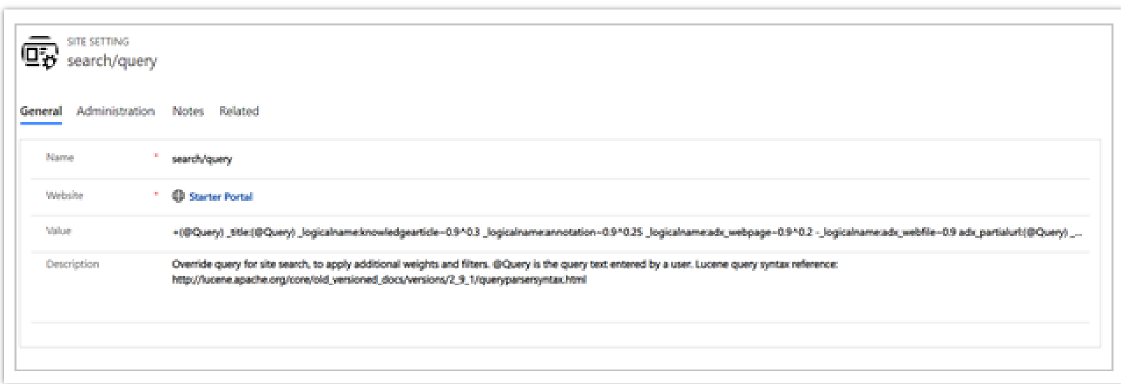
Portal Search view

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

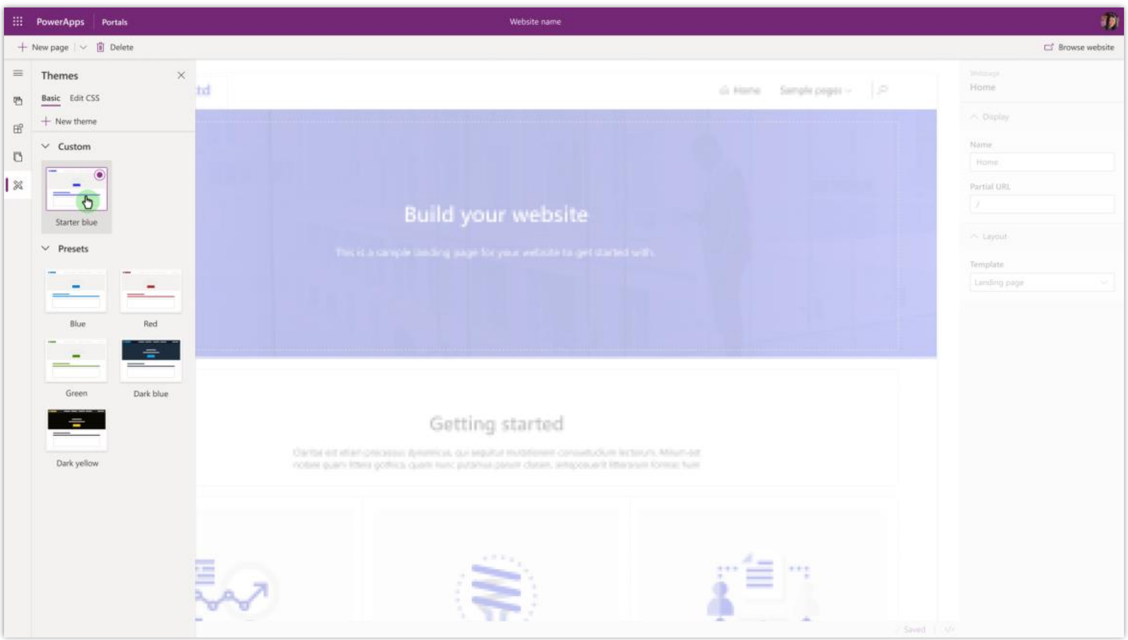
Thank you for submitting [this idea](). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Simplified themes in portals Studio

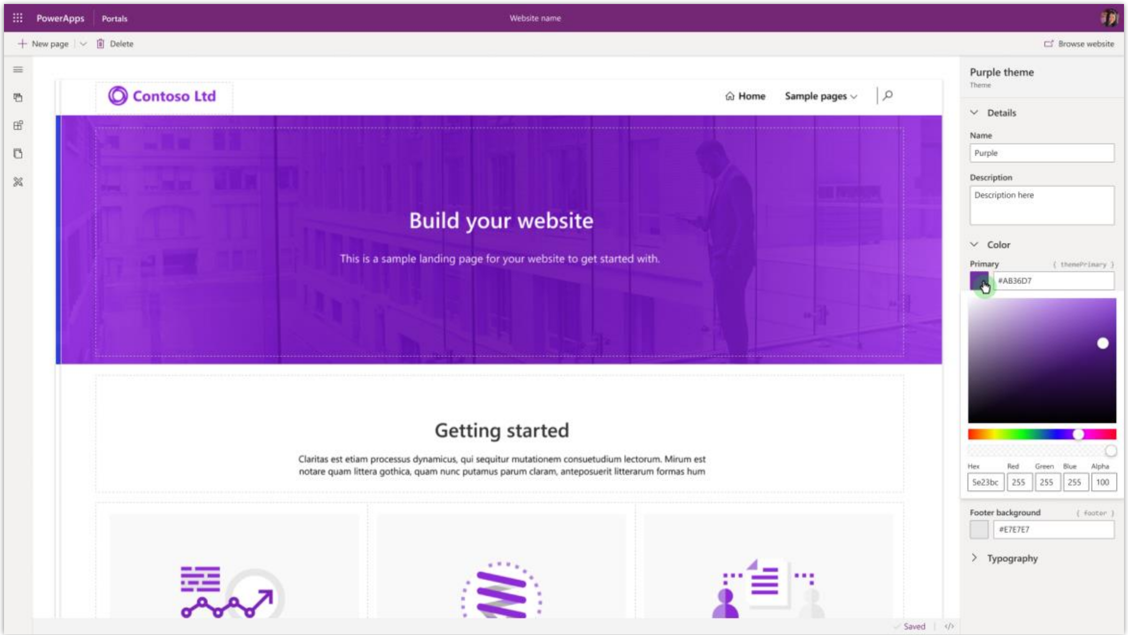
Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Apr 2020	-	May 2020

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.



Starter Blue theme



Custom Purple theme

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 flows supported by OpenID Connect protocol for user authentication in applications. As part of this feature, we are adding support for Authorization Code flow.

Simplified portal identity provider configuration

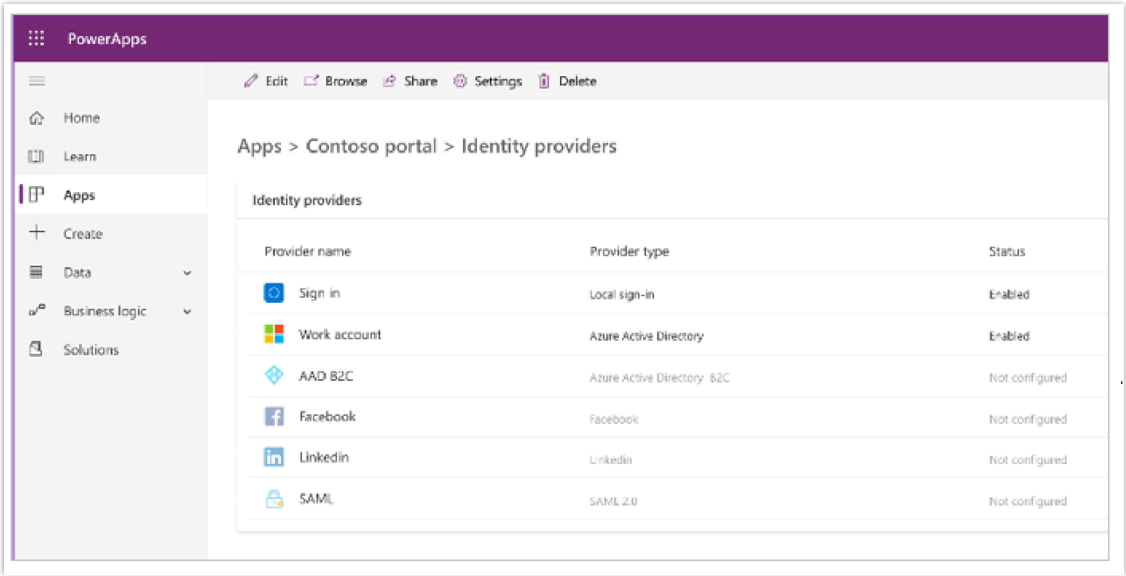
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Apr 2020	-	Jun 2020

Business value

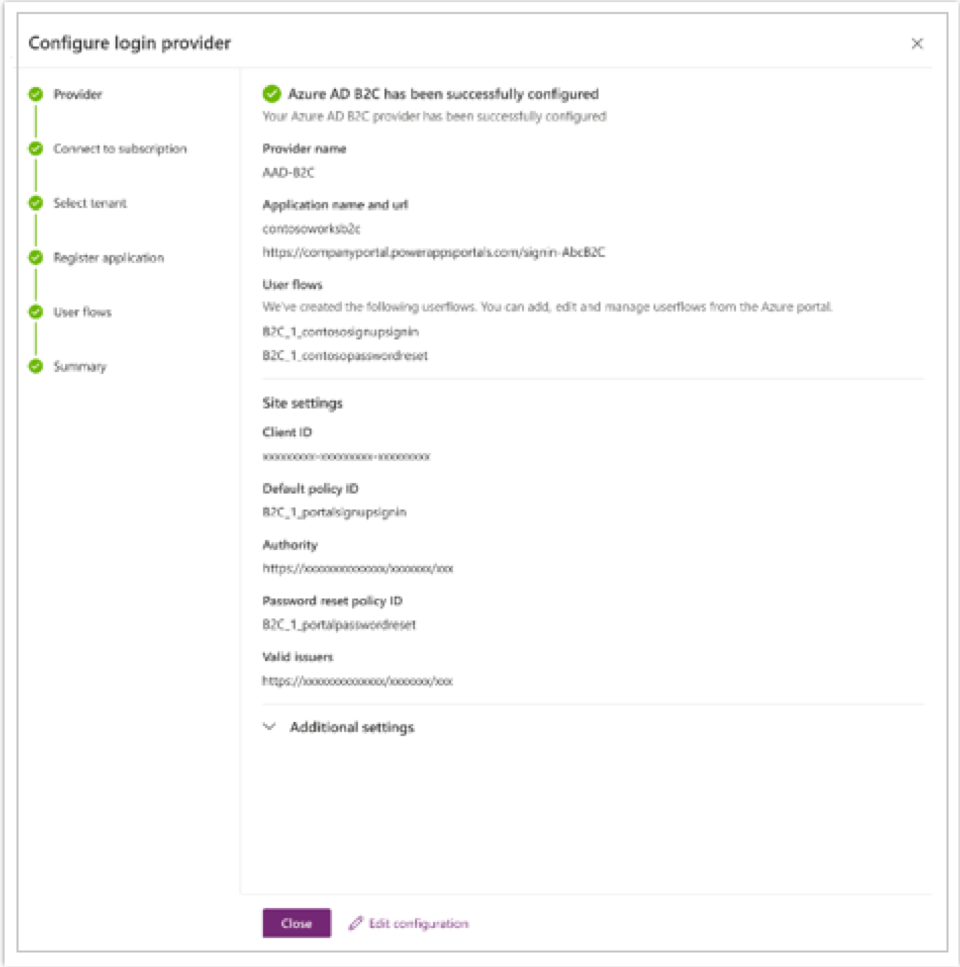
Setting up authentication provider is a core customization in any portal. With simplified portal identity provider configuration, we aim at providing in-app guidance for identity provider setup and abstract setup complexities. This helps makers and administrators quickly and easily perform setup for 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.

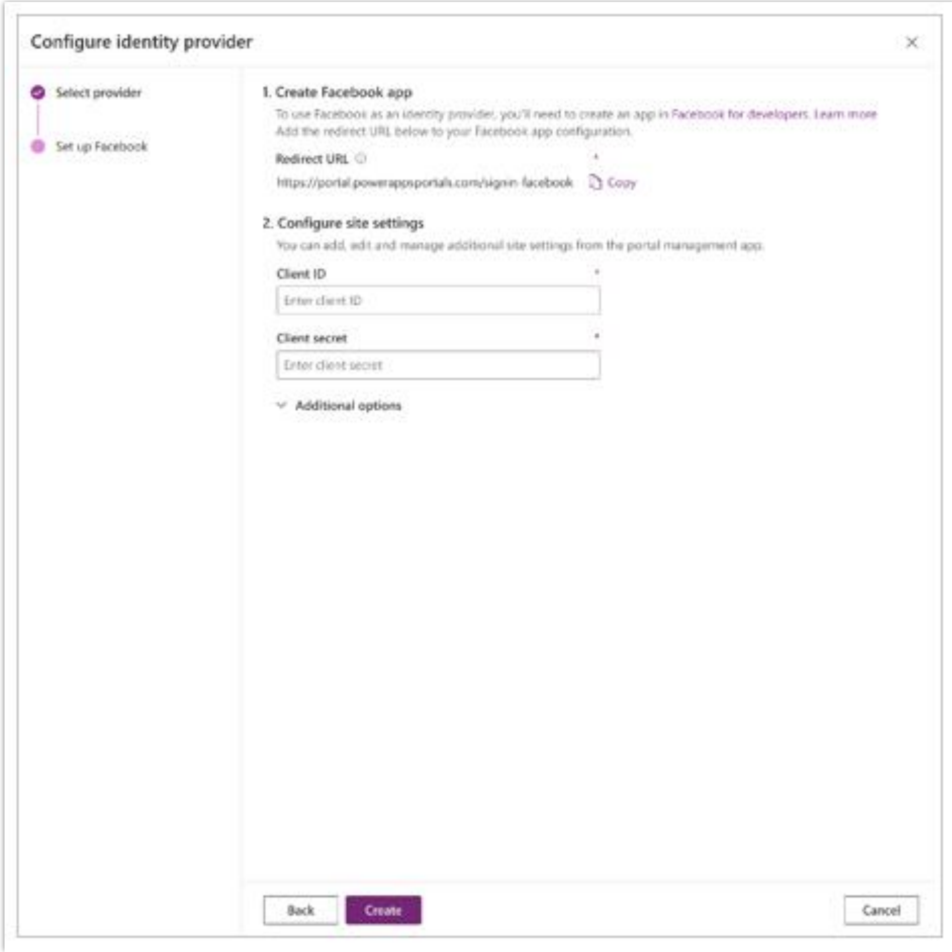


Identity providers for portals



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 oAuth 2.0 login provider

Simplified web page and entity permissions for Power Apps portals

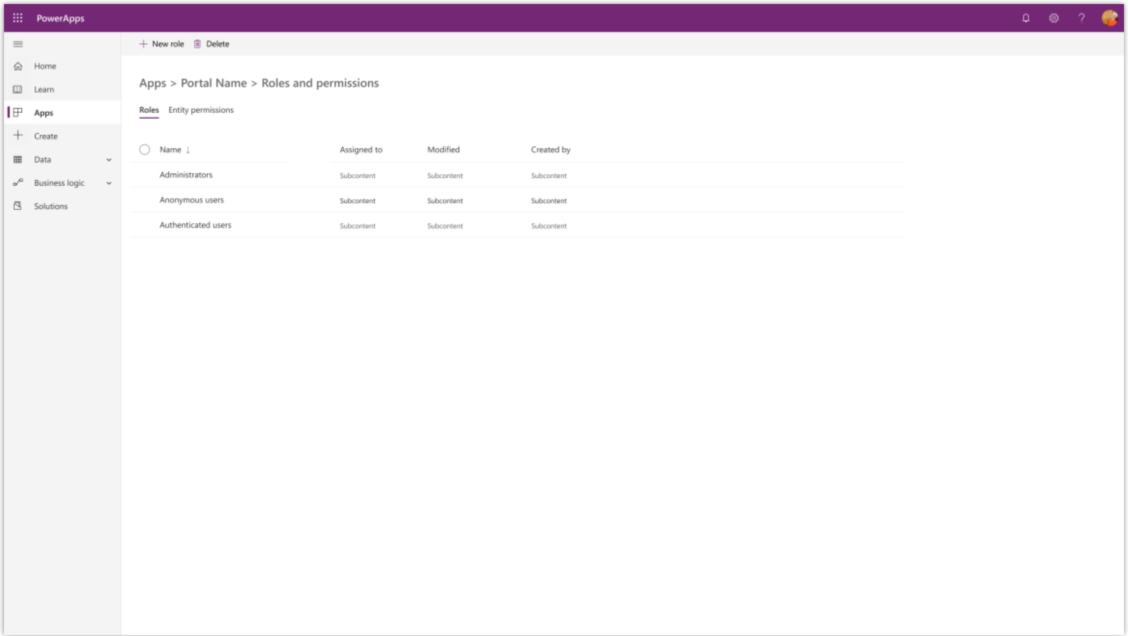
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Apr 2020	-	Jun 2020

