Microsoft

Microsoft Dynamics 365

2020 RELEASE WAVE 2 PLAN

Features releasing from October 2020 through March 2021

Contents

Dynamics 365: 2020 release wave 2 plan

The Dynamics 365 release plan for the 2020 release wave 2 describes all new features releasing from **October 2020** through **March 2021**. 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 data integration.

The Microsoft Power Platform features coming in the 2020 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

2020 release wave 2 overview

The 2020 release wave 2 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, Fraud Protection, and Business Central.

Marketing

- Dynamics 365 Marketing improves the customer journey canvas experience and adds integration with Microsoft Teams for virtual events. Segmentation is enhanced with a new natural language experience to create and consume segments, helping eliminate the specialized skills needed to build complex segments.

Sales

- Dynamics 365 Sales continues emphasis on simplified experiences, app integrations, gamification, a new mobile experience for quick access to customer information, and new enhancements to forecasting to natively create and manage bottom-up sales forecast processes.
- Dynamics 365 Sales Insights continues investments across multiple areas: sales acceleration, conversation intelligence, relationship intelligence, and advanced forecasting and pipeline intelligence with predictive lead and opportunity scoring to help sales teams uncover top deals.
- Dynamics 365 Product Visualize empowers sellers and accelerates complex sales processes by showcasing and customizing products in their real-world environment. Sellers can place a

3D digital twin of a product in their customer's environment and make detailed notes about their requirements.

Service

- Dynamics 365 Customer Service expands agent productivity capabilities enabling agents to engage in multiple sessions simultaneously. Omnichannel for Customer Service is enhanced with additional extensibility options to enable integration with mobile applications, Microsoft bot framework, and outbound messaging channels.
- Dynamics 365 Customer Service Insights adds new capabilities to help agents using similar case suggestions to resolve customer issues quickly and easily. A new analytical view for customer service managers helps them focus on key support areas that need attention. These highlights will also be included directly in the core Customer Service Hub app so that users can get insights in context without having to switch between applications.
- Dynamics 365 Field Service continues to add intelligence capabilities including a new Field Service dashboard for monitoring key KPIs and work order completion metrics. There are many user experience enhancements to enable proactive service delivery. The Field Service mobile app is enhanced with capabilities such as push notifications and real-time location sharing. This release wave also includes scheduling enhancements such as multiday manual scheduling and enhanced skill-based matching.
- Dynamics 365 Remote Assist expands its range of scenarios beyond calls, allowing technicians to perform activities such as capture service and repairs data, perform surveys and walk-throughs independently, and derive service insights from their service operations.

Finance and Operations

- Dynamics 365 Finance continues to focus on automating common tasks to reduce the number of manual processes and add insights and intelligence in Finance. Asset leasing enhances the core capabilities of Finance and the global coverage for Finance continues to expand in this release wave.
- Dynamics 365 Supply Chain Management expands planning optimization for Manufacturing to perform supply and production planning in near real time with in-memory services. Enhancements to Product Information Management include engineering change management and production versioning capabilities. Cost Management includes new features that will enable global companies maintain multiple cost accounting ledgers by allowing dual currency and dual valuation. Enhancements to the job card device include a new user experience and a new feature to enable reporting serial numbers.
- Dynamics 365 Guides is focusing on intelligent workflows in this release wave. By taking advantage of data and AI innovations, work instructions can be configured to adjust on the

fly based on operator inputs. In addition, insights will make it easier to use time-tracking data and connect that data to your business.

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

Human Resources

- Dynamics 365 Human Resources expands leave and absence and benefits management capabilities to transform the employee experience. Employees and managers will be able to manage leave and absence directly from Microsoft Teams. This release wave enables streamlined integrations to recruiting and payroll partners, thereby building a Human Capital Management (HCM) ecosystem.

Commerce

- Dynamics 365 Commerce continues to expand capabilities enabling non-developers to easily design and manage digital commerce experiences. Customers can increase lift online and in store with "Shop similar looks" for recommendations. Customers can discover and deploy third-party services, connectors, modules, and themes from Microsoft AppSource.
- Dynamics 365 Connected Store adds a number of new capabilities such as integration with Dynamics 365 Commerce, front-line worker task assignment and tracing with Microsoft Teams, integrated workflows with Microsoft Power Platform, intelligent command center, store analytics, and store insights solutions such as anomaly detection, inventory recommendations, and shift management recommendations.

Fraud Protection

- Dynamics 365 Fraud Protection adds integration with Dynamics 365 Commerce and a new "manual review" capability that allows customers to use the Fraud Protection rules experience to flag transactions for review, and then allow expert human agents to consume and adjudicate those transactions.

SMB

- Dynamics 365 Business Central investments for this release wave include service enhancements to meet the demands of a rapidly growing customer base, improved performance, handling of file storage, geographic expansion together with support for Group VAT, top customer-requested features, and deeper integration with Microsoft Teams.

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.
- Dynamics 365 Product Insights enables organizations to understand their customers' journey, usage, and experience across all channels of their products (web, mobile, and connected devices).

Dynamics 365 Customer Voice

NOTE Starting in July 2020, Microsoft Forms Pro is renamed to Dynamics 365 Customer Voice.

Dynamics 365 Customer Voice is the next product evolution from Microsoft Forms Pro. Dynamics 365 Customer Voice is an enterprise feedback management application, powering simple yet robust feedback capture, an integrated customer data platform, and built-in insights tools to enable timely followup actions to close the loop with your customers.

Dynamics 365 Customer Voice includes ready-to-use feedback solution templates that preconfigure survey questions, workflow, and reports including a customer feedback solution template based on customer experience (CX) best practices from Forrester Research.

Industry accelerators

Industry accelerators are foundational components within Microsoft Power Platform and Dynamics 365 that enable ISVs and other solution providers to quickly build industry vertical solutions. The accelerators extend Common Data Model to include new entities to support a data schema for concepts within specific industries. This release wave includes enhancements to the following industry accelerators: nonprofit, education, financial services, media and communications, healthcare, manufacturing, and automotive.

Key dates for the 2020 release wave 2

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 2.

Milestone	Date	Description
Release plans available	July 8, 2020	Learn about the new capabilities coming in the 2020 release wave 2 (October 2020 – March 2021) across Dynamics 365 and Microsoft Power Platform.
Early access available	August 3, 2020	Test and validate new features and capabilities that will be a part of the 2020 release wave 2, coming in October, before they get enabled automatically for your end users. You can view the Dynamics 365 2020 release wave 2 early access features now.
General availability	October 1, 2020	Production deployment for the 2020 release wave 2 begins. Regional deployments will start on October 2, 2020.

Just like the previous release waves, we continue 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 2.

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 2 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning **August 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
- 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 2 updates.

IMPORTANT If you are using Unified Interface 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 2 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
Create and manage content-rich social media posts and easily monitor performance	End users, automatically	Aug 3, 2020	Oct 2020
Create engaging, customized emails faster	End users, automatically	Aug 1, 2020	Oct 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
Be more productive with new capabilities for the enhanced email experience	End users, automatically	Aug 3, 2020	Oct 2020
Enterprise-grade, fully customizable forecast	End users, automatically	Aug 1, 2020	Oct 2020
Simplify your document workflows with enhanced PDF capabilities	End users, automatically	Aug 1, 2020	Oct 2020
Usability improvements to streamline the user experience	End users, automatically	Aug 3, 2020	Oct 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
Enable silent, seamless migration from legacy to Unified Interface service scheduling experience	End users, automatically	Aug 3, 2020	Oct 2020
Enhanced knowledge articles editing and view experience	End users, automatically	Aug 3, 2020	Oct 2020
Familiar, modern email template experience for agents and administrators	End users, automatically	Aug 3, 2020	Oct 2020
Insert knowledge articles into an email	End users, automatically	Aug 3, 2020	Oct 2020
Intuitive email file attachment experience for agents	End users, automatically	Aug 3, 2020	Oct 2020
New forms and dashboards for Customer Service	End users, automatically	Aug 3, 2020	Oct 2020
Usability enhancements for timeline	End users, automatically	Aug 3, 2020	Oct 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
Asset hierarchy and location on work order enhancements	End users, automatically	Aug 3, 2020	Oct 2020
Calendar view for booking work orders	End users, automatically	Aug 3, 2020	Oct 2020
Connected Field Service on Dynamics 365 Field Service mobile app	End users, automatically	Aug 3, 2020	Oct 2020
Dashboard for key field service metrics	End users, automatically	Aug 3, 2020	Oct 2020
Dynamics 365 Field Service mobile app updates for field technician efficiency	End users, automatically	Aug 3, 2020	Oct 2020
Enhanced work hours calendar for requirements	End users, automatically	Aug 3, 2020	Oct 2020
Field Service inspections	End users, automatically	Aug 3, 2020	Oct 2020
Technician time tracking on Dynamics 365 Field Service mobile app	End users, automatically	Aug 3, 2020	Oct 2020
Travel outside of working hours	End users, automatically	Aug 1, 2020	Oct 2020
Usability improvements for the field technician booking form	End users, automatically	Aug 3, 2020	Oct 2020

Feature	Enabled for	Early access	General availability
Work order metrics	End users, automatically	Aug 3, 2020	Oct 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
Barcode generation data source for configurable business documents	Admins, makers, or analysts, automatically	Aug 3, 2020	Oct 2020
Configurable business documents conversion to PDF	End users by admins, makers, or analysts	✔ Apr 3, 2020	Oct 2020
Configurable business documents direct printing	End users by admins, makers, or analysts	✔ Apr 3, 2020	Oct 2020
Country/region expansion: Bahrain	End users, automatically	Aug 3, 2020	Oct 2020
Country/region expansion: Hong Kong SAR	End users, automatically	Aug 3, 2020	Oct 2020
Country/region expansion: Kuwait	End users, automatically	Aug 3, 2020	Oct 2020
Country/region expansion: Oman	End users, automatically	Aug 3, 2020	Oct 2020

Feature	Enabled for	Early access	General availability
Country/region expansion: Qatar	End users, automatically	Aug 3, 2020	Oct 2020
Electronic reporting Legal entity-specific parameters enhancements	Admins, makers, or analysts, automatically	Aug 3, 2020	Oct 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
Confirm outbound shipments from batch jobs	End users by admins, makers, or analysts	Aug 3, 2020	Oct 2020
Enter serial numbers while reporting as finished from the job card device	End users by admins, makers, or analysts	Aug 3, 2020	Oct 2020
Order-committed reservation based on license plates	End users by admins, makers, or analysts	Aug 3, 2020	Oct 2020
Outbound workload visualization	End users by admins, makers, or analysts	Aug 3, 2020	Oct 2020
Planning optimization support for materials requirements planning (MRP)	End users by admins, makers, or analysts	✔ Apr 3, 2020	Oct 2020

Feature	Enabled for	Early access	General availability
Work pick line overview	End users by admins, makers, or analysts	Aug 3, 2020	Oct 2020
Work policy enhancements for inbound work	End users by admins, makers, or analysts	Aug 3, 2020	Oct 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
Employee leave and absence experience in Microsoft Teams	End users by admins, makers, or analysts	✔ May 18, 2020	Oct 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
Abandoned cart capabilities for e-commerce	End users by admins, makers, or analysts	Aug 3, 2020	Oct 2020
Dynamics 365 Commerce app marketplace	Admins, makers, or analysts, automatically	Aug 3, 2020	Oct 2020

Feature	Enabled for	Early access	General availability
Experimentation in Dynamics 365 Commerce	End users by admins, makers, or analysts	Aug 3, 2020	Oct 2020
Extensibility to support incremental capture during back office invoicing	End users by admins, makers, or analysts	Aug 3, 2020	Oct 2020
Site builder WYSIWYG improvements	Admins, makers, or analysts, automatically	Aug 3, 2020	Oct 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
Attach to user session when debugging in sandbox	Admins, makers, or analysts, automatically	Aug 1, 2020	Oct 2020
Auto-resolve Common Data Service conflicts	End users, automatically	Aug 3, 2020	Oct 2020
Bank reconciliation improvements	End users, automatically	Aug 1, 2020	Oct 2020
Basic auth settings deprecated for Contact Sync and Outlook Add-in	Admins, makers, or analysts, automatically	Aug 1, 2020	Oct 2020

Feature	Enabled for	Early access	General availability
Changes to the action bar in dialogs	End users by admins, makers, or analysts	Aug 1, 2020	Oct 2020
Check financial journals in background	End users by admins, makers, or analysts	Aug 3, 2020	Oct 2020
Code documentation comments	Admins, makers, or analysts, automatically	Aug 1, 2020	Oct 2020
Consolidation file format support for Dynamics 365 Finance	End users, automatically	Aug 1, 2020	Oct 2020
Database access intent changed to read-only for frequently used reports	End users, automatically	Aug 3, 2020	Oct 2020
Debug extension installation and upgrade code	Admins, makers, or analysts, automatically	Aug 1, 2020	Oct 2020
Default unit cost for non-inventory items	End users, automatically	✔ May 1, 2020	Oct 2020
Delete extension data	Admins, makers, or analysts, automatically	Aug 1, 2020	Oct 2020
Improved accessibility for low-vision users	End users, automatically	Aug 3, 2020	Oct 2020
Integrate Business Central and Common Data Service with fewer synchronization conflicts	End users, automatically	Aug 3, 2020	Oct 2020

Feature	Enabled for	Early access	General availability
[Manage irreversible features]	Admins, makers, or analysts, automatically	✔ Jun 10, 2020	Oct 2020
[Notify users of high-risk changes in selected setup fields]	End users by admins, makers, or analysts	Aug 3, 2020	Oct 2020
[Pages with FactBoxes are more responsive]	End users, automatically	✔ Jun 26, 2020	Oct 2020
[Performance Regression and Application Benchmark tools]	Admins, makers, or analysts, automatically	Aug 3, 2020	Oct 2020
[Report request page can open multiple previews]	End users, automatically	Aug 1, 2020	Oct 2020
[Role Centers open faster]	End users, automatically	Aug 3, 2020	Oct 2020
[Support for latest Microsoft Dynamics 365 SDK]	End users, automatically	Aug 3, 2020	Oct 2020
[Track packages from more types of sales documents]	End users, automatically	✔ May 1, 2020	Oct 2020
[Update the navigation experience terminology to improve usability]	End users, automatically	Aug 1, 2020	Oct 2020
[Updates to page styling]	End users, automatically	✔ Jul 28, 2020	Oct 2020
[Use recurring journals to allocate balances by dimension values]	End users, automatically	Aug 3, 2020	Oct 2020

Feature	Enabled for	Early access	General availability
Use the Copy Journal function on Posted General Journals and control date for reversing entries in Recurring General Journals	End users, automatically	Aug 3, 2020	Oct 2020
Use Word document layouts to customize outgoing customer documents	End users, automatically	Aug 3, 2020	Oct 2020
Write longer item references	End users by admins, makers, or analysts	Aug 3, 2020	Oct 2020

Marketing

Overview of Dynamics 365 Marketing 2020 release wave 2

Dynamics 365 Marketing is for marketers and any business users looking to use automation to deepen relationships with customers at scale. Building customer relationships using digital channels is becoming even more important to companies as they compete for customer loyalty and mindshare in this challenging and rapidly evolving environment.

Our vision is to leverage data and AI to enable teams inside and outside of marketing departments to deliver the right content through the right channel, at the right time, individualized for the customer across the entire customer journey.

With a 360-degree view of the customer that includes real-time transactional and observed data from every device, the future of marketing is moment-based and self-optimizing across channels, content, and real-time contexts such as location, time, weather, and customer action. Combined with intelligence, experience automation is changing into two-way conversations and deeper relationships through an end-to-end customer experience across all of marketing, sales, service, and commerce.

In response to the increased demand for digital channels, we are investing in:

- Microsoft Teams integration for virtual events.
- Improved social posting and analytics.

We are committed to being the benchmark for ease and usability and are delivering on that commitment through:

- A revamped customer journey designer experience.
- The ability to use natural language to create segments.

We are building the best integration with our Customer Insights Customer Data Platform for a 360-degree view of the customers and in this release, we will deliver continuously updating, multidata source segments from Customer Insights in your customer journeys.

What's new and planned for Dynamics 365 Marketing

This topic lists features that are planned to release from October 2020 through March 2021. 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
Use natural language to create targeted segments	End users by admins, makers, or analysts	Oct 2020	-	-
In-place editing of email and forms	Admins, makers, or analysts, automatically	-	-	Oct 2020
Use continuously updating, multidata source segments from Customer Insights in your marketing campaigns	End users by admins, makers, or analysts	-	-	Oct 2020
Create engaging, customized emails faster	End users, automatically	-	Aug 2020	Oct 2020
Create and manage content-rich social media posts and easily monitor performance	End users, automatically	-	Aug 2020	Oct 2020
Build customer journeys more efficiently using the new canvas experience	End users by admins, makers, or analysts	-	Sep 2020	Oct 2020
Run webinars and meetings using direct integration with Microsoft Teams	End users by admins, makers, or analysts	Aug 2020	-	Oct 2020
Collect data from form submissions more easily with expanded entity options	End users by admins, makers, or analysts	-	Sep 2020	Oct 2020

* Some features are available for you to opt-in as part of early access on August 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 and data centers (regions), go to the Dynamics 365 and Power Platform availability page.

Use natural language to create targeted segments

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

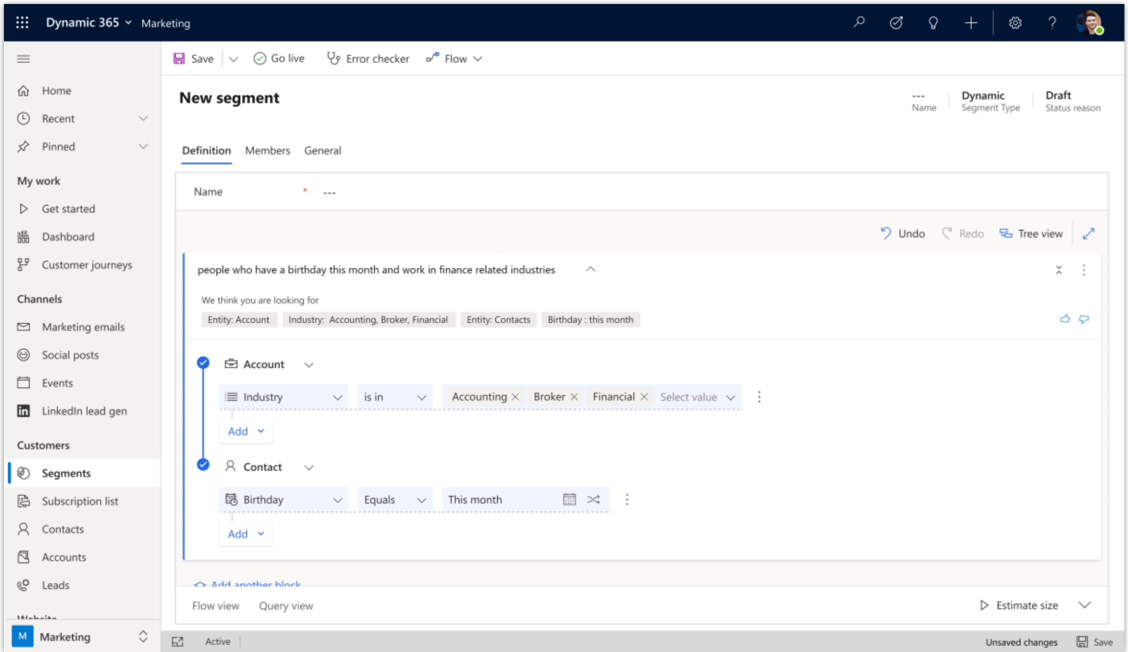
Business value

You can now use natural language sentences to build or view segments in Dynamics 365 Marketing. Use simple words to specify the attributes and logic for the segment you want to target so you can reach the exact audience you are looking for. For example, using natural language, you can create a segment of “customers who live in the US but not Florida, and work in retail.”

Feature details

Natural language queries enable the following:

- When creating a complex segment that includes contact attributes and interactions or behaviors, use natural language to target the right audience in a campaign without complex syntax.
- When looking at a segment created by another user (or imported from an external tool), understand the logic of the segment in natural language to decide whether it meets the target profile for a campaign.
- When using a segment template to create a segment, fill in the template using natural language instead of spending time parsing the segment logic.



Leverage natural language to create and consume segments

Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- United States
- Europe
- United Kingdom

In-place editing of email and forms

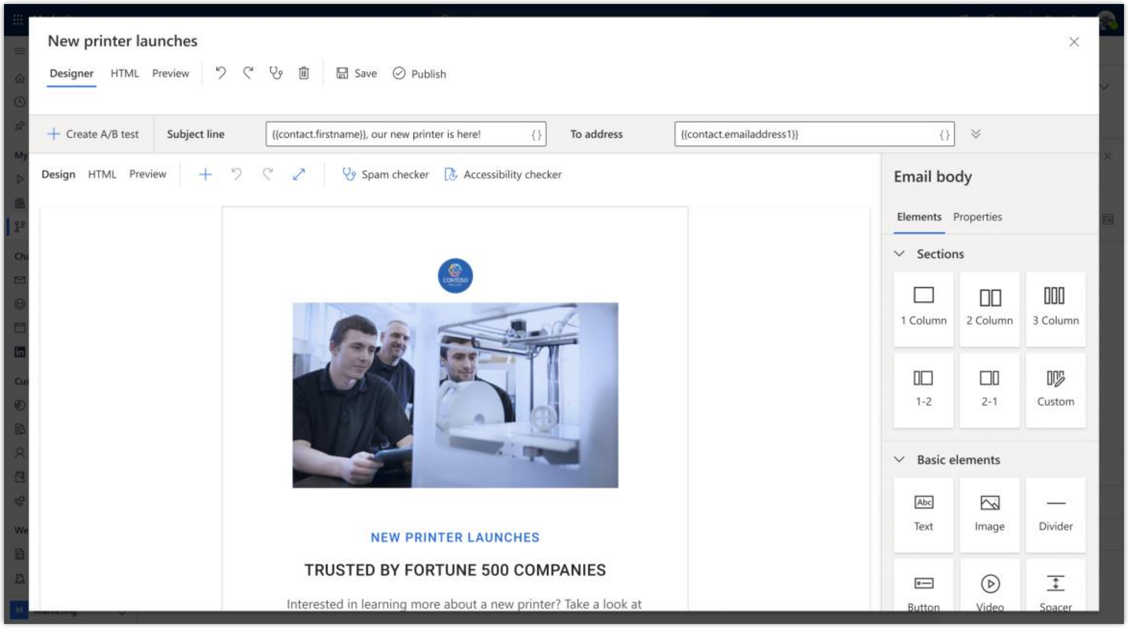
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Oct 2020

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.



Email editor opened within the customer journey context

Use continuously updating, multidata source segments from Customer Insights in your marketing campaigns

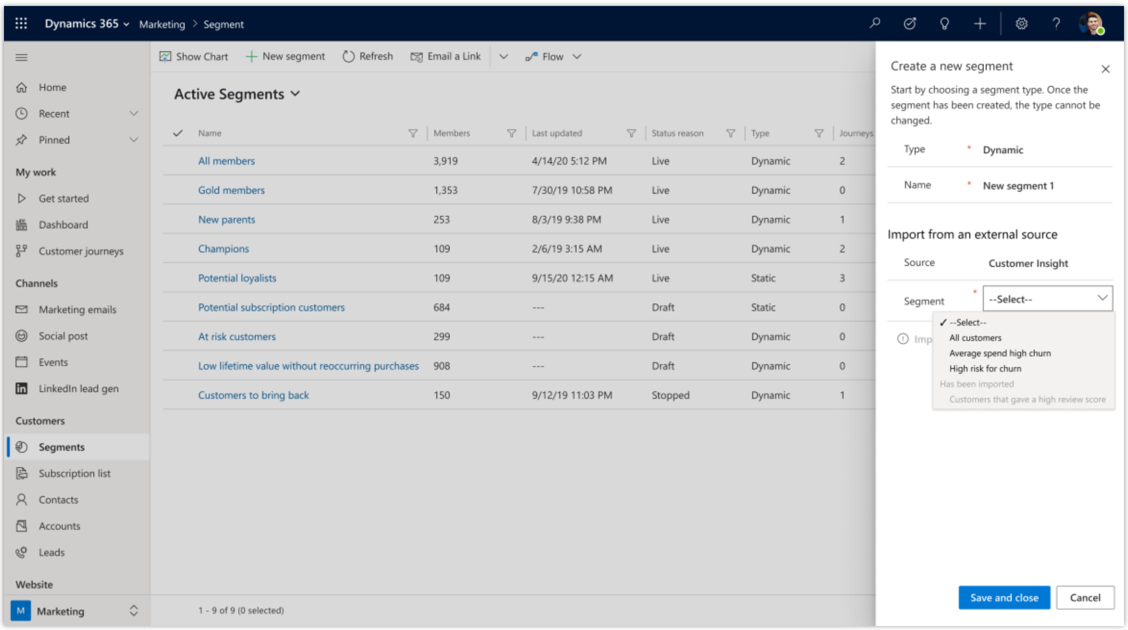
Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Oct 2020

Business value

Precisely identify the audience for your campaigns by leveraging data from multiple data sources across your organization. Build segments in Customer Insights and use them directly in Dynamics 365 Marketing to make campaigns more targeted and effective.

Feature details

- Discover Customer Insights segments instantly, see the segment creation logic, and use the segments for Marketing customer journeys.
- Customer Insights segments in Marketing are dynamically updated as long as Customer Insights and Marketing are connected.
- Save snapshots of Customer Insights dynamic segments as static segments in Marketing.
- Use Customer Insights segments directly in customer journeys, just like native Marketing dynamic segments.



Customer Insights segments are automatically usable within Marketing for campaign execution

Create engaging, customized emails faster

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

The better your emails look, the more likely your audience is to read them. You can now create highly customized, responsive emails quickly, without the need for complex HTML.

Feature details

- Engage your customers with an improved call-to-action button and background image support in Outlook.
- Increase device compatibility with better responsive email support for Outlook mobile and Windows.
- Create emails faster through boosted email editing performance, including faster loading and element interaction.

Create and manage content-rich social media posts and easily monitor performance

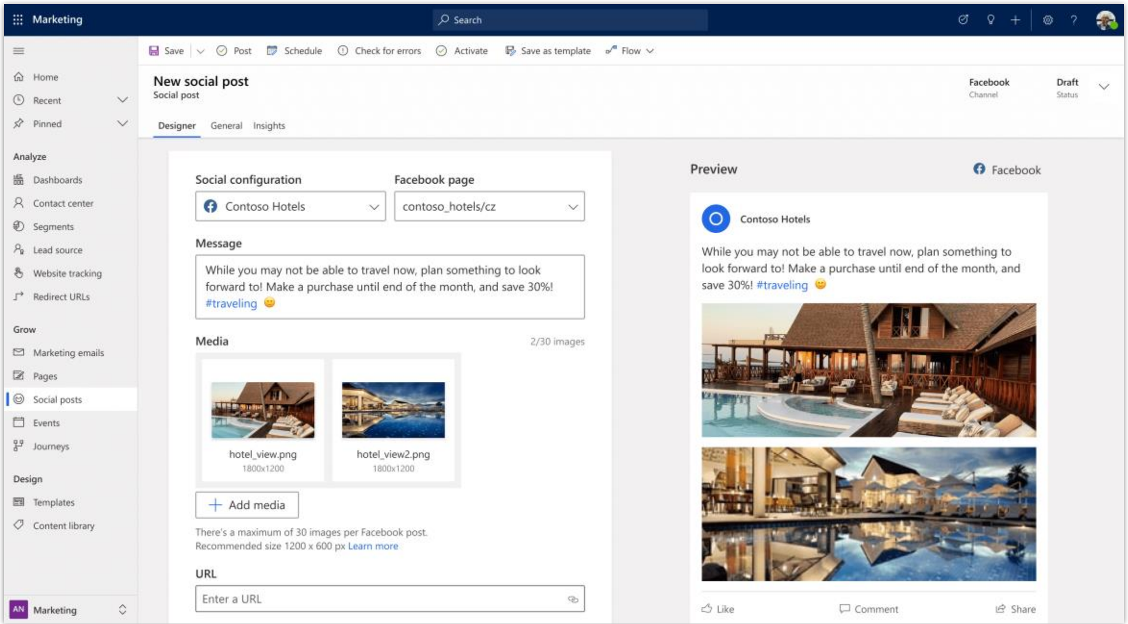
Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

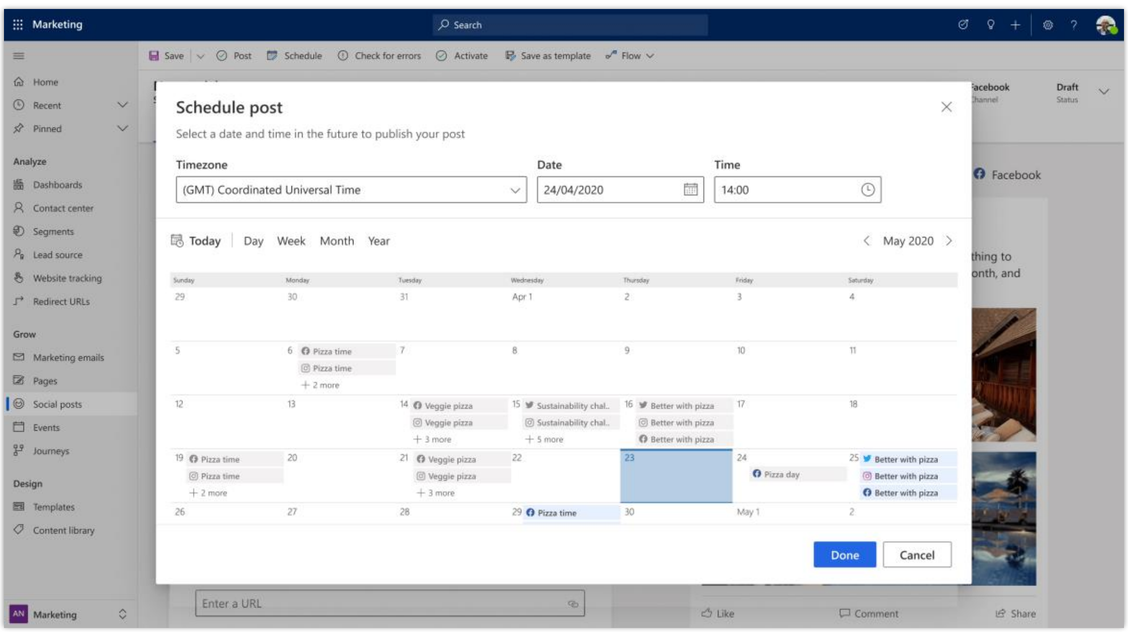
Social channels are powerful tools to communicate with and influence prospects and customers. With this release, you can easily create rich content for Facebook, Twitter, and LinkedIn. You can now optimize when posts are delivered by scheduling them.

Feature details

- Redesigned post creation experience, making it more engaging for marketers to build and post rich content.
- Conveniently view all related social interactions and performance.
- Redesigned scheduling experience, helping you create consistent streams of content across multiple social channels.



Improved social posting



Schedule posting

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.

Build customer journeys more efficiently using the new canvas experience

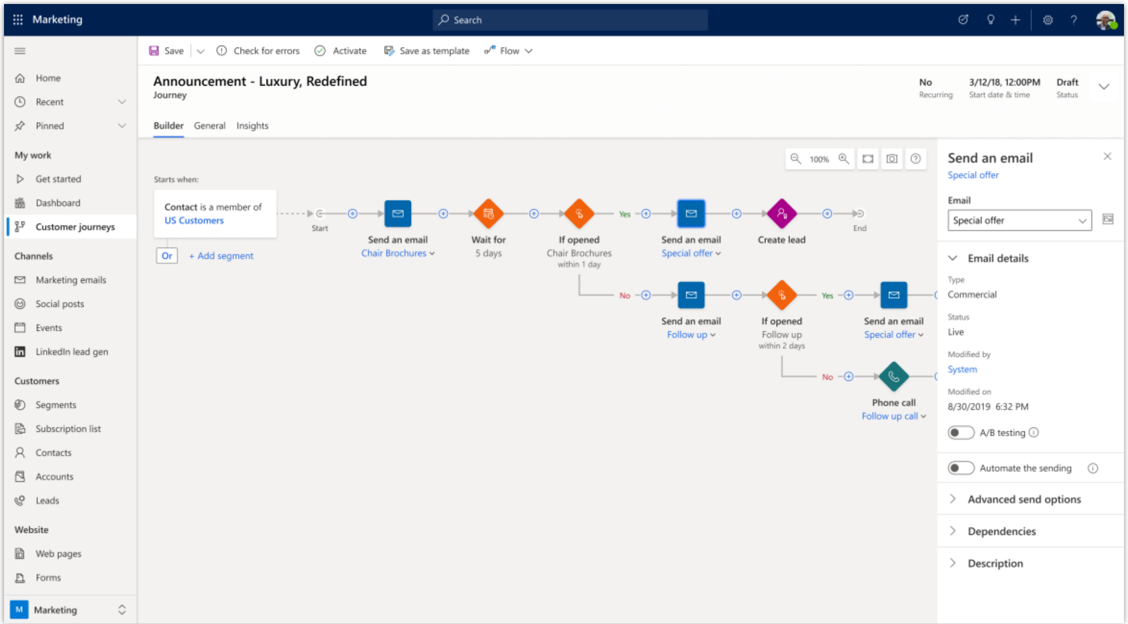
Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	Sep 2020	Oct 2020

Business value

Creating sophisticated, multistep campaigns can feel intimidating and time-consuming. With this release, the customer journey canvas has been completely redesigned. An enhanced UI, improved preview capabilities, a new view of journey insights, and more options to adjust the canvas view result in a more intuitive and efficient user experience.

Feature details

- Complete redesign of the canvas, making the experience of building customer journeys more intuitive. You no longer need to switch back and forth between the canvas and the toolbox while dragging elements onto the canvas. Now, you can build the whole journey directly on the canvas, using an in-place journey menu.
- Customize the canvas to your preferences with horizontal and vertical layout options.
- Improved visual journey insights.
- Enhanced performance and reliability when building complex, multistep journeys.
- Simplified time-based journey actions. "Wait for" and "Wait until" tiles are now available.
- Negative journey paths, enabling follow-up events exclusively for recipients who didn’t meet a certain condition—for example, recipients who didn’t open an email and select a link.