Business value

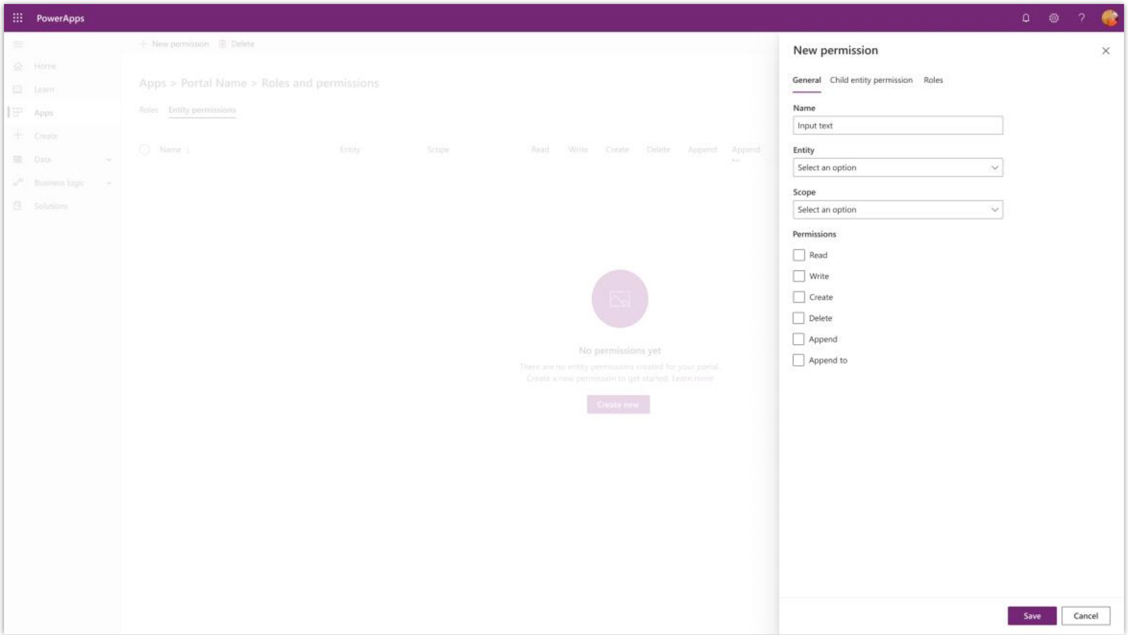
This feature makes the experience to create security model for portals quicker and less error prone. It also reduces the complexity of defining the security model in Portal Management app.

Feature details

This feature enables makers to efficiently configure and manage portal web roles and entity permissions outside the Portal Management app. It also enables the web page access to be configured based on web roles right from portals Studio.



Role management



Add new permission

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

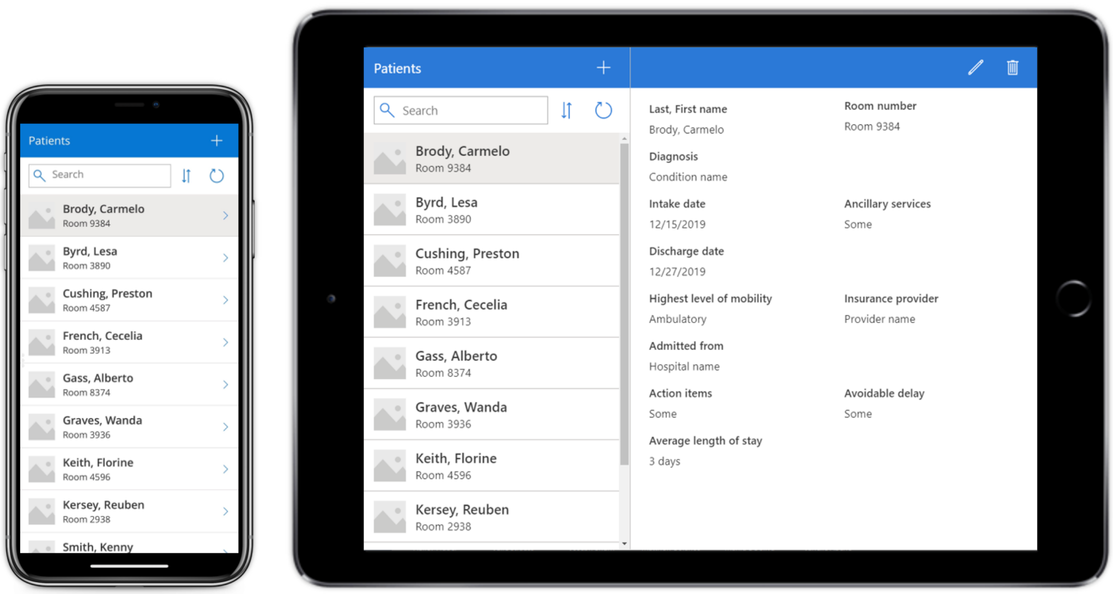
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Apr 2020

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

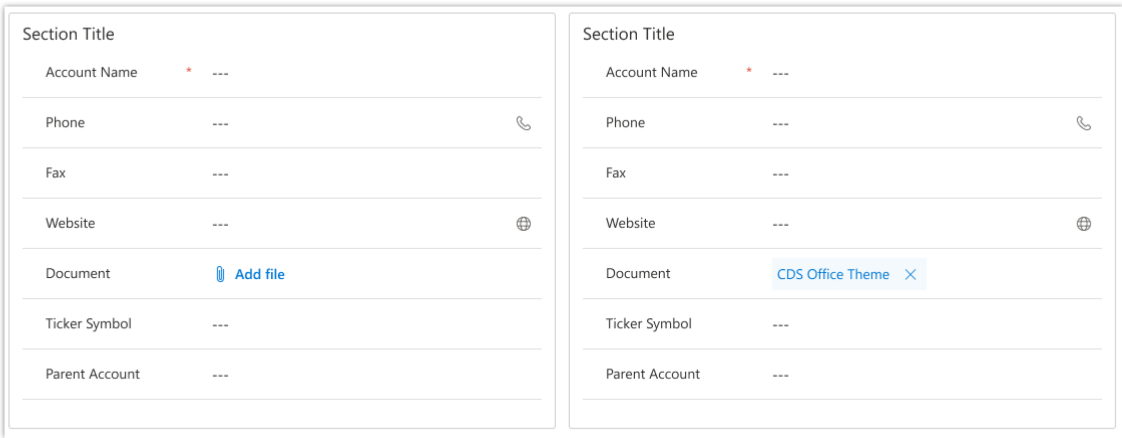
Business value

- 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.



Large file control

Chart and dashboard styling improvements for model-driven apps

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Jan 29, 2020	Apr 2020

Business value

UI improvements for better user experience and promote transition to Unified Interface.

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.

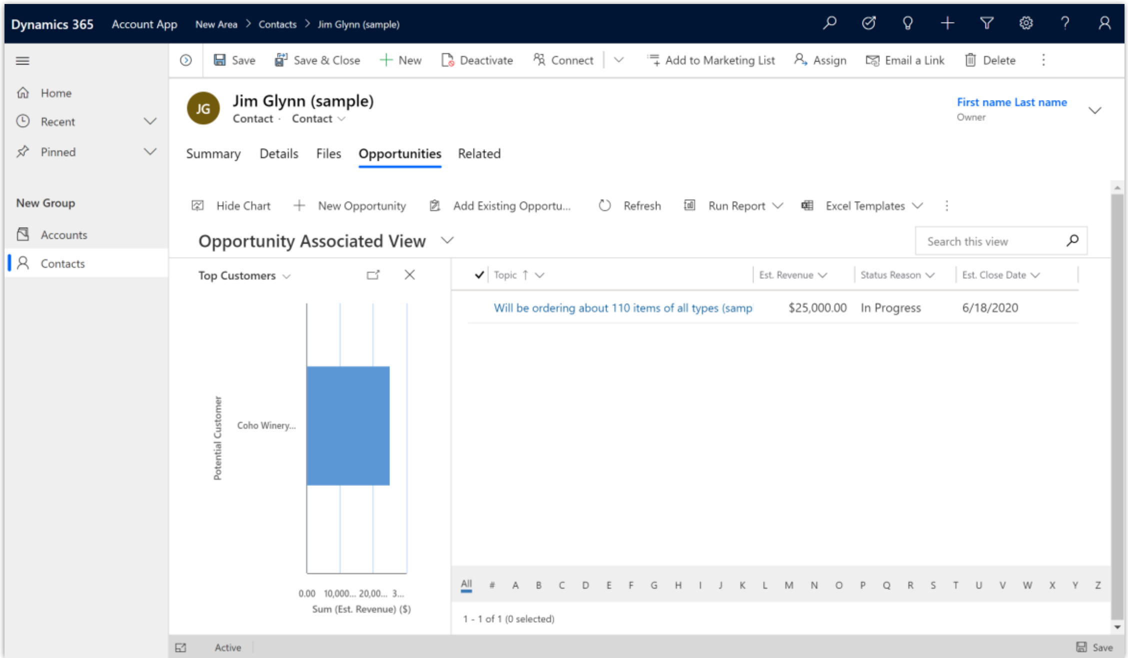


Chart control next to the associated grid in the form page

Enable creating and editing data in forms displayed as a modal dialog without navigating away

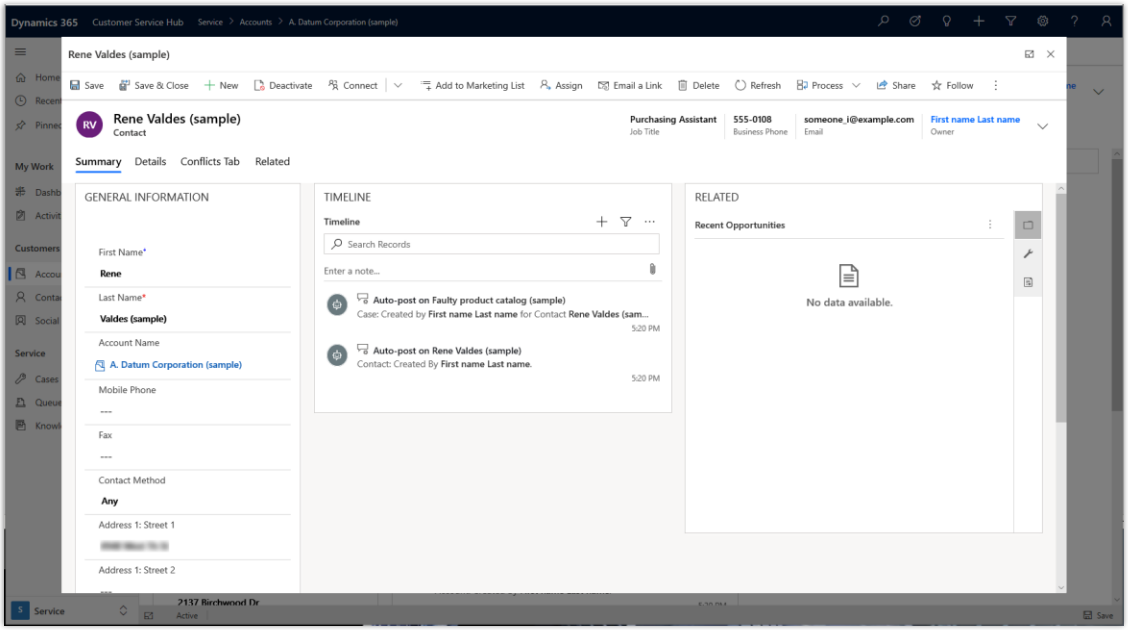
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	✔ Jan 29, 2020	-	Apr 2020

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

See also

[Open a main record in a dialog in a model driven app](#) (blog)

[Open main form in a dialog using client API](#) (docs)

Improvements to model-driven apps

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Jan 29, 2020	Apr 2020

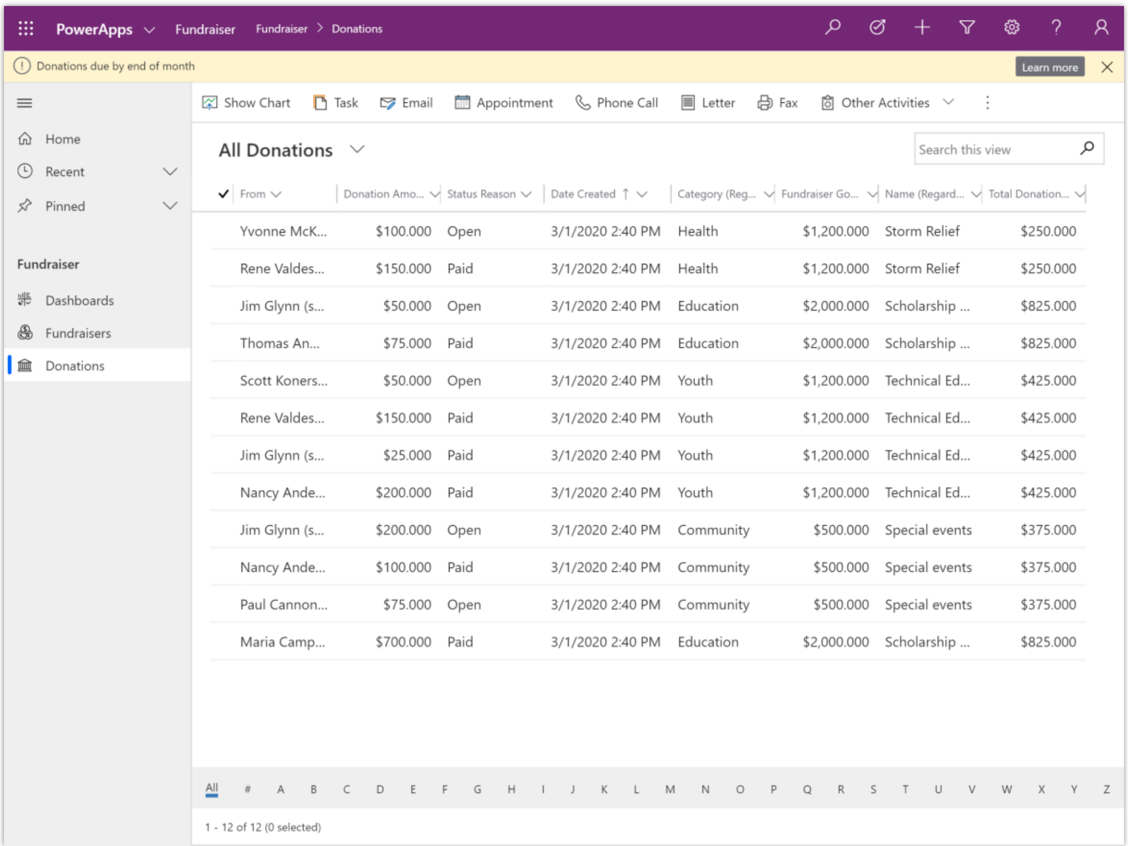
Feature details

Remember the last used app

Model-driven apps have been updated to remember the last app used thereby reducing the need to choose one in the apps list. The last app will be used if an app isn't specified in the URL. For example, use of the last app can happen when opening the organization URL or when opening a generated URL to a specific entity record. The first time opening the URL without specifying an app will still prompt the user, but subsequent opens will use the last app if an app has not been provided. If a user has only one app then that app becomes the last app, which results in no user prompt. This will improve user productivity by removing clicks when getting started with a session.

Updated app message bar visuals and new API

Visuals for the existing app message bar where updated to align with the form message bar appearance. Model-driven apps now have new APIs to show app level messages which remain visible while navigating. The API allows flexibility for the type of message. For example, an app can set a message to be user dismiss-able for information messages or set a message to be not dismiss-able for more permanent messages. The API also supports removing specific messages if they don't apply.



Global notification with information message bar

Save is always visible in the command bar on edit forms

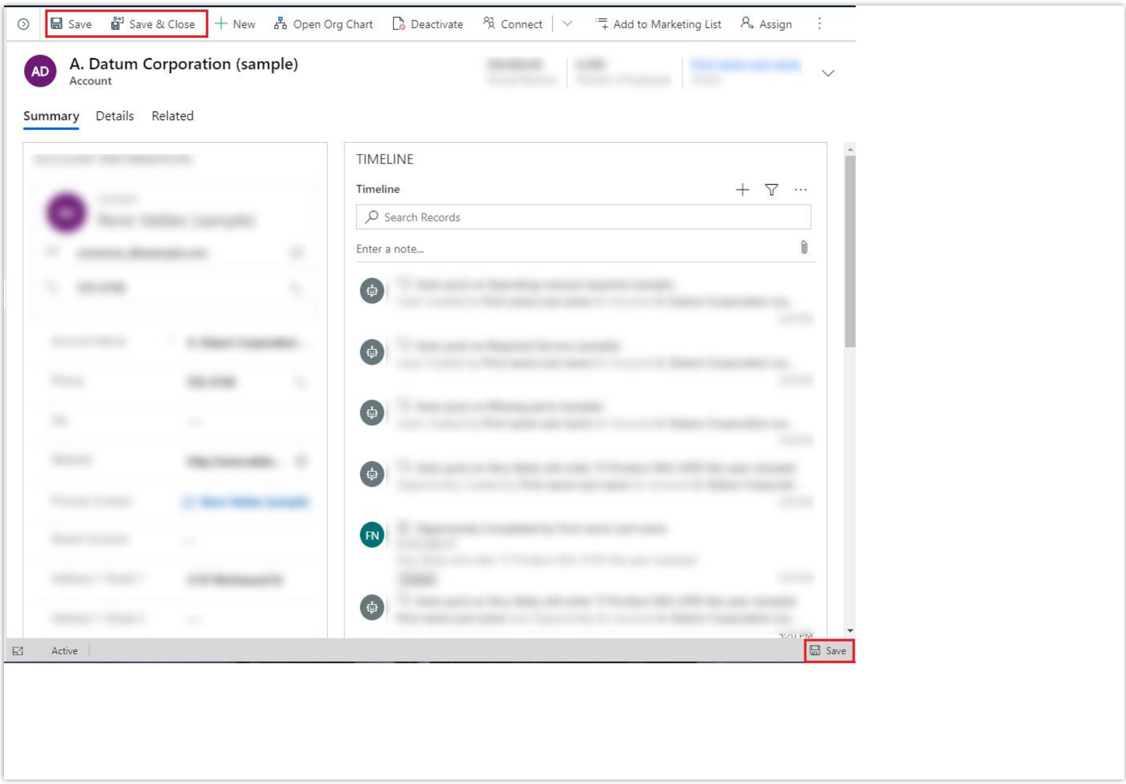
Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Jan 29, 2020	Apr 2020

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)

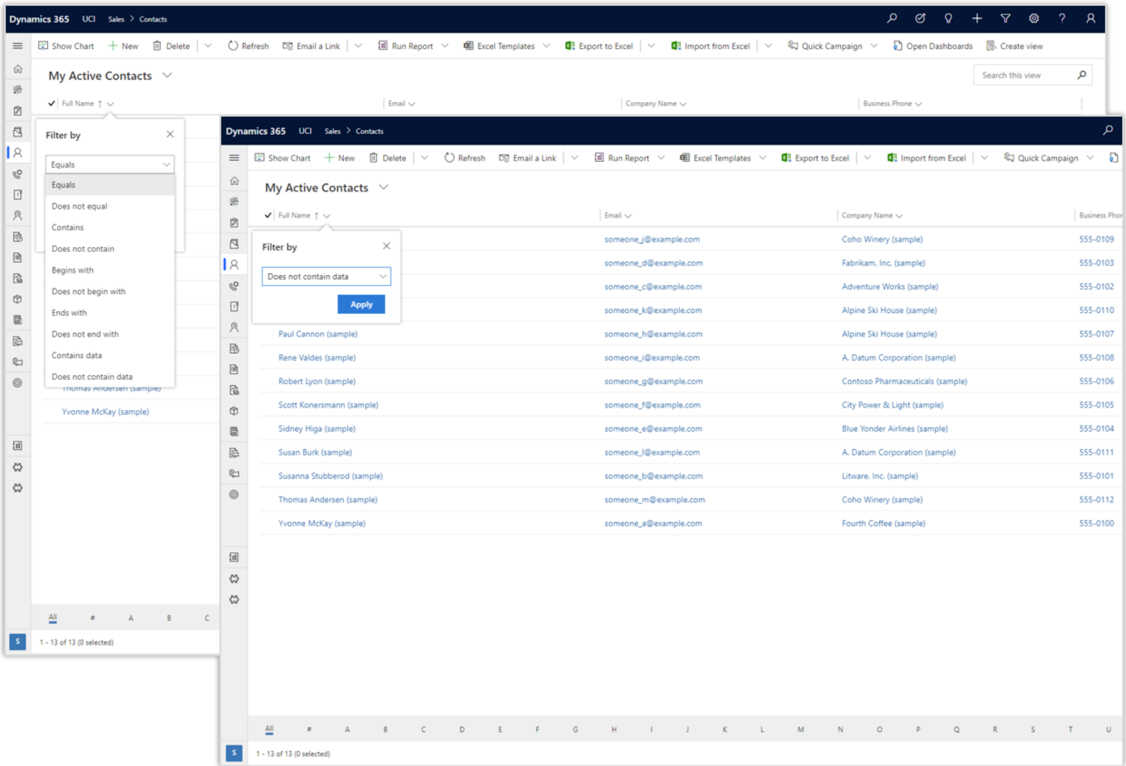
Improved grid column filtering in Power Apps

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 2020	Apr 2020

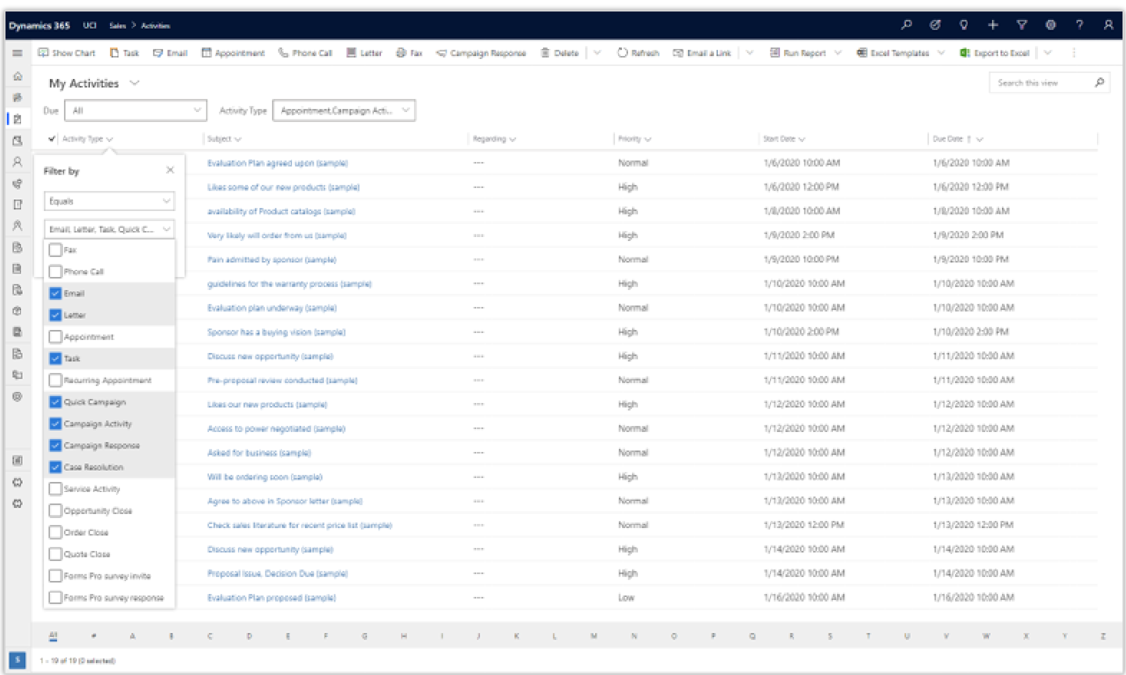
Feature details

Tabular data manipulation is now easier with a whole range of advanced grid column filtering capabilities.

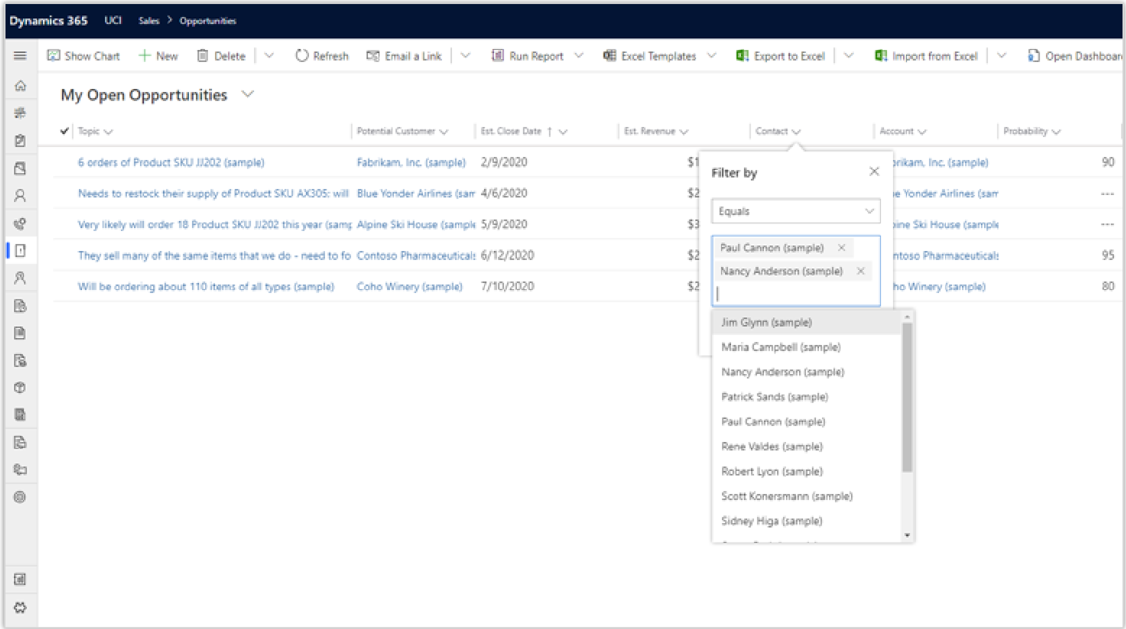
- String and numeric fields have operators to filters like: *begins with*, *ends with*, and *contains data*.
- Activity management is vastly improved with a new set of date filters. Absolute (before, after, on, etc.) and relative (last week, next year, older than X months, etc.) filters put powerful 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.
- Filtering a grid on columns not present in the view is easy and intuitive with the advanced filtering pane.
- Add multiple filter conditions, including grouping and use of logical operators to create more complex condition expressions.
- Legacy advanced find capabilities like building view filter expressions is now on the Unified Interface.