Improved customer journey experience

Run webinars and meetings using direct integration with Microsoft Teams

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

Business value

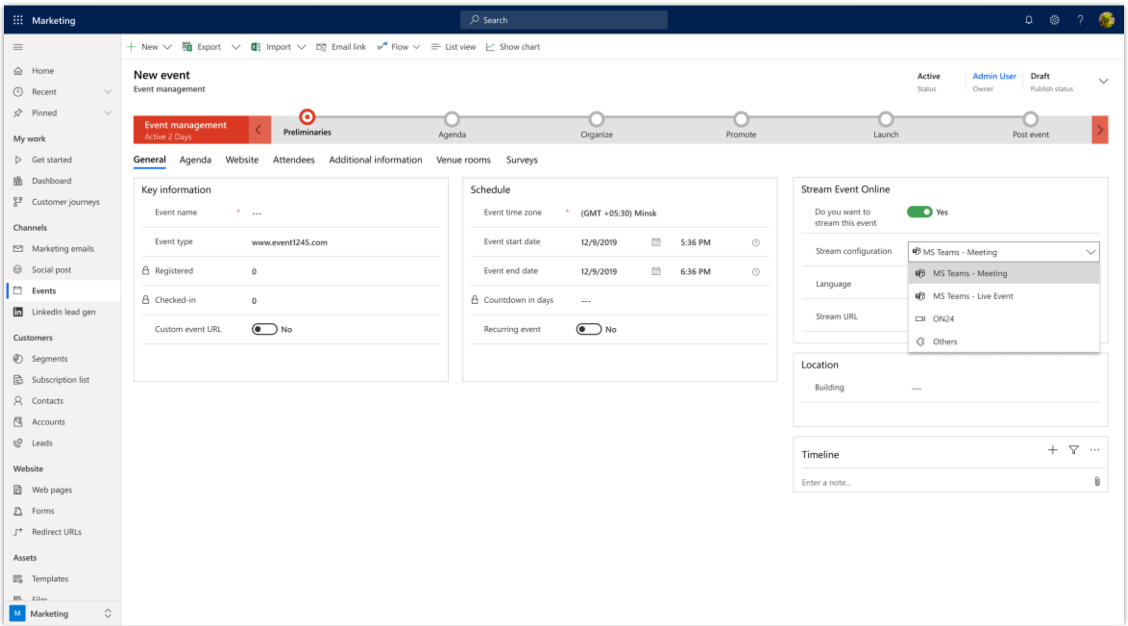
An increasing number of events are moving to a virtual format. You can manage registrations, communications, and reporting for webinars and interactive meetings hosted in Teams, directly from Dynamics 365 Marketing.

Feature details

Microsoft Teams is widely deployed, offering a scalable and robust platform for phone and video conferencing. With this Marketing release, you can:

- Create and host live events using Microsoft Teams as the webinar provider.
- Integrate Teams webinars directly into Marketing events.
- Set up a webinar event as either a Teams live event or a Teams meeting.

- Add event "producers" and "presenters" directly from the Marketing app.
- Allow event check-ins for live events and meetings, bringing visibility to online attendance.



Microsoft Teams integration for webinar

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.

Collect data from form submissions more easily with expanded entity options

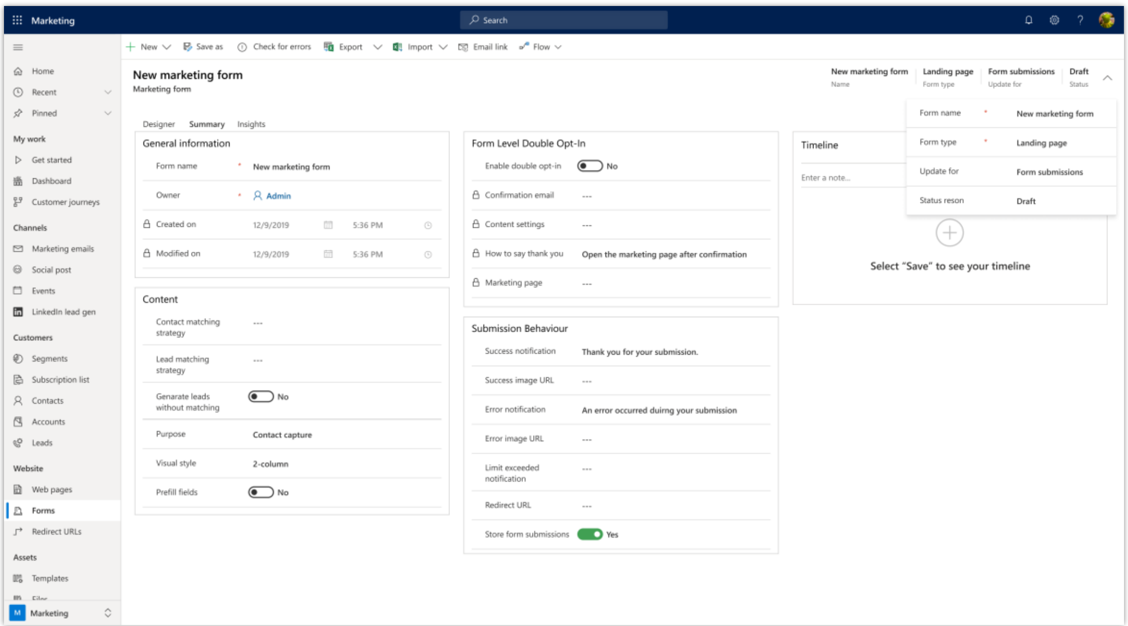
Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	Sep 2020	Oct 2020

Business value

When collecting information from forms, your data should not have to be tied to certain entities. Dynamics 365 Marketing now allows you to collect data under an entity other than a lead or contact, letting you trigger custom workflows and journeys based on this data.

Feature details

Previously, forms had to be connected to a lead or a contact. With this release, marketers can collect form submissions and store them under another entity. Not mapping forms to contacts or leads allows marketers to simplify and enhance the process of receiving data from customers. Marketers can then create workflows to store the form submissions as any other entity.



Collect and manage form submissions under an entity other than Lead or Contact

Sales

Overview of Dynamics 365 Sales 2020 release wave 2

Dynamics 365 Sales is centered on the customer relationship. It provides out-of-the-box capabilities tailor-made for a variety of sales scenarios. It helps organizations understand customer needs, drives more relevant and authentic engagements, and improves selling efficiencies. With the 2020 release wave 2 of Dynamics 365 Sales, there's a continued emphasis on simplified experiences, app integrations, and a new mobile experience. We're also enhancing our forecasting capabilities.

We aim to streamline the work of sellers and deepen their engagement with customers. The challenges of sales organizations described in this section are based on enterprise research, analyst reports, and conversations with customers.

Here are the focus areas for 2020 release wave 2:

- **New Dynamics 365 Sales mobile experience**: As part of our commitment to simplify CRM experiences and help sellers focus on selling, we're introducing an intuitive mobile experience to offer quick access to customer information and make it easy to keep this information current.
- **Forecasting and gamification**: With forecasting in Dynamics 365 Sales, we've introduced a set of capabilities that empower organizations to natively create and manage bottom-up sales forecasts to drive accountability and predictability in their sales processes.
- **Usability enhancements**: To make Dynamics 365 Sales better, we're continually introducing usability enhancements within the application that reduce friction and make features easier to use.

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 October 2020 through March 2021. 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 and gamification

With forecasting in Dynamics 365 Sales, we've introduced a set of capabilities that empower organizations to natively create and manage bottom-up sales forecasts to drive accountability and predictability in their sales processes.

Feature	Enabled for	Public preview	Early access*	General availability
Gamification admin experience now available in Unified Interface	Admins, makers, or analysts, automatically	-	-	Oct 2020
Enterprise-grade, fully customizable forecast	End users, automatically	-	Aug 2020	Oct 2020
Usability improvements to streamline the user experience	End users, automatically	-	Aug 2020	Oct 2020
Support for Dynamics 365 Assistant, ad-hoc reporting, and programmatic upload of quotas	Admins, makers, or analysts, automatically	-	-	Jan 2021

New Dynamics 365 Sales mobile experience

As part of our commitment to simplify CRM experiences and help sellers focus on selling, we're introducing an intuitive mobile experience to offer quick access to customer information and make it easy to keep this information current.

Feature	Enabled for	Public preview	Early access*	General availability
Easily complete common tasks on the go	End users by admins, makers, or analysts	Oct 2020	-	-
Find customer information easily when you're on the go, with improved search, lists, and forms	End users by admins, makers, or analysts	Oct 2020	-	-

Feature	Enabled for	Public preview	Early access*	General availability
Get started quickly with a standalone sales app	End users by admins, makers, or analysts	Oct 2020	-	-

Quote to cash

This product area includes capabilities and experiences delivering a rich, intuitive end-to-end quoting business process for sellers and their customers.

Feature	Enabled for	Public preview	Early access*	General availability
Enhanced experience for adding products to opportunities	End users by admins, makers, or analysts	Nov 2020	-	Jan 2021

Usability enhancements

To make Dynamics 365 Sales better, we are continually introducing usability enhancements within the application that reduce friction and make features easier to use.

Feature	Enabled for	Public preview	Early access*	General availability
Get improved data management experience with simplified duplicate detection and merge capabilities	End users by admins, makers, or analysts	-	-	Oct 2020
Simplify your document workflows with enhanced PDF capabilities	End users, automatically	-	Aug 2020	Oct 2020
Be more productive with new capabilities for the enhanced email experience	End users, automatically	-	Aug 2020	Oct 2020

* Some features are available for you to opt-in as part of early access on August 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 and data centers (regions), go to the Dynamics 365 and Power Platform availability page.

Forecasting and gamification

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're enhancing the set of capabilities that empower complex organizations to natively create and manage bottom-up sales forecast processes.

Gamification admin experience now available in Unified Interface

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

Business value

Gamification is commonly used in sales organizations and teams to boost seller motivation, which in turn drives CRM adoption and leads to increased performance and increased sales revenue. The admin interface is now available in Unified Interface.

Feature details

In this release, the admin section of the Gamification product has been moved to Unified Interface.

NOTE This feature is available in Unified Interface only.

Enterprise-grade, fully customizable forecast

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

With improvements to the forecast modeling, organizations can now configure forecasts to support many more complex requirements. With the ability to use custom entities for roll-ups and hierarchies, common sales scenarios—which include opportunity splits, opportunity overlays, and forecasting by product or even by quantity—will now be supported. Furthermore, forecasts can now be made available to worldwide teams with multicurrency support.

Feature details

- Custom entity support for forecast roll-up and forecast hierarchy entities.
- Ability to break down the forecast by a specific dimension—for example, by product family.*
- Support for multicurrency.*
- Support for quantity forecasts.*
- Hide managers from own forecast.*
- Calculated columns can now be adjustable.*
- Advanced admin capability for enabling/disabling underlying grid columns.*

Features marked with * will be released sometime between August 3, 2020, and October 2020 and will need to be enabled by a forecast administrator.

NOTE This feature is available in Unified Interface only.

Usability improvements to streamline the user experience

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

With these improvements, sellers will be able to quickly access their most recent forecasts and will benefit from a refreshed UI.

Feature details

- Load the latest forecast and latest underlying records view (most recently used).
- Hide managers from their own forecasts.

NOTE This feature is available in Unified Interface only.

Support for Dynamics 365 Assistant, ad-hoc reporting, and programmatic upload of quotas

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Jan 2021

Business value

Forecasts will now be written back to Common Data Service, allowing you to create dashboards or reports directly in the context of your Sales application. You'll also be able to create triggers by using Power Automate, allowing you to surface proactive assistant cards to help sellers meet their quotas. Finally, an API is being made available to allow you to extract the forecast report into external BI systems or programmatically import simple columns like quotas from other solutions.

Feature details

- Write back to Common Data Service to enable dashboard reporting and Assistant studio workflows.
- Forecast APIs to extract data into BI systems and upload quotas programmatically.

NOTE This feature is available in Unified Interface only.

New Dynamics 365 Sales mobile experience

Overview

Field sellers spend a lot of time on the road, traveling to meet customers. On-the-go time can become productive time with a mobile-first sales app for iOS and Android. As part of our commitment to simplify CRM experiences and help sellers focus on selling, we're introducing an intuitive mobile experience to offer quick access to customer information and make it easy to keep this information current.

Easily complete common tasks on the go

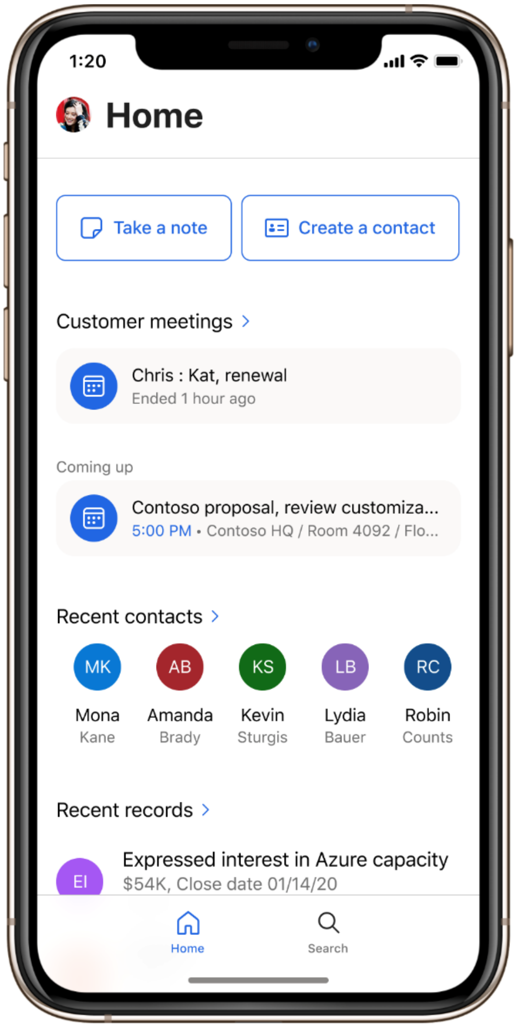
Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Oct 2020	-	-

Business value

Field sellers traveling from one customer to the next often don't have time to update their CRM tools. At the same time, keeping everyone on the sales team aligned is key to achieving successful outcomes, not to mention that current and consistent sales data powers meaningful insights that help the sales organization sell more efficiently. With the new mobile app, field sellers no longer need to wait. Updating Dynamics 365 Sales is quick and easy. The mobile app is optimized for the field seller's most common on-the-go tasks. This means information in Dynamics 365 Sales is always current and field sellers can get things done in the moment, so nothing falls between the cracks.

Feature details

- Start your day with easy access to important info: screen upcoming customer meetings, review related records, and make relevant updates in seconds.
- Add notes with the touch of a button as you walk out of meetings.
- Quickly update accounts and opportunities, and access account or opportunity details in seconds, wherever you are.
- Easily act on your customer info. Find information about your contacts and opportunities effortlessly when you're on the go, and take action.


1:20
Home
Take a note
Create a contact
Customer meetings
Chris : Kat, renewal
Ended 1 hour ago
Coming up
Contoso proposal, review customiza...
5:00 PM • Contoso HQ / Room 4092 / Flo...
Recent contacts
MK
Mona Kane
AB
Amanda Brady
KS
Kevin Sturgis
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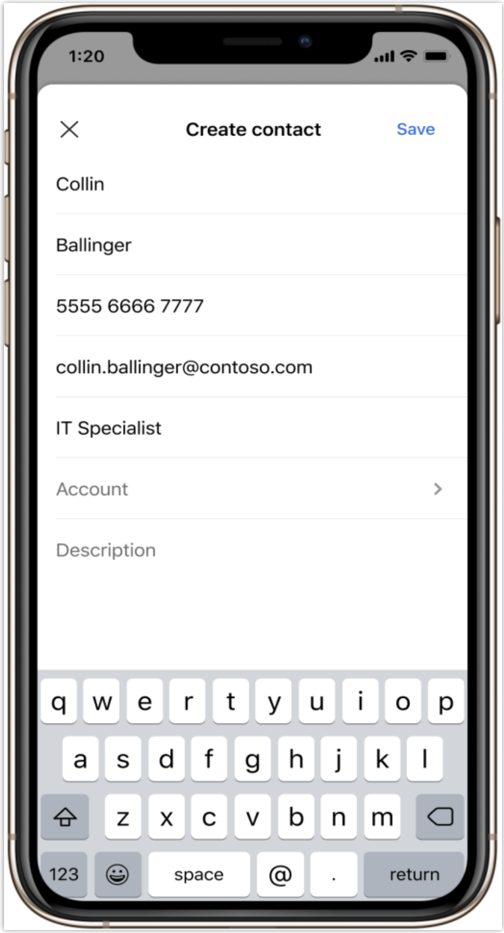
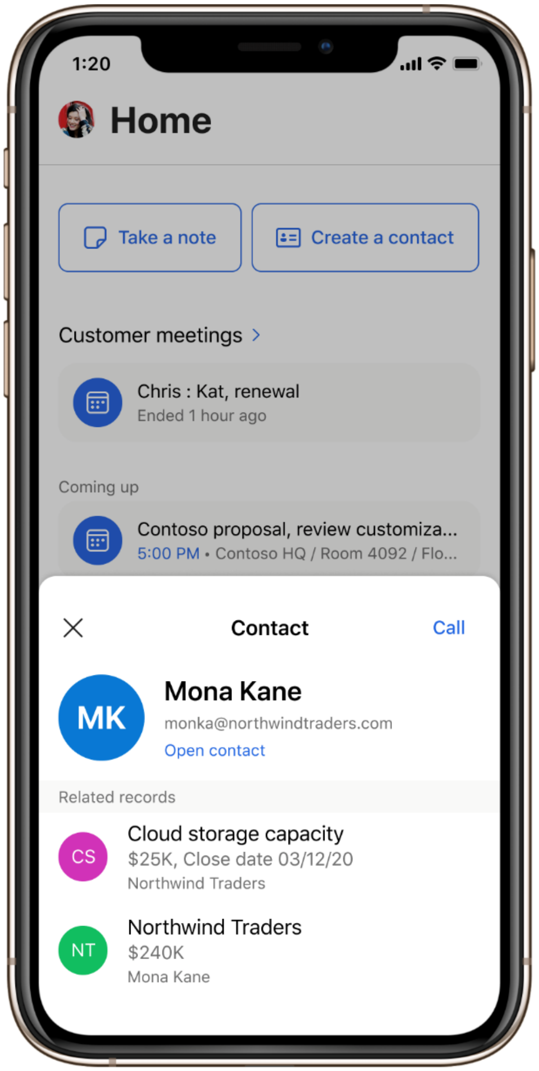
Home
Search

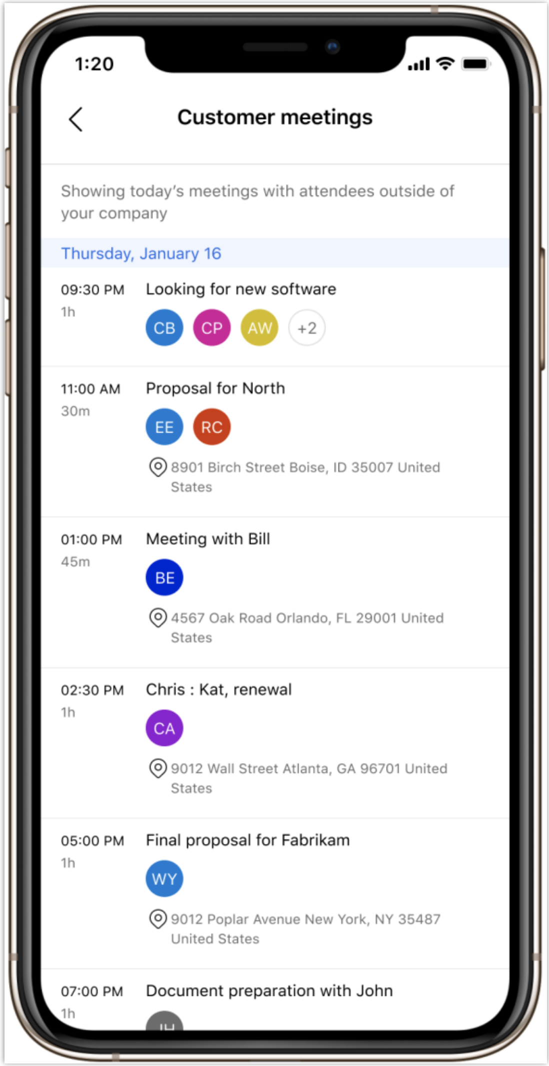
Mobile app



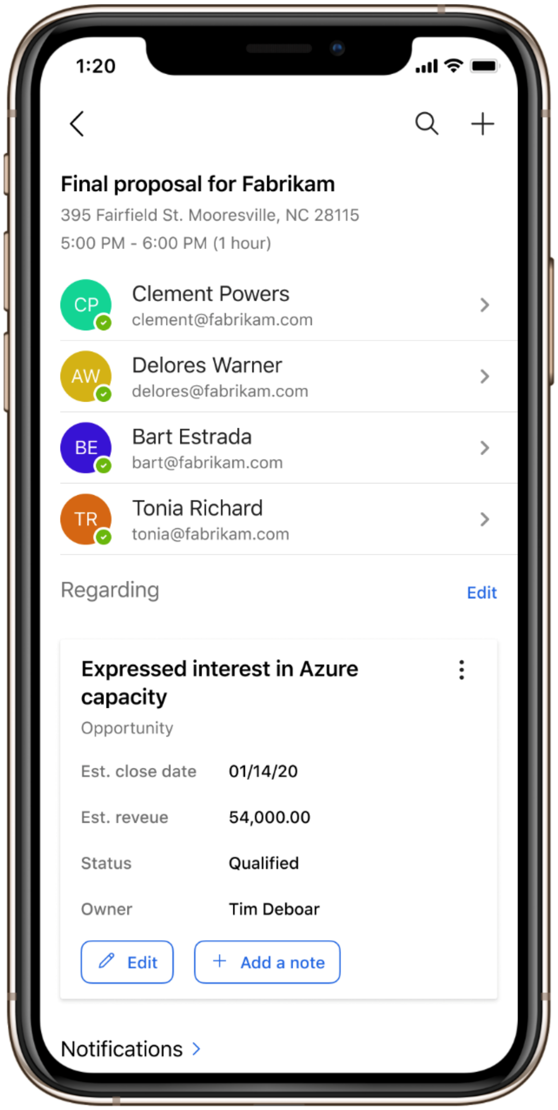
Create contact



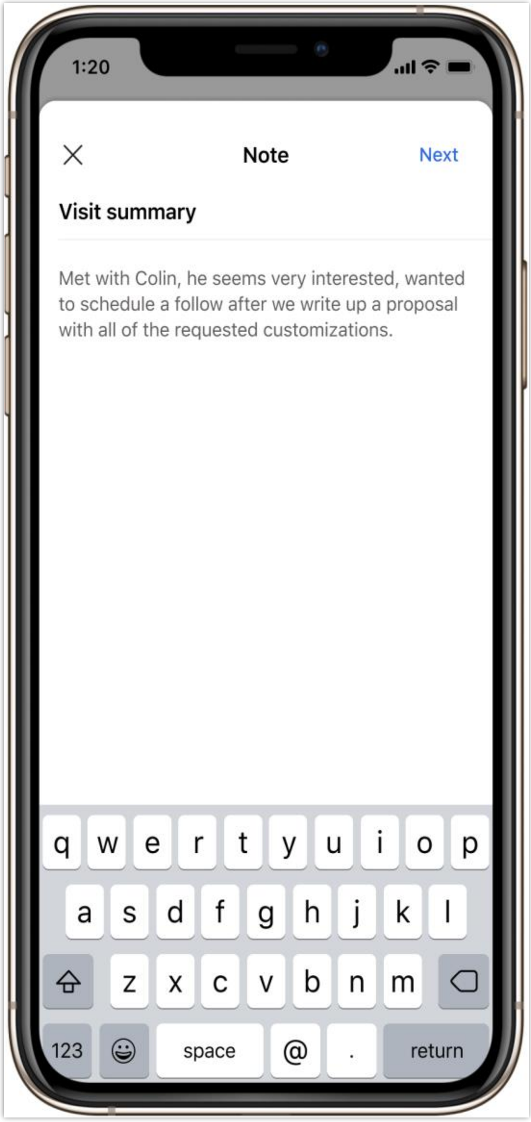
Quick contact sheet



Today's meetings



Meeting view


1:20
Note
Next
Visit summary
Met with Colin, he seems very interested, wanted to schedule a follow after we write up a proposal with all of the requested customizations.
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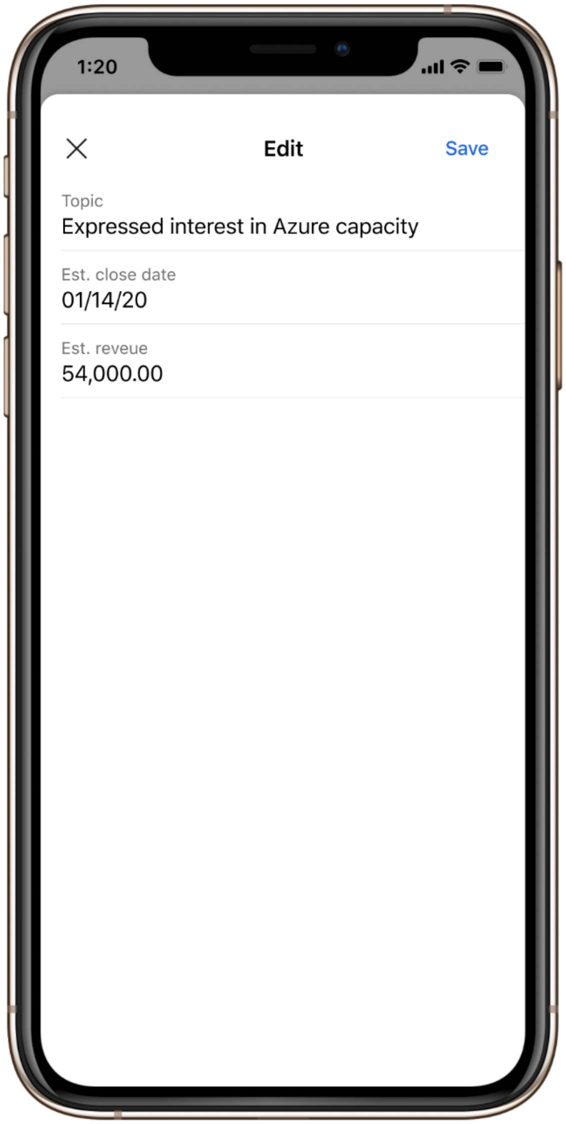
Note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Edit
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Topic
Expressed interest in Azure capacity
Est. close date
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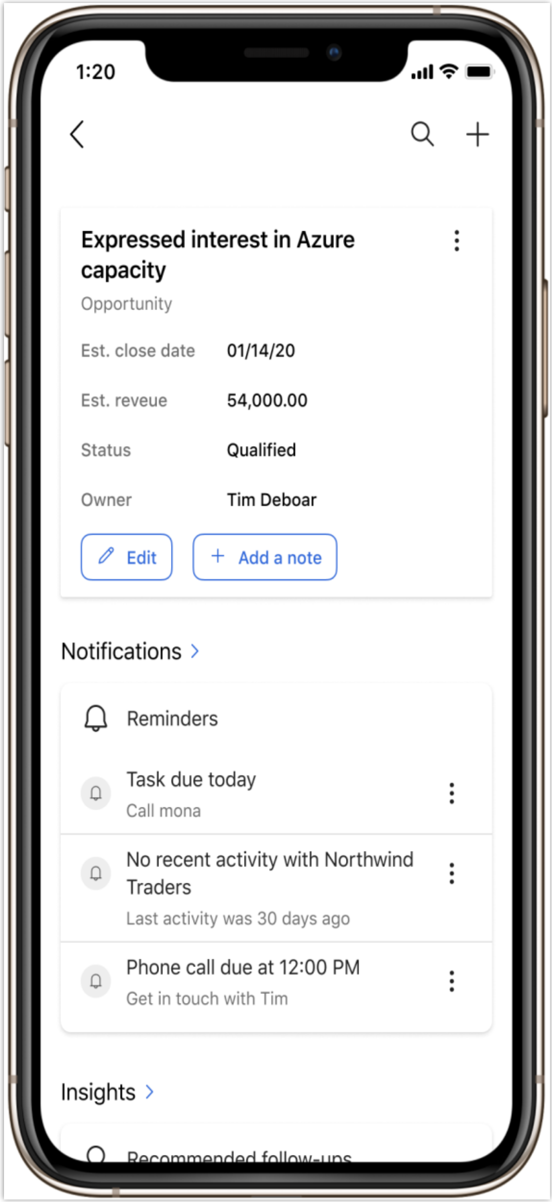
Est. reveue
54,000.00

Edit record



Compact view

NOTE This feature is available in Unified Interface only.

Find customer information easily when you're on the go, with improved search, lists, and forms

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

Business value

In many cases, field sellers find themselves needing to look for records that might not appear in quick links for meetings or as recent records. With the new capabilities, sellers will be able to easily and intuitively find any record in Dynamics 365 Sales.

Feature details

- Improved search experience: search suggestions, search as you type, and a helpful search result grouping
- Responsive lists: Reducing clutter and optimizing lists for drill-down and bulk actions
- Mobile-optimized forms with scrollable tabs
- Enhanced navigation with gesture support on iOS and Android

NOTE This feature is available in Unified Interface only.

Get started quickly with a standalone sales app

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

Business value

When field sellers are on the road, they often struggle to keep up with key information and make important updates. The new mobile app isn't a generic, "one size fits all" type of app, but rather a dedicated app for sellers that's designed to solve the specific challenges that on-the-go sellers face every day. It's optimized to help field sellers be more productive, saving their time and reducing friction.

Feature details

- Sign in swiftly with your work email: Access Dynamics 365 Sales quickly when you're on the go, using only your email address. (No need to remember org URLs.)

- Access sales information with a single click: Land directly in the Sales app with no unnecessary clicks or configurations.
- Use your org app module or the new-out-of-the-box module that's optimized for mobile work.

NOTE This feature is available in Unified Interface only.

Quote to cash

Overview

This area includes capabilities that expedite the end-to-end quoting process. Sellers and their customers can quickly and accurately create quotes, generate contract documents, and execute e-signatures to complete their deals and bring in revenue with these rich, intuitive, end-to-end experiences.

Enhanced experience for adding products to opportunities

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Nov 2020	-	Jan 2021

Feature details

The following enhancements are made to the Add product experience:

- **Updated experience for optimal screen usage**: Update to the existing preview experience to allow more optimal usage of screen space to search and find the right products in the catalog or price list.
- **Inline product details**: View additional information for each product along with the product name before selecting the product.
- **Configurable product line information**: Customize what information about the product line to provide in the Add Products dialog box.

NOTE This feature is available in Unified Interface only. This capability is available in Dynamics 365 Sales Enterprise.

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.

Usability enhancements

Overview

Sales teams are on the go, working closely with customers. They need to be productive and efficient in interacting with the Dynamics 365 Sales application to log their activities, working through the sales cycle stages—such as opportunity management—and getting in-product help where needed. Usability enhancements improve the user interface interactions of sales teams with the Dynamics 365 Sales application.

Get improved data management experience with simplified duplicate detection and merge capabilities

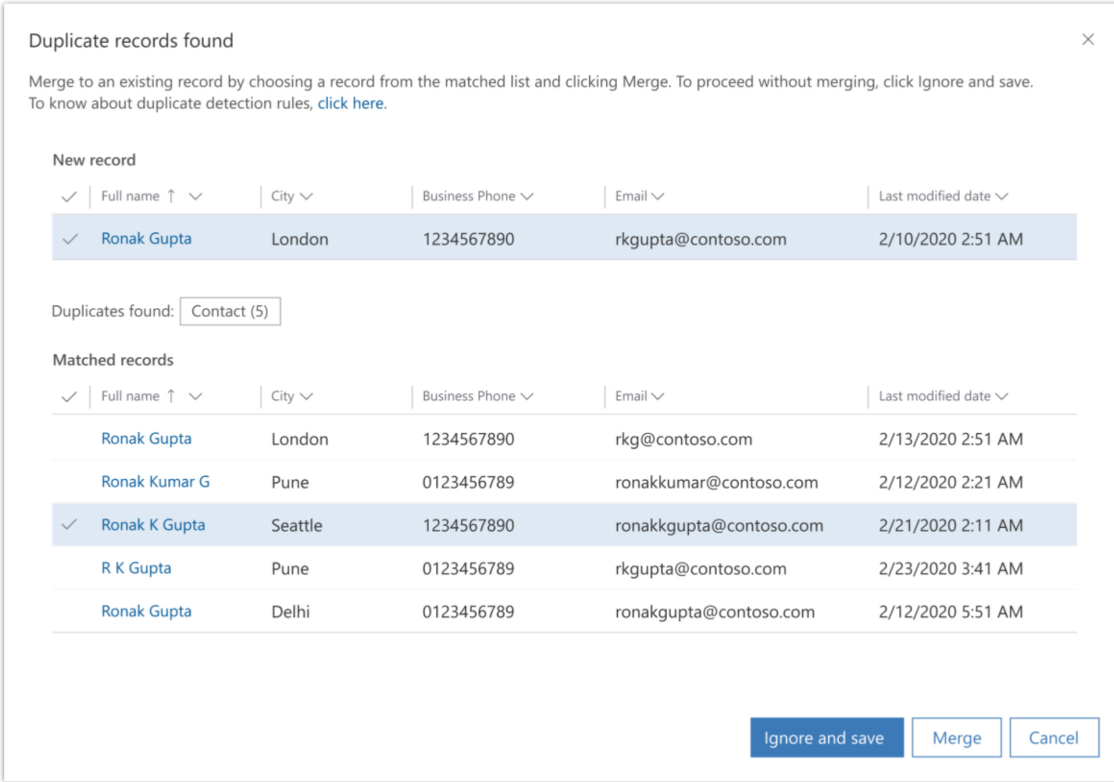
Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Oct 2020

Business value

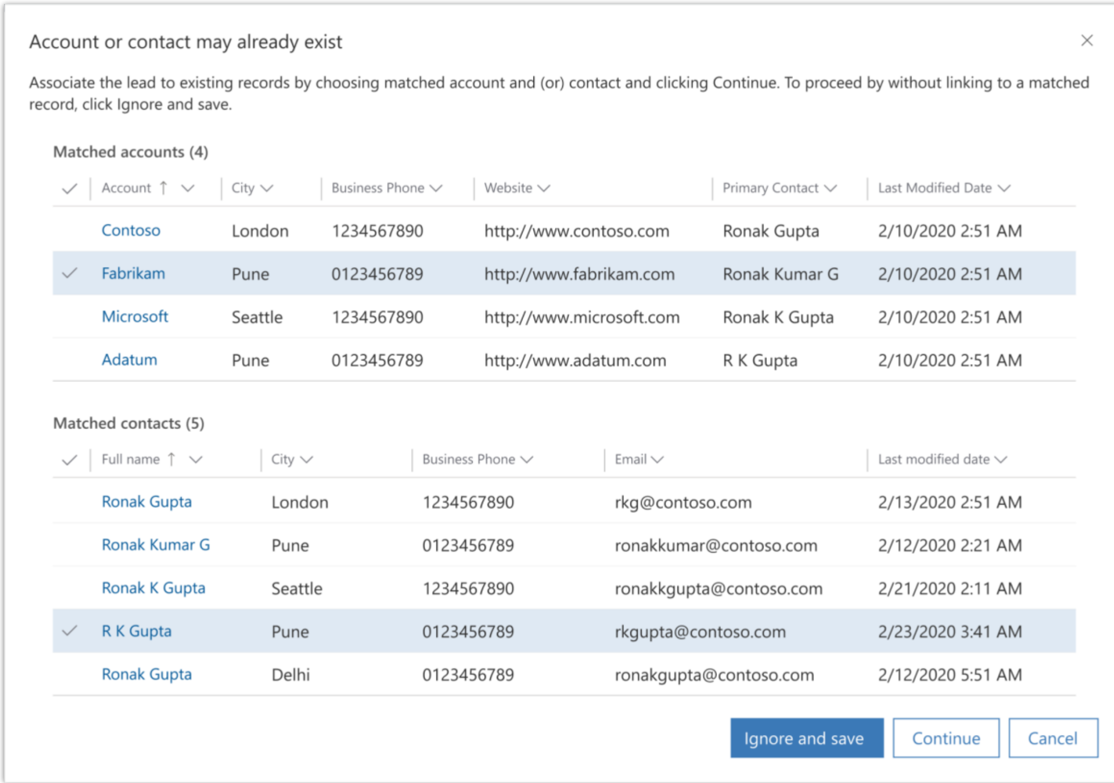
Data quality not only affects business performance but has a direct effect on a user's experience and productivity, due to effort wasted on searching and reconciling data. Duplicate detection and merge capabilities play a significant role in keeping data clean. To enable organizations to maintain data hygiene, we're optimizing the duplicate detection and merge user experiences, which would help users to make an informed decision and avoid duplicate data entry.