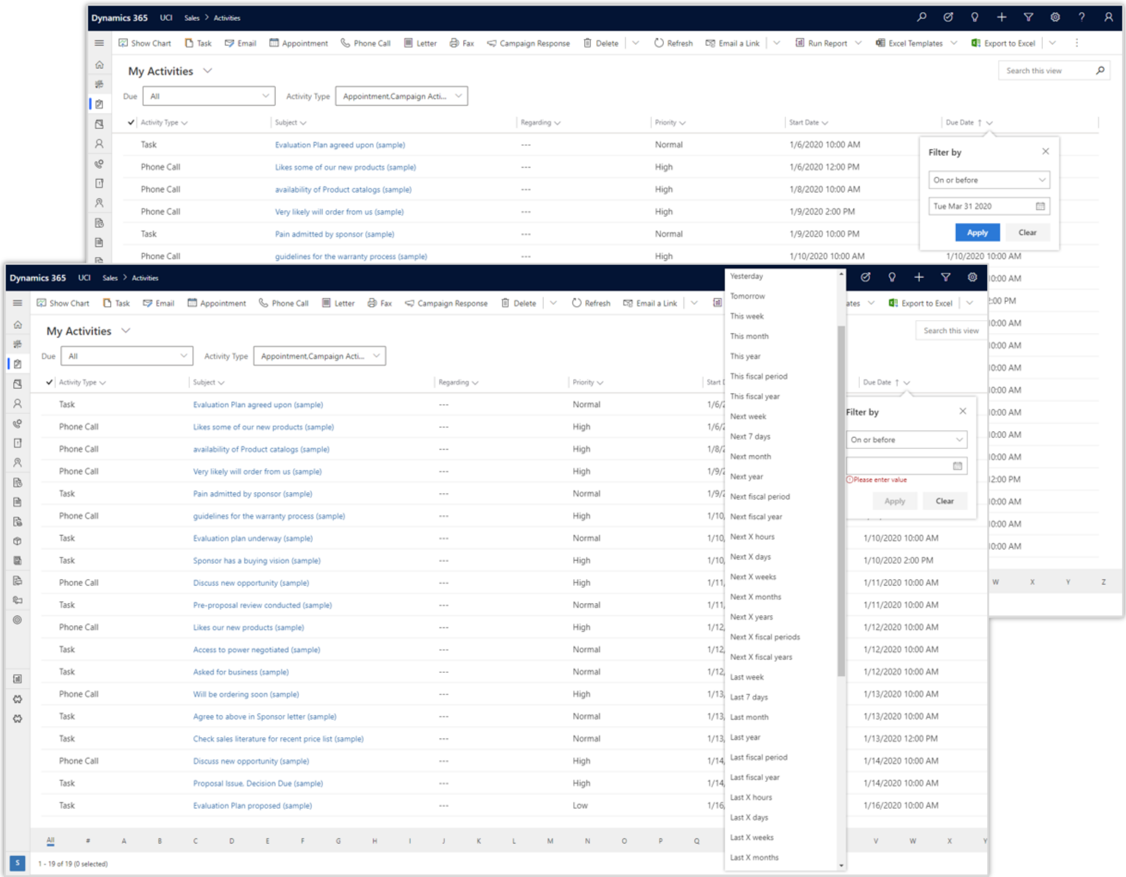
Grid filtering



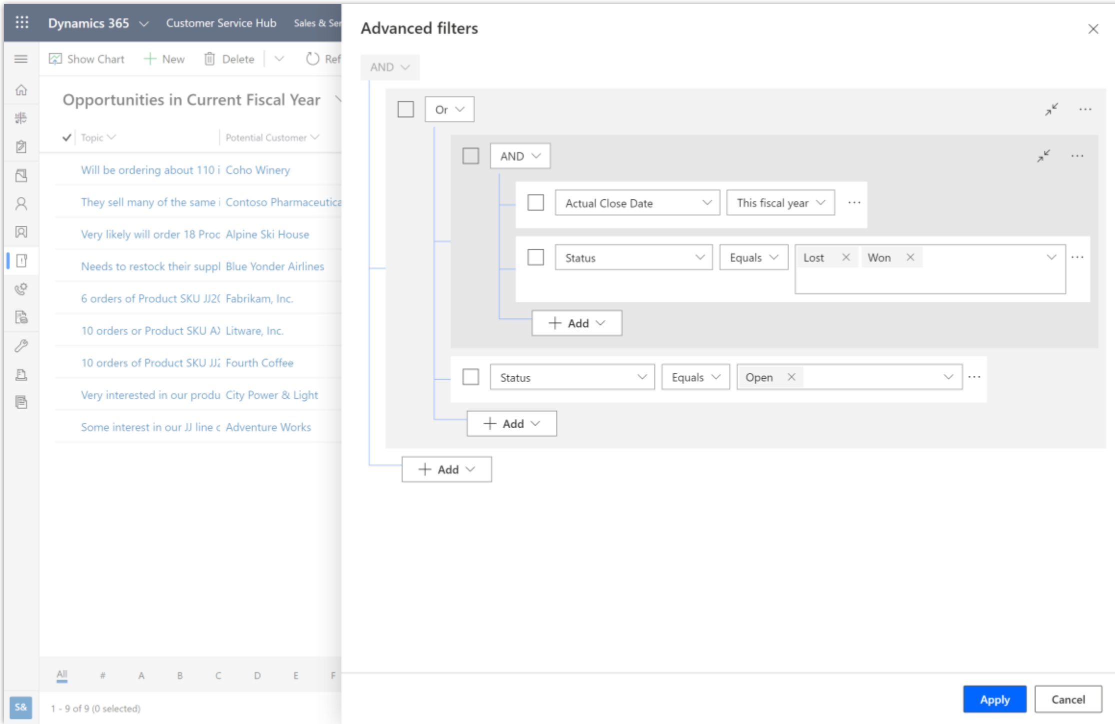
Grid filters option set



Grid filter lookup



Grid filter date



Advanced filtering

See also

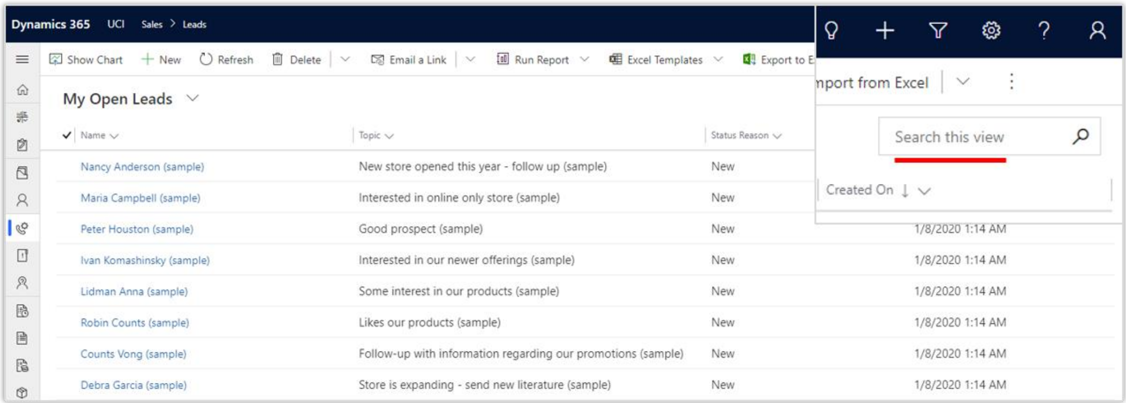
[Use grid filters](docs) (docs)

Improvements to quick find search experience on a grid

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✓ Feb 3, 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

See also

Use search on a grid (docs)

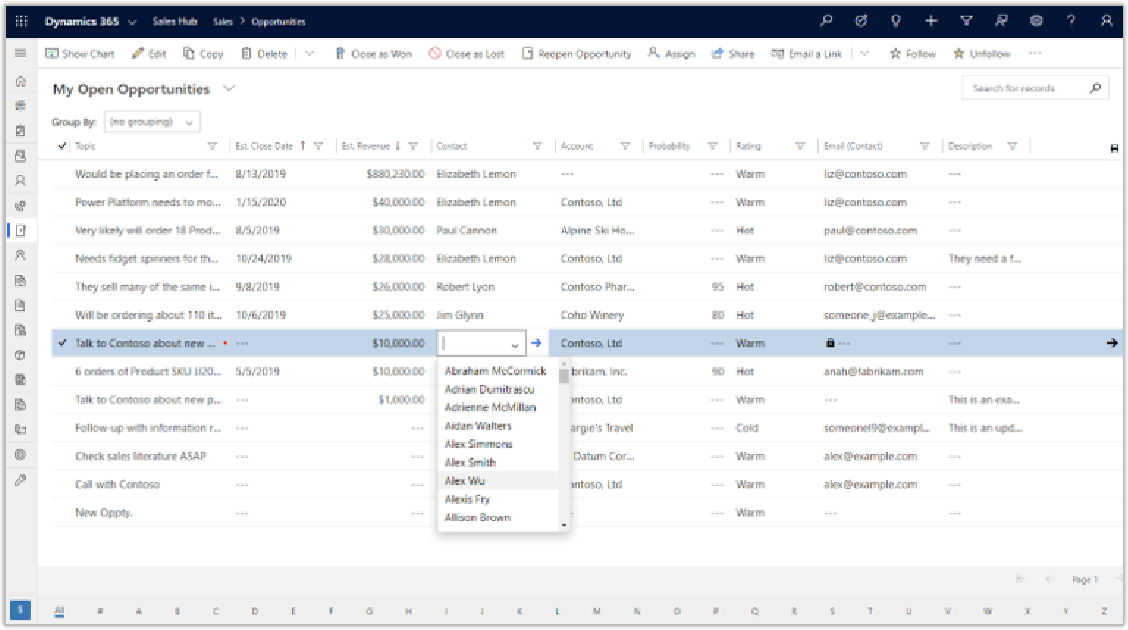
Usability enhancements to editable grid

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 2020	Apr 2020

Feature details

Targeted usability improvements to editable grid allows users to be more productive in editing grid-based data sets.

- Editable grid now displays up to 100 records on a lookup column, up from 20.
- Editable grids now also display rich text content with HTML tags stripped out for better readability of fields like email body.



Editable grid

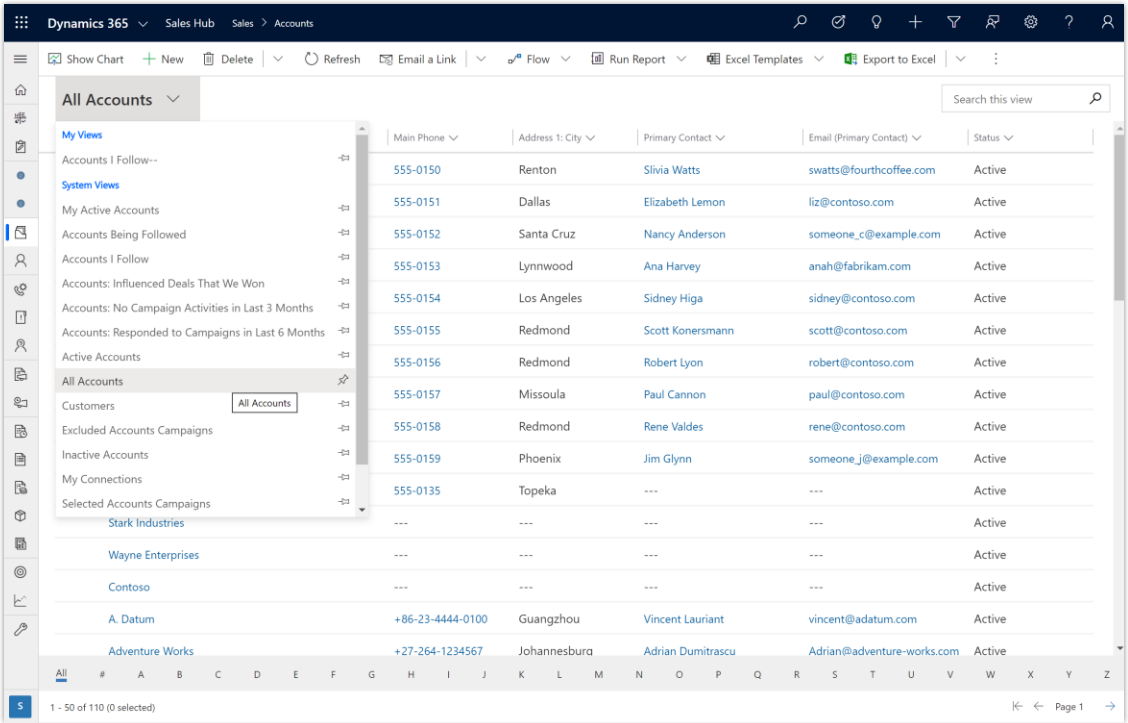
View selector usability enhancements

Enabled for	Public preview	Early access	General availability
End users, automatically	-	✔ Feb 3, 2020	Apr 2020

Feature details

The view selector dropdown is enhanced with the following capabilities:

1. The dropdown is longer and wider to show more views, that aid browse and selection experiences.
2. Personal views are separated from system views and shown higher in the list.
3. View header and label highlighting styles promote quick discovery of views.
4. Pinning is made easier with better icon alignment.



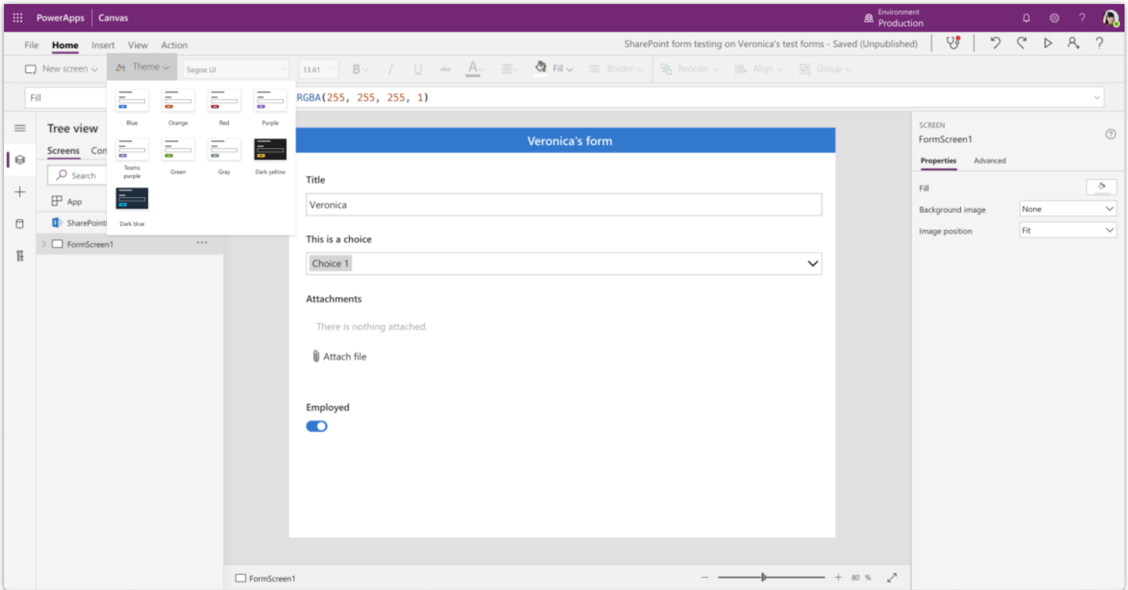
View selector

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.

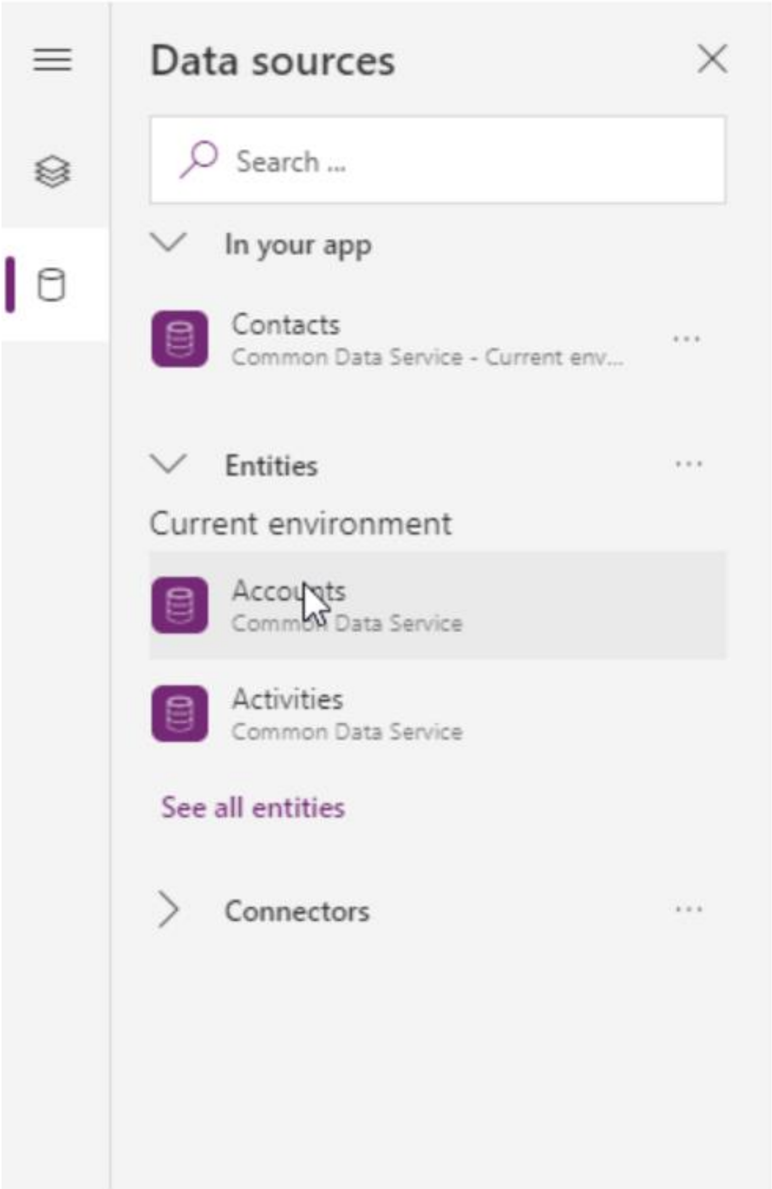
A big benefit of working with Common Data Service views is that the query for the view is run on the server - not locally on your device. This means you avoid delegation issues with the core query. In addition, you have the flexibility to append other filter conditions that are delegated, if supported. 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)

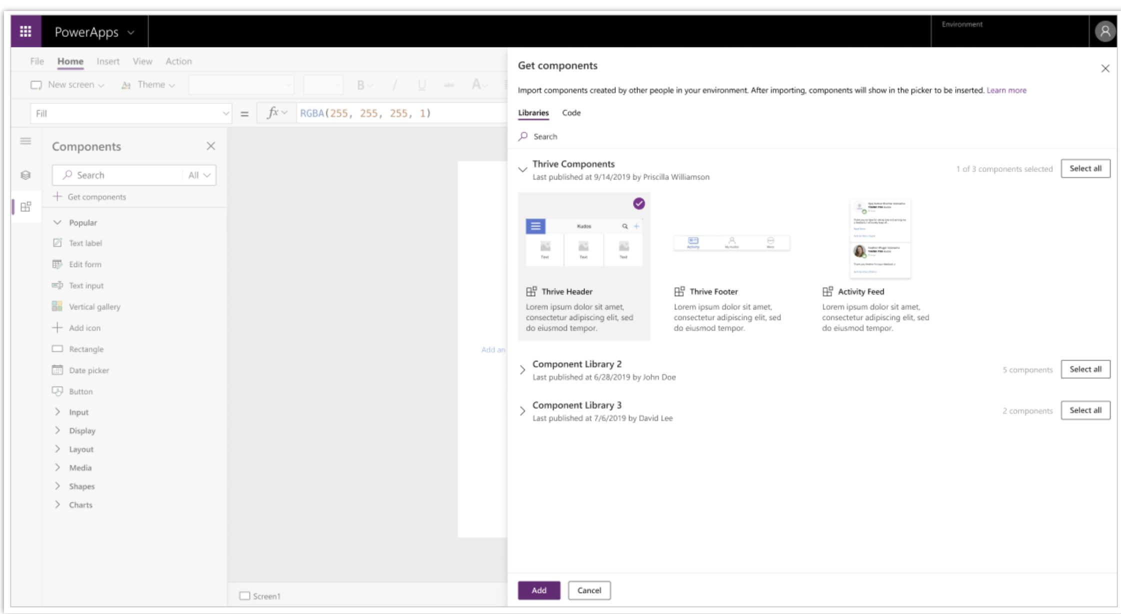
Canvas components are generally available

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	✔ Feb 26, 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