Feature details

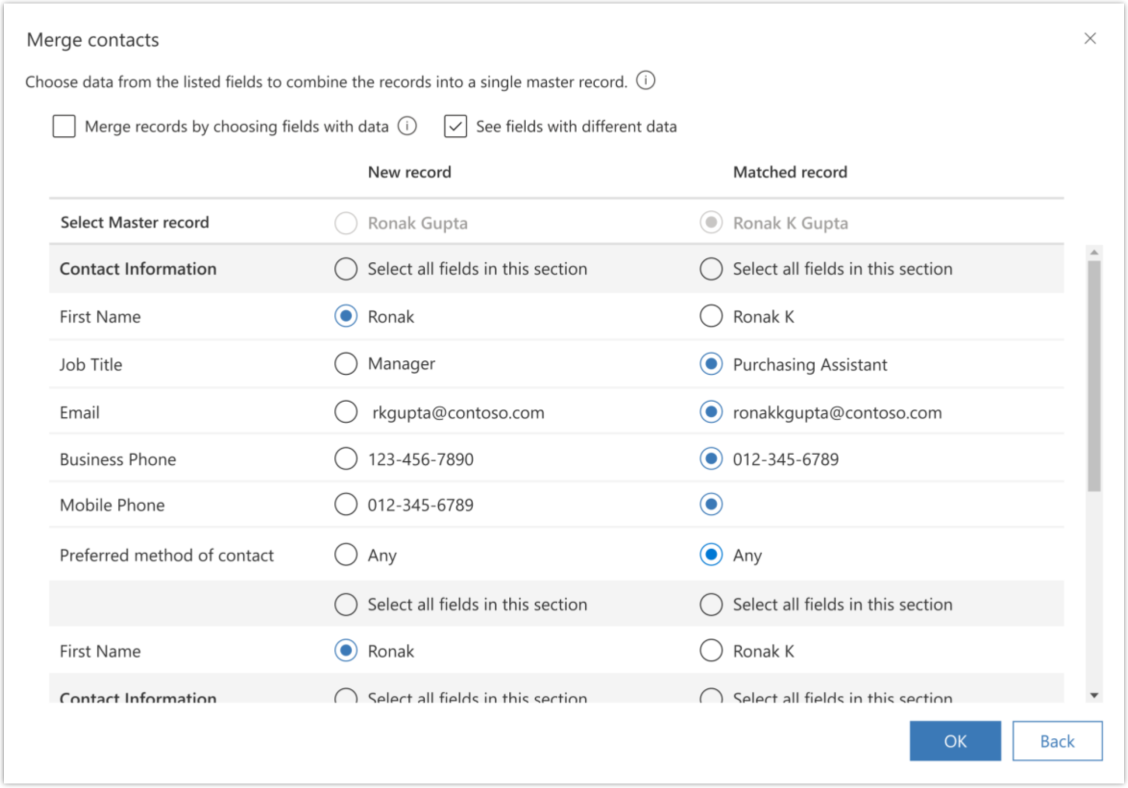
- Enable users to view more information contextually to help determine why a record is being flagged as a duplicate when they're adding or updating a record.
- Enable users to merge the record being added or updated (account, contact, or lead) from the Duplicate warning prompt without navigating away, by using the enhanced Merge dialog box. The enhanced experience replaces the legacy web client hybrid dialog box with a fully enabled Unified Interface experience.
- Enable sellers to easily view and identify matched account and contact records when qualifying a lead, with an improved cross-entity duplicate detection dialog box.
- Enable the improved duplicate detection and merge experiences with a configurable Administration flag.



Duplicate detection dialog



Lead qualification duplicate detection dialog



Merge dialog

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

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.

Simplify your document workflows with enhanced PDF capabilities

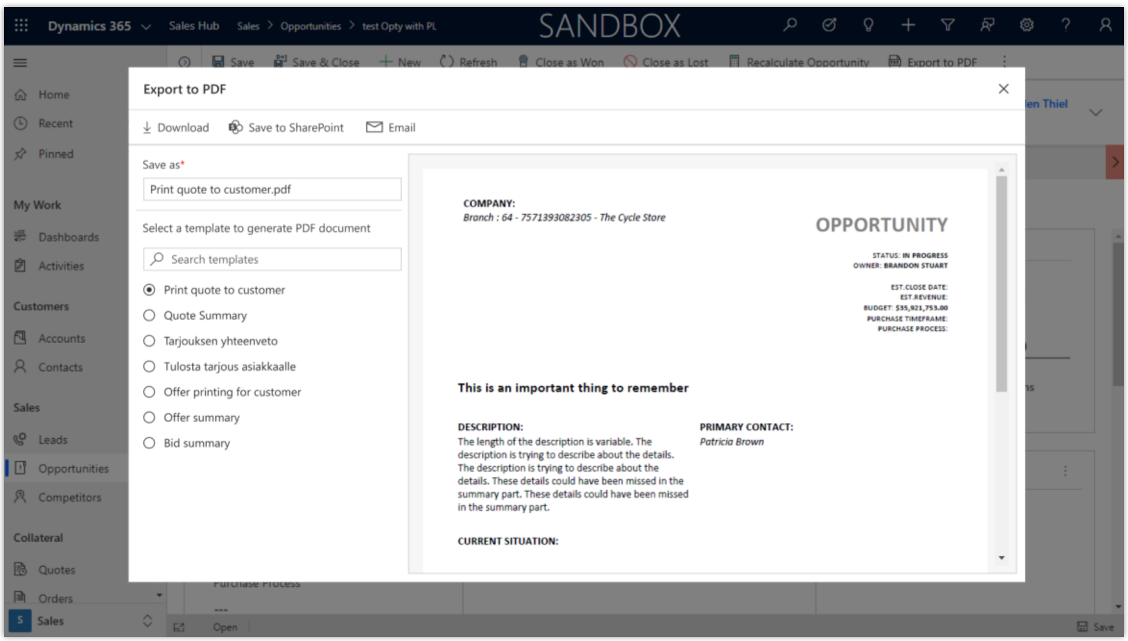
Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

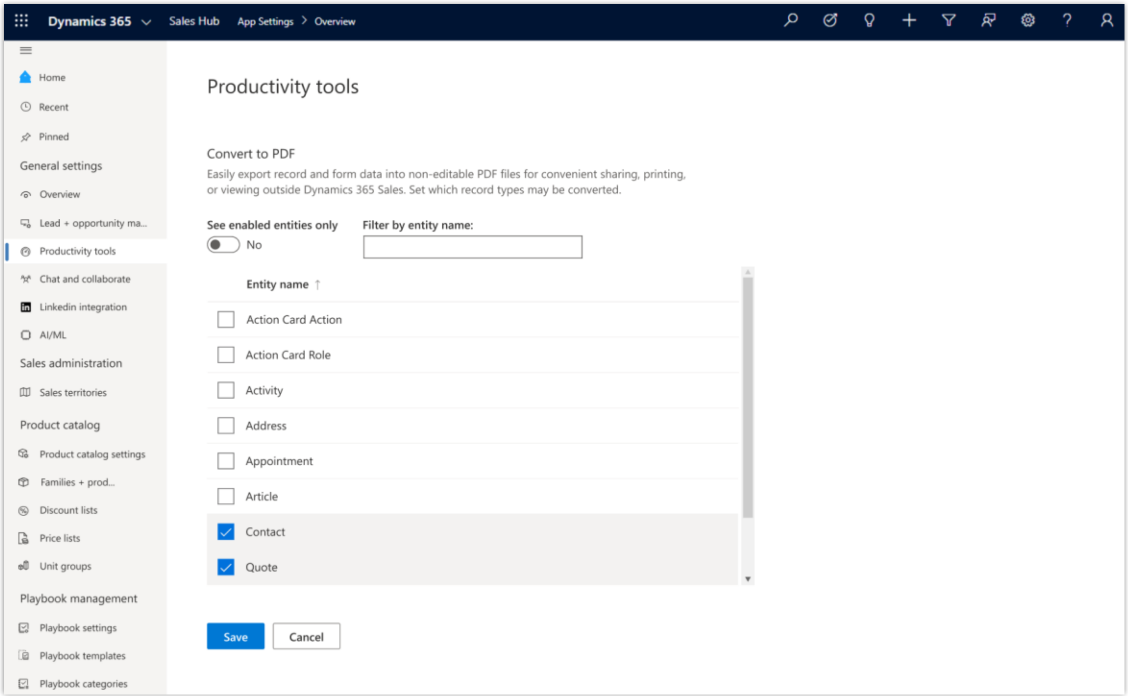
Organizations prefer creating and sharing offers or sales contracts in the form of non-editable PDF files to simplify and standardize the sales process and make it less error-prone. To make it even easier to collaborate on these generated PDF files, we're optimizing the PDF generation experience further and extending the capability to custom entities.

Feature details

- Enable the seller to save and share standardized PDF files for custom entities based on standardized Word templates.
- Enhanced PDF generation experience for the seller with simplified navigation, easy document template selection, PDF preview, and an intuitive PDF export and email options, with minimal clicks.
- Automate workflows by generating standardized PDF files programmatically using APIs.
- Conveniently manage entities for enabling/disabling PDF document generation.



Generate PDF files for sales records



Manage PDF generation settings

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

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.

Be more productive with new capabilities for the enhanced email experience

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

Email is one of the core communication channels that sellers regularly use while interacting with customers and prospects. With the enhanced email (pop-up) experience available from the Timeline, sellers will have a streamlined experience and greater flexibility allowing them to respond to and view email correspondences without losing the current context. Additionally, sellers can be more productive with an improved file attachment experience that allows them to easily add and remove files to an email.

Feature details

- **Consistent email experience**: Enhanced email experience, which was earlier supported only while composing emails, will now support actions like view, update, and reply from the Timeline section. (This capability will come in August 2020.)
- **Intuitive file attachment experience**: The following file attachment capabilities will be available:
    - Inline file attachment experience with the ability to manage multiple files.
    - Quick preview for files.
    - Ability to select and manage multiple attached files.

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

Overview of Dynamics 365 Sales Insights 2020 release wave 2

Dynamics 365 Sales Insights provides AI capabilities for accelerating sales, building better customer relationships, automating tasks, and guiding organizations to proactively pursue opportunities at the right time and with the right context. Furthermore, coaching and learning can be tailored to each organization. Using sales intelligence, Dynamics 365 Sales Insights empowers everyone in the sales organization to be more productive, agile, and customer focused—ultimately closing more deals, faster.

To help organizations adjust to recent changes in the world, Dynamics 365 Sales Insights brings together sales information via Dynamics 365, communications via Microsoft 365, relationships via LinkedIn, collaboration via Microsoft Teams, and transform selling via the power of AI and Microsoft Power Platform.

With the 2020 release wave 2 of Dynamics 365 Sales Insights, there's a continued emphasis on volume selling, relationship building, time-saving data automation, and overall improved usability.

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

2020 release wave 2 themes

- **Sales acceleration**: Sales accelerator helps inside sellers to further accelerate their sales rhythm, manage their interactive workday by prioritizing activities related to leads or opportunities, and engage directly with customers through integrated emails and phone dialer. In this release, we'll support automatic leads routing based on sales and marketing automation, enable organizations to connect with their customers across digital messaging channels, and encourage sellers to reach their goals.
- **Conversation intelligence**: By automatically transcribing calls and analyzing content, sentiment, and behavioral style, conversation intelligence provides meaningful insights. Sellers can effectively guide buyers toward a purchase by using proven conversation techniques. In this release, we'll introduce the ability to generate Teams calls right from within the sellers' workflows, inside their CRM, with conversational KPIs and advanced business insights surfaced on top of those calls.
- **Advanced forecasting and pipeline intelligence**: 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.
- **Relationship intelligence**: Relationship intelligence helps sellers identify, build, and nurture relationships with their customers. This release extends the breadth of communications to include customer-related calls and online meetings from Teams.

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 October 2020 through March 2021. 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.

Advanced forecasting and pipeline intelligence

Predictive forecasting and pipeline intelligence with predictive lead and 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.

Feature	Enabled for	Public preview	General availability
Enhanced predictive forecasting and deal flow experience	End users by admins, makers, or analysts	-	Oct 2020
Modified infrastructure for scoring leads and opportunities	End users, automatically	Aug 2020	Oct 2020
Redesigned predictive score experience	End users, automatically	Aug 2020	Oct 2020
Improved snapshot experience	End users, automatically	Aug 2020	Oct 2020

Conversation intelligence

Conversation intelligence provides meaningful insights by automatically transcribing calls and analyzing content, sentiment, and behavioral style. Sellers can effectively guide buyers toward a purchase by using proven conversation techniques.

Feature	Enabled for	Public preview	General availability
Easily onboard with out-of-the-box functionality and integrations	Admins, makers, or analysts, automatically	Oct 2020	
Holistic customer view in one place	End users by admins, makers, or analysts	Oct 2020	

Relationship intelligence

Relationship intelligence helps sellers use the information in their selling system across Dynamics 365 and Microsoft 365 to identify, build, and nurture relationships with their customers.

Feature	Enabled for	Public preview	General availability
Streamline data capture with auto capture	End users by admins, makers, or analysts	Oct 2020	

Sales accelerator

Sales accelerator helps inside sellers to further accelerate their sales rhythm, manage their interactive workday by prioritizing activities related to leads or opportunities, and engage directly with customers through integrated emails and phone dialer.

Feature	Enabled for	Public preview	General availability
Automatically perform activities on a seller's behalf	End users by admins, makers, or analysts	Oct 2020	

Feature	Enabled for	Public preview	General availability
Boost productivity with an intelligent and organized work list	End users by admins, makers, or analysts	Oct 2020	
Enable automatic intelligent assignment for leads and opportunities	Admins, makers, or analysts, automatically	Oct 2020	
Enable organizations to connect with their customers across digital messaging channels	End users by admins, makers, or analysts	Oct 2020	
Encourage sellers to reach their sales quota and improve performance	End users by admins, makers, or analysts	Oct 2020	
Provide sellers with conversation insights right where they conduct their daily business	End users by admins, makers, or analysts	Oct 2020	
Provide sellers with more granular control over a sequence	End users by admins, makers, or analysts	Oct 2020	
Streamline the sales admin experience	Admins, makers, or analysts, automatically	Oct 2020	
Zero-click sequence assignment	Admins, makers, or analysts, automatically	Oct 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 and data centers (regions), go to the Dynamics 365 and Power Platform availability page.

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's 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 prospects even when their sellers have yet to update them, keeping them honest and accurate.

Predictive forecasting and pipeline intelligence with predictive lead and 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 that rigorous quotas can be met, efficiently.

Enhanced predictive forecasting and deal flow experience

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

Business value

Data is the fuel that drives intelligent business processes. With predictive forecasting and snapshots, more data is available in the system to surface useful insights.

Improvements to the predictive forecasting experience ensures sellers and managers can derive that value.

Feature details

- View forecast factors per prediction.
- See the forecast confidence interval per prediction.

Modified infrastructure for scoring leads and opportunities

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

The predictive score recalculation won't update the **Last update date** on lead or opportunity records.

Feature details

- **New entity to store the score**: The predictive score will now be stored in a new related and dedicated entity, instead of directly in the lead or opportunity. This will ensure that the **Last update date** isn't reset with every run.
- **New views**: My Open Leads Scored, My Open Opportunities Scored.
- **Deprecations**: On the Lead entity: Lead Score, Lead Grade, Score Reasons, Score History, and Lead Score Trend. On the Opportunity entity: Opportunity Score, Opportunity Grade, Score Reasons, Score History, and Opportunity Score Trend.

Redesigned predictive score experience

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

Sellers benefit from a redesigned UI that makes it easier for them to understand the score and view underlying details.

Feature details

- **Redesigned score details UI**: The score widget has a new styling that makes it much more intuitive.
- **Ability to view more details**: When selecting view details, users will be able to get more information about the score, including more explanations, a trend visualization of the score over time, and helpful information about how the score calculations are performed.

The feature is now enabled for all users.

Improved snapshot experience

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

Snapshots allow organizations to keep track of ever-changing forecasts to ensure accountability in their teams. With a redesign of the snapshot experience, there won't be a need to manually take snapshots.

Feature details

- Enable daily snapshots from within the forecast configuration. Note: Labeled snapshots will be removed.
- Provide a new experience for selecting and comparing snapshots by using a calendar control.

Conversation intelligence

Overview

Talking directly with customers is an important part of any sales cycle. Although many organizations have already amassed large volumes of conversational data, most aren't 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.

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

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

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

Feature details

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

Holistic customer view in one place

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

Feature details

With the integration of conversation data and insights into Dynamics 365, sellers will be able to forget about forgetting and losing data, save time on every engagement, talk with customers in their own language, and be able to show exactly where and how they contributed to landing a deal. The increase in sellers' focus will have customers engaging them with greater willingness. Managers and sales enablement teams will conduct searches taking into account conversational attributes and be able to educate newcomers and evangelize conversation best practices across the sales organization.

Relationship intelligence

Overview

Relationship intelligence helps sellers use the information in their selling system across Dynamics 365 and Microsoft 365 to identify, build, and nurture relationships with their customers.

Relationship intelligence combines multiple features currently in the market, such as Who knows whom, Relationship Analytics, auto capture, talking points, and notes analysis. Each previously released feature provides functionality to sellers to improve their relationships. In the future, the relationship intelligence capabilities will be more connected and, therefore, create more valuable scenarios to the seller along the sales process.

Streamline data capture with auto capture

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

Business value

As part of 2019 release wave 2, we released for public preview a premium version of auto capture to make data capture simple and faster for sellers, so that they can have more focus on revenue-generating activities. In this release wave, we further streamlined the UI and improved our activity and contacts capture.

Feature details

Quality improvements: We continuously improve our AI-driven activity sync, focusing on connecting captured activities to appropriate records, in addition to capturing data of high quality so that irrelevant communication is excluded. In addition, we now go beyond capturing new contacts to also associating the contacts captured to their matching account.

Sales accelerator

Overview

The new experience, Sales accelerator in Dynamics 365 Sales, is targeted toward inside sales representatives working at contact centers.

Through this new workspace, inside sales reps will be able to work in a new experience designed for the way they sell, which differs significantly from how sellers use CRM today.

This unified workspace brings together existing CRM functionality, such as information about contacts or leads, with AI-driven prioritization (next best action) and an automated sales sequence. Benefits include:

- Simplified experience inside CRM for the sales reps.
- Next best customer—evolution from a leads list into a prioritized work queue.
- Integrated tools and a unified experience that save time and bring all relevant information to a seller's screen.

Automatically perform activities on a seller's behalf

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

Business value

Salespeople are spending time sending template-based emails to customers. To do so, they copy and paste a template, edit it if required, and send it as an email. Automating this process—and requesting input from salespeople only when their explicit action is required—will increase their productivity by reducing friction and expediting the sales cycle.

Feature details

This feature will reduce the number of steps in a sequence that requires salespeople to take action by automatically sending template-based emails on their behalf.

Boost productivity with an intelligent and organized work list

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

Business value

Sellers manage large numbers of leads and opportunities each day, and search through large amounts of relevant information to decide who is the next best customer to reach. Adding advanced capabilities to manage items in the work list will improve seller productivity and increase their chances of qualifying the lead, faster.

Feature details

This feature will allow real-time managing—in one organized place—all the relevant sales items regarding potential customers: leads, opportunities, emails, and tasks.

Enable automatic intelligent assignment for leads and opportunities

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

Business value

Sales managers spend a lot of time assigning leads to sellers based on their diagnosis of the deal value, size, or revenue. With an automatic lead distribution engine—based on territory/region, the seller's role, market/customer segmentation, and the source of the lead—leads will be automatically assigned to sellers. The sales manager will avoid the manual assignment task, keep essential load balancing among the sellers, and lower the risk of losing leads because they were never assigned to a seller.

Feature details

Adding a lead distribution engine will reduce the manual assignment work of the sales manager, preventing the loss of unassigned leads and balancing sales capacity among sellers.

Enable organizations to connect with their customers across digital messaging channels

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

Business value

Sellers spend most of their day trying to reach customers over the phone, and most of their attempts fail because the customer is unavailable. Communicating with digital text channels will raise a seller's chance to engage successfully with customers and will contribute to closing the lead successfully.

Feature details

Adding real-time digital channels will reduce the number of attempted—and failed—calls a seller needs to make to close a deal, and will improve the engagement between seller and customer.

Encourage sellers to reach their sales quota and improve performance

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

Business value

Sellers and managers have a monthly sales quota to reach. To measure their performance, they actively generate views and run manual reports. Adding real-time KPIs and dashboards helps sellers focus on their targets and helps the sales manager give real-time updates to guide and motivate the team accordingly.

Feature details

This feature will increase a sales manager's awareness of the achievements of the sales staff and improve the sellers' motivation to achieve their goals.

Provide sellers with conversation insights right where they conduct their daily business

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

Business value

Sellers engage frequently with customers through calls, and spend a lot of time logging summary notes of the calls and reading previous call summaries before making contact. Automating this process—presenting a call summary after the call is ended and a short summary of the previous engagement with the customer—will save time that the seller can invest in the sales process, and help the seller and customer pick up the conversation where they left it at their last interaction.

Feature details

This feature will reduce the time spent getting a deep dive into every phone call record in the system, summarizing the topics mentioned in the call and surfacing valuable information that will help the sales process move forward quickly and successfully.

Provide sellers with more granular control over a sequence

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

Business value

Salespeople engage with customers based on a predefined sequence of actions. While following sequence steps, they respond to customer inputs that might not necessarily align with the future steps in a sequence. Postponing the remaining steps will allow salespeople to provide a more personalized buying experience and help in redirecting ongoing engagement back to the expected sales play.

Feature details

With this enhancement, sellers will be able to freeze all future steps in the sequence attached to a lead or opportunity.

Streamline the sales admin experience

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

Business value

Sales enablement managers are responsible to enforce best practices to increase win rate, align to processes, and increase salespeople productivity. To do so, they use cadence to build sequences for salespeople to follow, depending on the business scenario.

Feature details

With the release, sales enablement managers will be able to:

- Add conditions to a sequence to support more complex business scenarios where the sales play isn't linear.
- Monitor sequences to gain better understanding of their performance.
- Quickly ramp up and understand how to use sequences by following a first-run guide.

Zero-click sequence assignment

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

Business value

Sales enablement managers use cadence to enforce best practices by building sequences that match their business scenarios. With this release, we help sales enablement managers scale by reducing the manual work required to assign a sequence to a lead or an opportunity.

Feature details

This feature will allow sales enablement managers to automatically assign a sequence to a lead or an opportunity.

Overview of Dynamics 365 Product Visualize 2020 release wave 2

Dynamics 365 Product Visualize empowers sellers to showcase and customize products in their real-world environment. Sellers can place a 3D digital twin of a product in their customer's environment, let them explore it as if it's physically there, and make detailed notes about their requirements. Using mixed reality, sellers can create a shared understanding between themselves and buyers to accelerate complex sales processes.

What's new and planned for Dynamics 365 Product Visualize

This topic lists features that are planned to release from October 2020 through March 2021. 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
3D animation	End users, automatically	Mar 2021	To be announced
Improve the rendering quality and performance	End users, automatically	Mar 2021	To be announced

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.

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3D animation

Enabled for	Public preview	General availability
End users, automatically	Mar 2021	To be announced

Business value

Static objects provide a sense of spatial reasoning of an object in a specific and fixed place in the environment. Animation of 3D objects can provide a sense of spatial reasoning for how an object can move or behave in the environment.

With 3D animations, you can deliver a more immersive and experientially rich way to engage with the product, delivering higher levels of entertainment or educational value compared to the static object representation.

Feature details

Personas

- Salespeople who want to demonstrate how a product moves in space (for example, a robotic arm).
- Salespeople or product engineers who want to demonstrate a deeper technical appreciation of the product (for example, “exploded view” to highlight all the technical components of an engine).

Features

- For selected products where animation is supported, a different user interface is provided to the end user that allows for animation play controls. Animation play controls consist of Play, Pause, and a scrubber bar that allows users to fast forward or rewind by adjusting a dial on a horizontal axis.
- Spatial notes in the form of a mixed-reality image capture and inking are enabled for animations.

Improve the rendering quality and performance

Enabled for	Public preview	General availability
End users, automatically	Mar 2021	To be announced

Business value

To run high-quality 3D models on mobile devices and mixed-reality headsets today, you often need to decimate 3D models and simplify them enough to run on target hardware. But this simplification can result in a loss of important detail that's needed in key business and design decisions. Azure Remote Rendering is a new mixed-reality service that enables you to render high-quality interactive 3D content in the cloud and stream it to your devices in real time.

With Azure Remote Rendering, you can interact with your architectural, engineering, and design models in mixed reality without any decimation or sacrifice on visual quality.

Feature details

Personas

Salespeople and marketing managers who want to show customers their products in the highest resolution in 3D. This can be useful for large models or models where every detail matters.

Features

When a user selects a model to view, in the background, Dynamics 365 Product Visualize renders the 3D file in the cloud, using Azure Remote Rendering, to allow viewing of the file in its highest quality.

Service

Overview of Dynamics 365 Customer Service 2020 release wave 2

Dynamics 365 Customer Service is an end-to-end service for customer support, spanning self and assisted scenarios across multiple channels of customer engagement. Customer Service provides comprehensive and efficient case routing and management for agents. It also provides add-ons for insights and omnichannel engagement, and enables authoring and consumption of knowledge management articles. For 2020 release wave 2, we are focused on the following three areas:

- **Agent productivity**: Enabling agents to engage in multiple sessions simultaneously with improvements in the productivity tools of timeline and email to increase efficiency of the agent experience.
- **Omnichannel for Customer Service**: Enhancing extensibility options to enable integration with mobile applications, integrating any channel through the Microsoft bot framework, and outbound messaging.
- **Integrated insights and AI-driven suggestions**: Integrating insights with the Customer Service and Omnichannel for Customer Service apps and intelligent knowledge and case suggestions for agents.

What's new and planned for Dynamics 365 Customer Service

This topic lists features that are planned to release from October 2020 through March 2021. 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

Dynamics 365 Customer Service aims to enable businesses to differentiate themselves from their competition by providing world-class customer experiences.

Feature	Enabled for	Public preview	Early access*	General availability
Embedded analytics for customer service managers	End users by admins, makers, or analysts	Oct 2020	-	-
Historical topic clustering for all channels	Admins, makers, or analysts, automatically	Oct 2020	-	
Knowledge search insights	End users by admins, makers, or analysts	Oct 2020	-	-
Rich text control with embedded images	End users by admins, makers, or analysts	-	-	Oct 2020
IoT alert measures and service history	End users by admins, makers, or analysts	✔ Feb 1, 2020	-	Oct 2020
Activity monitoring for automatically created records	Admins, makers, or analysts, automatically	-	Aug 2020	Oct 2020
Agent suggestions for knowledge	End users by admins, makers, or analysts	Aug 2020	-	Oct 2020
Agent suggestions for similar cases	End users by admins, makers, or analysts	Aug 2020	-	Oct 2020
Configuration experience for timeline in the new form designer	Admins, makers, or analysts, automatically	-	Aug 2020	Oct 2020

Feature	Enabled for	Public preview	Early access*	General availability
Create and configure device properties	End users by admins, makers, or analysts	-	Aug 2020	Oct 2020
Customer Service new multisession app	End users by admins, makers, or analysts	Aug 2020	-	Oct 2020
Enable silent, seamless migration from legacy to Unified Interface service scheduling experience	End users, automatically	-	Aug 2020	Oct 2020
Enhanced knowledge articles editing and view experience	End users, automatically	-	Aug 2020	Oct 2020
Familiar, modern email template experience for agents and administrators	End users, automatically	-	Aug 2020	Oct 2020
Insert knowledge articles into an email	End users, automatically	-	Aug 2020	Oct 2020
Intuitive email file attachment experience for agents	End users, automatically	-	Aug 2020	Oct 2020
New forms and dashboards for Customer Service	End users, automatically	-	Aug 2020	Oct 2020
Tool to migrate rules for automatically creating records, service-level agreements from classic app to Customer Service Hub app	Admins, makers, or analysts, automatically	Aug 2020	-	Oct 2020
Usability enhancements for timeline	End users, automatically	-	Aug 2020	Oct 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
Embedding chat in mobile experiences	End users by admins, makers, or analysts	-	-	Oct 2020
Persistent messaging for chat	End users by admins, makers, or analysts	-	-	Oct 2020
Outbound messaging	End users by admins, makers, or analysts	Aug 2020	-	Oct 2020
Post-conversation surveys using Dynamics 365 Customer Voice	End users by admins, makers, or analysts	Aug 2020	-	Oct 2020
Real-time language translation of messages	End users by admins, makers, or analysts	Aug 2020	-	Oct 2020
Agent personalization of quick replies	End users by admins, makers, or analysts	Sep 2020	-	Oct 2020
Agent personalization of sound notifications	End users by admins, makers, or analysts	Sep 2020	-	Oct 2020
Agent suggestions for cases similar to the conversation	End users by admins, makers, or analysts	Sep 2020	-	Oct 2020
Agent suggestions for knowledge articles	End users by admins, makers, or analysts	Sep 2020	-	Oct 2020
App profile manager for multisession apps	End users by admins, makers, or analysts	Sep 2020	-	Oct 2020

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

Description of **Enabled for** column values:

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

Overview

Dynamics 365 Customer Service is a comprehensive and efficient case-routing and management solution for agents. Agents can rapidly resolve customer issues with a unified interface that provides complete visibility into customer profiles, service level agreements, case timelines, and access to productivity tools such as business process flows and knowledge article recommendations. The community portal empowers customers to resolve issues on their own or through community engagement. All these capabilities are designed to help streamline resolution of customer issues in a consistent and effortless manner.

Embedded analytics for customer service managers

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

Business value

The embedded experience allows customer service managers quicker access to rich analytics and insights, helping them deliver better customer service and thereby improving 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 applications, providing rich insights to users in the familiar context of the application. We're also expanding the number of out-of-the-box analytics reports, providing insight into key business metrics for the customer support organization.

Historical topic clustering for all channels

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

Business value

Topics are a concept of AI-generated data that automatically organize similar issues into groups. By aggregating metrics from issues grouped into topics, customers get a full view of KPIs and metric impact for each topic. For example, customers can view the average handling time, sentiment, and CSAT for a specific topic, and whether the topic is a key driver for any of those metrics. It's been a key differentiator in Customer Service Insights for customers to get actionable insights. With the expansion of service delivery for all channels beyond cases, we now extend this powerful capability to conversations, correlating those topics with more conversation-related metrics, such as sentiment.

Feature details

Customer Service Insights uses AI to automatically group semantically similar support cases into topics.

In this release, the AI capability will also be applied to support channels, including chat and digital messaging transcripts. This will help organizations better understand issues that customers face and their impact on core business metrics across the spectrum of engagement.

Knowledge search insights

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

Business value

Understanding what agents are searching for while helping customers can help organizations improve the content of their knowledge base, which improves all agents' ability to help customers.

Feature details

Knowledge search insights highlights what agents are searching the knowledge base for most, to inform organizations of what articles might be needed to help customers. The knowledge search insights report features the following views and metrics to inform improvements to the support knowledge base:

- Search Term Volume
- Search Term Average Click Position
- Search Term Engagement Rate
- Top Search Terms by Volume and other KPIs
- Searches that return no results
- Searches with low engagement rate

Rich text control with embedded images

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

Business value

A rich text control provides a standard way to enable text formatting and embedded media support with minimal effort. This control gives makers and administrators a consistent way across their organization to enhance the user experience and encourage greater efficiency and productivity.

Feature details

A configurable PCF control that can be used for any multiline rich text input or viewing. Rich text enables formatting for emphasis and readability. The addition of embedded media, such as images, enables further contextual understanding and enhanced communication.

IoT alert measures and service history

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

Business value

Real-time alerts based on IoT data help agents monitor and fix issues with devices to provide more proactive customer service. Proactive customer service increases customer satisfaction by increasing product performance and reducing reactive customer support inquiries. Richer IoT alerts that include historical device metrics help agents know when to take action to update devices and avoid issues and failures.

Feature details

When IoT signals (alerts) are received, additional information and context is typically required to inform what action should be taken to handle the alert. This feature enhances the Connected Customer Service capability by enabling the agent to view real-time and historical device metrics. For example, showing the temperature and vibration reading history for a piece of equipment with in-context annotation of earlier cases. The historical data informs what outcomes occurred for specific readings in the past such as issues or failures and can be avoided if agents take action to update the devices proactively when alerts are triggered.

See also

Receive IoT Alerts from Azure IoT Central (docs)

Activity monitoring for automatically created records

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	Aug 2020	Oct 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. With automatic record creation, administrators can also create leads or any other entity record from a set of available activities. Once automatic record creation rules are set up, this feature enables monitoring of the rules for success or failure.

Feature details

This feature adds views to monitor and review the health of the rules to create records automatically. The success or failure of each rule can be viewed at a glance and grid filtering allows custom views to focus on the event types that require action such as rule failures.