See also

[Canvas components are generally available](#) (blog)

Build apps on top of your existing data in SharePoint more easily

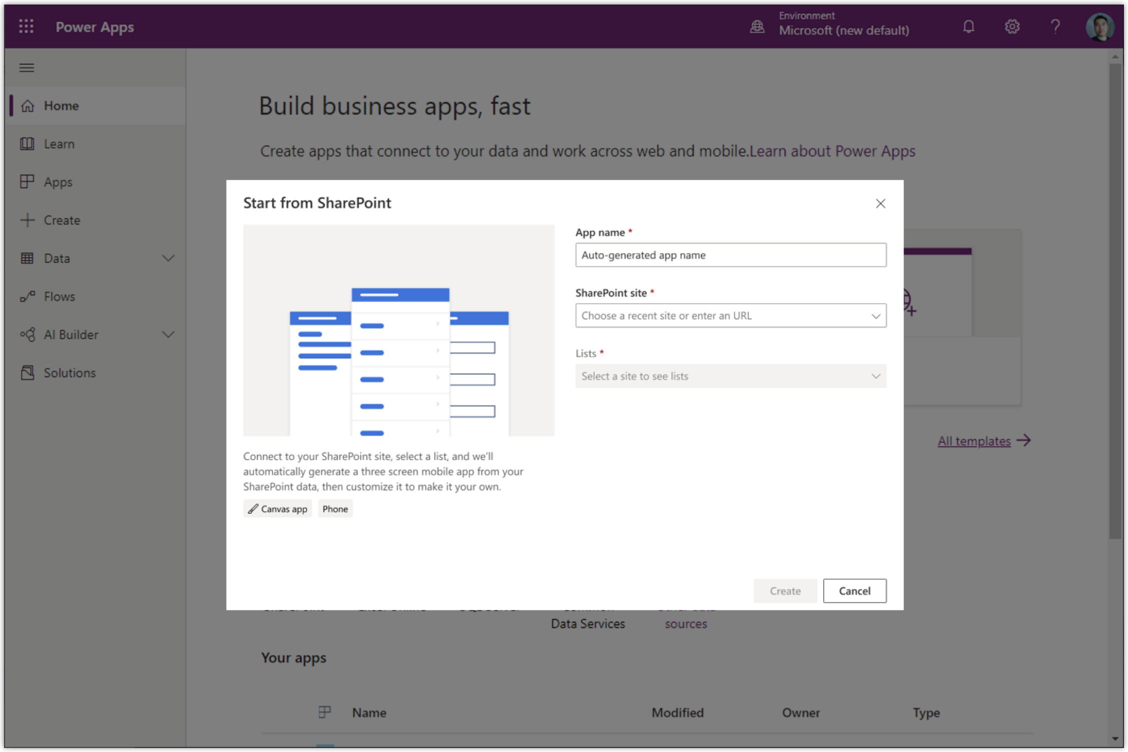
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	May 2020

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

Easily access and search for help while building apps

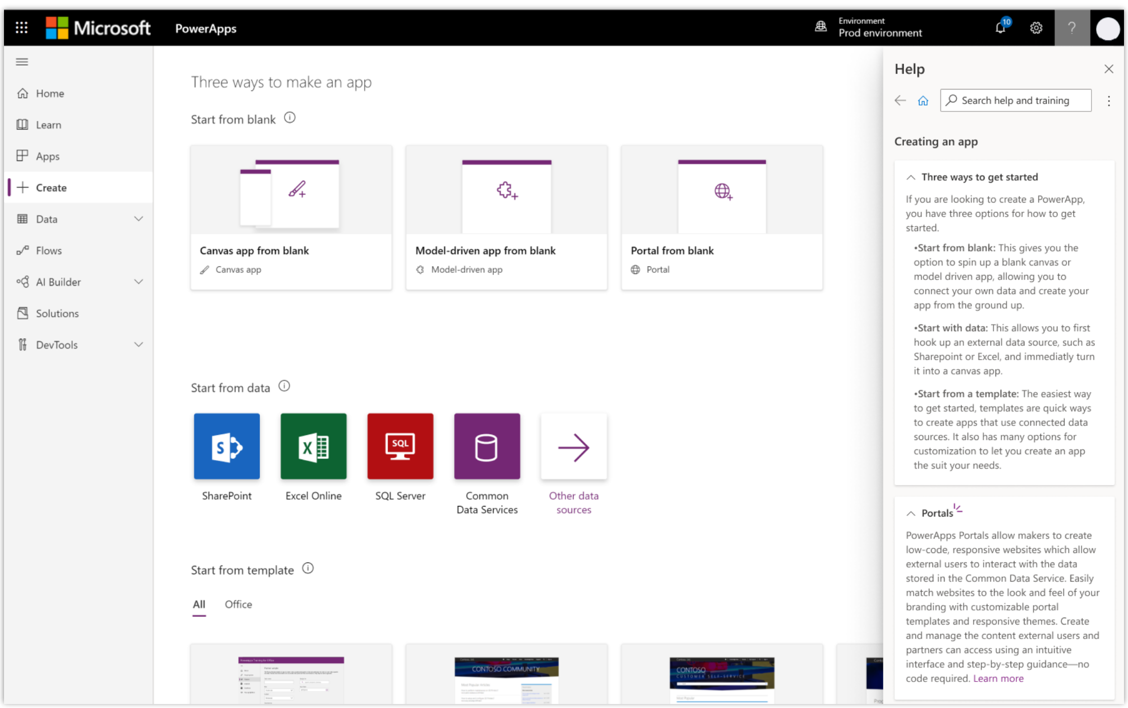
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	May 2020

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

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
Common expressions simplified	Admins, makers, or analysts, automatically	-	-	Apr 2020
Discover, learn, and create flows with seamless new experiences	Admins, makers, or analysts, automatically	-	-	Apr 2020
Power Automate and Microsoft Teams productivity enhancements	Admins, makers, or analysts, automatically	-	-	Apr 2020
Azure integration with Power Automate	Admins, makers, or analysts, automatically	-	-	Apr 2020
Building AI-infused workflows	Admins, makers, or analysts, automatically	-	-	Jul 2020
Certified datasets in Power Automate	Admins, makers, or analysts, automatically	-	-	Jul 2020
Copy and paste in Power Automate is generally available	Admins, makers, or analysts, automatically	-	-	Jul 2020
Interactive adaptive cards	Admins, makers, or analysts, automatically	-	-	Sep 2020
Power Automate is more accessible	Admins, makers, or analysts, automatically	-	-	Sep 2020

UI automation for applications and websites

Automate repetitive tasks across services and applications using UI flows in Power Automate

Feature	Enabled for	Public preview	Early access*	General availability
Run UI automation scripts on virtual machines	Admins, makers, or analysts, automatically	Apr 2020	-	-
Native support for commonly used applications	Admins, makers, or analysts, automatically	Sep 2020	-	-
Advanced error handling for UI flows	Admins, makers, or analysts, automatically	-	-	Jun 2020
Solutioning support for UI flows	Admins, makers, or analysts, automatically	-	-	Jun 2020
Automate web-based applications	Admins, makers, or analysts, automatically	✔ Nov 4, 2019	-	Jun 2020
Automate Windows applications	Admins, makers, or analysts, automatically	✔ Nov 4, 2019	-	Jun 2020
IME support for UI flows	Admins, makers, or analysts, automatically	Mar 2020	-	Jun 2020
Retry for desktop UI flows	Admins, makers, or analysts, automatically	Mar 2020	-	Jun 2020
Unattended automation in UI flows	Admins, makers, or analysts, automatically	Mar 2020	-	Jun 2020
Secrets management	Admins, makers, or analysts, automatically	-	-	Sep 2020
Advanced editor capabilities	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
Contextual automations in Power BI	Admins, makers, or analysts, automatically	-	-	Apr 2020
Cohesive Microsoft Teams file experiences	Admins, makers, or analysts, automatically	-	-	Jul 2020
Use business process flows in Office 365 apps	Admins, makers, or analysts, automatically	-	-	Jul 2020
Flow steps in business process flows are now generally available	Admins, makers, or analysts, automatically	✔ Jun 7, 2019	-	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

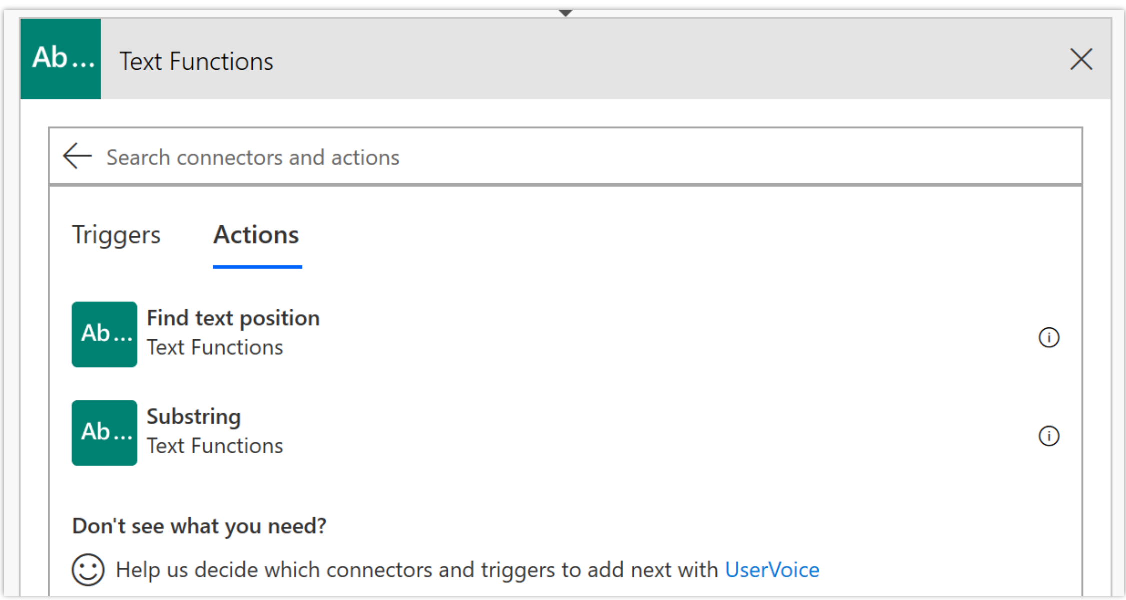
The citizen developers of Power Platform now have richer capabilities when they are building out business processes inside of Power Automate.

Common expressions simplified

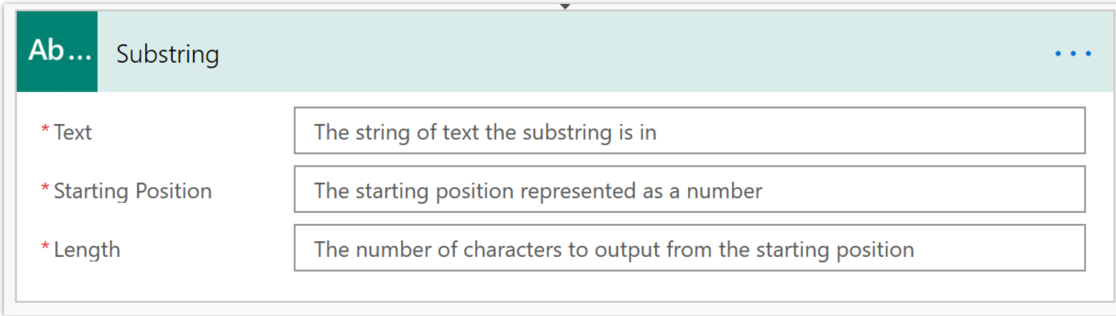
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Apr 2020

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

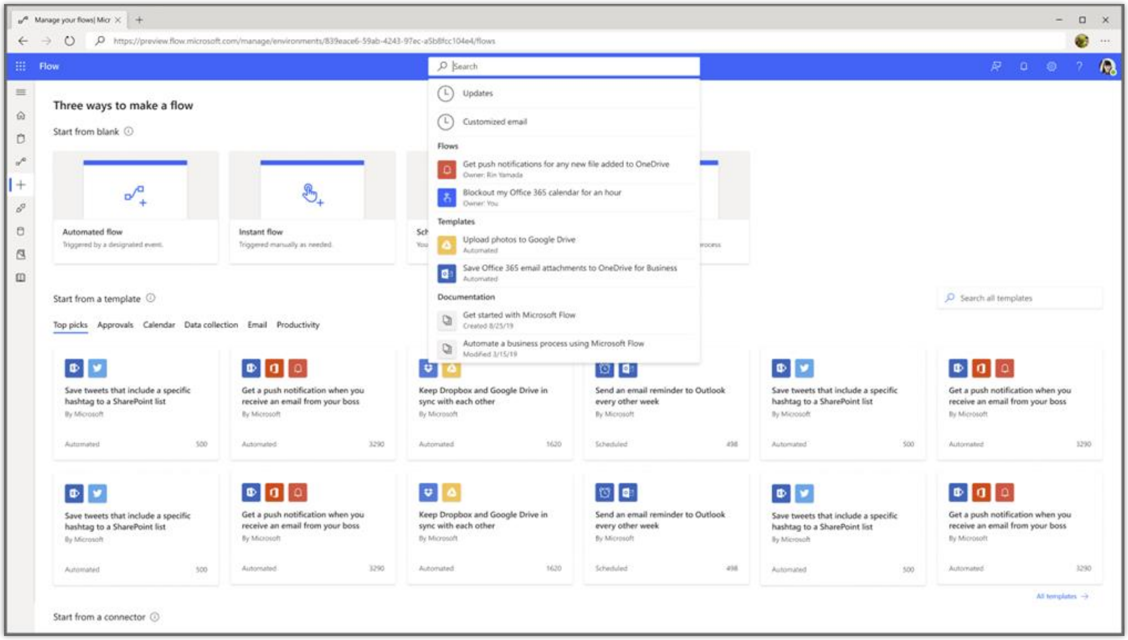
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Apr 2020

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
Admins, makers, or analysts, automatically	-	-	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.

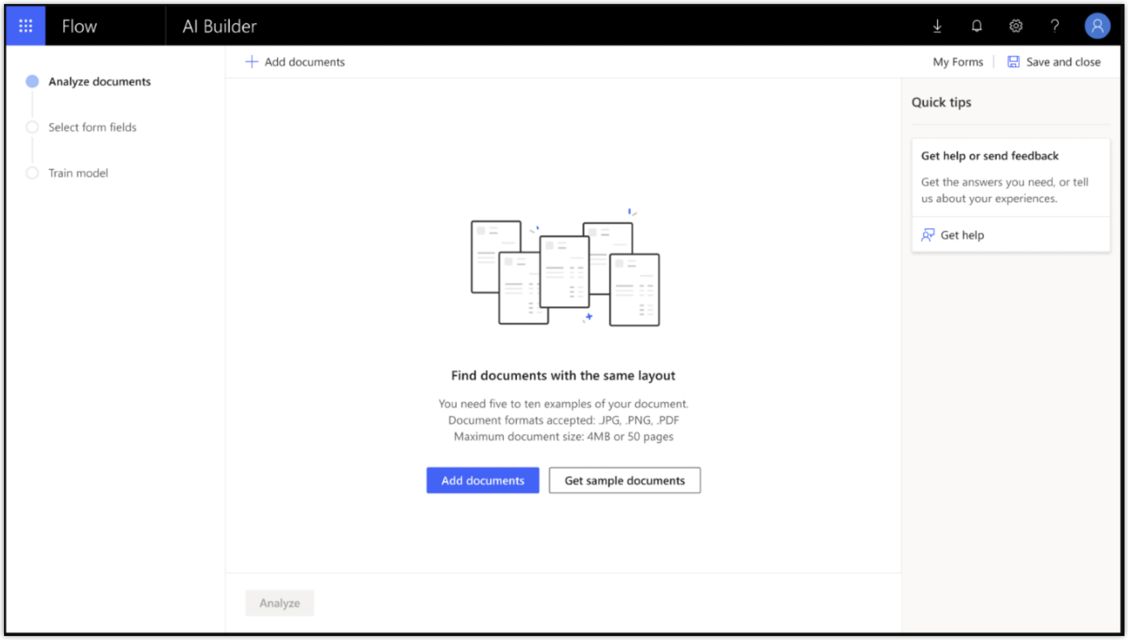
We also added templates to support common enterprise scenarios. For example, one of these templates gives the ability for someone to receive a notification when their costs increase by 10% day over day.