Agent suggestions for knowledge

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

Business value

Agents typically use several resources to efficiently resolve customer cases and provide consistent responses. These include knowledge articles, collaborating with other agents or experts, and reviewing active or successfully resolved similar cases. Surfacing the best knowledge articles with AI helps agents find the most applicable knowledge article quickly to increase agent productivity, and provide better and faster service to customers.

Feature details

Without artificial intelligence (AI), agents spend time searching for and scanning knowledge articles to determine if they are relevant to the active case they are working on. This delays customer service and resolution time. AI helps proactively surface the best knowledge articles by parsing through thousands of articles, taking case context and previous history into account.

Key highlights of this feature include:

- AI-driven knowledge article suggestions based on case context and historical success rate.
- A comprehensive feedback mechanism to continuously improve the recommendation model.

Agent suggestions for similar cases

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

Business value

Agents typically use several resources to efficiently resolve customer cases and provide consistent responses. These include referring to knowledge articles, collaborating with other agents or experts, and reviewing active or successfully resolved similar cases. With the use of AI, suggestions about similar cases help agents find the right solutions quickly, increase agent productivity, and provide better and faster service to customers.

Feature details

Very often, agents spend time searching and scanning for similar cases to determine if they are relevant to the active case they are working on. This delays customer service and resolution time. With AI, we can proactively suggest the right cases by parsing through thousands of cases, taking case context and previous history into account. Additionally, agents can also see and collaborate with the agents who serviced those cases and are considered as experts.

The key highlights of this feature include:

- AI-driven case suggestions based on case context and historical success rate.
- Secondary actions that agents can take, such as collaborate with an expert, after a similar case has been found.
- Continuous improvement of the recommendation model through comprehensive feedback mechanism.

Configuration experience for timeline in the new form designer

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

Business value

The timeline configuration experience enables the timeline to show a customer's history across cases, accounts, or contacts. This experience gives administrators the ability to configure the information displayed in each timeline to help agents have the best understanding of the customer's history so they can deliver more personalized service.

Feature details

Administrators need to be able to configure settings to maximize agent productivity. In this release, timeline can be customized in the form designer.

The following functionality is available:

- Set timeline records to show as expanded by default.
- Ability to add or remove +New activity items in Timeline.
- Ability to hide status tags and "What you've missed."

Create and configure device properties

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

Business value

This feature makes it easier to create unique device properties and associate them with different devices. The ability to manage different types of devices and easily keep track of key product details, usage, and service information is important to deliver effective service. Additionally, it becomes easier to track changes to the device properties over time.

Feature details

Device properties allow customers to easily define the different attributes that characterize a device. Common examples can include make, model, serial number, size, dimensions, and last service date. This feature also allows you to display properties dynamically based on the device and keeps track of how device properties change over time, like an audit.

Understanding device properties is a foundational capability that enables future capabilities like usage-based maintenance.

Customer Service new multisession app

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

Business value

The multisession app allows Customer Service agents to multitask on several customer cases simultaneously and seamlessly switch among issues without losing context of the in-progress work.

Feature details

The new multisession app for Customer Service allows agents to handle customer cases efficiently with the help of the following features:

- Management of multiple cases simultaneously.
- Management of email and other case-related activities without losing context of the parent case.
- Productivity pane for AI-based suggestions of knowledge articles, similar cases, and other productivity tools.

Enable silent, seamless migration from legacy to Unified Interface service scheduling experience

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

This feature automatically migrates remaining customers who are using the legacy scheduling experience to the new Unified Interface compliant service scheduling experience. The automated migration happens silently and has no impact on the customer's experience. Leveraging the latest experience ensures customers receive the best and most performant versions of Dynamics 365 applications.

Feature details

The following entities will be automatically migrated from the legacy web client to the latest Unified Interface service scheduling experience:

- Site
- Facility/equipment
- Resource Group
- Service
- Service Activity
- Service Calendar
- Search Availability

Enhanced knowledge articles editing and view experience

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

Collapsible sections help authors nest content effectively. The ability to nest content in articles enables agents to easily scan longer articles to find the most relevant sections quickly, which helps them better serve customers. The addition of five other editor plug-ins will help improve the knowledge editing experience.

Feature details

Key highlights of this feature include:

- Knowledge authors can easily create a collapsible section consisting of a header and a body in a knowledge article.
- Knowledge consumers can expand and collapse these sections to display or hide the content.
- In the knowledge base editor, knowledge authors can easily use superscript, subscript, text direction from left-to-right (LTR), right-to-left (RTL), and remove formatting functionality. Improvements to the modern design experience include the Change Div container, Embed media, and Anchor icons. On the preview tab, the warning message that states, "This content was not generated by Microsoft and may not be secure...." has been removed.
- In the knowledge search control, the interaction icons (for example, link article to entity, email articles, and copy URL) are updated with the modern design experience.

Familiar, modern email template experience for agents and administrators

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

Agents spend a significant amount of time using email to communicate with customers. They often need to communicate the same information to all customers at different stages in the support life cycle such as a welcome email, refund instructions, or a personalized signature.

Email templates make these processes efficient and standardized across the support team by providing the ability to create once and use any number of times.

Feature details

Email templates enable scale, efficiency, and consistency of email communication between agents and customers for support centers. In this release, we are bringing the following template authoring capabilities to the agent and administrator experience:

- Create templates with an intuitive and easy-to-understand experience.
- Author templates using a complete rich text experience, including the ability to 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.
- Personalize the message with dynamic customer or entity data.

Insert knowledge articles into an email

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

Email is a critical communication channel that support agents use to communicate with customers and a vehicle for sharing knowledge articles. This feature provides agents in Unified Interface with an easy way to insert one or more knowledge articles while working on an email.

Feature details

The legacy web client allows agents working on emails to search for knowledge articles and insert them into the email without losing context. This feature brings this capability into Unified Interface. While working on an email, an agent can search and select a knowledge article to include in the email.

Intuitive email file attachment experience for agents

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

Email is a critical communication channel that support agents use to communicate with customers. A great file attachment experience ensures agents can quickly and easily add or remove files and provide the best customer service experience possible.

Feature details

Agents often receive and view files or need to send files using email. An intuitive and easy-to-use file experience improves agent productivity and quality of service to customers. In this release, we are bringing the following file attachment capabilities to the agent experience:

- Inline file attachment experience with the ability to manage multiple files.
- Quick preview for files.
- Ability to select and manage multiple attached files.

New forms and dashboards for Customer Service

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

With the work being done to enable multisession capabilities in Customer Service, the new forms and dashboards are also available in existing experiences across Dynamics 365.

Feature details

These forms and dashboards are automatically available in the legacy web client and can be enabled in other apps using the Account, Contact, or Case entity and if all forms are shown by default when the appropriate roles are assigned.

Tool to migrate rules for automatically creating records, service-level agreements from classic app to Customer Service Hub app

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

Business value

The migration tool will allow legacy rules for creating records automatically and service-level agreements (SLAs) to be migrated to Customer Service Hub for easier access.

The Customer Service Hub app has several features that replace the features available in the legacy Customer Service app. The rules for creating records automatically and SLAs have moved to Power Automate-based workflows to make the transition to the new platform easier to manage.

Feature details

Companies often define multiple rules for SLAs and creating records automatically to help manage and automate their business processes. The future of these productivity features is with flows designed in Power Automate.

In this release, the migration tool will be available to help with the transition to Power Automate as follows:

- Admins can choose the legacy rules that need to be migrated.
- Admins decide when to switch to the new rule; legacy rules are not modified.
- Flows in Power Automate are created for the existing legacy rules for automatic record creation and SLAs.
- Admins can decide when to activate the new rules and deactivate the legacy rules.
- The legacy rules continue to run on existing cases until the rules are deactivated.

Usability enhancements for timeline

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 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 in 2020 release wave 2 include the ability to:

- Use inline images for rich text notes (this feature line item will come later in August).
- Expand or collapse all records.
- Provide email-specific actions for email records (this feature line item will come later in August).
- Highlight matching text for the search filter.

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 use 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.

Embedding chat in mobile experiences

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

Business value

Businesses that have mobile applications want to provide customers the option to engage customer support from within the mobile apps. This feature enables several ways to embed the chat widget into mobile apps so that businesses can serve their customers better.

Feature details

This feature enables organizations to embed the omnichannel chat widget into mobile applications across iOS and Android devices.

The Omnichannel for Customer Service chat widget can be embedded in mobile applications in two ways:

- Quickly with little code customization by embedding the omnichannel chat widget in an iFrame with customization of color and logo through the Omnichannel Administrator app. This also includes a sample app on AppSource with examples for common scenarios such as authentication, prechat survey, and other chat functionality scenarios.
- Through the React Native Mobile SDK for Omnichannel for Customer Service that developers can use to build customized chat widgets in their mobile apps.

Persistent messaging for chat

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

Business value

Live chat is a popular channel of choice for customers to reach support. The challenge with live chat is that when chat conversations are closed, the history of the chat is accessible through transcripts but not easily visible in the chat conversation history as it is with asynchronous messaging channels like WhatsApp. For chat, if an agent has to read transcripts before responding to a customer who is re-engaging in chat, it can delay the agent response time and degrade the customer's experience. This feature allows admins to enable persistence in chat so that the customer's previous conversation displays in the new chat session to provide context for the ensuing conversation.

Feature details

Admins can configure persistent messaging on chat, which ensures that a customer's previous conversation shows in the conversation window so the agent has the full context of the customer's previous engagement before responding.

Outbound messaging

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

Business value

Customer support organizations have the need to proactively reach out to their customer base to notify them with regard to upcoming appointments, status of the support tickets, and so on. Having the ability to reach out to their customers via the customer's preferred channel of communication is important for them to deliver best-in-class service.

Feature details

Outbound messaging enables organizations to dynamically message to their customers based on certain events through supported channels. For example, agents can notify customers about the status of their case. This feature includes the following capabilities:

- Create message templates that can be adopted for outbound messages.
- Configure outbound messages based on certain events on any entity and send the messages when those events are triggered.

When the customer responds back to the outbound messages, it will be treated like any other incoming conversation that exists today in Omnichannel for Customer Service, flowing through the routing and work distribution for agent assignment, and so forth, and the agent will be able to respond back to the customer.

Post-conversation surveys using Dynamics 365 Customer Voice

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

Business value

Businesses need a mechanism to run customer satisfaction surveys to ensure they are meeting the expectations of their customers through their service delivery.

Feature details

This feature enables administrators to configure post-conversation surveys using Customer Voice and present the survey natively as part of their customer experience to solicit feedback. The feature also supports sending offline surveys through one of the various channels enabled.

This feature will support:

- Inline surveys for web chat.
- Embedded link-based surveys for all other channels.

Real-time language translation of messages

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

Business value

Customers expect to receive support in their native language. Therefore, businesses need to deliver worldwide support in multiple languages while balancing the effectiveness of service delivery against the cost to deliver support. To staff support centers with agents who cover all languages that customers speak can be challenging to maintain over time. The real-time message translation feature enables agents to support customers in a language they elect to be serviced in.

Feature details

This feature allows for real-time translation of messages between the customer and support agent and messages among the support agents, such as supervisors or SMEs who consult and collaborate internally.

The real-time translation feature is enabled as a plug-in that exposes APIs to bring in third-party translation services and also provides a native implementation through Azure Cognitive Services.

Agent personalization of quick replies

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

Business value

Agents spend a considerable amount of time interacting with customers and aim to deliver a quality and timely engagement to their customers. Quick replies help agents store commonly used replies and phrases to ensure fast responses to customers. While businesses can provide a robust library of replies to ensure consistency of response and service delivery, the ability for the agents to personalize their service delivery to represent their identity is important.

Feature details

This feature enables agents to customize the preconfigured quick replies to represent their style and easily address communication scenarios in a manner that is common and personal to them.

Agent personalization of sound notifications

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

Business value

Most of us have preferences for different sound-based notifications that are helpful and meaningful in distinguishing events. It is common with any sound-based notification experience to be customizable, such as the ring tone, email, text, or other notifications on your cell phone. Similarly, it is helpful for agents to be able to customize the sound notifications they receive for different events in Omnichannel for Customer Service.

Feature details

This feature enables agents to customize sound notifications for incoming conversations so that they can easily distinguish between the different sessions that they are handling and differentiate their sessions from others around them in a call center setting.

Agent suggestions for cases similar to the conversation

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

Business value

Agents typically use several resources to efficiently resolve customer cases and provide consistent responses. These include referring to knowledge articles, collaborating with other agents or experts, and reviewing active or successfully resolved similar cases. With the use of AI, suggestions about similar cases help agents find the right solutions quickly, increase agent productivity, and provide better and faster service to customers.

Feature details

Very often, agents spend time searching and scanning for similar cases to determine if they are relevant to the active case they are working on. This delays customer service and resolution time. With AI, we can proactively suggest the right cases by parsing through thousands of cases, taking case context and previous history into account. Additionally, agents can also see and collaborate with the agents who serviced those cases and are considered as experts.

The key highlights of this feature include:

- AI-driven case suggestions based on case context and historical success rate.
- Secondary actions that agents can take, such as collaborate with an expert, after a similar case has been found.
- Continuous improvement of the recommendation model through comprehensive feedback mechanism.

Agent suggestions for knowledge articles

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

Business value

Agents typically use several resources to efficiently resolve customer cases and provide consistent responses. These include knowledge articles, collaborating with other agents or experts, and reviewing similar active or successfully resolved cases. Surfacing the best knowledge articles with AI helps agents find the most applicable knowledge article quickly to increase agent productivity and provide better, faster service to customers.

Feature details

Without artificial intelligence (AI), agents spend time searching for and scanning knowledge articles to determine if they are relevant to the active case they are working on. This delays customer service and resolution time. AI helps to proactively surface the best knowledge articles by parsing through thousands of articles, taking case context and previous history into account.

Key highlights of this feature include:

- AI-driven knowledge article suggestions based on case context and historical success rate.
- A comprehensive feedback mechanism to continuously improve the recommendation model.

Experience designer for multisession apps

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

Business value

The experience designer is an out-of-the-box solution that lets organizations create targeted app experiences for agents and supervisors. Administrators can select channels and tools to be used by different profiles as an alternative to building and maintaining custom apps.

Feature details

Organizations often set aside the out-of-the-box apps and, instead, create custom apps—with specific combinations of forms, channels, and tools—to help address the needs of their customers. However, when new app features are released, administrators have to spend time and money to manually update each custom app.

With the experience designer, administrators can create custom profiles with specific session templates, conversation channels, and productivity tools. These profiles can then be assigned to users. The out-of-the-box experience designer for multisession apps can help organizations get the latest product features without the costs of building and maintaining custom apps.

Overview of Dynamics 365 Customer Service Insights 2020 release wave 2

Dynamics 365 Customer Service Insights empowers agents and customer service managers to make better decisions to improve operational efficiency with confidence and achieve customer satisfaction.

Thanks to the power of artificial intelligence (AI), machine learning (ML), and business intelligence (BI), you can easily get a clear view into your customer service organizations on what's happening, why it's happening, and what could happen, to take the right actions. The AI models used by Customer Service Insights proactively learn from continuous user input and optimize themselves over time. Best of all, the AI capabilities are included out of the box and don't require any AI expertise to use.

Beginning with 2020 release wave 2, the insights-centric features will be deeply integrated into the Customer Service agent and manager experiences instead of through the standalone Customer Service Insights application we have today. You'll see a number of new capabilities from Customer Service Insights across core Customer Service, Omnichannel for Customer Service, and knowledge management. Intelligent agent-facing knowledge base and similar case suggestions will help agents resolve their customer issues quickly and easily, and new analytical views will help customer service managers focus on key support areas that need attention. These highlights will also be included directly in the core Customer Service application so that users can get insights in context without having to switch between applications.

Review the "what's new" page regularly for the latest updates. Additional feature requests can be made on 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 October 2020 through March 2021. 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
Embedded analytics for customer service managers	End users by admins, makers, or analysts	Oct 2020	-
Historical topic clustering for all channels	Admins, makers, or analysts, automatically	Oct 2020	
Knowledge search insights	End users by admins, makers, or analysts	Oct 2020	-
Improve topic generation by excluding unnecessary phrases	Admins, makers, or analysts, automatically	-	Oct 2020
Real-time language translation of messages	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Agent suggestions for knowledge	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Agent suggestions for similar cases	End users by admins, makers, or analysts	Aug 2020	Oct 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.

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Embedded analytics for customer service managers

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

Business value

The embedded experience allows customer service managers quicker access to rich analytics and insights, helping them deliver better customer service and thereby improving customer satisfaction.

Feature details

Dynamics 365 Customer Service Insights provides many key analytics and insights about your customer service data. We're also expanding the number of analytics reports that are available out of the box, providing insight into key business metrics for the customer support organization.

With this release, Customer Service analytics and insights will be embedded within Dynamics 365 Customer Service applications to provide rich insights to users in a familiar context.

Historical topic clustering for all channels

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

Business value

Topics are a concept of AI-generated data that automatically organizes similar issues into groups. By aggregating metrics from issues grouped into the same topic, customers get a full view of KPIs and metric impact for each topic. For example, customers can view the average handling time, sentiment, and CSAT for a specific topic, and whether the topic is a key driver for any of those metrics. It's been a key differentiator in Customer Service Insights for customers to get actionable insights. With the expansion of service delivery for all channels beyond cases, we now extend this powerful capability to conversations, correlating those topics with more conversation-related metrics, such as sentiment.

Feature details

Customer Service Insights uses AI to automatically group semantically similar support cases into topics.

In this release, the same capability will now be applied to all support channels including chat, and digital messaging transcripts. This will help organizations better understand issues that customers face and their impact on core business metrics across the spectrum of engagement.

Knowledge search insights

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

Business value

Understanding what agents are searching for while helping customers can help organizations improve the content of their knowledge base, which improves all agents' ability to help customers.

Feature details

Knowledge search insights highlights what agents are searching the knowledge base for most, to inform organizations of what articles might be needed to help customers. The knowledge search insights report features the following views and metrics to inform improvements to the support knowledge base:

- Search Term Volume
- Search Term Average Click Position
- Search Term Engagement Rate
- Top Search Terms by Volume and other KPIs
- Searches that return no results
- Searches with low engagement rate

Improve topic generation by excluding unnecessary phrases

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

Business value

The analysis of support issues helps businesses optimize support delivery and improve customer experience but can be time-consuming. This feature improves the quality of the AI-driven clustering by identifying and excluding common phrases that can skew the clustering.

Feature details

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

With this release, additional keywords and phrases, such as company name and irrelevant words, that are specified by the users will be ignored when the text is parsed. The exclusion of the irrelevant words will result in a more accurate and meaningful topic generation.

Real-time language translation of messages

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

Business value

Customers expect to receive support in their native language. Therefore, businesses need to deliver worldwide support in multiple languages while balancing the effectiveness of service delivery against the cost to deliver support. To staff support centers with agents who cover all languages that customers speak can be challenging to maintain over time. The real-time message translation feature enables agents to support customers in a language they elect to be serviced in.

Feature details

This feature allows for real-time translation of messages between the customer and support agent and among the support agents who consult and collaborate internally, such as supervisors or SMEs.

The real-time translation feature is enabled as a plug-in that exposes APIs to bring in third-party translation services and also provides a native implementation through Azure Cognitive Services.

Agent suggestions for knowledge

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

Business value

Agents typically use several resources to efficiently resolve customer cases and provide consistent responses. These include knowledge articles, collaborating with other agents or experts, and reviewing active or successfully resolved similar cases. Surfacing the best knowledge articles with AI helps agents find the most applicable knowledge article quickly to increase agent productivity, and provide better and faster service to customers.

Feature details

Without artificial intelligence, agents spend time searching for and scanning knowledge articles to determine if they are relevant to the active case they are working on. This delays customer service and resolution time. Using AI helps proactively surface the best knowledge articles by parsing through thousands of articles, taking case context and previous history into account.

Key highlights of this feature include:

- AI-driven knowledge article suggestions based on case context and historical success rate.
- A comprehensive feedback mechanism to continuously improve the recommendation model.

Agent suggestions for similar cases

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

Business value

Agents typically use several resources to efficiently resolve customer cases and provide consistent responses. These include referring to knowledge articles, collaborating with other agents or experts, and reviewing active or successfully resolved similar cases. With the use of AI, suggestions about similar cases help agents find the right solutions quickly, increase agent productivity, and provide better and faster service to customers.

Feature details

Very often, agents spend time searching and scanning for similar cases to determine if they are relevant to the active case they are working on. This delays customer service and resolution time. With AI, right cases are automatically suggested from all cases that were resolved successfully in the past, taking case context and previous history into account. Additionally, agents can also see and collaborate with the agents who serviced those cases and are considered as experts.

The key highlights of this feature include:

- AI-driven case suggestions based on case context and historical success rate.
- Secondary actions that agents can take, such as collaborate with an expert, after a similar case has been found.
- Continuous improvement of the recommendation model through comprehensive feedback mechanism.

Overview of Dynamics 365 Field Service 2020 release wave 2

Dynamics 365 Field Service is an end-to-end solution for onsite 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 2, we are focused on the following areas:

- **Insights**: We continue to add intelligence to Field Service including a new Field Service dashboard for monitoring key KPIs, ability to send work order completion surveys with Dynamics 365 Customer Voice, and work order completion metrics.
- **Proactive service delivery**: User experience enhancements for working with all Field Service forms, further integration with Supply Chain Management, ability to create hierarchical models for assets, and location capabilities for work orders.
- **Scheduling**: Multiday manual scheduling, optimizer embedded in the schedule board, enhanced skills-based matching in resource scheduling, predictive technician travel time, ability to schedule technicians to travel outside of working hours, and enhanced work hours for requirements.
- **Technician success**: Field Service inspections, technician locator, and Power Apps mobile enhancements.

What's new and planned for Dynamics 365 Field Service

This topic lists features that are planned to release from October 2020 through March 2021. 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

Insights features for 2020 release wave 2.

Feature	Enabled for	Public preview	Early access*	General availability
Work order completion surveys with Microsoft Forms Pro	End users by admins, makers, or analysts	-	-	Oct 2020
Dashboard for key field service metrics	End users, automatically	-	Aug 2020	Oct 2020
Work order metrics	End users, automatically	-	Aug 2020	Oct 2020

Proactive Service Delivery

Proactive service delivery for 2020 release wave 2.

Feature	Enabled for	Public preview	Early access*	General availability
Using Power Automate for Field Service workflow	End users by admins, makers, or analysts	Oct 2020	-	
Integration with Dynamics 365 Supply Chain Management	End users by admins, makers, or analysts	-	-	Oct 2020
Asset hierarchy and location on work order enhancements	End users, automatically	-	Aug 2020	Oct 2020
Create and configure asset properties	End users by admins, makers, or analysts	-	Aug 2020	Oct 2020
Usability improvement Field Service subgrids as a dialog	End users by admins, makers, or analysts	-	Aug 2020	Oct 2020

Scheduling

Scheduling features for 2020 release wave 2.

Feature	Enabled for	Public preview	Early access*	General availability
Embedded optimizer within schedule board	Admins, makers, or analysts, automatically	Oct 2020	-	-
Predictive work duration	End users by admins, makers, or analysts	Oct 2020	-	-
Enhanced skills-based matching in resource scheduling optimization	Admins, makers, or analysts, automatically	-	Aug 2020	Oct 2020
Predictive technician travel time	Admins, makers, or analysts, automatically	-	Aug 2020	Oct 2020
Travel outside of working hours	End users, automatically	-	Aug 2020	Oct 2020
Enhanced work hours calendar for requirements	End users, automatically	-	Aug 2020	Oct 2020

Technician success

Technician success features for 2020 release wave 2.

Feature	Enabled for	Public preview	Early access*	General availability
Technician locator	End users by admins, makers, or analysts	Dec 2020	-	-
Connected Field Service on Dynamics 365 Field Service mobile app	End users, automatically	-	Aug 2020	Oct 2020

Feature	Enabled for	Public preview	Early access*	General availability
Dynamics 365 Field Service mobile app updates for field technician efficiency	End users, automatically	-	Aug 2020	Oct 2020
Field Service inspections	End users, automatically	-	Aug 2020	Oct 2020
Technician time tracking on Dynamics 365 Field Service mobile app	End users, automatically	-	Aug 2020	Oct 2020
Usability improvements for the field technician booking form	End users, automatically	-	Aug 2020	Oct 2020
Calendar view for booking work orders	End users, automatically	-	Aug 2020	Oct 2020

* Some features are available for you to opt-in as part of early access on August 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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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 and data centers (regions), go to the Dynamics 365 and Power Platform availability page.

Insights

Overview

Insights features for 2020 release wave 2.

Work order completion surveys with Microsoft Forms Pro

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

Business value

Businesses need a mechanism to run customer satisfaction surveys to ensure they are meeting the expectations of their customers through their service delivery.

Feature details

This feature enables administrators to configure work order completion surveys using Forms Pro in order to solicit feedback, and present the survey natively as part of the customer's experience.

NOTE This feature is available in Unified Interface only.

Dashboard for key field service metrics

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

In order for service managers and dispatchers to ensure they are providing effective service, they need to see the right metrics and measures. This new dashboard provides out-of-the-box field service metrics and measures.

Feature details

This dashboard enables a field service manager or dispatcher to use the field service reports to monitor KPIs.

NOTE This feature is available in Unified Interface only.

Work order metrics

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

Users will be able to understand at a glance the estimated duration of a work order and the history of service over the work order's life cycle.

In the future, having this information captured at the work order level will enable advanced reporting and analytics scenarios around SLAs, operational efficiency, and service history.

Feature details

This feature captures service delivery time metrics at the work order level for awareness and reporting, including:

- Total estimated duration.
- First arrived on (time that the first person arrives at a scheduled appointment).
- Completed on.

These metrics will be captured and calculated on every work order.

The Field Service reports will be updated to leverage these new time stamps so that metrics like **Broken Promise %** more accurately reflect the customer's experience.

NOTE This feature is available in Unified Interface only.

Proactive service delivery

Overview

Proactive service delivery for 2020 release wave 2.

Using Power Automate for Field Service workflow

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Oct 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 Unified Interface only.

Integration with Dynamics 365 Supply Chain Management

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

Business value

When technicians are conducting a service call, they often need to create purchase orders to order parts for their customers. This feature integrates Field Service with Dynamics 365 Supply Chain Management purchase orders to make it more seamless for technicians to purchase parts and increase first-time fix rates.

Feature details

With this feature, technicians using Field Service can easily and seamlessly initiate purchase orders that flow into Dynamics 365 Supply Chain Management without switching apps or initiating manual workflows outside of Dynamics 365.

NOTE This feature is available in Unified Interface only.

Asset hierarchy and location on work order enhancements

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

Both assets and locations can be complex and have hierarchical models. Understanding the hierarchy of an asset or a location such as a large office building or campus site helps technicians find the asset quickly and easily onsite. This feature provides an enhanced authoring experience for creating hierarchical models and a location identification feature on work orders that allows dispatchers and service managers to pinpoint the location of an asset within a physical space so a technician can deliver faster and more efficient service.

Feature details

With this feature you can model your customers' physical spaces. You can build a location hierarchy and link your assets to a functional location. For example, you can model a physical space with a hierarchy that includes campus, buildings, floors, rooms, and common areas, as well as link assets to the related functional location. When creating work orders, you can select a functional location so your technicians can quickly check the asset's location. Admins will be able to build location hierarchies with intuitive tools.

Before this release, you had to create different service accounts for assets to differentiate between locations when dealing with large customer sites. This feature adds necessary flexibility when dealing with large customer sites, such as campuses, manufacturing facilities, and farms. Now, you can use a single service account but store the location of your assets through the functional location hierarchy. You can also add location data to any work order independent of an asset. It also opens up a more natural way to deal with equipment that moves between areas within a large site, such as mobile equipment like tractors and projectors.

NOTE This feature is available in Unified Interface only.

Create and configure asset properties

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

Business value

This feature makes it easier to create unique asset properties and associate them with different assets. The ability to manage different types of assets and easily keep track of key product details, usage, and service information is important to deliver effective service. Additionally, it becomes much easier to track changes to the asset properties over time.

Feature details

Asset properties allow customers to easily define the different attributes that characterize an asset. Common examples can include make, model, serial number, size, dimensions, and last service date. This feature also allows you to display properties dynamically based on the asset and keeps track of how asset properties change over time, like an audit.

Understanding asset properties is a foundational capability that enables future capabilities like usage-based maintenance.

NOTE This feature is available in Unified Interface only.

Usability improvement Field Service subgrids as a dialog

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

Business value

User feedback has shown that too many clicks and lost context leads to a denigrated user experience. This user experience improvement maintains context when navigating within any form to certain important Field Service child records within subgrids of the form by opening the child records in an overlay.

Feature details

User feedback highlights that when users are editing records in Field Service, navigating away from the main record to other records breaks the user experience context and creates too many navigation clicks. This feature introduces an overlay experience for data entry of certain important Field Service child records in a subgrid of a record. The overlay experience helps users maintain context and creates a smoother navigation for data entry.

For example, while you are working on an entity, like a work order, you can create, update, and review related subrecords, like work order product, without leaving the form you started from, making the system less disjointed and maintaining context through navigation. This new navigation mode will be enabled for these key entities:

- Work order product
- Work order service
- Work order service task
- Work order incident

- Bookable resource booking
- Time entry

NOTE This feature is available in Unified Interface only.

Scheduling

Overview

Scheduling features for 2020 release wave 2.

Embedded optimizer within schedule board

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

Business value

Dispatchers spend a lot of time creating bookings while on the schedule board. The resource scheduling optimizer enables automated scheduling optimization and reduces manual scheduling efforts to free up dispatcher time for higher-value activities.

Feature details

The default capabilities of resource scheduling optimizer functionality is made available in the schedule board. This enables dispatchers to manage schedules from a requirements or resources point of view with the organization's business goals applied automatically by the optimizer.

NOTE This feature is available in Unified Interface only.

Predictive work duration

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

Business value

Currently, dispatchers assign a fixed duration for a job type, regardless of the various factors that may lengthen or shorten the work order. This can potentially cause cascading delays or low usage, reducing the effectiveness of schedules.

Predictive work duration solves this problem by predicting a realistic duration for a given job. This helps dispatchers reduce risk by identifying unforeseen delays and shorten buffer time. Service managers can also use these insights to uncover technician strengths, enhance service delivery, and improve their capacity plans.

Feature details

This feature predicts the duration for a given booking or requirement, based on various factors like resource performance, incident type, customer location, territorial differences, and seasonal changes. Powered by AI models, this feature learns from the historical booking completion times to compute a realistic duration.

It also provides a blended efficiency rating for territories and incident types based on their completion times and allows dispatchers and service managers to drill down to detailed ratings for different technicians across incident types. This helps dispatchers easily identify the right technician for a given job at a customer location.

NOTE This feature is available in Unified Interface only.

Enhanced skills-based matching in resource scheduling optimization

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

Business value

When organizations have a workforce with varying skillsets, it's critical to be able to match the service need levels with the appropriate skillset levels for optimal service delivery. This feature enhances the intelligence of resource scheduling optimization to automatically match the technician with the least common denominator of skills first when there is more capacity than demand while keeping the resources with multiskills for intraday emergencies.

Feature details

It's common for agents to have varying skillsets—some agents might only have one skillset, while others might have many. This enhancement to the resource scheduling optimizer analyzes the skills of technicians and chooses the least common denominator—that is, the technician with the least amount of skills required to execute the work order. This leaves technicians with additional skills to be available to service work orders that require more skills.

Customers can better reserve capacity for resources that have unique or multiple skills for intraday emergencies or exceptions by using those resources with single skills. This can improve customer satisfaction and better meet SLAs by handling emergency jobs in a timely and professional manner.

NOTE This feature is available in Unified Interface only.

Predictive technician travel time

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

Business value

Having accurate technician travel time ensures that scheduling is more accurate and overall service delivery runs more effectively. Having accurate travel time between bookings increases the ability for businesses to meet the demand without having to reschedule the service.

Feature details

This feature enables the resource scheduling system to take in the historical travel data (using Bing Maps as the provider) and predict travel time between bookings. The predicted travel times can then be used by dispatchers to more accurately schedule technicians and have overall more accurate scheduling and service delivery.

NOTE This feature is available in Unified Interface only.

Travel outside of working hours

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

Customers can define various travel policies across the company while technicians can define their traveling rules and limits outside of working hours based on their preferences. This ensures all of the data necessary to create accurate schedules is available in the system.

Feature details

Sometimes technicians start their day at the site of the first assigned job instead of their home or office address. The goal of this feature is to allow resource travel outside of working hours to accommodate various scenarios for starting and ending points in the trip.

Technicians' travel time availability can be scheduled independently of working hours so that jobs that require extra travel outside of working hours can be assigned to those technicians and still be captured and accounted for in the schedule.

NOTE This feature is available in Unified Interface only.

Enhanced work hours calendar for requirements

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

Managing requirements is a key factor in the efficiency of a business's service operations. This enhancement improves the user experience, making it easier to manage the requirements calendar.

Feature details

Resource managers currently set requirements for work orders. The experience to manage the requirements calendar is accessible and consistent with the Unified Interface experience. Additionally, the calendar control will be a Power Apps component framework control, meaning that partners and customers can enable scenarios to modify requirements from outside entity forms and views, like with a canvas app.

NOTE This feature is available in Unified Interface only.

Technician success

Overview

Technician success features for 2020 release wave 2.

Technician locator

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

Business value

One way for service providers to help delight customers is to provide clear communication and status around scheduled service appointments. This communication includes confirmation, reminders, and details on the expected technician arrival.

Feature details

The technician locator capability of Field Service includes:

- Sending scheduled service confirmation notifications to the customer.
- On the day of service, sending a reminder with a link to track technician location and estimated arrival time.
- A portal application from which customers can view scheduled service details and technician arrival details.

NOTE This feature is available Unified Interface only.

Connected Field Service on Dynamics 365 Field Service mobile app

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

Device telemetry and service maintenance data helps Field Service technicians make intelligent decisions.

Feature details

Technicians will now be empowered to leverage Connected Field Service as part of their onsite process. From the first time they are dispatched for an issue, it's essential that technicians have the most recent asset information and are able to interact with the asset in order to properly analyze and provide a fix.

With Connected Field Service on mobile, technicians can:

- View IoT alerts to help diagnose device anomalies.
- Send IoT commands to devices. Examples include resetting a device, or updating settings (online only).
- Send updates to the device through the device settings attribute (can create when offline, but will only hit the device when the record is synced to the server).
- Pull the most recent device data so they are certain they're analyzing the most recent set of readings from the device (online only).
- Register devices so they can ensure newly installed assets are connected to the respective IoT provider (online only).
- View device data history, such as when the device was registered and when the latest properties from the device were received.
- View Summary tiles, bringing key information to the technician without having to dig into subgrids (Online only).

NOTE This feature is available in Unified Interface only.

Dynamics 365 Field Service mobile app updates for field technician efficiency

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

Our next generation Field Service mobile app is built on the Microsoft Power Apps platform. For 2020 release wave 2, we'll release the next set of features for our out-of-the-box solution aimed at driving field technician service success.

Feature details

- Push notifications to alert technicians of important updates, such as a new or canceled booking.
- Customized reporting.
- Offline enhancements (such as sync performance improvements, manual force sync, and the app runs offline by default).
- Record service with photos, videos, and files up to 32 MB.

NOTE This feature is available in Unified Interface only.

Field Service inspections

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 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. Performing inspections is a key part of proactive service and preventing additional break-fix service calls.

Feature details

This previous preview feature is now generally available.

Field Service 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 (including the Field Service Mobile application).
- Capture the inspection results for analysis or further action.

NOTE This feature is available in Unified Interface only.

Technician time tracking on Dynamics 365 Field Service mobile app

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 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 the Dynamics 365 Field Service mobile app built on Power Apps.

Feature details

This work brings the same critical time entry functionality that is available in Field Service Mobile to the Dynamics 365 Field Service mobile app built on Power Apps. 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 organizations to drive more accurate technician time capture, whether online or offline, improving accounting practices and profit-loss calculations.

NOTE This feature is available in Unified Interface only.

Usability improvements for the field technician booking form

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

With improvements to the booking work order form usability, field service technicians have greater success finding important information about their service appointments.

Feature details

- Ability to change booking status from an inline drop-down list.
- Address fields are merged for a quick read without scrolling and editing, and include location recommendations when technicians have internet access.
- Quick find is visible by default on list views (for example, booking and work orders).
- Grids with no results show an action to add (for example, "Add Work Order Product").
- Grids for work order service tasks, products, and services show up to five results.
- Tablet optimizations:
  - Quick create forms render left align.

- Minimize horizontal scroll on the **Booking Service** tab by reducing the subgrid columns shown to three.
- Reduce the sitemap to a smaller viewing pane.

NOTE This feature is available in Unified Interface only.

Calendar view for booking work orders

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

Calendar improvements help field technicians plan their days by providing key information for their booked work orders.

Feature details

Calendar improvements include:

- Booking appointments in the day view show service account, location, incident type, and booking status as space is available based on the appointment duration.
- Agenda view shows all information for each appointments.
- Improvements to the view switch control and day picker.
- Maintaining day and view selection on back navigate.

NOTE This feature is available in Unified Interface only.

Overview of Dynamics 365 Remote Assist 2020 release wave 2

Microsoft Dynamics 365 Remote Assist is a mixed-reality application that empowers technicians to solve problems faster the first time. Whether in a heads-up, hands-free environment on Microsoft HoloLens or using the iOS or Android devices, technicians can collaborate with remote experts to troubleshoot issues in context. This modernizes field service operations, so technicians can make the most of their time.

Coming in 2020 release wave 2, Dynamics 365 Remote Assist will be focused on these three key scenarios:

- **Service and repairs**: Enable companies to service assets faster by pulling the right remote collaboration fast and capturing the right fix to perform further analysis.
- **Surveys and walkthroughs**: Perform tasks such as inspections, quality assurance, project reviews, and other field service and operations activities by capturing asset information with augmented reality.
- **Knowledge and service insights**: Empower your technicians to capture the right information and make it available for your broader organization; use repair data from your technician operations to improve your business processes.

What's new and planned for Dynamics 365 Remote Assist

This topic lists features that are planned to release from October 2020 through March 2021. 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
Remote Assist calls dashboard	End users by admins, makers, or analysts	-	Oct 2020
Spatial tracking experience improvements	End users by admins, makers, or analysts	✓ May 28, 2020	Oct 2020

Feature	Enabled for	Public preview	General availability
Updates to the annotation placement algorithm	End users by admins, makers, or analysts	✓ May 28, 2020	Oct 2020
Use Remote Assist on mobile devices without augmented reality support	End users by admins, makers, or analysts	✓ May 28, 2020	Oct 2020
Automate asset-related processes with Power Automate	End users by admins, makers, or analysts	✓ Jun 10, 2020	Oct 2020
Capture and visualize asset information with spatial markup	End users by admins, makers, or analysts	✓ Jun 10, 2020	Oct 2020
Create and manage organizational asset records	End users by admins, makers, or analysts	✓ Jun 10, 2020	Oct 2020
Prepare your workspace with service-related documentation	End users by admins, makers, or analysts	✓ Jun 10, 2020	Oct 2020
Enabling calls between Remote Assist mobile users	End users by admins, makers, or analysts	✓ Jul 1, 2020	Oct 2020
Improved annotation placement experience	End users by admins, makers, or analysts	✓ Jul 1, 2020	Oct 2020
Make group calls on Remote Assist mobile	End users by admins, makers, or analysts	Sep 2020	Oct 2020
Enable customer or vendor to join one-time call	End users by admins, makers, or analysts	Oct 2020	Dec 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 and data centers (regions), go to the Dynamics 365 and Power Platform availability page.

Remote Assist calls dashboard

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

Business value

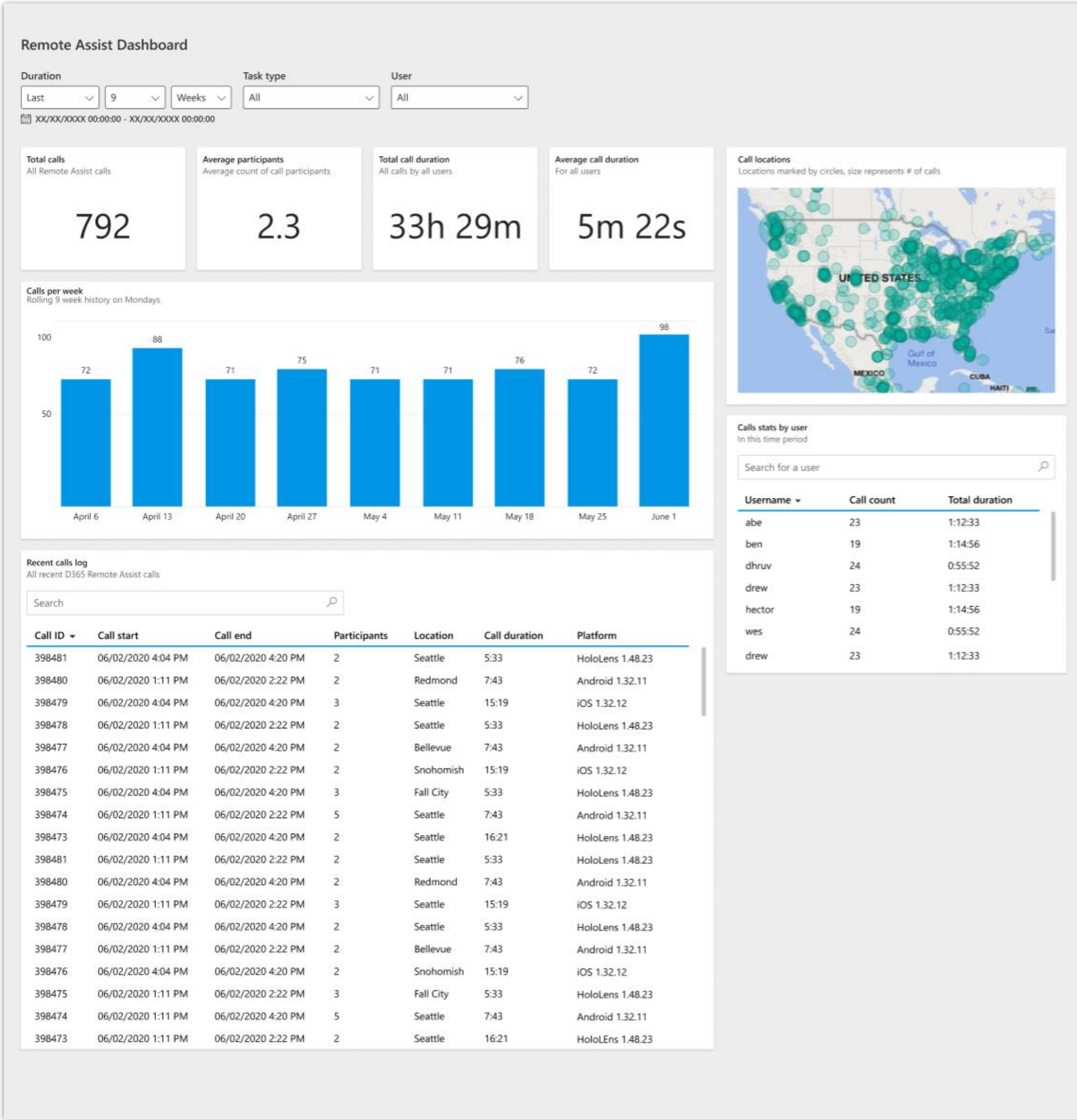
Field Service dispatchers or supervisors make critical decisions based on metrics, such as number of field visits by technicians and the use of various tools. These metrics can reveal insights that can help inform their organization on operational efficiencies and other process improvements. With this feature, Dynamics 365 administrators will now have easy access to their Remote Assist call metrics across their field workforce.

Feature details

Administrators will be able to view the operational dashboard for their organization by selecting Remote Assist in Dynamics 365 on desktop or mobile. Once the user has selected that tab, they'll see aggregated metrics for the Remote Assist calls in their organization to which they have access. They will be able to see metrics, such as:

- Number of Remote Assist calls.
- Average duration of calls.

Administrators will be able to drill down into individual calls or filter based on various categories. They will also be able to export these metrics to a CSV or Excel file for manipulation and analysis.



Dynamics 365 Remote Assist calls dashboard as seen in the Unified Interface app

Spatial tracking experience improvements

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ May 28, 2020	Oct 2020

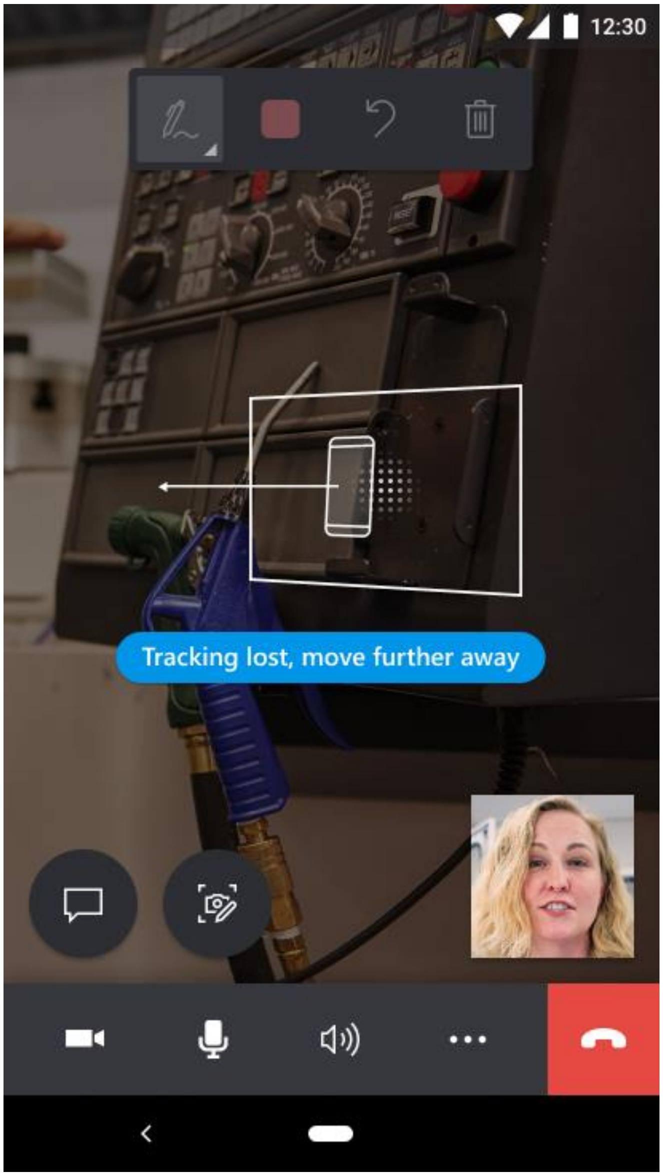
Business value

Spatial tracking is fundamental to the Remote Assist mobile app because it is the first task every technician must do when they join a Remote Assist mobile call. They must scan their surroundings so that the app detects surfaces, which allows them to more precisely place annotations in their environment. By improving users' understanding of spatial tracking, users can now better place their annotations and provide more accurate instructions.

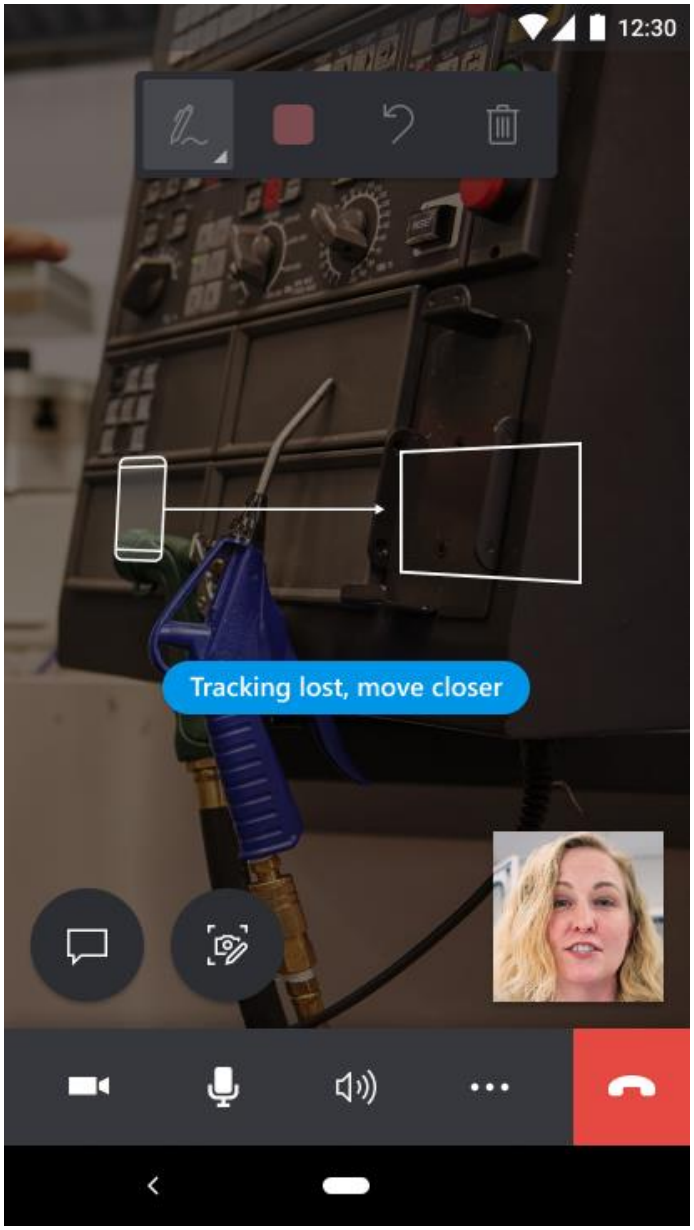
Feature details

This feature includes the following capabilities for 2020 release wave 2:

- Better messaging with animations to help educate technicians on how to scan their environment.
- Better messaging on how to regain lost tracking.



Example of spatial tracking message: too close



Example of spatial tracking message: too far

Updates to the annotation placement algorithm

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ May 28, 2020	Oct 2020

Business value

Annotations are a core piece of the Remote Assist functionality because they enable technicians and remote collaborators to easily specify an area or particular asset to look at or manipulate, rather than trying to verbally convey this to an inexperienced technician. By updating the algorithm used, the accuracy and ease of adding annotations will allow users to better use the Remote Assist mobile experience.

Feature details

This feature includes the following capabilities for 2020 release wave 2:

- Modifying the annotation placement algorithm that better detects non-planar surfaces and allows better placement of annotations in your environment.
- Improved arrow and ink scaling in your environment.

Use Remote Assist on mobile devices without augmented reality support

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ May 28, 2020	Oct 2020

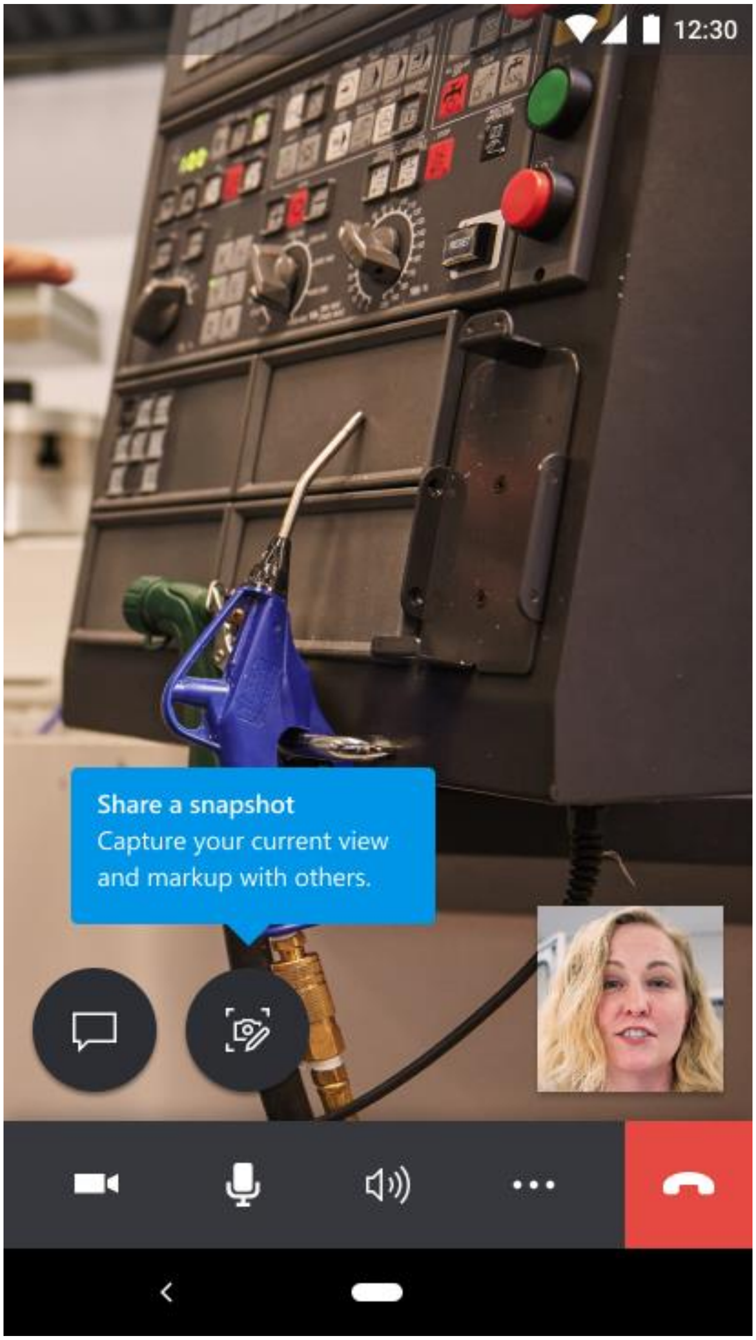
Business value

Prior to 2020 release wave 2, Remote Assist mobile was only available on ARCore-enabled Android devices and ARKit-enabled iOS devices; however, plenty of field technicians have mobile devices without support for ARCore and ARKit. Bringing support for these kind of platforms will allow them to work with and solve problems with remote collaborators.

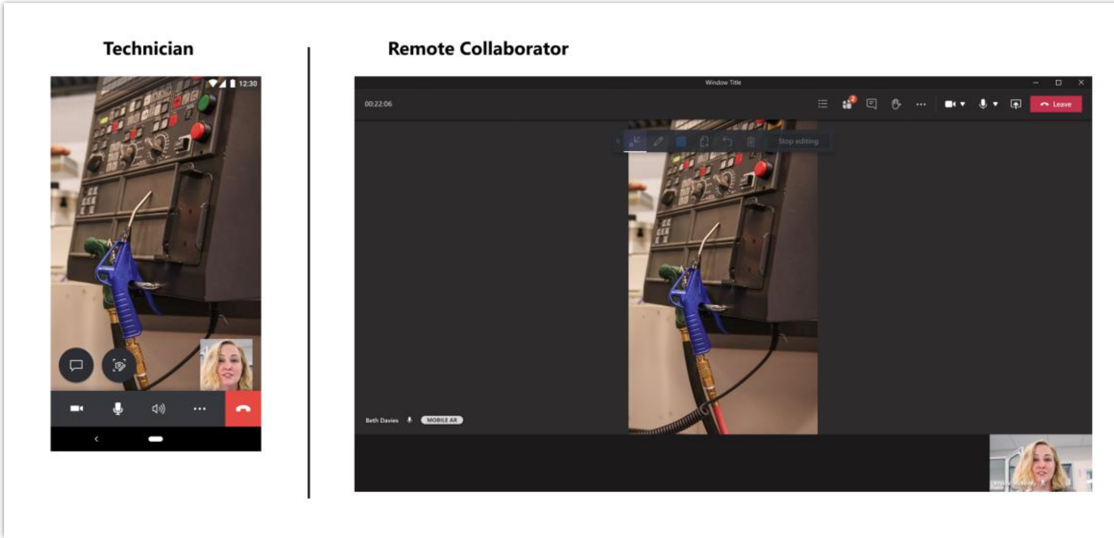
Feature details

Remote Assist for devices not enabled for augmented reality will introduce modified functionality that can still be used in many environments. This feature includes the following capabilities for 2020 release wave 2:

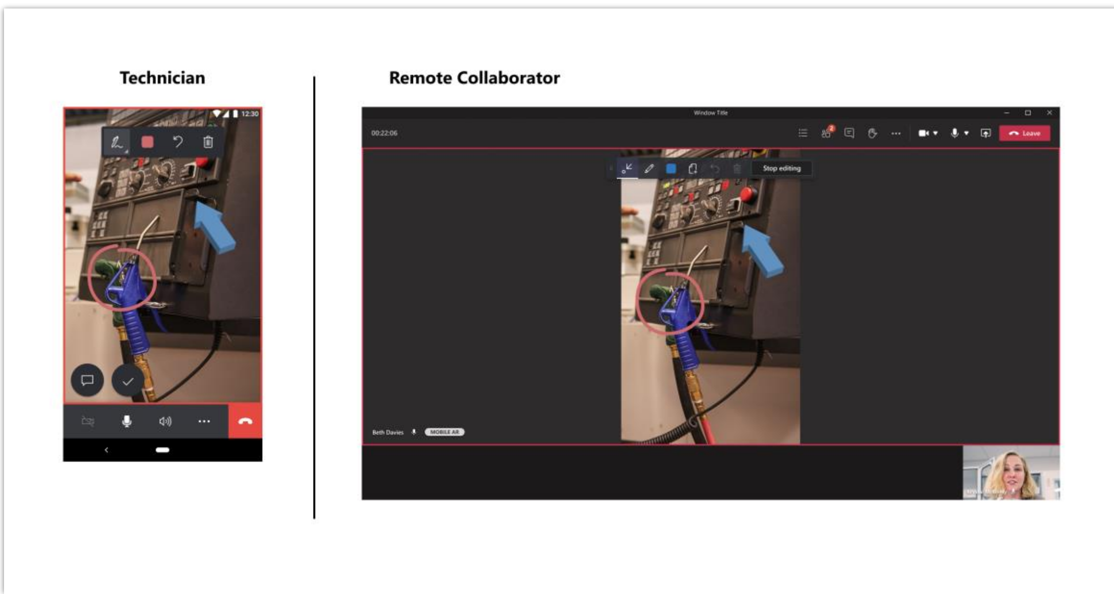
- Ability to use Remote Assist on mobile devices without augmented reality support.
- Share your live video feed and provide instructions using 2D annotations on still images with the remote collaborator.



Use snapshots on a mobile device without AR support to add 2D annotations



In-call experience using Remote Assist on a mobile device without AR support with Teams desktop



Snapshot mode experience for using Remote Assist on a non-AR-supported device with Teams desktop

Automate asset-related processes with Power Automate

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔Jun 10, 2020	Oct 2020

Business value

When new asset information is captured, customers might want to take additional actions based on that information, such as integrating asset data with other enterprise systems, reviewing new assets, generating reports or kick off inspections and analysis. With Power Automate integration in Remote Assist, customers will have the ability to automate these workflows to reduce manual effort, collect consistent data, standardize operations, and send reports with a faster turnaround time.

Feature details

Asset capture data captured through Remote Assist will be stored in Common Data Service. With this feature, customers will be able to create and trigger automated workflows based on the captured asset data and simplify business processes. We will publish a series of tutorials for setting up various Power Automate flows based on common scenarios from customers—ensuring they can be successful from day one.

Capture and visualize asset information with spatial markup

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Jun 10, 2020	Oct 2020

Business value

First-line workers don't always need to engage with a remote collaborator through a call; they often work independently, in scenarios like 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 the current state (or as-built condition) of a specific asset with spatial markup and integrate that information with their business processes.

After a first-line worker has captured the current condition of assets, remote collaborators might need to review and verify the asset data that was captured. They can also discover issues with assets without having to be present physically on site or via a live call.

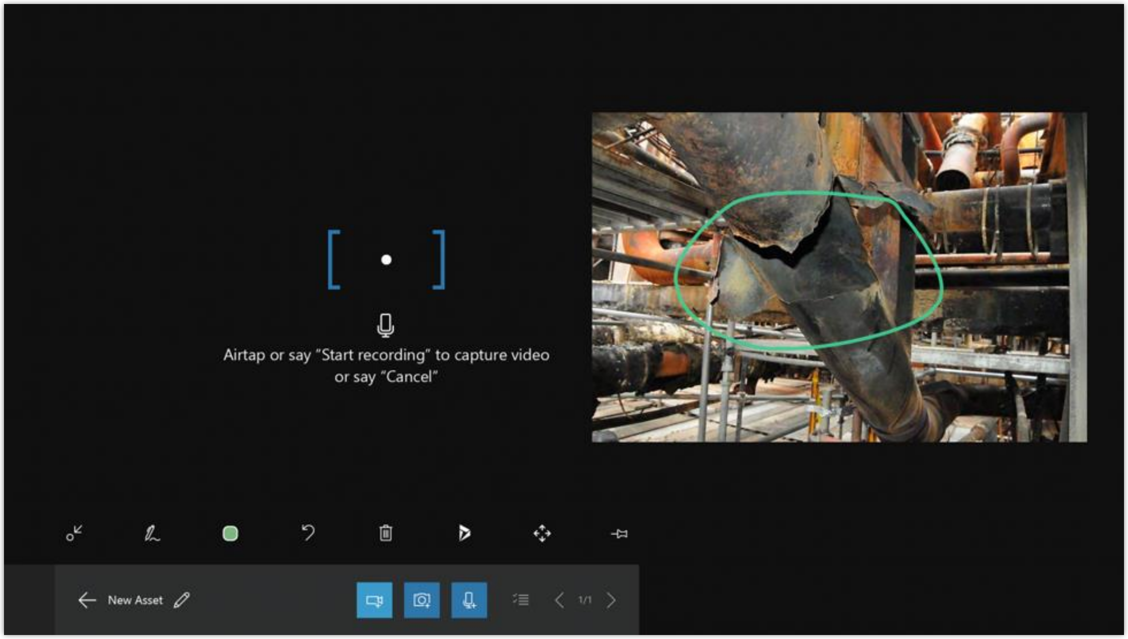
Feature details

With this release, we are delivering a new experience in Remote Assist to capture the current condition of assets and the ability to review that captured data. Key capabilities include:

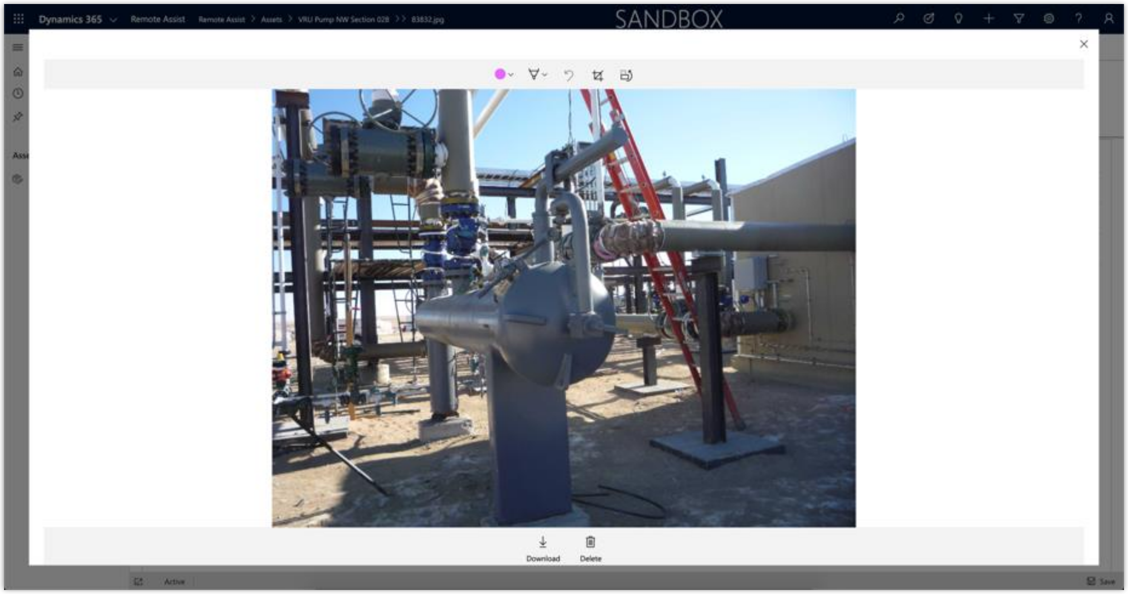
- Capture photos of assets to track their current condition and build a history over time.

- Record videos to build work instructions related to that asset or capture issues best understood through video.
- View captured asset data from Remote Assist for validation, report generation, and reference during service-work.

The preview will only be available in HoloLens 2.



Hololens experience for capturing asset snapshots and marking it up



Dynamics 365 Remote Assist Unified Interface app experience for visualizing and editing asset images

Create and manage organizational asset records

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Jun 10, 2020	Oct 2020

Business value

For any company, maintaining consistent output and minimizing downtime due to faulty equipment is critical. To enable that, organizations need to track their various assets, such as production facilities, equipment, and devices through their lifetime and across multiple inspections and repair operations. Remote Assist will provide an initial set of asset servicing capabilities for field service technicians, which will allow them to better manage customer assets and aim for faster resolution times.

Feature details

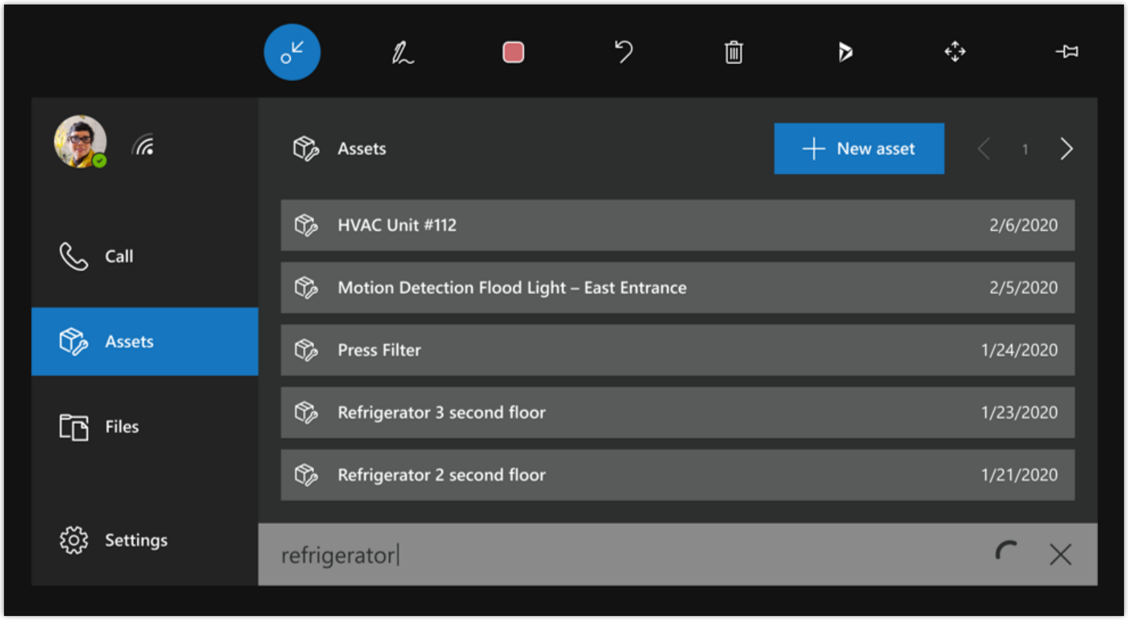
With this release, we are delivering a new set of experiences in Remote Assist that leverage Microsoft Power Platform, Common Data Service, and Common Data Model to enable organizations to create and manage their assets. Key capabilities include:

- Import, manually create, and edit asset records.

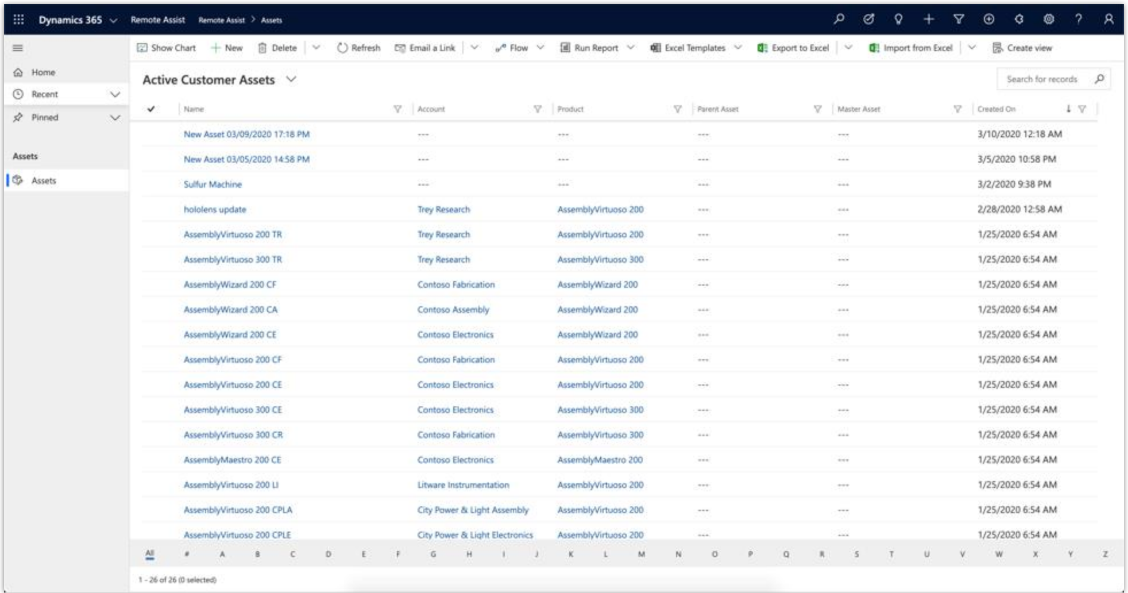
- Search and view the organization's assets.
- Create asset hierarchies with child-parent relationships.
- Import existing asset data into Common Data Service.