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

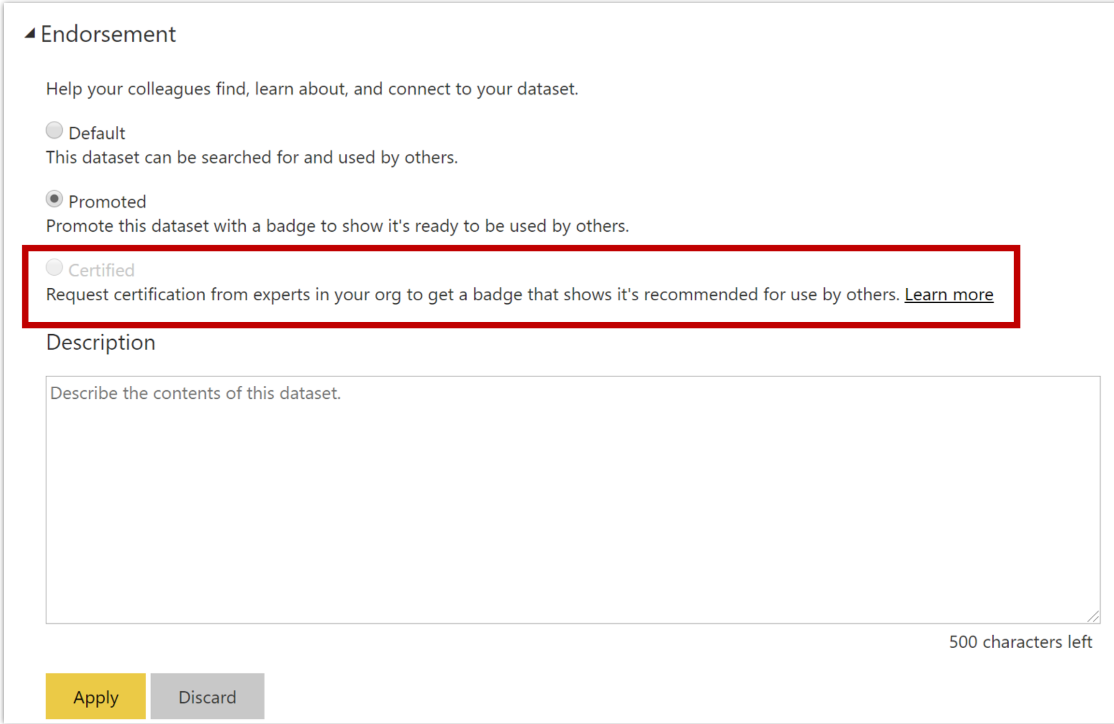
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Jul 2020

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.



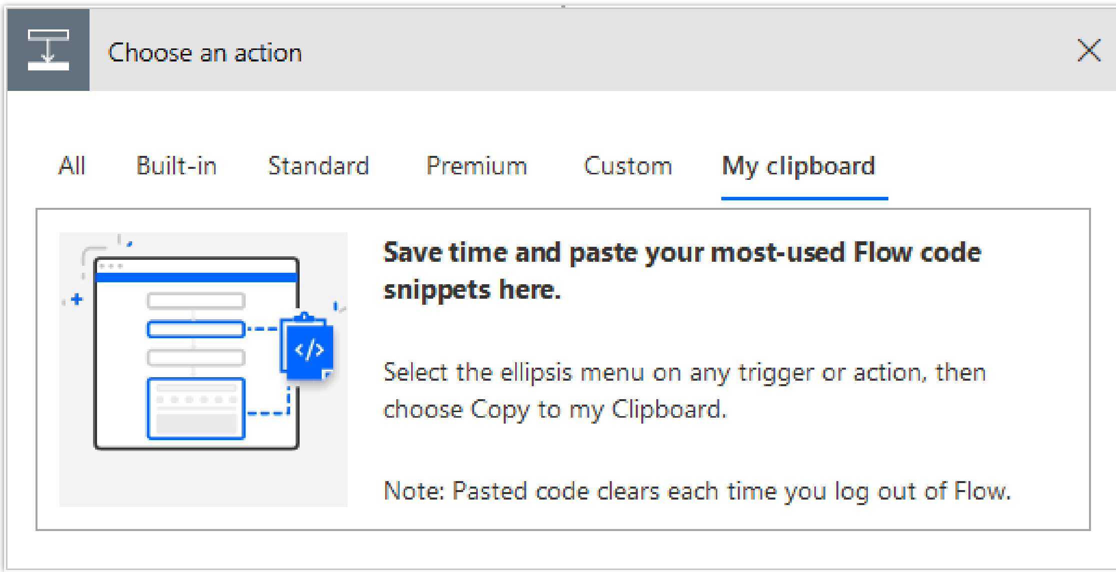
Certified datasets

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.

Run UI automation scripts on virtual machines

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Apr 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.

Native support for commonly used applications

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

Feature details

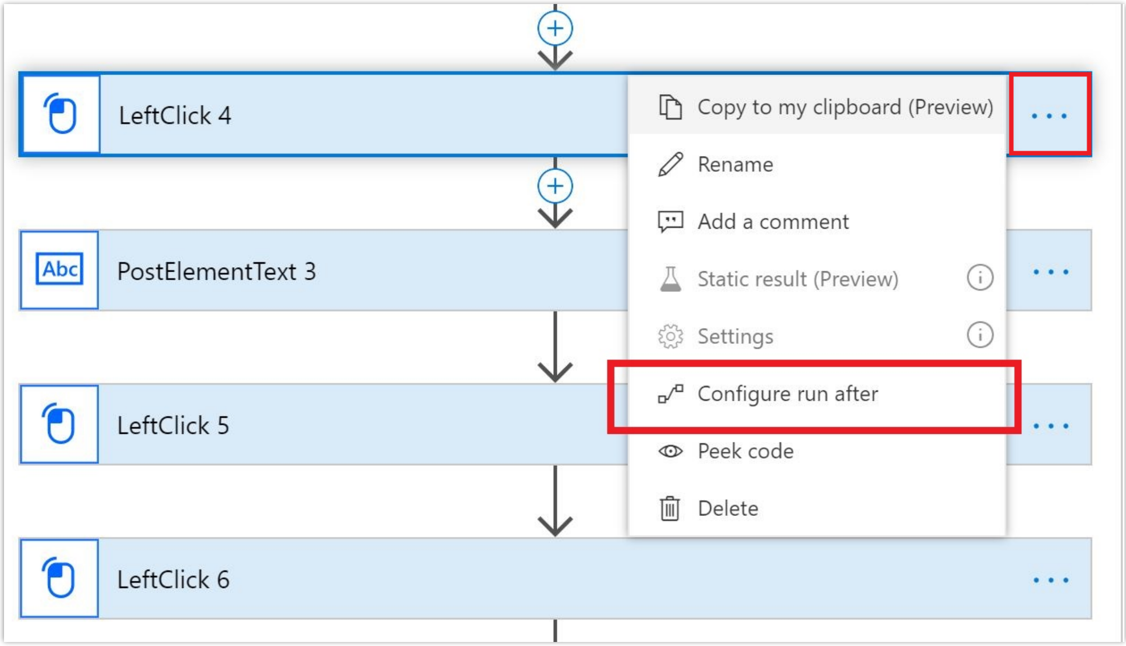
We are adding built-in automation support for some Windows applications. This feature enables users to use libraries for commonly used applications in frequently used scenarios, making automation faster and more robust.

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

Solutioning support for UI flows

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	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.

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

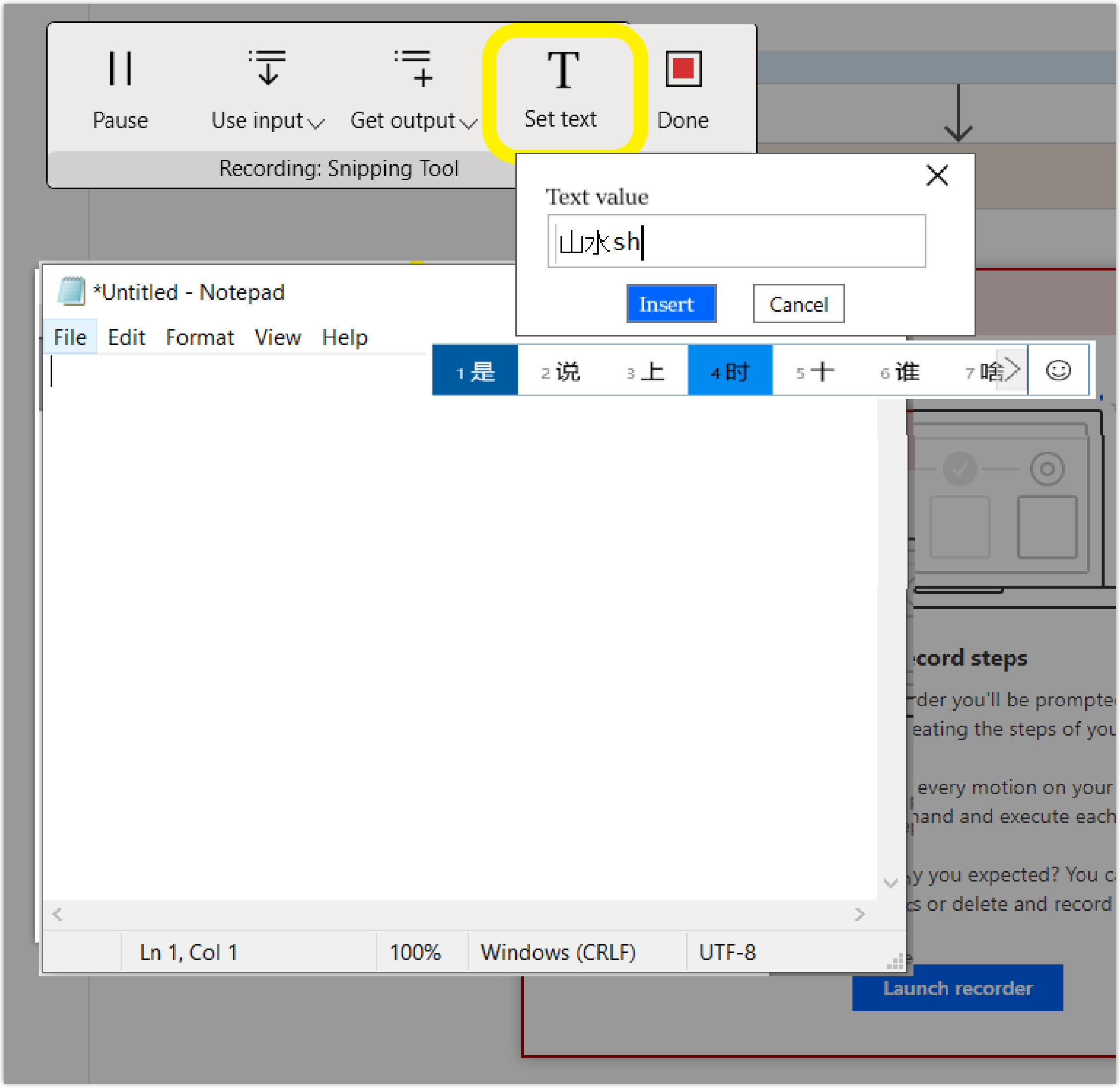
Create and test desktop UI flows (docs)

IME support for UI flows

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, 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
Admins, makers, or analysts, automatically	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.

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

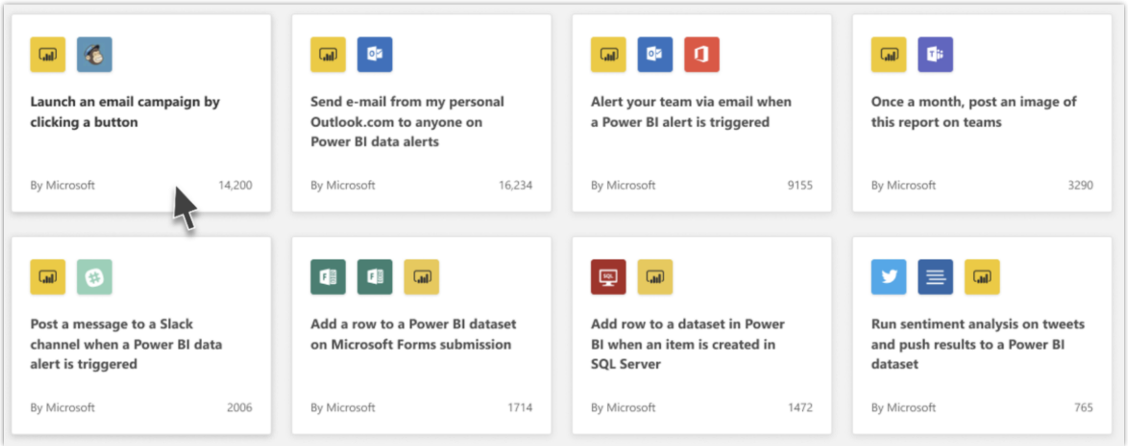
Business value

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

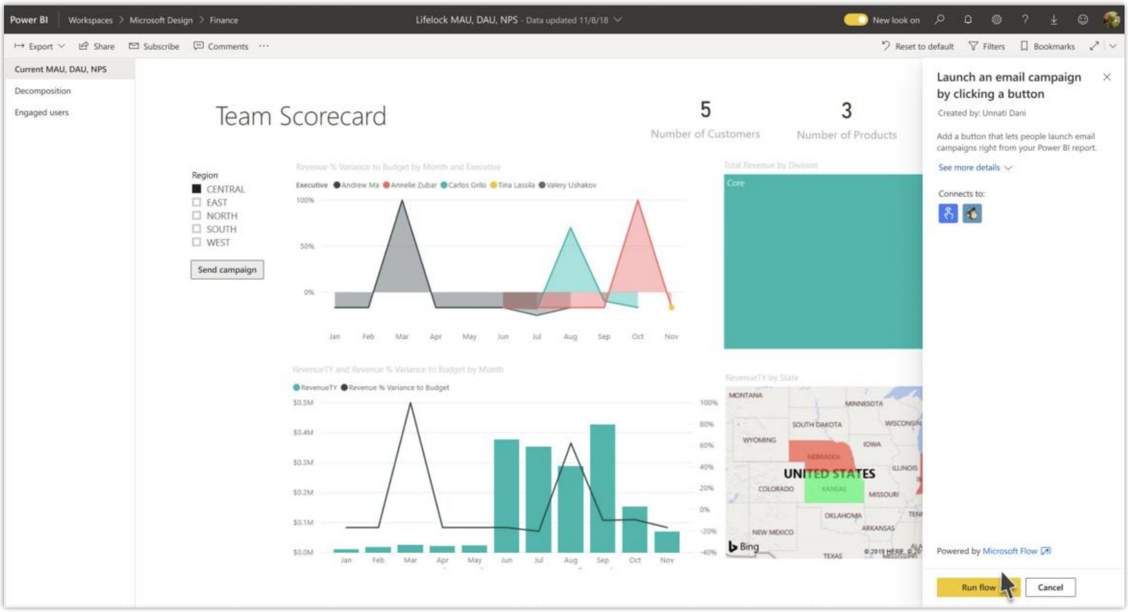
Power Automate is progressively extending its integrations with Power BI scenarios, which will enable users to discover and to quickly adopt workflow and automation services for business-relevant datasets, reports, and dashboards.

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

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.

Flow steps in business process flows are now generally available

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	✔ Jun 7, 2019	-	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!

See also

Power Automate (blog)

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 business needs.