Customers using both Remote Assist and Field Service will be able to store asset information leveraging the same asset type, creating an integrated experience.

The preview will only be available in HoloLens 2.



Remote Assist on Hololens experience for creating asset record



Dynamics 365 Remote Assist Unified Interface app experience for creating and viewing asset records

Prepare your workspace with service-related documentation

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Jun 10, 2020	Oct 2020

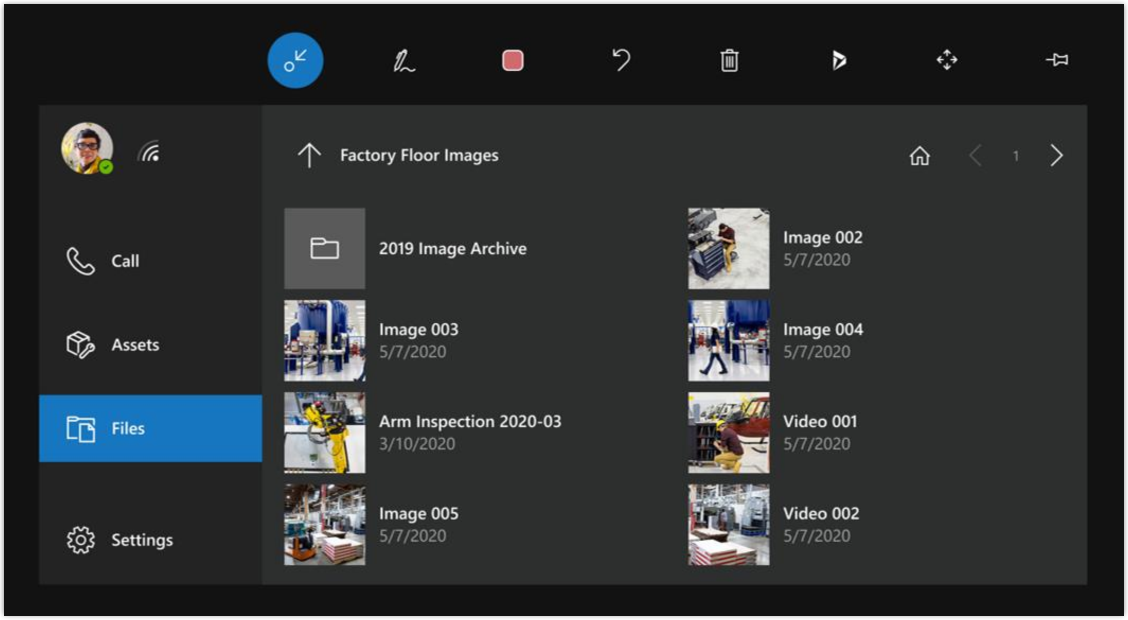
Business value

First-line workers rely on service-related documentation such as work instructions, engineering drawings, and manuals to complete their jobs. Remote Assist enables first-line workers to access the right documents, in the right place, and at the right time to ensure they remain productive throughout the day.

Feature details

In this release, we're enabling first-line workers to browse and view service-related documentation from their files, independent of a video call—ensuring they can access the documents they need during any job.

The preview will only be available in HoloLens 2.



Prepare your workspace with service-related information in Hololens

Enabling calls between Remote Assist mobile users

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

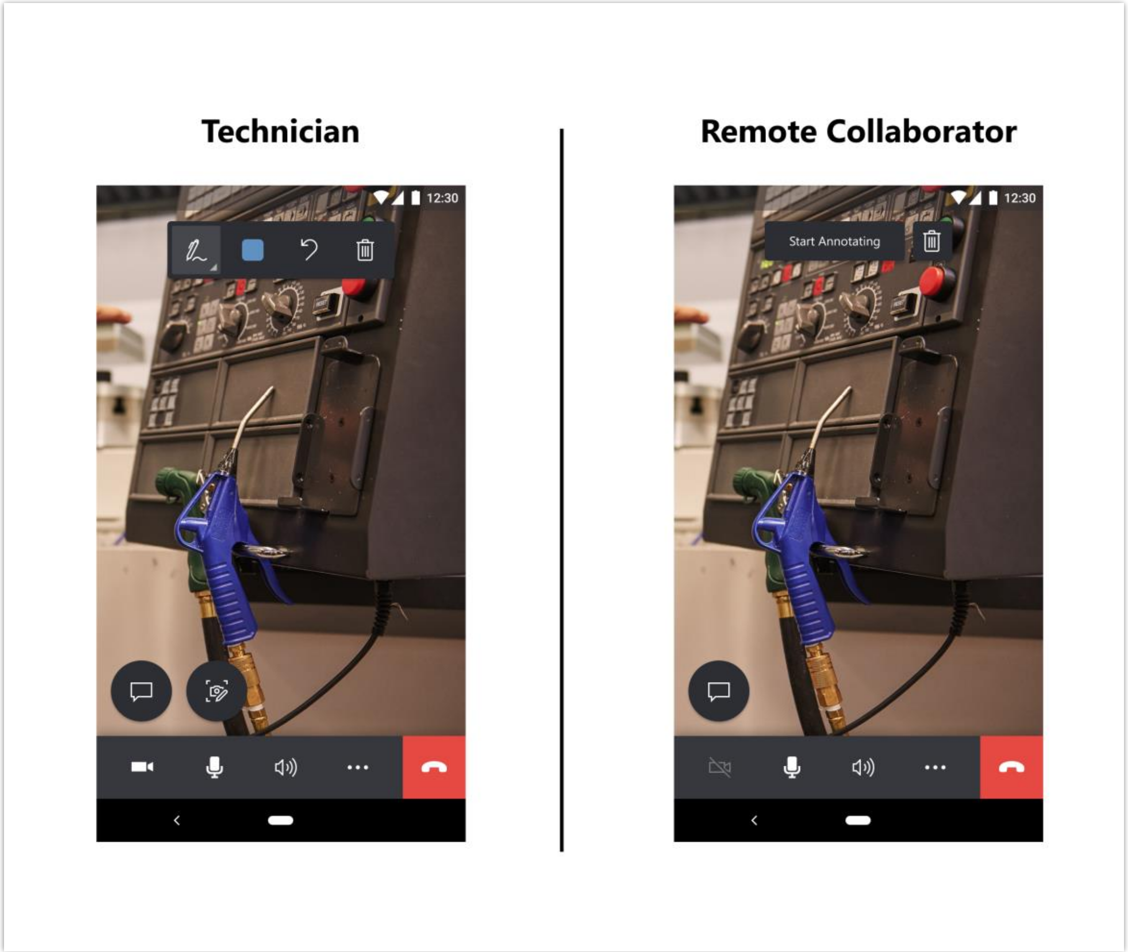
Business value

Technicians often need to collaborate with each other as a part of their daily tasks. By enabling technicians to make calls between Remote Assist mobile users, this feature will provide technicians another way to communicate with each other by using a single app: Remote Assist mobile. This helps technicians reduce the time it takes to collaborate in the workplace.

Feature details

This feature includes the following capabilities for 2020 release wave 2:

- A technician using the Remote Assist mobile app can now make and receive one-to-one calls with another technician using the Remote Assist mobile app.
- Both technicians can add mixed-reality annotations to the shared environment.



In-call experience for a Remote Assist mobile to Remote Assist mobile call

Improved annotation placement experience

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

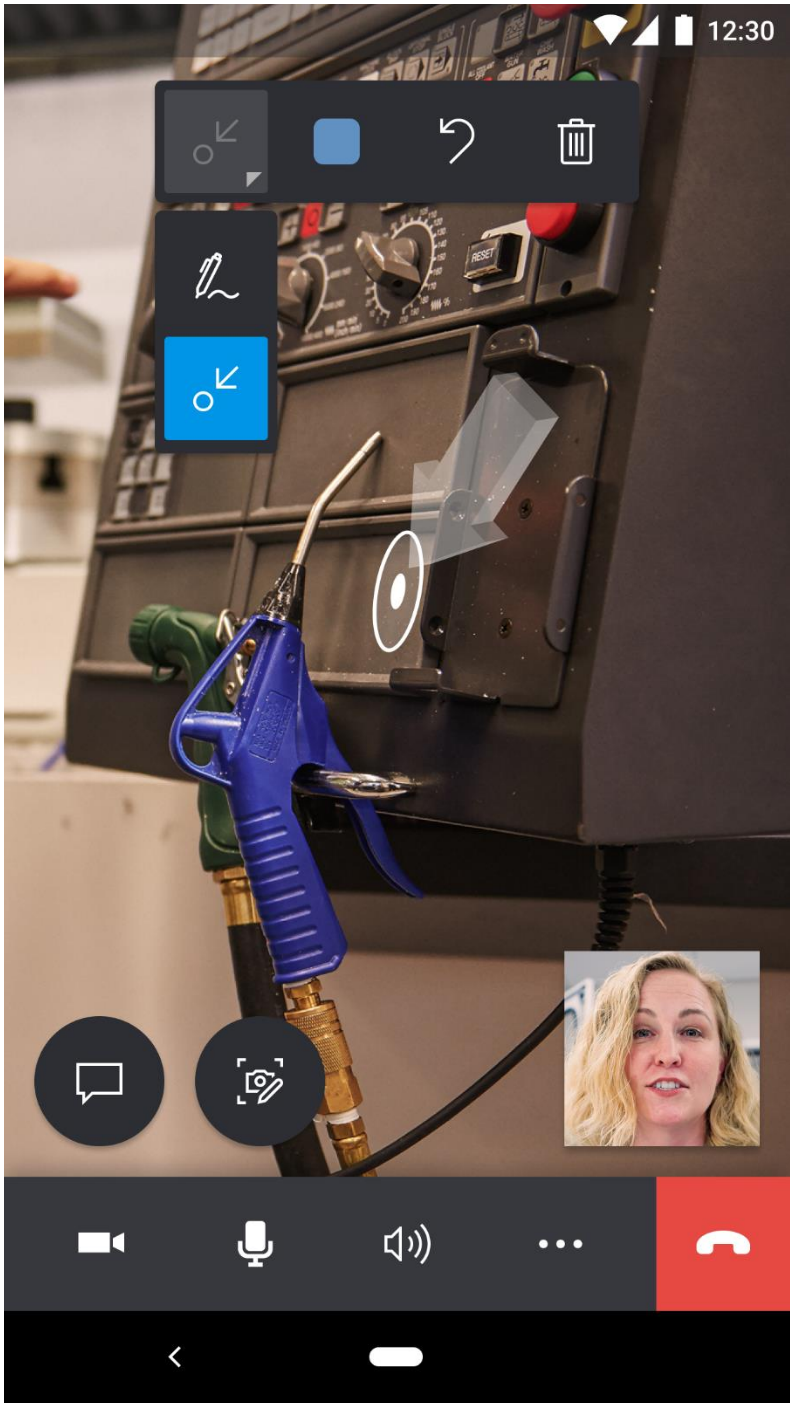
Business value

Annotations are fundamental in Remote Assist because they enable technicians and remote collaborators to easily specify an area or particular asset to look at or manipulate, rather than verbally trying to convey a thought. By improving the annotation placing model, users can more intuitively use mixed-reality annotations and place annotations where they intend to more easily and accurately.

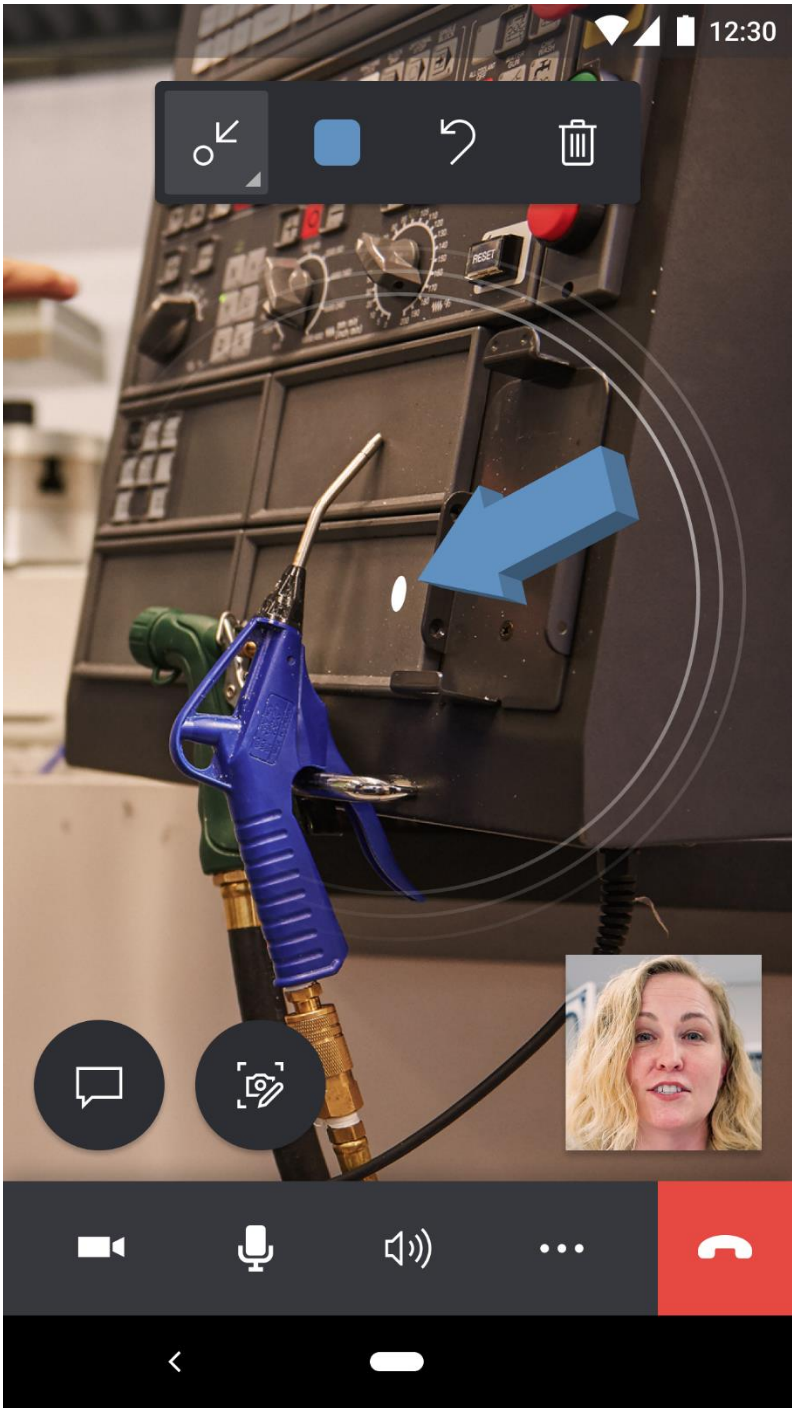
Feature details

This feature includes the following capabilities for 2020 release wave 2:

- New arrow annotation design.
- Ability to rotate the arrow annotation.
- Easier annotation placement in your environment.



New arrow annotation design for ease of placement



Ability to rotate arrow annotations for better placement

Make group calls on Remote Assist mobile

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

Business value

Group calling opens more scenarios for customers such as engaging multiple remote collaborators at a time for repairs and maintenance, providing remote training, and performing remote inspections and audits. Technicians can now get multiple perspectives and feedback to get the job done.

Feature details

This feature includes the following capability for 2020 release wave 2: Enable Remote Assist mobile calls with three or more call participants.

Enable customer or vendor to join one-time call

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

Business value

Customers want an easy way to remotely assist B2B vendors and customers or B2C customers via a mixed-reality video call. For example, a customer might want to remotely assist a vendor field engineer to resolve an issue or remotely assist a customer to repair an asset. Previously, only vendors and customers with Remote Assist licenses in the correct tenant could use Remote Assist. Now, vendors and customers without Remote Assist licenses can join a one-time call using Remote Assist mobile. This simplifies the deployment process required for customers to provide support via a Remote Assist call.

Feature details

This feature includes the following capabilities:

- Customer support agent or field expert can create a one-time call link.
- Vendor or customer can use a one-time call link to download the Remote Assist mobile app and join the call.
- All call participants can view and create mixed-reality annotations.

Finance and Operations

Overview of Dynamics 365 Finance 2020 release wave 2

For Dynamics 365 Finance, we continue to focus on completing core functional capabilities, automating common processes, and adding insights and intelligence in Finance. Intelligent cash flow forecasting, which previewed in 2020 release wave 1, will be released for general availability along with additional intelligence and automation in vendor invoicing.

We'll also enhance core financials by adding Asset leasing. This continues to build confidence in our Finance community and eliminate risk as CFOs strive to do, by making sure the system stays compliant with changing accounting regulations.

What's new and planned for Dynamics 365 Finance

This topic lists features that are planned to release from October 2020 through March 2021. 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 Finance users complete manually. It also introduces Asset leasing to enhance the core capabilities of Finance.

Feature	Enabled for	Public preview	General availability
Financials embedded Power BI is enhanced and renamed	End users, automatically	Aug 2020	Oct 2020
Notification of related prepayment invoices marked for settlement	End users by admins, makers, or analysts	Aug 2020	Oct 2020

Feature	Enabled for	Public preview	General availability
Trial balance report with transactional detail and unposted GL transactions	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Update the invoice quantities to match product receipt quantities in workflow	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Cash flow forecast calculation – enhanced scheduling (via process automation)	End users by admins, makers, or analysts	Sep 2020	Oct 2020
Asset leasing	End users by admins, makers, or analysts	-	Nov 2020
Automatic collection task creation	End users by admins, makers, or analysts	Oct 2020	Nov 2020
Touchless email reminders to customer	End users by admins, makers, or analysts	Oct 2020	Nov 2020
Vendor invoice automation – Enhanced historical information experience for vendor invoices	End users by admins, makers, or analysts	-	Jan 2021
Vendor invoice automation – Analytics and metrics	End users by admins, makers, or analysts	Oct 2020	Jan 2021
Vendor invoice automation – Match product receipts to invoice lines that have a three-way matching policy	End users by admins, makers, or analysts	Oct 2020	Jan 2021
Vendor invoice automation – Prevalidate vendor invoice posting	End users by admins, makers, or analysts	Oct 2020	Jan 2021
Vendor invoice automation – Submit imported vendor invoices to workflow	End users by admins, makers, or analysts	Oct 2020	Jan 2021

Feature	Enabled for	Public preview	General availability
Vendor invoice automation – Tracking imported invoice amount and imported sales tax amount	End users by admins, makers, or analysts	Oct 2020	Jan 2021
Vendor invoice automation – Tracking the Invoice received date	End users by admins, makers, or analysts	Oct 2020	Jan 2021
Vendor invoice automation – Resume automated processing for multiple invoices	End users by admins, makers, or analysts	-	Feb 2021

Globalization

This release focused on delivering localizations for five additional countries/regions – Bahrain, Hong Kong SAR, Kuwait, Oman, and Qatar – simplifying configuration management and expanding its regional coverage, and shipping several other highly requested features.

Feature	Enabled for	Public preview	General availability
Extended Finnish localization – Finvoice 3.0	End users by admins, makers, or analysts	-	Oct 2020
Invoicing: Advanced notes management	End users by admins, makers, or analysts	-	Oct 2020
Invoicing: VAT directives on project invoices	End users by admins, makers, or analysts	-	Oct 2020
Regulatory Configuration Service expanded regional coverage France	End users by admins, makers, or analysts	-	Oct 2020
Regulatory Configuration Service Global repository for simplified configuration management	End users by admins, makers, or analysts	-	Oct 2020

Feature	Enabled for	Public preview	General availability
Regulatory Configuration Service Simplified Globalization feature management for Globalization services	End users by admins, makers, or analysts	-	Oct 2020
Configurable business documents conversion to PDF	End users by admins, makers, or analysts	✔ Apr 3, 2020	Oct 2020
Configurable business documents direct printing	End users by admins, makers, or analysts	✔ Apr 3, 2020	Oct 2020
Barcode generation data source for configurable business documents	Admins, makers, or analysts, automatically	Aug 2020	Oct 2020
Country/region expansion Bahrain	End users, automatically	Aug 2020	Oct 2020
Country/region expansion Hong Kong SAR	End users, automatically	Aug 2020	Oct 2020
Country/region expansion Kuwait	End users, automatically	Aug 2020	Oct 2020
Country/region expansion Oman	End users, automatically	Aug 2020	Oct 2020
Country/region expansion Qatar	End users, automatically	Aug 2020	Oct 2020
Electronic reporting Legal entity-specific parameters enhancements	Admins, makers, or analysts, automatically	Aug 2020	Oct 2020

Public sector

This area covers features in Dynamics 365 Finance specific to the public sector industry.

Feature	Enabled for	Public preview	General availability
Delegation of multiple purchasing work items	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Associate 1099 default value to Main account	End users by admins, makers, or analysts	-	Nov 2020
Vendor details to bridged transactions and check forms	End users by admins, makers, or analysts	-	Nov 2020
Restrict ability to edit accounting distribution on vendor invoices	End users by admins, makers, or analysts	-	Feb 2021

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 and data centers (regions), go to the Dynamics 365 and Power Platform availability page.

Core financials

Overview

This release focuses on automating common tasks to reduce the number of processes that Finance users complete manually. It also introduces Asset leasing to enhance the core capabilities of Finance.

Financials embedded Power BI is enhanced and renamed

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

With these enhancements, the financial analytical workspaces become a more reliable financial analysis tool because of the addition of editing capabilities and resolution of a prior data model issue.

Feature details

The enhancements to Financials Power BI include the following:

- Renamed menu items to **Financial analysis – current company** and **Financial analysis – all companies** to clarify capabilities.
- Enabled the edit function for embedded Power BI reports.
- Addressed an issue that incorrectly applied company security on the All companies report.
- Addressed a data model issue that incorrectly used values from the accounting distribution tables, which could cause incorrect numbers for some rounding and other scenarios.

Notification of related prepayment invoices marked for settlement

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

Business value

Raising awareness among your accounting staff of the existence of prepayments that are marked for settlements gives them the opportunity to pay the marked prepayments, or continue with the invoicing process, without unnecessary interruptions to your accounting processes.

Feature details

This feature notifies you that related prepayment invoices that are marked for settlement exist. This notification will happen when the final invoice is created.

Trial balance report with transactional detail and unposted GL transactions

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

Business value

The trial balance with transaction detail report adds transaction detail to the summarized amounts on the trial balance. The report also lets you include unposted general ledger transaction detail to produce a provisional report.

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. It will also show unposted general ledger transactions.

Update the invoice quantities to match product receipt quantities in workflow

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

Business value

Having the flexibility to update the invoice quantity helps correct errors that can prevent posting. Because posting issues can require resubmitting the invoice to workflow, the ability to prevent posting problems saves submitters and approvers time and wasted effort.

Feature details

Now you can update the **Invoice quantity** field within the workflow process. This lets you change the invoice quantity so that it matches the value in the **Product receipt quantity to match** field. When an approver closes the **Match product receipt to invoice** page and the value in the **Product receipt quantity to match** field doesn't match the invoice quantity, a message will be displayed to indicate the discrepancy and you'll be able to update the invoice quantity. If all the product receipts from the invoice line are unmatched in workflow, the invoice line will be deleted.

Cash flow forecast calculation – enhanced scheduling (via process automation)

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

Business value

This feature lets you schedule the calculation of cash flow forecasts, which relieves you from having to schedule the process manually, and helps ensure that the cash forecasts are generated at the most optimum times for your organization.

Feature details

An enhancement to the calculation process was added to the process automation framework. The enhancement is used to schedule the cash flow calculation job and monitor its status while the job is in process. Once enabled, select the **Cash flow forecast automation** link to display the new automation page where you can schedule the cash flow calculation process.

Asset leasing

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

Business value

Asset leasing helps customers feel more confident that they're following the proper accounting standards for ASC 842 and IFRS 16, reducing the risk of spending extensive time doing offline calculations.

Feature details

Asset leasing includes the following functions:

- Automates complex lease calculation of a lease’s present value, and its subsequent processes such as future lease payments, amortization of lease liability, and the right-of-use asset depreciation and expenses schedules.

- Helps automatically classify the lease as either operating or finance, or as a short-term lease or low-value lease. The lease classification tests include Transfer of ownership, Purchase option, Lease term, Present value, and Unique asset.
- Centralizes the management of lease information, such as important dates, including the commencement and expiration dates, as well as the lease's transaction currency, payment amounts, and payment frequency.
- Helps generate accounting entries for the initial recognition and subsequent measurement of the lease liability and right-of-use asset.
- Reduces time for complex calculation of lease modification and automatic adjustment transactions.
- Provides posting to different layers to accommodate different reporting purposes, such as tax reports that are available in Dynamics 365 Finance.
- Complies with the accounting standards to represent leases in balance sheets using the Balance sheet impact calculator.
- Provides audit controls over the integrity of the lease data to ensure that the posted transactions match the calculated amounts of the present value, future payments, and liability amortization.
- Provides tools to import from or export to Excel for all lease data.
- Includes features that help in preparing asset leasing reports, particularly the preparation of disclosures and notes.
- Integrates with your company chart of accounts, currencies, fixed assets, vendors, journals, data management, and number sequences.

Automatic collection task creation

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

Business value

Automatically creating collection tasks that are based on rules lets your collections agents focus their activities on the areas that have the highest value for your organization.

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.

Touchless email reminders to customer

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

Business value

Automatically sending email reminders might initiate an activity that encourages payment sooner than would be made without the reminder.

Feature details

When enabled, email reminders will be sent automatically to customers, with a list containing overdue invoice information based on email templates.

Vendor invoice automation – Enhanced historical information experience for vendor invoices

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Jan 2021

Business value

Having a simplified historical view of an invoice saves both accounts payable professionals and vendor invoice approvers time. The easily consumable representation can help speed up decision-making by eliminating the need to search for information.

Feature details

Vendor invoice workflow history can be accessed directly from the vendor invoice, reducing the number of clicks that are needed to find that information. The most pertinent workflow history steps are surfaced, which lets you quickly scan the current and past steps of the invoice. Also, if your organization has enabled the ability to automatically submit imported vendor invoices to workflow, the automation history is provided for the imported invoices. The automation history helps you identify the current process step, in addition to the steps that have already been completed. When a step is unsuccessful, detailed information is provided to help you understand the reason for the failure.

Vendor invoice automation – Analytics and metrics

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Oct 2020	Jan 2021

Business value

The availability of good metrics can help your managers identify opportunities for greater efficiency, potentially resulting in cost savings. Power BI metrics can also help raise awareness of invoices that didn't make it through the automated process successfully. That information can help accounts payable clerks find and address issues quickly.

Feature details

The **Vendor invoice entry** workspace lets you focus on vendor invoices that didn't make it through the automated process. Tiles on the workspace list information about vendor invoices that weren't successfully submitted to workflow, imported, or matched to product receipts. The workspace now lets you switch the view to a different company without having to sign in to a different company. Power BI metrics are also provided to give accounts payable managers insight into the efficiencies of vendor invoice automation. This information includes the number of days to process an invoice, the percentage of invoices in the last 30 days that were successfully processed without being touched, the reasons that an invoice failed automation, and additional workflow analytics.

Vendor invoice automation – Match product receipts to invoice lines that have a three-way matching policy

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Oct 2020	Jan 2021

Business value

This feature saves time and labor costs by using the system to automatically match quantities on vendor invoice lines to product receipts. Your employees no longer have to monitor the arrival of goods and then complete the matching process manually.

Feature details

Invoices frequently arrive before the goods do. When the invoice line has a three-way matching policy, someone must match the invoice lines to the posted product receipts after the goods arrive. Now, the system can automatically match posted product receipts to invoice lines for which a three-way matching policy has been defined. The process will run until the matched product receipt quantity is equal to the invoice quantity. As part of this process, you can indicate the maximum number of times the system should try to match product receipts to an invoice line before concluding that the process failed. The match-product-receipt-to-invoice-lines process will run in the background, using a frequency of either hourly or daily. You can run the automated matching process as part of the process for submitting invoices to workflow, or as a standalone process.

Vendor invoice automation – Prevalidate vendor invoice posting

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Oct 2020	Jan 2021

Business value

Validating the posting prior to posting saves time by ensuring accuracy of the invoice before it's sent for approval. This allows accounts payable professionals to find and fix errors before submitting the invoice to workflow for approval.

Feature details

Accounts payable professionals can run same the validation process that's run during vendor invoice posting, but without updating accounts. You can run the process on a single invoice, or multiple invoices, which you select from the **Pending vendor invoices** page.

Vendor invoice automation – Submit imported vendor invoices to workflow

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Oct 2020	Jan 2021

Business value

Submitting imported invoices to workflow automatically saves accounts payable professionals time that they would otherwise have spent manually editing each vendor invoice.

Feature details

As part of a touchless accounts payable invoicing process, you can choose to have the system automatically submit an imported invoice to workflow. The submit-to-workflow process will run as a background process, using a frequency that you can specify, either hourly or daily. You can also require the system to match product receipts to invoice lines automatically, before submitting the invoice to workflow. To ensure that the invoice can be processed straight through, without manual intervention, an automated posting task must be included in the workflow configuration. Invoices that are related to purchase orders and invoices that contain a non-PO procurement category, and non-stocked lines, can be submitted to workflow automatically.

Vendor invoice automation – Tracking Imported invoice amount and Imported sales tax amount

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Oct 2020	Jan 2021

Business value

Tracking both imported invoice and sales tax amounts can help reduce errors. The imported totals provide accounts payable professionals a way to verify that the calculated invoice totals are correct before they're posted.

Feature details

The imported invoice amount and imported sales tax amount for vendor invoices can be provided in the import file. Typically, these values are scanned by an outside provider and included in the import file. As the invoice is processed in Dynamics 365 Finance, the system calculates values based on the invoice data. Imported values must match the calculated values, ensuring that the invoice accurately reflects the amount due to the vendor. If your organization allows imported invoices to be submitted to workflow automatically, you can optionally require that the imported totals match the calculated totals before the invoice can be submitted to workflow.

Vendor invoice automation – Tracking the Invoice received date

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Oct 2020	Jan 2021

Business value

Tracking the date that an invoice was received lets accounts payable professionals analyze the amount of time it takes to process a vendor invoice. The date received provides a measurement of the efficiency in the organization, based on how long it takes from the time the invoice arrives until it's posted. Effectively managing the time it takes to process an invoice can help lead to more timely invoice payments.

Feature details

The **Invoice received date** is the date that the company received the invoice from the vendor. It provides a starting point for tracking the invoice's progress.

The invoice received date can be included in the imported data for a vendor invoice. For invoices that were created manually, you can specify the invoice received date. If received date isn't entered, the date will default to today's date.

Vendor invoice automation – Resume automated processing for multiple invoices

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Feb 2021

Business value

This feature saves your accounts payable staff time by letting them restart processing for multiple vendor invoices in a single step.

Feature details

When an imported invoice can't be submitted to workflow successfully, the system will remove it from further automated processing. An accounts payable clerk can review and edit the invoice before the automated process attempts to rerun the process for that invoice. Currently, unsuccessful invoices must be resubmitted for processing one at a time. This feature lets you restart processing for multiple invoices where the reason for the failure can be resolved by a single fix for those invoices. For example, assume that one of the financial dimensions in the account structure was inadvertently changed. This change prevented multiple imported invoices from being submitted to workflow successfully. Correcting the financial dimension will solve the failure reason for all unsuccessful invoices that were affected by that issue.

Globalization

Overview

To run operations globally, businesses must meet complex, country-specific globalization requirements in the areas of tax, e-invoicing, auditing, regulatory reporting, banking, business document layout, and so on. Some of these are legally required in certain countries and regions and some of them are adopted based on local business practices. These requirements are frequently changed by local government or 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 regions and efficiently address global regulatory trends, we made key globalization areas of Dynamics 365 Finance and Dynamics 365 Supply Chain Management configurable by power users and even business users (for business documents).

Partners and customers used our configuration tools and services to extend out-of-the-box country and region localizations in addition to creating new features, resulting in almost 10,000 custom features for 114 countries.

In 2020 release wave 2, we focused on delivering localizations for five additional countries or regions—Bahrain, Hong Kong SAR, Kuwait, Oman, and Qatar—extending the number of Microsoft-supported countries and regions to 42. We also simplified configuration management with global repository and globalization feature functionality, and expanded regulatory configuration regional coverage to Europe and United Arab Emirates. We shipped the GA versions of PDF conversion and direct printing features for configurable business documents, invoicing advanced notes management feature, Finnish e-invoice Finvoice 3.0, and a few other features that were highly requested by customers and partners.

Extended Finnish localization – Finvoice 3.0

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

Business value

Global and local customers who deploy Dynamics 365 Finance and Dynamics 365 Supply Chain Management in Finland will have access to a configurable electronic invoice format that satisfies local Finnish requirements.

Feature details

Global and local customers who deploy Dynamics 365 Finance and Dynamics 365 Supply Chain Management in Finland will have access to a configurable electronic invoice format that satisfies local Finnish requirements.

This feature satisfies the Finnish-specific requirements for implementation of Finvoice v. 3.0.

Invoicing: Advanced notes management

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

Business value

The advanced notes management feature enables you to set up predefined notes that apply to all or specific customers, vendors, and products. You can then add these notes to specific business documents.

Feature details

Advanced notes management is no longer controlled by country context. This change means it can be used across all legal entities.

See also

Advanced notes management (docs)

Invoicing: VAT directives on project invoices

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

Business value

This feature provides compliance with legal requirements for multiple geographies. A European Union (EU) directive provides regulations to be followed by all member states regarding invoice rules and information that must be included when creating invoices. The EU directive lists the information required by suppliers for their customers in the EU. For example, an invoice can include a reference that describes the legal grounds for a VAT zero-rating or an exemption.

Feature details

Project invoices and contract project invoices now support printing the tax directive texts, which are defined as user-created descriptions of sales tax codes. Previously, these directives were shown only for Eastern European countries on project invoices, despite the requirements being applicable to all EU member states.

Regulatory Configuration Service expanded regional coverage: France

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

Business value

The Regulatory Configuration Service (RCS) lets business and power users configure regulatory reports, e-invoices, business document layouts, payment formats, and tax rules that are frequently affected by changing legal requirements. These configurations can be done in a single application, rather than writing code in multiple applications or multiple versions, of one application, and then distributing it to required locations through a centralized repository.

This regional expansion lets customers in different countries meet local data residency requirements and use the benefits of the RCS, instead of relying on the configuration that designers built into Dynamics 365 Finance, which has limited functionality.

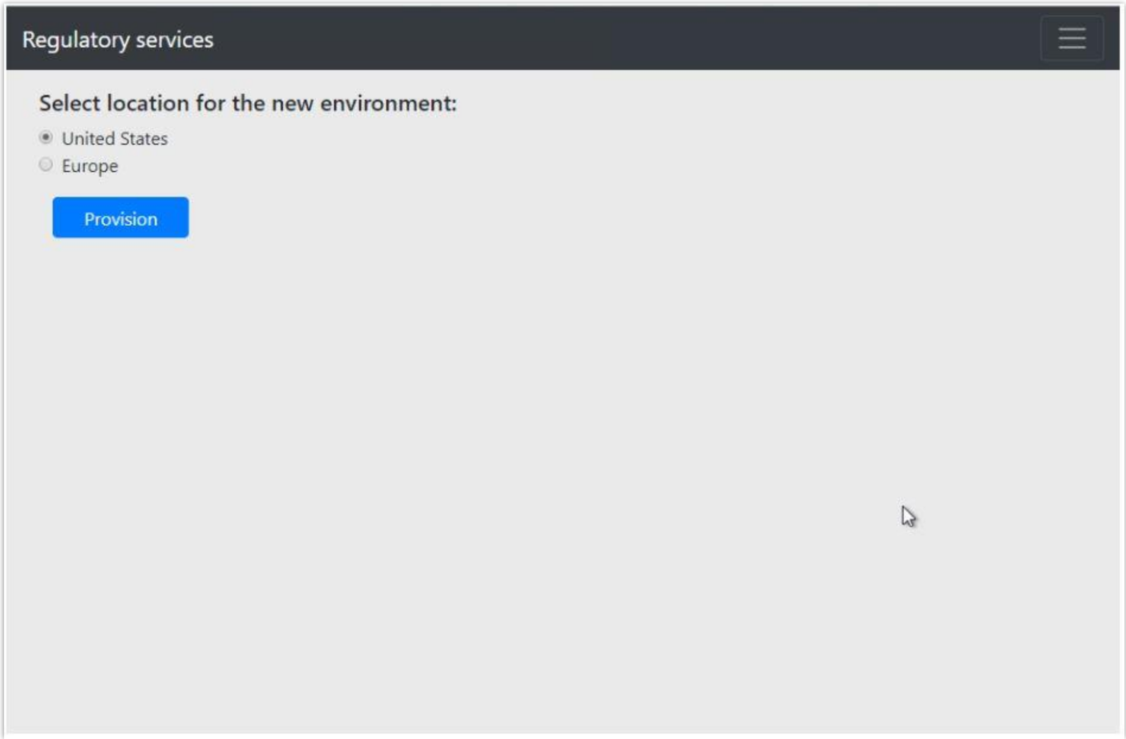
Feature details

As part of the ongoing enhancements to RCS, we're increasing the breadth of regional coverage where RCS environments can be deployed. When undertaking the initial service sign-up, the system administrator can select to have their RCS environments deployed in the existing supported regions, or they can select to deploy their instance in the newly supported regions.

In 2020 release wave 2, you can select to host RCS environments in the following countries or regions:

- United States (already available)
- India (already available)
- France

As part of the RCS provisioning flow, you can select the datacenter that is geographically located where your environment will be provisioned.



Users can select a geographic datacenter

Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- United States
- Europe
- India

Regulatory Configuration Service: Global Repository for simplified configuration management

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

Business value

The Regulatory Configuration Service (RCS) allows business and power users to configure the regulatory reports, e-invoices, payment formats, business documents, and tax rules that are frequently affected by changing legal requirements. These configurations can be shared and reused in multiple applications and application versions. To simplify the storage, handling, and sharing of these configurations, RCS will support a new type of global repository through which users can centrally store and manage their configurations directly in RCS.

Currently, users need to complete a multiple-step process to use Dynamics Lifecycle Services (LCS) to be able to export their configurations and share them through LCS projects with external organizations. By using the new Global repository as centralized configuration storage in RCS, users will be able to store and directly share their configurations from the repository.

Feature details

As part of 2020 release wave 2, Global repository functionality is generally available and supports the following capabilities:

- Users will have access to all Microsoft-produced configurations directly in RCS (without using LCS).
- Users will be able to centrally store, publish, and share their configurations with their own organization.
- Users will have the ability to share configurations directly with external organizations.
- User can filter by using different tags to discover configuration related to country/region, functional/feature area, industry, and business document type.

Regulatory Configuration Service: Simplified Globalization feature management for Globalization services

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

Business value

The Regulatory Configuration Service (RCS) allows business and power users to configure the regulatory reports, e-invoices, payment formats, business documents, and tax rules that are frequently affected by changing legal requirements in one centralized service.

Currently, users need to undertake multiple steps to be able to discover, import, and set up features on a single component level. This sometimes leads to difficulty in finding all the related components and set up parameters that must be completed to enable a specific global feature.

To simplify the handling, set-up, and deployment for Globalization services, we have developed Globalization feature functionality that supports packaging related artifacts into a bundle which defines a product-functional capability.

Feature details

As part of 2020 release wave 2, the Globalization feature functionality becomes generally available and supports the following capabilities. Users will be able to:

- Discover and access Microsoft-produced Globalization features.
- Review and configure related feature components including electronic reporting format configurations, processing actions, and corresponding parameter setup.
- Deploy their configured Globalization feature for use in Globalization services like the e-invoicing service.
- Centrally store and share their Globalization features with their own organization.
- Share their Globalization features directly with external organizations.

Configurable business documents conversion to PDF

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Apr 3, 2020	Oct 2020

Business value

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

Feature details

This feature allows any business document generated in Excel or Word to be converted to a PDF. The functionality **Convert to PDF** is added in the **Electronic reporting destination setup** for a given report.

See also

Output conversion to PDF (docs)

Configurable business documents direct printing

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Apr 3, 2020	Oct 2020

Business value

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

Feature details

This feature lets you select the printer destinations for electronic reporting destinations of Word, Excel, and PDF-format 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.

See also

Printer destination (docs)

Barcode generation data source for configurable business documents

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

Feature details

When you configure an electronic record format, you can specify the data sources of the Barcode type to generate barcode images and populate them to generated business documents such as orders, invoices, packing slips, and receipts, or different kind of labels such as product and shelf labels, and packaging and shipping labels.

Country/region expansion: Bahrain

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

Globalization for Bahrain is now available out-of-the-box as part of Dynamics 365 Finance.

Feature details

The country-specific functionality for Bahrain includes:

- Reverse charge
- VAT declaration and VAT details (VAT payer sales template and VAT payer purchase template)
- Invoice and credit note
- Invoice issue deadline
- User interface in the Arabic language

Country/region expansion: Hong Kong SAR

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

Globalization for Hong Kong SAR is now available out-of-the-box as part of Dynamics 365 Finance.

Feature details

Globalization functionality for Hong Kong SAR in this release includes:

- User interface in English (Traditional Chinese is not supported)
- ISO 20022

Country/region expansion: Kuwait

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

Globalization for Kuwait is now available out-of-the-box as part of Dynamics 365 Finance.

Feature details

Globalization functionality for Kuwait in this release includes:

- Reverse charge
- User interface in the Arabic (Kuwait) language

Country/region expansion: Oman

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

Globalization for Oman is now available out-of-the-box as part of Dynamics 365 Finance.

Feature details

The globalization functionality for Oman in this release includes:

- Reverse charge
- User interface in the Arabic (Oman) language

Country/region expansion: Qatar

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

Globalization for Qatar is now available out-of-the-box as part of Dynamics 365 Finance.

Feature details

Globalization functionality for Qatar in this release includes:

- Reverse charge
- User interface in the Arabic (Qatar) language

Electronic reporting: Legal entity-specific parameters enhancements

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

Business value

With planned feature improvements, more legislatively required reports can be implemented by using the electronic reporting (ER) framework. These improvements increase the configurability of such reports, making maintenance and customizations more efficient and allowing for faster reaction to legislative changes and specific customer requests. It will help customers to more quickly deploy, set up, and start using such ER formats. These improvements simplify the configuration of ER formats containing lookup data sources for a business user. They also make more effective the setting of ER format-specific company (legal entity) master data for a business user.

Feature details

A power user can configure a legal entity independent rule, translating its terms to all languages that are supported in Finance. Although a business user sets this rule up for a legal entity, the rule details are currently presented in the default language. This feature offers a business user the option to create rule terms in the user's preferred language. When a power user configures a legal entity independent rule, a data source field is specified to return values describing the configured rule. Currently, this field is indicated only by the name. This feature provides the entire path to this field, allowing a power user to quickly navigate to it. Additionally, this feature allows a power user to explicitly identify what fields of the lookup data source will be presented for a business user when ER format-specific company (legal entity) master data is being set up. A legal entity independent rule can now be configured to return only the enumeration data type for every configured condition. A power user can also configure a rule to return a text value as well.

Public sector

Overview

This area covers features in Dynamics 365 Finance specific to the public sector industry.

Delegation of multiple purchasing work items

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

Business value

The **Work items assigned to me** page now includes the ability to delegate multiple work items to another user in one action. In earlier versions, work items were delegated one at a time, which was time-consuming and might have occasionally led to misassignments. This feature helps make a clerical task easier and more efficient.

Feature details

The following work items can be delegated:

- Purchase requisitions
- Purchase agreements
- Purchase orders
- Vendor invoices

Associate 1099 default value to Main account

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

Business value

Some vendors receive payments that must be reported on 1099 statements, in addition to receiving payments that don't have the same requirement. Also, some invoice lines might be reported in different 1099 boxes than are specified by default for the vendor. Associating a 1099 box number with a main account can help ensure that 1099 reporting remains consistent, and in compliance with reporting requirements.

Feature details

To set up main accounts for 1099 reporting, go to **Accounts payable** > **Periodic tasks** > **Tax 1099** > **1099 field**.

Vendor details to bridged transactions and check forms

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

Business value

This feature makes information that might be used in reconciliation more readily available.

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**.

Restrict ability to edit accounting distribution on vendor invoices

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Feb 2021

Business value

This feature helps you maintain the accuracy of accounting information on vendor invoices by locking in values for certain accounts, such as the fund or department account, while allowing the main account to be changed.

Feature details

A setup form has been added that allows you to set restrictions on which financial account number dimensions can be edited on vendor invoices that were created from a purchase order.

Overview of Dynamics 365 Supply Chain Management 2020 release wave 2

Now more than ever companies need to be agile and change rapidly to the new business reality. One of the biggest impacts of the COVID-19 pandemic has been the disruption in supply chains driven by a historical emphasis on efficiency versus resiliency. Enhanced supply chain visibility, optimized workforce, agile planning and distribution processes, with maximized asset uptime to ensure business continuity in a safe and cost-efficient manner, will be key components leveraging Common Data Service integration, performance, usability, monitoring, and reliability. Planning optimization for manufacturing will add product scheduling optimization.

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

This topic lists features that are planned to release from October 2020 through March 2021. 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.

Costing

Feature	Enabled for	Public preview	General availability
Enhanced cost allocation	End users by admins, makers, or analysts	Mar 2021	-

Inventory management

Feature	Enabled for	Public preview	General availability
Enterprise-scale inventory performance improvements and archiving	End users by admins, makers, or analysts	Oct 2020	Oct 2020

Manufacturing

Manufacturing features shipped for 2020 release wave 2.

Feature	Enabled for	Public preview	General availability
Enter serial numbers while reporting as finished from the job card device	End users by admins, makers, or analysts	Aug 2020	Oct 2020
New user experience for production floor execution	End users by admins, makers, or analysts	Sep 2020	Oct 2020

Planning

Planning optimization support for creation of planned production orders.

Feature	Enabled for	Public preview	General availability
Planning optimization enhancements	End users by admins, makers, or analysts	-	Oct 2020
Planning optimization support for materials requirements planning (MRP)	End users by admins, makers, or analysts	✔ Apr 3, 2020	Oct 2020

Product information management

New inventory dimensions for product version tracking and enhanced extensibility.

Feature	Enabled for	Public preview	General availability
New inventory dimensions for product version tracking and enhanced extensibility	End users by admins, makers, or analysts	-	Oct 2020

Trade and source

Feature	Enabled for	Public preview	General availability
Default RFQ reply fields for vendor bidding	End users by admins, makers, or analysts	Sep 2020	Oct 2020
Vendor RFQ search by procurement category	End users by admins, makers, or analysts	-	Nov 2020
Approve and save vendor-submitted bank details	End users by admins, makers, or analysts	-	Jan 2021
Vendor-submitted certifications	End users by admins, makers, or analysts	-	Jan 2021
Preserve vendor bid data for amended RFQs	End users by admins, makers, or analysts	-	Feb 2021
Vendors can request approval for procurement categories	End users by admins, makers, or analysts	-	Feb 2021
Landed cost and inbound transportation management	End users by admins, makers, or analysts	Feb 2021	Mar 2021

Warehouse and transportation management

Feature	Enabled for	Public preview	General availability
Confirm outbound shipments from batch jobs	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Order-committed reservation based on license plates	End users by admins, makers, or analysts	Aug 2020	Oct 2020

Feature	Enabled for	Public preview	General availability
Work pick line overview	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Work policy enhancements for inbound work	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Outbound workload visualization	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Create and process transfer orders from the warehouse app	End users by admins, makers, or analysts	Sep 2020	Nov 2020
Manual sales line picking	End users by admins, makers, or analysts	Sep 2020	Nov 2020
Process warehouse app events	End users by admins, makers, or analysts	Sep 2020	Nov 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 and data centers (regions), go to the Dynamics 365 and Microsoft Power Platform availability page.

Costing

Enhanced cost allocation

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Mar 2021	-

Business value

For organizations operating in high-volume, low-margin industries (such as service, retail or distribution), the ability to accurately flow overhead cost to products or groups of products is essential to obtain profitability, and to support decisions such as when to phase out products or groups of products. Users have often requested the ability to allocate the balance of a cost center to products by applying an allocation base by nature of cost elements, personnel cost, and operating expenditure (OPEX).

Feature details

Support for multiple cost allocation bases provides both new and existing customers with insights into the profitability of products and groups of products at a level not possible today. This feature introduces the ability to perform cost allocation using more than one allocation basis. This is achieved through advanced cost allocation policies that allow:

- Allocation rules to be defined per cost object.
- Allocation of cost per single cost element or user-defined group of cost elements.
- Assignment of a representative allocation base to each rule.

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.

Inventory management

Enterprise-scale inventory performance improvements and archiving

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

Feature details

This feature adds archiving for inventory transactions and improves system performance when accessing and managing inventory information.

Manufacturing

Overview

The two manufacturing features delivered for 2020 release wave 2 will focus on enhancements to the job card device.

The first feature will deliver a new user experience where the user interface of the job card device has been modernized and further optimized for touch interaction. This feature will also enable users to start production jobs in bundles.

The second feature will enable reporting serial numbers as finished from the job card device. This feature will support both reporting on pre-allocated serial numbers and reporting serial numbers manually assigned by the user.

Enter serial numbers while reporting as finished from the job card device

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

Feature details

This feature enables users of the job card device to enter serial numbers while reporting as finished. To use this capability, associate relevant products that are enabled for serial-number control with a tracking dimension group that has the serial number dimension active. Then use the tracking number group associated with the product to configure one of the following supported scenarios:

- Manual serial number registration
- Registration of pre-allocated serial numbers
- Registration of fixed serial numbers

New user experience for production floor execution

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

Business value

The production floor execution interface helps workers manage and record production activities. It helps improve throughput, decrease scrap and defect ratios, and reduce work in progress.

Feature details

The new production floor execution interface provides workers with a new user experience for shop floor execution. The new interface serves the same function as the current *job card device* but provides a redesigned and modern user interface that is optimized for touch interaction. It also adds the following new feature:

- **Work on multiple jobs**: Shop floor workers can select and start multiple jobs at the same time or start a new job while continuing to work on already started jobs.

Planning

Overview

This feature set enables manufacturers to gain performance benefits during master planning.

Material requirements planning (MRP) helps planners at manufacturing companies ensure that materials are available for production and that products are available for delivery to customers. Planning optimization functionality facilitates fast master planning with MRP. Businesses rely on MRP to plan their production and ensure that the needed materials and products are available.

With planning optimization support for MRP, manufacturers can benefit from:

- Improved performance with high data volume.
- Removing the load of master planning from their ERP system.
- Fast insights into requirement changes during office hours.

Planners will be able to plan production orders and their related requirements with planning optimization, limited to:

- Supply suggestions for production.
- Support for bill of materials (BOM).

- Support for phantom BOMs.
- Product-defined lead time (not from Route).

Planning optimization enhancements

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

Feature details

We are releasing the following functional enhancements for planning optimization, which will ship during 2020 release wave 2:

- **Approval of planned orders**: Users can approve planned orders to ensure that the changes will be kept during the next master planning run.
- **Time margins**: Safety margins will be included as part of the lead time calculation.
- **Forecast sub-models**: Demand from forecast can include forecast sub-models.
- **Support service items**: Service items will automatically be filtered out during master planning to avoid supply suggestions for service items.
- **Purchase requisitions**: Demand from purchase requisitions will be included.
- **Intercompany planning**: Plans include planned intercompany demand from other companies (legal entities). This enables basic intercompany support where batch jobs need to be coordinated manually to provide the desired result.

Planning optimization support for materials requirements planning (MRP)

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ Apr 3, 2020	Oct 2020

Business value

Value for manufacturers:

- Eliminate daily time reserved for planning batch jobs.
- Future business growth won't overload the planning system.
- Execute planning runs more frequently—not just daily or weekly.

- Improve customer service with shorter total lead times.
- Save cost and capital by reducing inventory levels.

Feature details

Material requirements planning (MRP) helps planners at manufacturing companies ensure that materials are available for production and that products are available for delivery to customers. Businesses rely on MRP to plan their production and ensure that the needed materials and products are available. Planning optimization now provides MRP functionality and facilitates near-real-time planning by running as a separate service.

With planning optimization support for MRP, manufacturers can benefit from:

- Improved performance with high data volume.
- Removing the load of master planning from their ERP system.
- Near-real-time insights into requirement changes.

Planners will be able to plan production orders and their related requirements with planning optimization, limited to:

- Supply suggestions for production.
- Support for bill of materials (BOM).
- Support for phantom BOMs.

Product information management

Overview

A new standard inventory dimension (version) is introduced for product version tracking and two new generic inventory dimensions (InventDimension11 and InventDimension12) are introduced for enhanced extensibility.

New inventory dimensions for product version tracking and enhanced extensibility

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

Business value

Version is a product dimension that helps companies maintain and track multiple versions of a product throughout the supply chain, while the new generic dimensions provide increased flexibility for extending the capabilities of the application to fit individual business needs.

Feature details

This feature introduces a new standard inventory dimension (version) and two new generic inventory dimensions (InventDimension11 and InventDimension12).

New product dimension: Version

Version is a product dimension that is intended to help you maintain and track multiple versions of a product throughout the supply chain. Version tracking is essential to the success of manufacturers operating in a world of constantly shrinking product lifecycles, increased quality and reliability requirements, and increased focus on product safety.

As a standard product dimension, version will behave similarly to the existing product dimensions of size, style, color, and configuration, which means you could also choose to use it for purposes other than tracking product versions.

Two new generic dimensions: InventDimension11 and InventDimension12

The two new generic, string-based inventory dimensions increase the number of generic inventory dimensions from 10 to 12. This gives even more flexibility for partners and ISVs to enhance the standard application capabilities through extensions.

Trade and source

Default RFQ reply fields for vendor bidding

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

Business value

Provides improved control over which fields are shared with vendors in RFQs.

Feature details

This feature allows you to specify specific types of information that you want to receive from vendors when they reply to (bid on) a request for quotation (RFQ). Fields that you mark as default are included on the online form provided for vendor collaboration, and printed on RFQ reply sheets sent to vendors. These fields are also included on the RFQ return document that you can send to vendors if, for example, you want to negotiate prices or delivery times.

Vendor RFQ search by procurement category

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

Business value

Makes it easier for vendors to find relevant RFQs to bid on.

Feature details

The vendor collaboration interface offers a new search feature that lets vendors find open requests for quotations (RFQs) based on their procurement category. This feature requires the public sector features to be enabled on your system.

Approve and save vendor-submitted bank details

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Jan 2021

Business value

Streamlines the process of updating and storing vendor bank details.

Feature details

This feature allows vendors to use the vendor collaboration interface to submit bank account information to be included as part of their vendor record. Each submission is sent through an approval process and is only added to the record if approved by somebody at your company.

Vendor-submitted certifications

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Jan 2021

Business value

Streamlines the process of collecting vendor certifications and makes them easily available for future reference.

Feature details

This feature enables vendors to use the vendor collaboration interface to submit certifications for storage and future reference. They can also mark existing certificates as expired. These certifications are issued by a third party and submitted as attachments.

Preserve vendor bid data for amended RFQs

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Feb 2021

Business value

Makes it more convenient for vendors to submit bids in situations where an RFQ was later amended by the buyer.

Feature details

When buyers amend a request for quotation (RFQ), this feature will save the bid data previously submitted by vendors. Previously, each time a buyer amended an RFQ, all related vendor-submitted data would be removed, so vendors needed to reenter all bid data using the vendor collaboration interface.

Vendors can request approval for procurement categories

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Feb 2021

Business value

Provides closer vendor collaboration and improves visibility into vendor requests.

Feature details

Allows vendors to use the vendor collaboration interface to request to do business within a new procurement category. The feature includes a workflow that allows buyers to review and approve each request before it is permitted to take effect.

Landed cost and inbound transportation management

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2021	Mar 2021

Feature details

Shippers in a wide range of industries, from food and beverage to retail and distribution, can optimize their supply chain performance by actively managing their inbound process using the new landed cost and inbound transportation management solution. The feature provides many benefits, including:

- Accurate and timely costing.
- Increased financial and logistical visibility into the extended supply chain.
- Streamlined receiving processes.
- Landed cost prediction for an item, which enables improved and more agile decision making.
- Reduced administration and costing errors.
- Maximized item profitability.
- Reduced internal follow-up calls from sales, customer service, logistics, and purchasing.
- Improved warehouse planning through better visibility.
- Improved customer service though immediate visibility of stock delays that impact customer deliveries.
- Enhanced sourcing competitiveness.

Warehouse and transportation management

Confirm outbound shipments from batch jobs

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

Feature details

This feature adds the ability to set up batch jobs that automatically confirm outbound shipments for ready-to-ship loads. For load lines related to transfer orders, the system automatically runs a process that updates the transfer order shipments. However, for sales orders, an operator must manually run a sales packing slip update from the load to update the outbound cost.

Order-committed reservation based on license plates

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

Business value

Add new capabilities by integrating with external systems while also adding flexibility to inventory reservation policies and improving warehouse efficiency.

Feature details

This feature makes it possible to integrate Supply Chain Management with external systems, such as an external load optimization planning service. To improve compatibility between systems, the feature also adds new flexibility to inventory reservation policies, which makes it possible to create order-committed reservations of specific license plates (rather than just at the warehouse level).

To reserve a specific license plate using this feature, you must use its open data protocol (OData) interface. This is primarily intended to support integration with external systems, though you can also interact with the interface manually using a Microsoft Excel add-in.

At the warehouse, the system helps maintain an optimized license plate picking process. Workers scan a single license plate, and the warehouse app instantly identifies the required work order and related picking operations. The system also lets workers pick multiple work-order lines at once from the same license plate, so for example, they can register and ship an entire pallet containing multiple SKUs with just one scan.

To enable this functionality, administrators must set the license plate inventory dimension to "Allow reservation on demand order" within the relevant reservation hierarchy. To make the functionality available to workers, add a mobile device menu item that uses the "Handle by license plate" process.

Work pick line overview

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

Business value

Improves warehouse efficiency by allowing workers to optimize their picking sequence.

Feature details

This feature lets system administrators define where in the warehousing app to show a list of all lines for the current work and allows workers to select which line to pick next. This benefits warehouse workers who often need to get an overview of the pick lines in a work order so they can better optimize their picking sequence.

Work policy enhancements for inbound work

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

Business value

Simplifies the receiving process for the warehouse receiving clerks.

Feature details

This feature allows the purchase order item, purchase order line, and load item receiving (and put away) processes to receive goods without creating warehouse work (instead, it can register inbound physical inventory directly to the location at the inbound receiving dock). This feature also adds support for receiving at any location in a warehouse by letting you add location-specific menu items to the warehousing mobile app, including non-license-plate controlled locations.

Outbound workload visualization

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

Feature details

This feature visualizes outbound workloads in the warehouse, and allows warehouse managers to define their own filters and refresh schedule. It introduces new data entities to support visualization of current workforce assignments.

Create and process transfer orders from the warehouse app

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

Business value

Improve warehouse efficiency by optimizing the processes for creating transfer orders and outbound shipping.

Feature details

This feature lets warehouse workers create and process transfer orders directly from the warehouse app. Workers start by scanning one or more license plates using the app, which then creates the required transfer order and order lines based on the on-hand inventory registered for those license plates. On receiving the "complete order" signal from the warehouse app, Supply Chain Management can automatically process the outbound transfer order shipment using the "License plate guided" strategy process running in batch.

Manual sales line picking

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

Feature details

This feature allows administrators to manually pick inventory transactions related to sales lines, including lines that have already been released to warehouse. Administrators should only do this in exceptional cases, such as when the system is in a corrupted state.

Process warehouse app events

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

Business value

Improves warehouse efficiency by increasing system automation and responsiveness.

Feature details

This feature adds a queue for processing events issued by the warehouse app. Batch jobs running in Supply Chain Management can use data from this queue to react as needed to the signaled events. The warehouse app adds relevant events to the queue in response to certain types of actions taken by workers using the app.

Overview of Finance and Operations cross-app capabilities 2020 release wave 2

Finance and Operations cross-app capabilities apply to all Finance and Operations apps like Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations.

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 frequent updates (eight updates per year) that help customers stay current in a consistent, predictable, and seamless manner. Most capabilities introduced with the 2020 release wave 2 will be persona opt-in enabled, which allows customers to adopt 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 keeps the focus on fundamentals to enhance the user experience. It also continues the journey of making Finance and Operations data and business processes seamlessly available to Dynamics 365 applications (via Common Data Service), Microsoft Power Platform, Azure Data Lake, and other Dynamics 365 applications.

As Finance and Operations apps continue to integrate with Common Data Service natively, admin experiences will link Lifecycle Services with the Power Platform admin center. The first of these experiences to light up will be a unified support experience across the admin portals. This wave will also enable provisioning and trial experiences for Project Operations and a new, improved test and demo environment type that supports end-to-end experiences (including add-ins) for all Finance and Operations apps that can leverage all the new experiences.

What's new and planned for Finance and Operations cross-app capabilities

This topic lists features that are planned to release from October 2020 through March 2021. 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

Capabilities and features that apply to all apps running on the Finance and Operations platform.

Feature	Enabled for	Public preview	General availability
Lifecycle Services support experience	Admins, makers, or analysts, automatically	Oct 2020	-
New grid control – general availability	End users by admins, makers, or analysts	-	Oct 2020
New task recorder capabilities	End users by admins, makers, or analysts	-	Oct 2020
Saved views – general availability	End users by admins, makers, or analysts	-	Oct 2020
Upgrade three jQuery components libraries	End users by admins, makers, or analysts	-	Oct 2020
New HTML editor control	End users by admins, makers, or analysts	-	Jan 2021

Data and process integration

Finance and Operations app data and processes are available in Azure Data Lake Storage, Common Data Service, and Power Automate.

Feature	Enabled for	Public preview	General availability
Finance and Operations data in Azure Data Lake available in all Azure regions and to all customers	End users by admins, makers, or analysts	-	Mar 2021
Finance and Operations data in Common Data Service – Phase 3	End users by admins, makers, or analysts	Oct 2020	Mar 2021

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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Cross-app features

Overview

This release wave includes several new capabilities that apply to all Finance and Operations apps. This includes improvements to the user experience such as saved views, grids, and personalization capabilities. Dynamics Lifecycle Services will also feature many enhancements related to Finance and Operations apps.

Lifecycle Services support experience

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

Business value

This will provide a consistent support experience for all Dynamics 365 and Microsoft Power Platform users.

Feature details

When submitting a support case to Microsoft from Lifecycle Services, users will have a new, enhanced experience that's consistent with other Dynamics products, including:

- A new look and design that provides better visibility of issue categories.
- An improved self-help experience that includes a context-based document search experience that provides recommended solutions and documentation for troubleshooting.

- Knowledge base suggestions with visibility to known issues and status for the impacted product versions.

See also

[Manage the support experiences for Finance and Operations apps] (docs)

New grid control – general availability

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

Feature details

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. These issues do not occur with the new grid control.
- **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.
- **Pinned marking column**: The marking column in the new grid is pinned to the left and so will always be visible and available regardless of the width of the grid.
- **SizeToAvailable width columns**: Developers can set WidthMode=SizeToAvailable on columns inside grids, and these columns will start with the same width as the SizeToContent width mode setting, but will stretch to use any extra available width inside the grid. If multiple columns are set to SizeToAvailable, they will share any extra available space in the grid.

- **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 (**=**).
- **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. Note that the entire dataset is required for this functionality, so it might take time to calculate totals for large datasets.
- **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. Users can also paste copied tables from Excel directly into grids in the system.

Follow the link in the "See also" section of this article for:

- More details about some of the capabilities listed above.
- Instructions on how to enable the new grid control.
- A list of known issues with the new grid control as well as information on when these issues have been addressed.

See also

Grid capabilities (docs)

New task recorder capabilities

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

Feature details

Customers are encouraged to create regression test suites using the Regression suite automation tool (RSAT) and task recorder. Regression test suites help ensure updates to Finance and Operations apps are seamless and issue-free for your 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.

Improvements are planned to be delivered incrementally over the course of the release wave. Check back for updates on capabilities that will be added and when they will be available.

Version 10.0.13

The **Allow validation of control state in task recordings** feature allows you to add validation steps in a task recording that check whether a control is enabled, disabled, read-only, or editable.

See also

Task recorder resources (docs)

Saved views – general availability

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

Feature details

Saved views provides a number of benefits in the personalization area of the product:

- You can define multiple, named sets of personalizations per page.
- You can specify filter and sort conditions as part of a saved view on list pages.
- You can pick a default view that will load whenever you come to the page.
- You can pin saved views to workspaces (as tiles, lists, or links), which allows you to drill back from the workspace to that view, which includes not only the filter conditions from the view but also any associated personalizations.
- Your organization can publish views to users with specific security roles and access to specific legal entities.
- Your organization can publish views as default views to modify the user's default experience with pages in the system.
- Users without personalization privileges can still have access to views that have been published to their roles.
- Administrators can import and export views in bulk. This includes both personal views as well as published views.

Follow the link in the "See also" section of this article for:

- More details about the capabilities listed above.
- Instructions about how to enable saved views.

A list of known issues with saved views as well as information on when these issues have been addressed is available in the documentation.

See also

Saved views (docs)

Upgrade three jQuery components libraries

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

Feature details

This feature upgrades three jQuery components used by Finance and Operations applications. Specifically, this includes moving jQuery to version 3.5.0 (from 2.1.4), jQuery UI to version 1.12.1 (from 1.11.4), and jQuery qTip to version 3.0.3 (from 2.2.1). Enabling this feature means that Finance and Operations apps will use these updated libraries.

IMPORTANT Customers should test any custom JavaScript code, typically part of extensible control implementations, to ensure there are no issues with the upgrade. This feature is targeted to be required with the April 2021 release, but is currently optional to allow time for migration of affected APIs. If you are affected, you can find more information for migrating your affected APIs at jQuery.com/.

New HTML editor control

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Jan 2021

Feature details

The HTML editor control is being replaced with the CKEditor control to provide more robust editing capabilities and to align with editing experiences in other Dynamics products.

Data and process integration

Overview

Seamless data exchange between Finance and Operations apps and Common Data Service

This release wave will support new out-of-the-box scenarios of the dual-write framework. The dual-write framework provides a seamless experience that allows you to converge business processes between Finance and Operations apps and customer engagement apps in Dynamics 365. Administrators configure data entities in Finance and Operations apps to synchronize near real-time with Common Data Service.

Finance and Operations data in Azure Data Lake Storage Gen2

Core tables, data entities, and aggregate measurements defined in Finance and Operations apps will be available in your own data lake (Azure Data Lake Storage). This functionality will become generally available to a larger number of customers and additional Microsoft Azure regions.

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 Common Data Model along with rich attributes, definitions, and relationships. Data exported to the data lake is described in Common Data Model. The data structure in Data Lake Storage mirrors the organization of data definitions in 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.

You can use Data Lake Storage 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 apps, you can transition to Data Lake Storage—no need to export data on your own, you can use data already present in Data Lake Storage.

Finance and Operations data in Azure Data Lake available in all Azure regions and to all customers

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Mar 2021

Business value

All your data (including tables and entities) from Dynamics 365 Finance and Operations apps is also available in Azure Data Lake. The data is updated within minutes so you can easily mash up business data with signals from machines, sensors, and clickstreams with Azure Synapse Analytics. You can also unlock new insights apps from Microsoft and partners.

Feature details

Tables in Azure Data Lake Service is a feature that was made available in 2020 release wave 1 for a limited set of regions and customer environments. This feature is now available in all supported regions. The feature is also available to all customer environments.

You can unlock a new set of ready-made insight apps that combine business data (including tables and entities) from your Finance and Operations apps with signals from machines, sensors, and clickstreams.

Modernize your on-premises legacy data warehouse by leveraging Azure Data Lake and Azure Synapse and bring data from your on-premises systems including Microsoft Dynamics AX 2012 and AX 2009. You can easily mash up data from current Finance and Operations apps, legacy systems, and data from devices and sensors. By using Azure Synapse, you can consume data in the lake using T-SQL and familiar tools.

You can discontinue the use of existing services such as Entity store and Bring your own database (BYOD) seamlessly with the transition into Azure Data Lake Storage.

Finance and Operations data in Common Data Service – Phase 3

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Oct 2020	Mar 2021

Business value

This feature facilitates seamless data exchange between Finance and Operations apps and Common Data Service.

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 customer engagement 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.

In 2020 release wave 1, we delivered features that provide multimastering capabilities for customers, vendors, and products, along with an introduction of the company concept in Common Data Service. We also covered end-to-end scenarios like on-demand pricing from Finance and Operations apps, integrated quotes, orders, invoices, and assets along with some reference data from finance, tax, accounts receivables, and accounts payables. In all, 112 entities are supported. For more information, see Data in Common Data Service – phase 1 & 2.

These scenarios can be further enriched by customers and partners so that they extend across Finance and Operations apps and Common Data Service.