Feature	Enabled for	Public preview	General availability
Addition of a new data location Canada	End users by admins, makers, or analysts	-	Apr 2020
Create and manage Power Virtual Agents directly from Power Apps	Admins, makers, or analysts, automatically	-	Apr 2020
Customizable bot behavior when no topic is triggered	Admins, makers, or analysts, automatically	-	Apr 2020
Single Sign-On	Admins, makers, or analysts, automatically	-	Jun 2020
Add a Power Virtual Agents bot into Power Apps canvas app	Admins, makers, or analysts, automatically	-	Aug 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
Export and import bots using solutions	Admins, makers, or analysts, automatically	Apr 2020	-
Improved Power Automate flow integration in Power Virtual Agents	Admins, makers, or analysts, automatically	-	Apr 2020
Pass context to a bot from the calling site	Admins, makers, or analysts, automatically	-	Apr 2020
Use global variables across topics within a bot	Admins, makers, or analysts, automatically	-	Apr 2020

Feature	Enabled for	Public preview	General availability
[Multiple users can edit topics at the same time within a bot]()	Admins, makers, or analysts, automatically	May 2020	Jun 2020
[Add images and videos to topics]()	Admins, makers, or analysts, automatically	-	Jul 2020
[Support for additional languages]()	Admins, makers, or analysts, automatically	May 2020	Jul 2020

Enable voice interactions

Feature	Enabled for	Public preview	General availability
[Connect bots to voice and phone call interactions]()	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 Microsoft Teams and Facebook channels, and direct embedding a bot in web-based mobile apps.

Addition of a new data location: Canada

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

Feature details

Many enterprise organizations need to store their data in a specific geographic location. With this release, we are expanding the list of data locations to include an eighth location: Canada. Organizations will be able to store data for their bots in a Canadian-specific data location.

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)

Add a Power Virtual Agents bot into Power Apps canvas app

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Aug 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.

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.

Export and import bots using solutions

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

Feature details

Enterprise organizations set up different environments (for example, for testing or production) for their bots to manage change control, governance, data residency, and latency requirements.

With the ability to export or import bots using solutions, admins will be able to move their bots across multiple environments.

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)

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.

Multiple users can edit topics at the same time within a bot

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

Add images and videos to topics

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Jul 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.

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.

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
Environment lifecycle supports Power Apps, Power Automate, Common Data Service, and more	Admins, makers, or analysts, automatically	Apr 2020	
Provisioning new environments will only be handled in the Power Platform admin center	Admins, makers, or analysts, automatically	Apr 2020	
Storage reporting will be based on customer licenses and capacity add-ons	Admins, makers, or analysts, automatically	Apr 2020	
User access diagnostic experience	Admins, makers, or analysts, automatically	Apr 2020	
Certain admin operations unavailable when tenant exceeds storage capacity entitlements	Admins, makers, or analysts, automatically	Jun 2020	
Retry experience for early access opt-in updates	Admins, makers, or analysts, automatically	✔ Feb 3, 2020	Apr 2020
Early access updates	End users, automatically	✔ Feb 3, 2020	Apr 2020
Unified service health experience in Power Platform admin center	Admins, makers, or analysts, automatically	-	Sep 2020
Service health in the Power Platform admin center	Admins, makers, or analysts, automatically	Sep 2020	To be announced

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
Admin connectors for Power Automate are generally available	Admins, makers, or analysts, automatically	-	Jul 2020
PowerShell cmdlets for Power Automate admins are generally available	Admins, makers, or analysts, automatically	-	Jul 2020
PowerShell cmdlets for Power Apps admins are generally available	Admins, makers, or analysts, automatically	✓ May 21, 2018	Jul 2020
Admin connectors for Power Apps	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.

Provisioning new environments will only be handled in the Power Platform admin center

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

Feature details

Today, there are two different entry points for provisioning new environments: **Dynamics 365 admin center** and **Power Platform admin center**. This has caused some confusion, and we are working diligently to move to a single provisioning experience in the Power Platform admin center.

In the coming months, all customers can provision environments from Power Platform admin center. An available database capacity of 1GB is a pre-requisite for being able to provision an environment.

Storage reporting will be based on customer licenses and capacity add-ons

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

Feature details

In April 2019, we introduced Common Data Service capacity storage that is optimized for relational data, attachments, and audit logs. New Dynamics 365 Customer Engagement and Power Apps customers receive a tenant wide default entitlement for each of these three storage types and additional per user subscription license entitlements. Additional storage can be purchased in 1GB increments, if needed. Existing customers are not impacted by this change until the end of their current Power Apps or Dynamics 365 subscription, when renewal is required. This means that two licensing models will be in market.

Following the introduction of Common Data Service capacity, we updated our capacity reporting to show database, log, and file entitlement for all our customers. This change in reporting has caused some confusion to customers who are still on the previous licensing model. We are now addressing this.

If you are a customer who is still on the previous licensing model for storage, you will see one single capacity for entitlement. If you are a customer who transitioned to the licensing model introduced on April 1, 2019, you will see your storage capacity entitlement and usage by database, log, and file as it appears in the Power Platform admin center today.

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.

Certain admin operations unavailable when tenant exceeds storage capacity entitlements

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

Feature details

When an organization's storage capacity usage is greater than the capacity entitled or purchased via add-ons, the following admin operations will be blocked:

- Create new environment (requires minimum 1 GB capacity available)
- Copy an environment
- Restore an environment

To be compliant with storage usage requirements, you can always clean up storage, delete unwanted environments, or buy more capacity. To learn more about capacity add-ons, see the **Add-ons** section in the Dynamics 365 Licensing Guide or the Power Apps and Power Automate Licensing Guide. You can work through your organization's standard procurement process to purchase capacity add-ons.

Retry experience for early access opt-in updates

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✔ Feb 3, 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.

See also

Updates status and Retry (docs)

Early access updates

Enabled for	Public preview	General availability
End users, automatically	✔ Feb 3, 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.

See also

Opt in to early access updates (docs)

Unified service health experience in Power Platform admin center

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

Service health in the Power Platform admin center

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Sep 2020	To be announced

Business value

Enabling the Power Platform administrators to stay on top of the service status and information to help support their users.

Feature details

The Power Platform admin center now provides a dedicated page for administrators to assess the health of the products and services that are available to them. In the event an incident occurs, administrators will be able to see a detailed description and updates on how the incident is being mitigated by Microsoft. Any modification to an incident will, by default, trigger a notification to the Power Platform administrators. Administrators could further configure the notification experience by subscribing to incidents and directing communications to their preferred destination.

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.

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 Automate admins are generally available

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

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
New Common Data Model entity definitions for analytics	Admins, makers, or analysts, automatically	-	Sep 2020
New Common Data Model standard entity definitions	Admins, makers, or analysts, automatically	-	Sep 2020
Enhanced Common Data Model SDK functionality	Admins, makers, or analysts, automatically	Jun 2020	Sep 2020
Empower out-of-the-box analytics	Admins, makers, or analysts, automatically	Jun 2020	To be announced
Common Data Model visualization experience	Admins, makers, or analysts, automatically	Jul 2020	To be announced

Dual-write

Dual-write provides a tightly coupled near-real time and bi-directional integration between the Finance and Operations apps and Common Data Service.

Feature	Enabled for	Public preview	General availability
Ability to add a company after linking your environment with pre-existing data	Admins, makers, or analysts, automatically	Jun 2020	
Ability to bulk handle entity maps across environments	Admins, makers, or analysts, automatically	Jun 2020	
Confidently create solutions based on performance guidance	Admins, makers, or analysts, automatically	Jun 2020	

Feature	Enabled for	Public preview	General availability
Removal of tenant admin-level consent requirement	Admins, makers, or analysts, automatically	Jun 2020	
Resiliency across planned and unplanned maintenance without admin intervention	Admins, makers, or analysts, automatically	Jun 2020	
Automated data movement operations between connected environments	Admins, makers, or analysts, automatically	-	Sep 2020
Conflict resolution review	Admins, makers, or analysts, automatically	-	Sep 2020
Dual-write support for Microsoft Government Cloud	Admins, makers, or analysts, automatically	-	Sep 2020
One-click to unlink dual-write environment	Admins, makers, or analysts, automatically	-	Sep 2020
Support copying pre-existing data for existing environments provisioned via the initial sync	Admins, makers, or analysts, automatically	-	Sep 2020

Export to data lake

The Export to data lake service enables continuous replication of Common Data Service entity data to Azure Data Lake gen 2 which can then be used to run analytics, such as Power BI reporting and ML.

Feature	Enabled for	Public preview	General availability
Export to data lake supported in additional regions	Admins, makers, or analysts, automatically	-	Sep 2020

Feature	Enabled for	Public preview	General availability
Support for entities with attachments	Admins, makers, or analysts, automatically	-	Sep 2020
Time series data	Admins, makers, or analysts, automatically	-	Sep 2020

Power Platform connectors

A critical part of data integration and the suite of products it supports—Power Apps and Power Automate—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
Better enterprise connectivity to SQL Server with support for Windows authentication	Admins, makers, or analysts, automatically	Sep 2020	
Improvements in the Marketo connector	Admins, makers, or analysts, automatically	Sep 2020	
Improvements in the Planner connector	Admins, makers, or analysts, automatically	Sep 2020	
Multi-region support for Azure services	Admins, makers, or analysts, automatically	Sep 2020	
Office 365 Groups Mail connector for Power Apps and Power Automate	Admins, makers, or analysts, automatically	Sep 2020	
Telemetry for certified connectors	Admins, makers, or analysts, automatically	Sep 2020	-

Feature	Enabled for	Public preview	General availability
Give feedback directly from the documentation pages	Admins, makers, or analysts, automatically	-	Apr 2020
Provide documentation guidance for next steps when connectors and operators are deprecated	Admins, makers, or analysts, automatically	-	Apr 2020
FAQs for the certification process	Admins, makers, or analysts, automatically	-	Jun 2020
SAP ERP connector for Power Apps and Power Automate	Admins, makers, or analysts, automatically	-	Jun 2020
Submit documentation during the certification process	Admins, makers, or analysts, automatically	-	Jun 2020
Support for multiple account owners in the connector certification portal	Admins, makers, or analysts, automatically	-	Jun 2020
Improved certification experience for open sourced connectors	Admins, makers, or analysts, automatically	-	Sep 2020
Improved connector metadata within connectors documentation	End users, automatically	-	Sep 2020
Improved experience downloading connector artifacts	Admins, makers, or analysts, automatically	-	Sep 2020
Improved landing page experience for connectors	Admins, makers, or analysts, automatically	-	Sep 2020
Improved partner story and experience in our connector certification program	Admins, makers, or analysts, automatically	-	Sep 2020

Feature	Enabled for	Public preview	General availability
Informative and consistent experience verifying the quality of connector artifacts	Admins, makers, or analysts, automatically	-	Sep 2020
More certified and custom connectors in our open source repository	Admins, makers, or analysts, automatically	-	Sep 2020
Stronger documentation, tutorials, and guidelines for contributors to the open source repository	Admins, makers, or analysts, automatically	-	Sep 2020
Stronger integration of the open source repository with custom connectors	Admins, makers, or analysts, automatically	-	Sep 2020
Summary page with connectors and their metadata	Admins, makers, or analysts, automatically	-	Sep 2020
Support for connection parameters when building custom connectors	Admins, makers, or analysts, automatically	-	Sep 2020
Support for multi-auth when building custom connectors	Admins, makers, or analysts, automatically	-	Sep 2020
Support for ordering operation parameters when building connectors	Admins, makers, or analysts, automatically	-	Sep 2020
Support for testing OAuth connections in the custom connector building experience	Admins, makers, or analysts, automatically	Jun 2020	Sep 2020
Support for smart polling triggers	Admins, makers, or analysts, automatically	Jul 2020	Sep 2020

Power Platform dataflows

Power Platform dataflows provide a no-code experience based on Power Query Online for non-technical users to connect, transform, and enrich data from a wide variety of data sources into the Common Data Service and Azure Data Lake storage in CDM format.

Feature	Enabled for	Public preview	General availability
Generate a new dataflow from Power Query queries in an existing Excel or Power BI Desktop file	Admins, makers, or analysts, automatically	Sep 2020	
Onetime upload file support for file connectors	Admins, makers, or analysts, automatically	Sep 2020	
Support for mapping to Common Data Service option sets	Admins, makers, or analysts, automatically	Sep 2020	
Support for mapping to system fields within Common Data Service entities	Admins, makers, or analysts, automatically	Sep 2020	
Dataflow scheduling enhancements	Admins, makers, or analysts, automatically	-	Sep 2020
Dataflows actions and triggers for Power Automate	Admins, makers, or analysts, automatically	-	Sep 2020
Improved dataflow load performance and reliability	Admins, makers, or analysts, automatically	-	Sep 2020

Power Platform gateway

Feature	Enabled for	Public preview	General availability
Data source management enhancements	Admins, makers, or analysts, automatically	-	Sep 2020

Power Query Desktop

Feature	Enabled for	Public preview	General availability
New modern ribbon in Power Query Editor	Admins, makers, or analysts, automatically	Sep 2020	
SharePoint Online List connector	End users, automatically	Sep 2020	
Smart data extraction from text and CSV files in Power Query Desktop	Admins, makers, or analysts, automatically	Sep 2020	-
Hive LLAP	End users, automatically	✔ Mar 9, 2020	Sep 2020

Power Query Online

Feature	Enabled for	Public preview	General availability
Add column from examples	Admins, makers, or analysts, automatically	Sep 2020	
Copy and paste queries from Power Query Desktop into Power Query Online	Admins, makers, or analysts, automatically	Sep 2020	
Power Query Online Query Editor: Schema-only view	End users by admins, makers, or analysts	Sep 2020	
Smart data extraction from text and CSV files	Admins, makers, or analysts, automatically	Sep 2020	-
Smart data extraction from web pages using Web by example	Admins, makers, or analysts, automatically	Sep 2020	-
Active Directory connector	End users, automatically	-	Sep 2020

Feature	Enabled for	Public preview	General availability
[Azure China region support]()	End users, automatically	-	Sep 2020
[Essbase connector]()	End users, automatically	-	Sep 2020
[Exchange Online connector]()	End users, automatically	-	Sep 2020
[Hadoop File and Azure HDInsight connectors]()	End users, automatically	-	Sep 2020
[Hive LLAP connector]()	End users, automatically	-	Sep 2020
[IBM Netezza connector]()	End users, automatically	-	Sep 2020
[Power Query connector improvements]()	End users, automatically	-	Sep 2020
[Query diagnostics improvements]()	Admins, makers, or analysts, automatically	-	Sep 2020
[Snowflake connector]()	End users, automatically	-	Sep 2020
[Support for beta tags for connectors]()	End users, automatically	-	Sep 2020
[Sybase connector]()	End users, automatically	-	Sep 2020
[View native query for supported connectors]()	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.

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 for analytics

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 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 visualize 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.

Dual-write

Overview

Customers use and monitor their sales processes with Common Data Service while all aspects of fulfillment and invoicing use the rich functionality of Finance and Operations apps.

Dual-write allows our customers to think about these applications as a system to which they can write simultaneously. It provides a tightly coupled near real time and bi-directional integration between the Finance and Operations apps and Common Data Service. Once an entity map, for example Account – Customer, is enabled for dual-write, any create, update change in the Customer entity in Finance and Operations apps results in writes, in near-real time, to the Account entity in Common Data Service and vice versa.

Ability to add a company after linking your environment with pre-existing data

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

Feature details

The company or legal entity list doesn’t remain static and is constantly changing. There may be a need to add new companies especially during a phased rollout or acquisitions. Up until now, you were unable to add a company or legal entity without system down-time where you have to unlink and relink your environment, which can be expensive, especially due to pre-existing data. With this feature, you will be able to add a company in a live environment without the need for unlinking.

Ability to bulk handle entity maps across environments

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

Feature details

Currently, you have the ability to move dual-write artifacts, such as entity maps across environments. With this feature, you'll be able to bulk enable these entity maps so that you can replicate the state of entity maps with little effort.

Confidently create solutions based on performance guidance

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

Feature details

Dual-write developers can confidently create solutions based on performance guidance, and they can be assured of optimized performance for dual-write entity maps (e.g., being able to predict the flow of Project actuals data between Project Operations and Finance and Operations apps under different transaction loads).

Removal of tenant admin-level consent requirement

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

Feature details

In order for the Common Data Service and the Finance and Operations apps to communicate, a tenant admin needed to explicitly give consent to the applications. This is not always practical (e.g., the persona provisioning Project Operations will require additional approval and involve more staff which can be time consuming). With this feature, we will remove this prerequisite and the need for explicitly giving consent to the applications.

Resiliency across planned and unplanned maintenance without admin intervention

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

Feature details

Dual-write provides out-of-the-box knobs for admins to make their environment resilient to planned or unplanned maintenance; however, this also means that an admin is required for most of these operations, which may not be practical or feasible in all scenarios. With this feature, agents working on dual-write enabled apps, such as Project Operations, are assured that it will be resilient across maintenance and can seamlessly conduct their day-to-day activities like uploading bulk data without the need for an admin.

Automated data movement operations between connected environments

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

Feature details

Our customers need to create daily copies of their dual-write enabled production environment to a sandbox. While doing this, they also want to minimize downtime related to manually connecting the dual-write enabled sandbox environments. With this feature, you will be able to automate these operations without the need to manually link the environments.

Conflict resolution review

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

Feature details

When conflicts occur while copying pre-existing data between Finance and Operations apps and Common Data Service applications, administrators will now have an intuitive user interface that lets them easily review and resolve these conflicts.

Dual-write support for Microsoft Government Cloud

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

Feature details

We are making investments in dual-write compliance to support Microsoft Government Cloud (GCC - Level 2).

One-click to unlink dual-write environment

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

Feature details

Our customers are regularly testing dual-write in their sandbox or test environments and need to quickly unlink their environments and start again. Previously, customers had to disable all entity maps before unlinking an environment. This may seem cumbersome and sometimes not possible as one of the environments may not be available. This new feature provides a quick way to unlink your environments.

Support copying pre-existing data for existing environments provisioned via lifecycle services

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

Feature details

With this feature, we will support copying pre-existing data while linking existing Finance and Operations apps that are provisioned via lifecycle services (LCS) with a new Common Data Service environment.

Export to data lake

Overview

The **Export to data lake** service enables continuous replication of Common Data Service entity data to Azure Data Lake gen 2, which can then be used to run analytics, such as Power BI reporting, ML, data warehousing, or other downstream integration purposes. It simplifies the technical and administrative complexity of operationalizing entities for analytics and managing schema and data. Within a matter of minutes, you will be able to link a Common Data Service environment to a data lake in your Azure subscription, select standard or custom entities, and export it to data lake. Any data or metadata changes (initial and incremental) in the Common Data Service is automatically pushed to the lake without any additional actions.

This service also empowers our first party AI apps (Customer Insights, Sales Insights, CCA, and AI Builder, etc.) by continuously pushing Common Data Service data to the Azure Data Lake gen 2.

In this release, we are making additional investments to increase Enterprise adoption.

Export to data lake supported in additional regions

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

Feature details

With this release, **Export to data lake** is now available in France and the UAE regions.

Support for entities with attachments

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

Feature details

This feature supports entities with attachments. For example, we support the **Annotation** entity with *documentbody*, which can be used to attach notes, and the data from notes can be used for analytics.

Time series data

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

Feature details

With this feature, you can get historical data for a given entity. You will get the full history of changes for entity records. This feature enables several AI scenarios that require a lifetime view of the data.

Power Platform connectors

Overview

A critical part of data integration and the suite of products it supports—Power Apps and Power Automate—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.

Improvements in the Marketo connector

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

Feature details

Marketo is a marketing automation platform that enables marketers to manage personalized multi-channel programs and campaigns to prospects and customers. This connector provides users the ability to read and query data from Marketo.

With this release, the connector now supports writing data to Marketo. Users can now create, modify, or delete records.

Improvements in the Planner connector

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

Feature details

With Microsoft Planner, users can easily bring together teams, tasks, documents, and conversations for better results. The Planner connector enables makers and users to automate important processes. In this release, users can now do much more with the Planner connector. This includes support for adding, removing, or updating checklists in a task.

Multi-region support for Azure services

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

Feature details

Azure services are provided in many sovereign regions and in various commercial data centers. Previously, Power Platform users could only connect to either one of the commercial Azure offerings or one of the sovereign regions. This mapping is based on the data center region for their Power Platform environment.

With this release, users can now select whether they want to connect to commercial Azure services or to sovereign regions. This will allow customers like local city offices on a sovereign Power Platform environment to use commercial Azure services.

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.

Telemetry 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 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 to owners through the connector certification portal.

Give feedback directly from the documentation pages

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

Provide documentation 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.

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.

In this release, the connector is enhanced to support production workload (GA) and will also provide additional functionality to connect to SAP ERP using ODATA services.

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.

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.

Improved certification experience for open sourced connectors

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

Feature details

Per feedback from partners looking for an improved certification experience after open sourcing, we are allowing partners to designate an open sourced connector they own to be certified from the certification portal experience. The portal will retrieve the files from the open source repository so the partner does not have to provide and upload a local copy.

Improved connector metadata within connectors documentation

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

Feature details

We will be expanding our connectors documentation to support our users. We will add more public metadata, such as Publisher, service owner, support contact, and links to end service privacy policy documentation.

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.

Improved partner story and experience in our connector certification program

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

Feature details

A more structured program for partners looking to certify a connector with us. We will be offering clearer partner benefits and a more structured story through the certification and beyond.

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.

More certified and custom connectors in our open source repository

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

Feature details

We will create and set up more connectors in our open source repository for developers to use, build on top of, and contribute to. The specific connectors to be added will be determined by high priority requests from our community and other stakeholders.

Stronger documentation, tutorials, and guidelines for contributors to the open source repository

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

Feature details

We are adding more README.md files, process documentation, and tutorials to assist contributors to the open source repository for connectors so that they can better understand the process of deploying and contributing to connectors.

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 when building connectors

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 for connector builders to set and enforce the order in which operation parameters appear to the user when using a connector. This new feature will give a more consistent and reliable user experience.

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.

Support for smart polling triggers

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Jul 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. This feature will enable custom connector developers to start with a polling trigger but provide the ability to include webhook functionality to optimize the polling frequency.

Power Platform dataflows

Overview

Power Platform dataflows provide a no-code experience based on Power Query Online for non-technical users to connect, transform and enrich data from a wide variety of data sources into the Common Data Service and Azure Data Lake storage in CDM format.

Dataflows provide the building blocks that allow Microsoft to enable out-of-box analytics and AI insights to its users, such as the analytic and insights provided by AI Builder or Dynamics 365 Customer Insights, making them a huge differentiator for the company's Dynamics 365 offerings.

Generate a new dataflow from Power Query queries in an existing Excel or Power BI Desktop file

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

Feature details

With Power Platform dataflows, you can easily convert Excel workbooks or Power BI Desktop files that contain Power Query queries into dataflows and keep your data updated in the cloud.

Once imported, they become a regular dataflows that you can continue to improve and refine your queries, schedule automatic refresh, and share the resulting data with people in your organization.

Onetime upload file support for file connectors

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

Feature details

With this feature, users creating dataflows can perform a onetime upload of a local file as the source for a dataflow, including support for Excel, Text/CSV, and other file types supported within Power Platform dataflows.

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.

Dataflow scheduling enhancements

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

Feature details

Power Platform dataflows allow any Power Platform customer to easily define ETL pipelines (dataflows) to ingest data into Common Data Service or their company's **Business data lake** (Azure Data Lake storage). Dataflows run in the cloud and are either manually triggered or can be scheduled to trigger automatically. With this set of enhancements, customers will be able to schedule dataflows to run either on a frequency, specific times, opt-in to receive email notifications in the event of run failures, and enjoy overall performance improvements in the experience to configure refresh settings and view run results.

Dataflows actions and triggers for Power Automate

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

Feature details

Power Automate creators will now be able to author flows using dataflows actions and triggers. For example, when a business critical dataflow completes its scheduled run successfully, the flow can use dataflow actions to determine the run's status. It can then trigger an Azure Data Factory pipeline run that consumes data created in the organization's lake. If the dataflow fails, the flow can trigger a notification to alert the dataflow owner to take action.

Improved dataflow load performance and reliability

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

Feature details

Through telemetry and customer feedback on dataflow performance when loading data into Common Data Service, we have identified key improvements that can help customers who work with large volumes of data.

These improvements help in three key areas of ingestion:

1. **Velocity**: We've reduced the end-to-end dataflow run time.
2. **Size**: We've increased the size limits for ingestion.
3. **Reliability**: We respect Common Data Service throttling limits.

Power Platform gateway

Overview

The **On-premises data gateway** is a well-established product that is widely used by enterprises to access on-premises data sources and transfer petabytes of data weekly. Today, gateways are used with either one or a combination of services and applications, such as Power BI, Power Apps, Power Automate, Logic Apps, and others. Based on Enterprise requests, we plan to continue focusing on making on-premises data gateways an enterprise-grade product with features like enhancements to load balancing, monitoring, and integration with additional services in the current milestone.

Data source management enhancements

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

Feature details

We have been working on centralizing gateway management in the admin center. We will continue this effort by introducing data source management for Power BI to the admin center in 2020 release wave 1. This new feature will include management of both cloud and on-premises Power BI data sources, including features like status check, sort, search, and others.

Power Query Desktop

Overview

Power Query provides a no-code experience for non-technical users to seamlessly connect, transform, and combine data from hundreds of data sources. Power Query is natively integrated into several Microsoft offerings, both in the desktop experience and through a web-based experience built on Microsoft Azure.

New modern ribbon in Power Query Editor

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

Feature details

The ribbon control within the query editor in Power Query Desktop will be replaced with a modern ribbon control. This new control provides enhanced and more accessible ribbon capabilities as well as a modern look and feel.

SharePoint Online List connector

Enabled for	Public preview	General availability
End users, automatically	Sep 2020	-

Feature details

A new SharePoint Online List connector will be previewed in Power BI Desktop. Compared to the existing connector, this new connector will have improved performance around column expansions and table joins, improved paging, and a better user experience overall.

Smart data extraction from text and CSV files in Power Query Desktop

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

Feature details

Text/CSV by example will become available within Power Query Desktop. This feature allows users to extract data from semi-structured text and CSV files by providing sample output values based on file contents from which Power Query will infer the extraction rules. The overall user paradigm for this feature is similar to **Web by example**. You can read more about Web by example here.

Hive LLAP

Enabled for	Public preview	General availability
End users, automatically	✔ Mar 9, 2020	Sep 2020

Feature details

One of the new features being added is the ability to configure HTTPSource. You can read more about the beta connector here.

Power Query Online

Overview

Power Query provides a no-code experience for non-technical users to seamlessly connect, transform, and combine data from hundreds of data sources. Power Query is natively integrated into several Microsoft offerings, both in the desktop experience and through a web-based experience built on Microsoft Azure.

Add column from examples

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

Feature details

Add column from examples will become available in Power Query Online.

With **Add column from examples** in the Power Query Editor, you can add new columns to your data simply by providing one or more example values for the new columns. You can create the new column examples from a selection or provide input based on all existing columns in the table.

This feature is already available in Power Query Desktop. You can learn more about it in this documentation article.

Copy and paste queries from Power Query Desktop into Power Query Online

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

Feature details

Users will be able to right-click on items within the queries pane in Power Query Desktop and then paste those items into Power Query Online. This will take care of copying all selected queries as well as any other queries that are being referenced.

This feature is already available within Power Query Desktop and allows users to easily move their queries between Power BI Desktop and Excel Workbook. With these planned enhancements, users will also be able to seamlessly move their queries into Power Query Online projects, such as dataflows within Power Apps, Customer Insights, Power BI, and others.

Power Query Online Query Editor: Schema-only view

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

Feature details

A new **Schema-only view** will be introduced within the Power Query Online Query Editor. This view will allow customers to apply schema-only transformations (e.g., Remove/Rename/Reorder Columns, Change Column Data Types, and others) more efficiently when working against tables with a large number of columns.

Smart data extraction from text and CSV files

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

Feature details

Text/CSV by example will become available within Power Query Online. This feature allows users to extract data from semi-structured text and CSV files by providing sample output values based on file contents from which Power Query will infer the extraction rules. The overall user paradigm for this feature is similar to **Web by example**. You can read more about Web by example here.

Smart data extraction from web pages using Web by example

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

Feature details

Web by example will become available within Power Query Online. This feature allows users to extract data from semi-structured web pages by providing sample output values based on web page content from which Power Query infers the extraction rules. You can find more details about existing Power Query Desktop Web by example capabilities here.

Active Directory connector

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

Feature details

Currently available in Power BI Desktop, we will enable the Active Directory connector for Power Query Online to allow users to connect to Active Directory.

Azure China region support

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

Feature details

We will be bringing Power Query Online support to Azure China. This will enable products that incorporate Power Query Online (such as Power BI Dataflows, Power Apps Dataflows, or Customer Insights) to enable dataflow capabilities in Azure China as part of their overall support/roll-out plans for that region.

Essbase connector

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

Feature details

Currently, available in Power BI Desktop, we will enable the Essbase connector for Power Query Online. This connector will allow users to connect to Essbase. You can read more about the existing connector in Power BI Desktop here.

Exchange Online connector

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

Feature details

Currently available in Power BI Desktop, we will enable the Exchange Online connector for Power Query Online. This connector will allow users to connect to Exchange Online. You can read more about the existing connector in Power Query here.

Hadoop File and Azure HDInsight connectors

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

Feature details

Currently available in Power BI Desktop, we will enable the Hadoop File (HDFS) and the Azure HDInsight (HDFS) connectors for Power Query Online. These connectors allow users to connect to HDFS. You can read more about the existing connectors in Power Query here.

Hive LLAP connector

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

Feature details

This connector will allow users to connect to Hive LLAP. You can read more about capabilities of the existing connector in Power BI here.

IBM Netezza connector

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

Feature details

Currently available in Power BI Desktop, we will enable the IBM Netezza connector for Power Query Online. This connector will allow users to connect to IBM Netezza. You can read more about capabilities of the existing connector in Power BI here.

Power Query connector improvements

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

Feature details

There are many Power Query connectors that offer advanced options. These options extend the capabilities of the connectors to add more versatility and address more use cases beyond the default, which can be important to appropriately work with your architecture.

Advanced options, including native database queries, timeout, and others, will be enabled for parity with how customers use these connectors in Power Query Desktop today.

Query diagnostics improvements

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

Feature details

Often, customers connect to slow data sources and then create queries with many or complex transformation steps, resulting in slow queries. To debug issues with queries, customers need to analyze their Power Query traces to understand whether their queries are pushed to the data source (if the data source supports the transformations being used) or Power Query compensated and ran those queries locally within the Mashup Engine.

We'll bring feature parity with the Power Query Desktop query diagnostics feature to Power Query Online, including:

- Knowledge of what data source queries are being generated to run their M queries
- Knowledge of what data source queries are being generated to retrieve schema and metadata
- The amount of time queries run within the data source versus locally in the Mashup Engine

Query Diagnostics will allow customers to troubleshoot issues with their queries and identify potential optimizations more easily.

As part of this enhancement, we will also provide step-level indicators regarding whether a given step execution was folded to the underlying data source backend or not. This allows users to get immediate feedback as they add new steps to their queries without having to go into the full Query Diagnostics experience.

Snowflake connector

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

Feature details

Currently available in Power BI Desktop, we will enable the Snowflake connector for Power Query Online. This connector will allow users to connect to Snowflake. You can read more about the existing connector in Power BI Desktop here.

Support for beta tags for connectors

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

Feature details

We will add the ability to indicate if a connector is in beta within the Power Query Online Get Data experiences, allowing users to make an informed choice of their use of the connector. This is a capability that already exists in Power Query Desktop.

Sybase connector

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

Feature details

Currently available in Power BI Desktop, we will enable the Sybase connector for Power Query Online. This connector will allow users to connect to Sybase. You can read more about capabilities of the existing connector in Power BI here.

View native query for supported connectors

Enabled for	Public preview	General availability
End users, automatically	-	Sep 2020

Feature details

Today in Power Query Desktop, users have the capability to view the native query emitted by certain connectors, such as the SQL connector. This capability allows users to easily see what query they're emitting as a result of operations in Power Query, and it can be used to tell when something has stopped folding.

This feature will be lighting up in Power Query Online, bringing additional self-diagnostic capabilities to users. Alongside query diagnostics, it will allow users to have a much better understanding of what is being retrieved from their data sources.

Got feedback?

Share your feedback on a community forum for Dynamics 365 or Power Platform. We'll use your feedback to make improvements. To find out about updates to these release notes, follow us on Twitter @MSFTDynamics365.

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