The 2020 release wave 2 targets support for Dynamics 365 Commerce scenarios on Common Data Service and other concepts like party model, activities and notes, and services. These features will be released for public preview in the July-August timeframe and made generally available in the October timeframe. Entity coverage will be revealed at a future date.

Overview of Dynamics 365 Project Operations 2020 release wave 2

Today's project-based service 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 often use 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. 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 look 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, customers are provided with 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.

It's everything you need to run your operations, from sales to financials, all in one application.

- **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 use 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 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 works like you expect because they share a common foundation and 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 October 2020 through March 2021. 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
View grant information on the Project invoice and Project invoice proposal list pages	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Create project invoice proposals by funding source from the periodic area	End users by admins, makers, or analysts	-	Nov 2020
New Invoice summary page available from Project invoice proposals and Project invoices list pages	End users by admins, makers, or analysts	-	Nov 2020
Public sector – Project invoice proposal selection parameter by funding source	End users by admins, makers, or analysts	-	Nov 2020

Feature	Enabled for	Public preview	General availability
Upgrade from Dynamics 365 Project Service Automation to Dynamics 365 Project Operations	End users by admins, makers, or analysts	-	Mar 2021

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 and data centers (regions), go to the Dynamics 365 and Power Platform availability page.

View grant information on the Project invoice and Project invoice proposal list pages

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

Feature details

View summarized project invoice information for project invoices and project invoice proposals.

You can select any number of project invoices or proposals on their respective list page and then select the new Invoice summary button in the form's Action pane. This opens a form that displays subtotals for the selected invoices. The subtotals are broken down by project and activity number. A grand total for all selected project invoices is also displayed.

Create project invoice proposals by funding source from the periodic area

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

Business value

Previously, the **Create invoice proposals** page only allowed you to create invoice proposals by first selecting the project contract or project. This made it difficult to create a large number of invoice proposals for a single customer. Now you can choose to create project invoice proposals by selecting the customer account associated with funding sources, allowing you to create any number of project invoice proposals regardless of the number of project contracts on which the customer is a funding source.

Feature details

This feature allows a user to create project invoice proposals by funding source in the **Periodic** area.

New Invoice summary page available from Project invoice proposals and Project invoices list pages

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

Business value

Adding additional information on the Project invoice proposals and Project invoices list pages will determine what documents to process for a single customer.

Project managers and grant managers might need to process many project invoices and project invoice proposals for a single customer (funding source). Additional information on the Project invoice proposals and Project invoices list pages will help them decide whether to process the individual documents.

Feature details

This feature adds an Invoice summary to the Project invoice proposals and Project invoices list pages. Selecting to view the invoice summary will display project, activity, and summarized amount information for selected records. When the new grid control is enabled, totals are also visible on the Invoice summary page.

Public sector – Project invoice proposal selection parameter by funding source

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

Business value

In earlier versions, invoice proposals were created by first selecting the project contract, or the project. This made it cumbersome to create multiple invoice proposals for a single customer. Now you can create any number of project invoice proposals, regardless of the number of project contracts the customer is a funding source for.

Feature details

This feature lets you create project invoice proposals by selecting the customer account associated with funding sources, which lets you create multiple project invoice proposals, regardless of the number of project contracts the customer is a funding source for.

Upgrade from Dynamics 365 Project Service Automation to Dynamics 365 Project Operations

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Mar 2021

Feature details

The 2020 release wave 2 will include investments that allow existing Dynamics 365 Project Service Automation customers to upgrade to the new Dynamics 365 Project Operations offering. We will leverage capabilities from the platform team to provide a frictionless upgrade of data from the old Project Service Automation application to the new offering.

Overview of Dynamics 365 Guides 2020 release wave 2

Dynamics 365 Guides is a mixed-reality application that enables employees to learn and execute complex tasks by providing holographic instructions in the flow of their work. Use Dynamics 365 Guides to:

- Reduce errors and help increase safety.
- Standardize skills and reinforce compliance.
- Increase employee retention and close knowledge gaps.
- Analyze data to improve training and operations.

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 get guidance while they work in a heads-up, hands-free style. Trainers and managers can analyze usage data to optimize their workflows.

For 2020 release wave 2 (October 2020 to March 2021), the Dynamics 365 Guides team is focusing on intelligent workflows. By taking advantage of data and AI innovations, work instructions can be configured to adjust on the fly based on operator inputs.

For example, with new branching capabilities, workflows can change course depending on the scenario. This could be driven by an operator answering a question, or by using easy-to-configure computer vision that provides timely and reliable feedback to the operator. Operators will receive feedback on whether they have done the work correctly and the guide can adjust next steps accordingly.

In addition, insights will make it easier to use time-tracking data and connect that data to your business. For example, you'll be able to determine whether operators have completed all steps of a guide before sending a completion signal.

What's new and planned for Dynamics 365 Guides

This topic lists features that are planned to release from October 2020 through March 2021. 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 guides that support branching flows	End users, automatically	-	Oct 2020
Extend analytics capabilities with Guides Insights	Admins, makers, or analysts, automatically	-	Oct 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 and data centers (regions), go to the Dynamics 365 and Microsoft Power Platform availability page.

Create guides that support branching flows

Enabled for	Public preview	General availability
End users, automatically	-	Oct 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 that 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 step 2 to step 5 depending on the operator's answer to a question in step 2.

Extend analytics capabilities with Guides Insights

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

Business value

Guides Insights provides 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 predefined Common Data Service entities that contain data collected during operator run-throughs will enable a wide variety of applications. For example, you'll be able to 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.

Human Resources

Overview of Dynamics 365 Human Resources 2020 release wave 2

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 2, we're focused on the following areas to help you expand your offerings and extend your solutions:

- **Transform the employee experience**: Manage leave and absence directly from Microsoft Teams, along with full enhancements to employee and manager self service.
- **Build an HCM ecosystem**: Enable streamlined integrations to recruiting and payroll partners.
- **Optimize HR programs**: Continue from wave 1 with additional enhancements in Leave and absence and Benefits management.
- **Unlock your HR data**: Modify existing reports and build custom reports using Azure Data Lake and Power BI Pro.
- **Enrich your existing Microsoft solutions with HR data**: Integrate directly with Azure Active Directory, Outlook, and other Dynamics 365 applications.

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 October 2020 through March 2021. 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.

Benefits management

Benefits management provides you with a flexible solution that supports a wide variety of benefit options. Human Resources also includes an easy-to-use employee experience that showcases your offerings.

Feature	Enabled for	Public preview	General availability
Benefits management Common Data Service entities	End users by admins, makers, or analysts	-	Oct 2020

Employee and Manager self-service

Employee and Manager self-service allows both employees and managers to view and maintain their own information or information for their directs and extended reports.

Feature	Enabled for	Public preview	General availability
Employee leave and absence experience in Microsoft Teams	End users by admins, makers, or analysts	✓ May 18, 2020	Oct 2020
Custom links in Manager self service	End users by admins, makers, or analysts	-	Dec 2020
Manager access to employee attachments	End users by admins, makers, or analysts	-	Feb 2021

General

We're enhancing our user experience, and we're providing general improvements to Human Resources that apply to multiple workspaces and forms.

Feature	Enabled for	Public preview	General availability
Automated address validation	End users by admins, makers, or analysts	-	Oct 2020

Integrations and extensibility

Feature	Enabled for	Public preview	General availability
Skills and certificates Common Data Service entities	End users by admins, makers, or analysts	-	Oct 2020
Enable simplified integration with recruiting providers	Admins, makers, or analysts, automatically	Sep 2020	Oct 2020
Enhanced candidate profile in Personnel management	End users by admins, makers, or analysts	Sep 2020	Oct 2020
Manager can submit a recruiting request for open positions	End users by admins, makers, or analysts	Sep 2020	Oct 2020
Integration with LinkedIn Talent Hub	End users by admins, makers, or analysts	Sep 2020	Oct 2020
Azure AD integration	End users by admins, makers, or analysts	Oct 2020	Dec 2020

Feature	Enabled for	Public preview	General availability
[Enable simplified integration with payroll providers (Phase 1)]	Admins, makers, or analysts, automatically	Oct 2020	Dec 2020

Leave and absence

Feature	Enabled for	Public preview	General availability
[Leave and absence workflow experience enhancements]	Admins, makers, or analysts, automatically	Sep 2020	Oct 2020
[Provide additional insight into leave balances]	Admins, makers, or analysts, automatically	Oct 2020	Nov 2020
[Cross-company view of employee leave for managers]	Admins, makers, or analysts, automatically	Nov 2020	Dec 2020
[Approved leave integrated with Microsoft Outlook calendar]	Admins, makers, or analysts, automatically	Feb 2021	Mar 2021

Organization and personnel management

Feature	Enabled for	Public preview	General availability
[Organization and Personnel management workflow experience enhancements]	Admins, makers, or analysts, automatically	Sep 2020	Oct 2020

Performance management

Feature	Enabled for	Public preview	General availability
Performance entities in Common Data Service	Admins, makers, or analysts, automatically	-	Nov 2020

Reporting and analytics

Feature	Enabled for	Public preview	General availability
Create customized reports	Admins, makers, or analysts, automatically	Nov 2020	Dec 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 and data centers (regions), go to the Dynamics 365 and Power Platform availability page.

Benefits management

Overview

Benefits management provides you with a flexible solution that supports a wide variety of benefit options. Human Resources also includes an easy-to-use employee experience that showcases your offerings.

Benefits management Common Data Service entities

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

Business value

New Common Data Service entities for Benefits management will help build integrations to payroll and benefit providers.

Feature details

New Common Data Service entities for Benefits management will help build integrations to payroll and benefit providers. Adding this data into Common Data Service will allow you to take advantage of Microsoft Power Platform to extend existing functionality. You will also be able to enhance functionality with Power Automate, Azure Functions, and Power BI.

The entities provided in this feature will include:

- Setup entities
- Benefit plan entity
- Worker enrolled benefit entities

Employee and Manager self-service

Overview

Employee and Manager self-service allows both employees and managers to view and maintain their own information or information for their direct and extended reports.

Employee leave and absence experience in Microsoft Teams

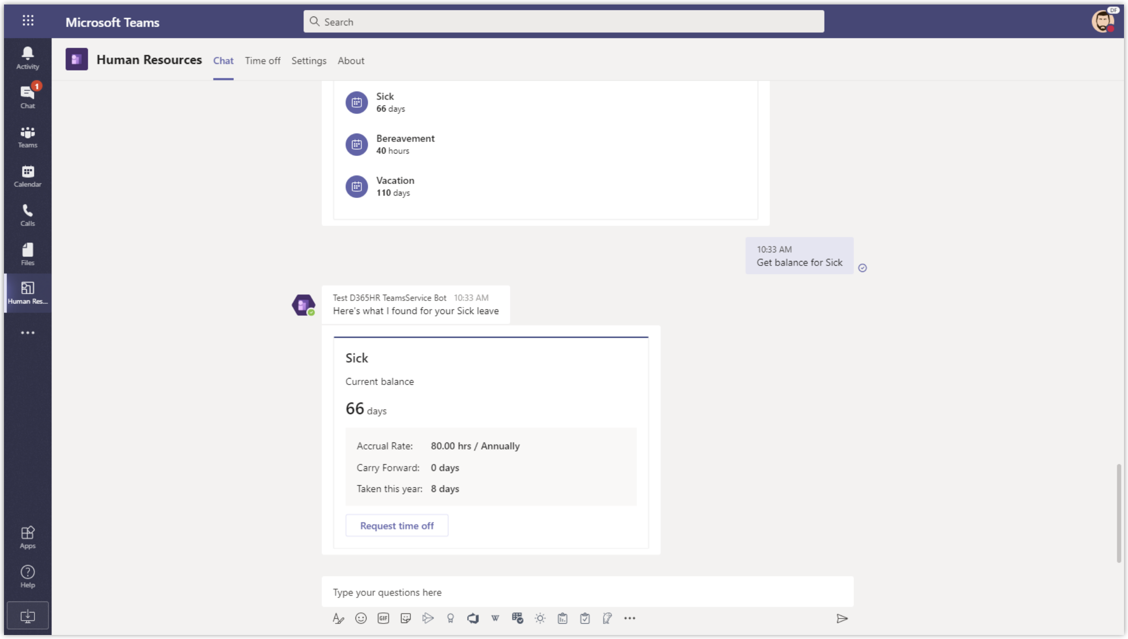
Enabled for	Public preview	General availability
End users by admins, makers, or analysts	✔ May 18, 2020	Oct 2020

Business value

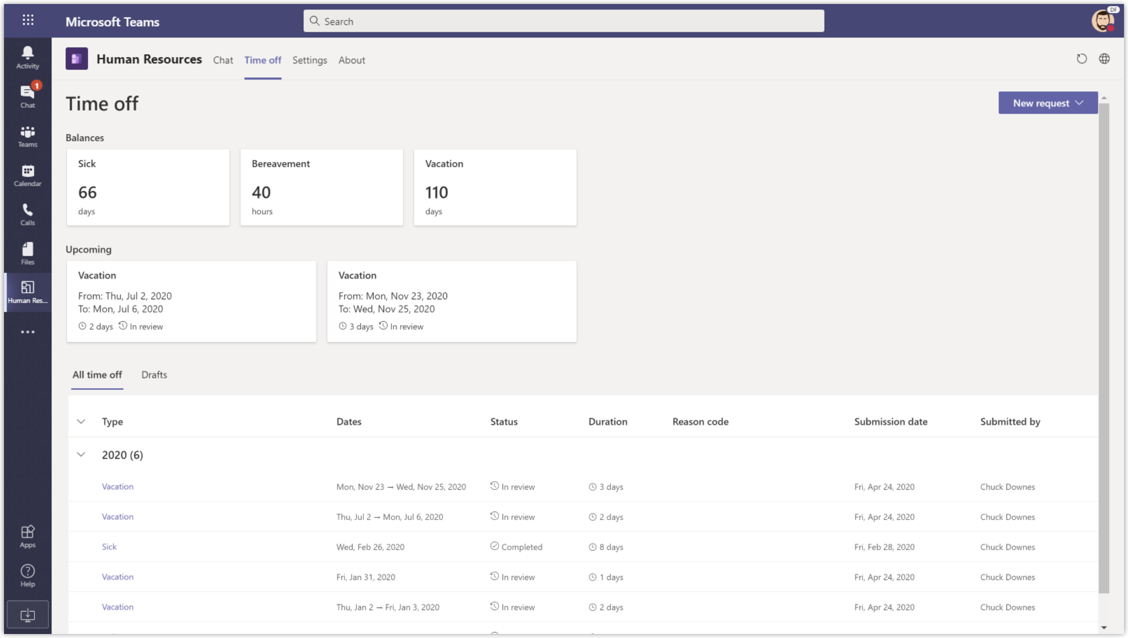
Employees can view time-off balances and submit leave requests from within Microsoft Teams. Managers or HR will be notified when a request needs attention.

Feature details

Quickly view time-off balances and submit leave requests right in Microsoft Teams. The Dynamics 365 Human Resources app takes the guesswork out of requesting leave. Employees can quickly access leave balance and request information right in Teams, where they already do much of their collaboration work. In addition, managers also have the ability to act on leave requests needing their attention in Teams. The app is tightly integrated with Human Resources, so you can view the progress of your leave request in real time.



Time-off bot



Time-off tab

See also

Human Resources app in Teams (docs)

Custom links in Manager self service

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

Business value

Allow custom links on the **My team** tab in Manager self service.

Feature details

Managers are often the liaison between employees and HR. To support managers, we're expanding capabilities in Manager self service. We're adding the capability to add custom links on the **My team** tab. This feature is similar to the custom links feature we provide in the **My information** tab in Employee self service.

Manager access to employee attachments

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Feb 2021

Business value

Allow managers to view employee attachments.

Feature details

Because managers are often the liaison between employees and HR, we're continuing to expand the capabilities in **Manager self service**. Currently, managers must store important employee documents in other document repositories, which can create duplication, inefficiencies, and privacy concerns.

With this added capability, managers will have access to documents that employees and HR have uploaded in Human Resources.

General

Overview

We're enhancing our user experience, and we're providing general improvements to Human Resources that apply to multiple workspaces and forms.

Automated address validation

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

Business value

Verify alternate addresses and provide alternate suggestions.

Feature details

Human Resources will verify alternate addresses and provide alternate suggestions if available. This process won't overwrite existing data.

Integrations and extensibility

Overview

A core focus for Dynamics 365 Human Resources is ensuring customers are able to extend and expand application functionality through integrations and customizations. We're making new integrations available and providing new features that streamline custom integrations through Common Data Service.

Skills and certificates Common Data Service entities

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

Business value

Common Data Service entities for skills and certificates entities will be available.

Feature details

Skills and certificates entities will be made available in Common Data Service to support integration and reporting scenarios.

Enable simplified integration with recruiting providers

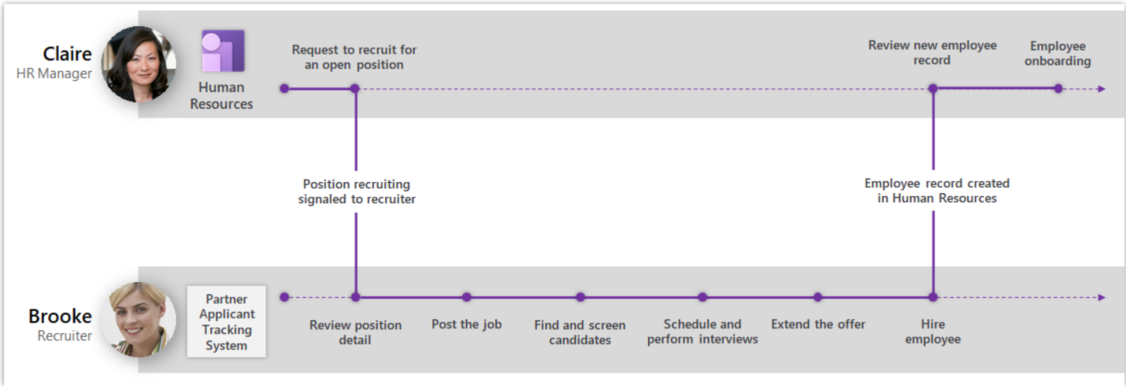
Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Sep 2020	Oct 2020

Business value

The retirement of Dynamics 365 Talent Attract will leave gaps in employee recruiting functionality for our customers. To maintain customer value, we will ensure the gap in functionality is filled by integrations with applicant tracking systems (ATS) in the partner application ecosystem. Dynamics 365 Human Resources customers must have access to a wide range of third-party recruiting applications that provide streamlined integration, removing the silos from their human resources functions.

Feature details

We will create a set of scenario-specific APIs in our integration platform, based on Common Data Service, that are streamlined to enable partners to quickly create tight integrations with Human Resources. This will enable an end-to-end scenario of hiring a new employee for companies using a wide range of partner recruiting applications.



Talent acquisition integration with Human Resources

Enhanced candidate profile in Personnel management

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

Business value

Our work to create a streamlined end-to-end hiring experience for Human Resources includes enabling tight integrations with Applicant Tracking Systems (ATS). As part of this experience, an integrating ATS will send a full candidate profile to display in the **Candidates to hire** section of **Personnel management**, where an HR pro can then complete any required onboarding workflows and create an employee record. This flow streamlines the overall hiring experience, saving time and helping maintain data accuracy by removing the need for double entry of data.

Feature details

Enhancements to the **Candidate** records in **Personnel management** include the ability to create records for a candidate directly in **Personnel management**. Previously, you could only create records through the Dynamics 365 Talent: Attract ATS. The **Candidate** record will also be expanded to include a more detailed candidate profile, including education, skills, employment history, and other information gathered through the hiring process. This detail can then be transferred to the new employee record.

Manager can submit a recruiting request for open positions

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

Business value

Provide managers with the ability to request recruiting a new employee, which will initiate a workflow to begin hiring.

Feature details

It's challenging to gather all the required information to hire a new employee. Human Resources will automate much of this process with the ability to create a new request to recruit.

Hiring managers will be able to use **Manager self service** or **Personnel management** to create a request to recruit a new employee. The request will initiate a workflow to begin hiring.

To streamline the process of creating a job posting, you will be able to populate the request form with default job and position information. Managers will be able to change the default information as needed.

Managers will be able to use the request records to track the status of the hiring process with the recruiter.

Integration with LinkedIn Talent Hub

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

Business value

The retirement of the Attract application in the Dynamics 365 Talent family will leave gaps in employee recruiting functionality for our customers. To maintain customer value, we will ensure the gap in functionality is filled by integrations with applicant tracking systems (ATS) in the partner application ecosystem.

Feature details

When a candidate has accepted an offer in LinkedIn Talent Hub, an action is available to send the candidate record into the Human Resources system. This eliminates the need to manually enter the new employee record in Human Resources, removing silos from the related business functions. Once the candidate record is in Human Resources, a workflow is enabled to review the new record, add any additional needed information, and approve the new hire before the final employee record is created and linked to the position.

Azure AD integration

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

Business value

Integration with Azure Active Directory provides a single point that allows maintaining user accounts, security, and data access for all workers (employees and contractors) in Human Resources.

Feature details

Companies today are looking for ways to lower administration costs and strengthen security. The challenges of single sign-on, data integrity, data accuracy, and data consistency across systems continue to be problematic for virtually every company. Changes occur frequently, and keeping disparate systems updated is a big challenge.

Integration with Azure Active Directory (Azure AD) provides a single point that allows maintaining user accounts, security, and data access for all workers (employees and contractors) in Human Resources.

Enable simplified integration with payroll providers (Phase 1)

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

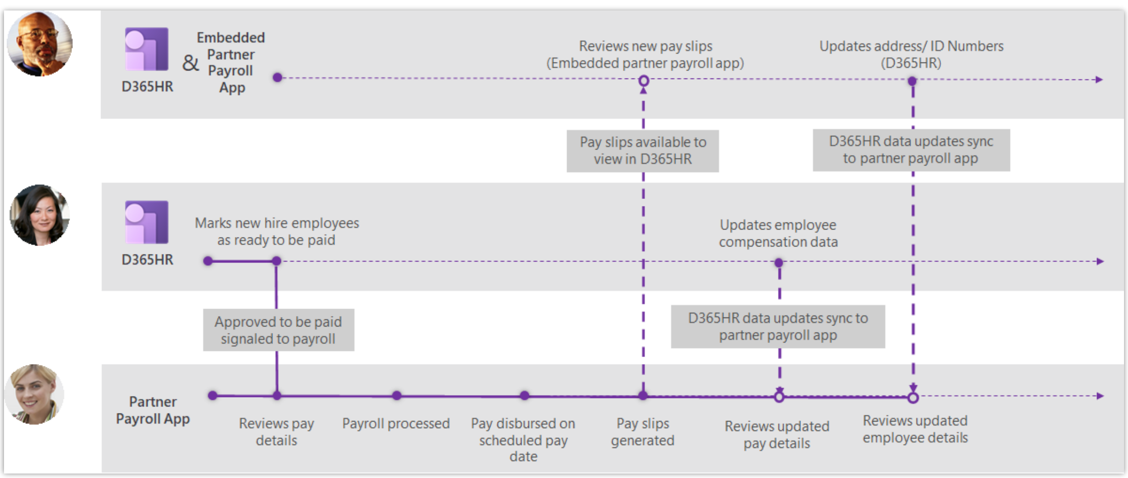
Business value

Global companies often rely on in-country and other third-party providers to process payroll. Integrating their employee profile, benefit, and compensation data is necessary to effectively process payroll. They also want to provide a single point of entry for their employees to be able to update their data and view earnings statements and tax documents. By providing these in-country providers the ability to integrate with Human Resources, these customers can use any payroll provider that fits their business needs.

Feature details

This feature will enable:

- Partners to use an API to build integration to a third-party payroll system for the following:
  - Employee pay profile
  - Fixed compensation (pay rate)
  - Benefit contributions and deductions
- Employees and HR professionals to view and update payroll-related information in Human Resources through deep linking with single sign-on.



Payroll integration with Human Resources

Leave and absence

Overview

The **Leave and absence** workspace provides a flexible framework for creating new leave plans, workflows for managing requests, and an intuitive self-service page for employees to request time off. Analytics help your organization measure and monitor leave balances and usage for your leave plans.

Leave and absence workflow experience enhancements

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

Business value

Workflow approvals are a key aspect of leave requests. Enhancements in this area will help managers and employees to better understand the approval process and the state of leave requests.

Feature details

This feature will enable employees and managers to understand how to update and cancel leave requests.

Provide additional insight into leave balances

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

Business value

Provide more insight into leave balances so employees and managers can find answers themselves.

Feature details

Time off is a key benefit in any organizations. Employees, managers, and HR need insight into leave balances to answer questions and make decisions about time off. Human Resources will provide additional insight into what makes up leave balances. This additional insight will help employees and managers find answers themselves instead of reaching out to HR every time they have a question about leave balances.

Leave balance insights will include:

- Ability to view all employee leave balances in a single place.
- Employee and manager insight into:
- Accrual amount

- Time off taken
- Remaining time off

Cross-company view of employee leave for managers

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

Business value

In many global organizations, managers have direct reports across multiple companies. They need to be able to see and manage the leave across all of their employees, regardless of the company.

Feature details

This feature enables managers to view team leave across companies.

Approved leave integrated with Microsoft Outlook calendar

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Feb 2021	Mar 2021

Business value

Employees live in their email and drive their work from their calendars. By integrating approved leave with their Exchange calendar, employees can better plan their work.

Feature details

This feature will enable employee approved time off to be added to their Outlook calendar.

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.

Organization and personnel management

Overview

Organization management in Human Resources lets you define the groups, legal entities, operating units, and hierarchies in your organization. Personnel management allows managers and HR users to start the hiring process for a position, set up the approval process, and manage employees and positions.

Organization and Personnel management workflow experience enhancements

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

Business value

Workflow approvals are a key aspect of organization and personnel management. Enhancements in this area will help HR professionals and managers to better understand the approval process and the state of new hires and positions requests, or to make changes to existing employees or positions.

Feature details

This feature will enable HR professionals and managers to:

- Understand how to update and respond to new hire requests.
- Understand how to respond to requests to changes to existing employees or positions.

Performance management

Overview

The performance management process lets employees document and discuss their performance and goals with their manager. In turn, managers can provide feedback and guidance to employees.

Performance entities in Common Data Service

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

Business value

New Performance management entities will be available in Common Data Service.

Feature details

The new Performance management entities in Common Data Service will help support additional integration, reporting, and extensibility scenarios. Adding this data into Common Data Service will allow you to take advantage of Microsoft Power Platform to extend existing functionality. You will also be able to enhance functionality with Power Automate, Azure Functions, and Power BI.

Reporting and analytics

Overview

Reporting and analytics are key for organizations to make critical business decisions. Every organization has different needs, in addition to standard reporting, to help make informed decisions about the ever-changing workforce. Providing the ability to create customized report catalogs that combine data across human resources, finance, time, and other critical data is key to helping organizations make those informed business decisions.

Create customized reports

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

Business value

Reporting is key for organizations to make critical business decisions. Each company has different needs for their reports. Providing the ability to create customized reports that combine data across human resources, finance, time, and other data is key to helping organizations make those critical business decisions.

Feature details

In addition to more flexible reporting, Human Resources will enable Azure Data Lake Storage to provide a scalable service for all your data analytics needs.

This feature enables:

- Human resources analysts to create custom reports for human resources, time, finance, and other data.
- Human resources analysts to embed custom reports in workspaces.

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.

Commerce

Overview of Dynamics 365 Commerce 2020 release wave 2

Dynamics 365 Commerce delivers a comprehensive omnichannel solution that unifies back-office, in-store, call center, and digital commerce experiences to provide a delightful shopping journey for consumers across the different retail 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 and support for emerging retail channels.
- Optimizing operations to reduce costs.
- Driving supply chain efficiencies.

The investments in this release further empower retailers to be highly productive in their tasks by helping them to know and better serve their customers, and to efficiently run operations across the value chain.

Digital commerce

- Improved WYSIWYG authoring to enable non-developers to easily design and manage digital commerce web pages.
- New experimentation capabilities enable easy-to-configure A/B testing, showing relevant experiences to customers and to drive increased conversion rates.
- Track abandoned carts to perform analysis and to send notifications to customers to maximize revenue.
- Accept payments via PayPal with a new out-of-the-box integration.

Omnichannel

- Improve product discovery online and in the store with Bing for Commerce intelligent and personalized search capabilities.
- Create additional lift online and in the store with the ability to “shop similar looks”—a new intelligent capability that uses a product image to automatically discover and recommend other similar products.

Marketplace

Enable customers to do more with the platform with third-party services, connectors, modules, and themes. Easily discover these new capabilities in Microsoft AppSource where you can purchase and deploy them for configuration and use in your Dynamics 365 Commerce environment.

What's new and planned for Dynamics 365 Commerce

This topic lists features that are planned to release from October 2020 through March 2021. 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.

E-commerce

This section includes new capabilities and enhancements for e-commerce in Dynamics 365 Commerce.

Feature	Enabled for	Public preview	General availability
Abandoned cart capabilities for e-commerce	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Experimentation in Dynamics 365 Commerce	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Site builder WYSIWYG improvements	Admins, makers, or analysts, automatically	Aug 2020	Oct 2020
Gift card purchase in e-commerce	Admins, makers, or analysts, automatically	Oct 2020	Jan 2021
New out-of-the-box commerce modules for e-commerce	Admins, makers, or analysts, automatically	Nov 2020	Feb 2021

Globalization

In 2020 release wave 2, we will extend the out-of-the-box Commerce localization by delivering the Commerce localization for Brazil.

Feature	Enabled for	Public preview	General availability
[Commerce localization for Brazil]()	End users by admins, makers, or analysts	Oct 2020	-

Industry excellence

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

Feature	Enabled for	Public preview	General availability
[Improvements for facilitating curbside pickup store operations]()	End users by admins, makers, or analysts	Oct 2020	Jan 2021

Omnichannel excellence

This section includes new and enhanced omnichannel capabilities in Dynamics 365 Commerce.

Feature	Enabled for	Public preview	General availability
[Shop similar looks]()	End users by admins, makers, or analysts	Oct 2020	-
[Dynamics 365 Commerce app marketplace]()	Admins, makers, or analysts, automatically	Aug 2020	Oct 2020
[Extensibility to support incremental capture during back office invoicing]()	End users by admins, makers, or analysts	Aug 2020	Oct 2020
[PayPal payments connector]()	End users by admins, makers, or analysts	Aug 2020	Nov 2020

Feature	Enabled for	Public preview	General availability
Support for adding items to purchase orders during receiving in POS	End users by admins, makers, or analysts	Aug 2020	Nov 2020
Dynamics 365 Commerce integration with Bing for Commerce	End users, automatically	Oct 2020	Jan 2021
Support for closing lines in purchase orders during receiving in POS	End users by admins, makers, or analysts	Oct 2020	Jan 2021
Support serial number registration on outbound transfer order shipments from POS	End users by admins, makers, or analysts	Oct 2020	Jan 2021

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 and data centers (regions), go to the Dynamics 365 and Power Platform availability page.

E-commerce

Overview

In 2020 release wave 2, we will continue to build upon the foundational e-commerce capabilities we launched with Dynamics 365 Commerce for 2020 release wave 1. Some of the key investments include:

- Experimentation
- Abandoned cart capabilities

- Site builder WYSIWYG authoring improvements
- New page modules

Abandoned cart capabilities for e-commerce

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

Business value

Abandoned cart capabilities are a key component of an e-commerce platform. These capabilities support a virtuous cycle that allows retailers to identify abandoned purchases, contact those customers to encourage them to complete their purchase, analyze the effectiveness of those communications, and adjust business rules to optimize conversion.

Dynamics 365 Commerce will provide the tools and infrastructure that let retailers enable and customize the abandoned cart cycle to maximize the revenue they recover from abandoned carts.

Feature details

Dynamics 365 Commerce will provide a code sample that provides the link between the retail server and your email marketing provider. This code sample will:

- Provide a sample integration with a third-party marketing platform that can be customized by the customer.
- Retrieve abandoned carts from the retail server on a customer-defined schedule and push them to the configured email marketing provider.

Experimentation in Dynamics 365 Commerce

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

Business value

Dynamics 365 Commerce will provide the ability to perform controlled experiments such as A/B testing on e-commerce websites. This will allow merchants to make data-driven updates to their e-commerce website experiences and encourage customers to engage more frequently, therefore driving increased adoption and conversion rates.

Feature details

This feature will enable the creation, editing, and management of page layout and content treatments in Commerce site builder. Integrations with third-party experiment solution providers will enable the creation of experiments and resulting solutions. Event streams from the website storefront will support analytics and enable reports that detail the experiment results in the third-party solution. End-to-end experimentation support will be enabled for e-commerce pages and entities within a page.

Site builder WYSIWYG improvements

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

Business value

Dynamics 365 Commerce will enable a modern and responsive what-you-see-is-what-you-get (WYSIWYG) content authoring interface, which will improve marketers' ability to create visually rich and enticing marketing and merchandising pages for their website. WYSIWYG editing significantly reduces the learning curve for site authors by providing an intuitive and direct content authoring experience, thereby reducing time to market for content and layout changes.

Feature details

The WYSIWYG interface will allow marketers to edit content in a seamless graphical interface. Marketers can make content and settings changes and view them in the preview canvas in real time. The WYSIWYG functionality will make content editing simple to learn and more efficient by making edit controls directly discoverable in the graphical preview experience.

Gift card purchase in e-commerce

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Oct 2020	Jan 2021

Business value

To provide a complete gift card purchasing experience, Dynamics 365 Commerce will enable the customer to purchase, send as a gift, and redeem gift cards through the e-commerce channel.

Feature details

This functionality allows the purchase of physical and digital gift cards through the e-commerce channel. New modules for the module library will be provided to support gift card purchase without the need for additional customization.

New out-of-the-box commerce modules for e-commerce

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Nov 2020	Feb 2021

Business value

The Dynamics 365 Commerce module library provides a comprehensive set of modules that can be used by customers to build an e-commerce site without the need for additional customization. We will continue to invest in the number and types of modules provided in the module library to further improve the web experiences that can be built without the need for customization.

Feature details

This feature will add the following modules, but not be limited to:

- Tab control to organize information in a tabbed view.
- Accordion control to organize information in collapsible drawers.
- Breadcrumb to provide secondary site navigation.
- Mini-cart to show cart summary on the header.
- Improvements to store locator to find all stores, preferred store, and more.
- Integration with Bing Maps to provide address suggestions in store selector module.
- Integration with Bing Maps to provide a map control that can be used to view the location of stores nearby.
- Media gallery improvements to allow full screen, zoom capabilities, and so on.

- Market and locale picker to allow the user to choose a market or locale that they want to shop at.
- Checkout flow enhancements to support different types of shipping charges and non-shipping charges.
- Navigation menu enhancements to allow multiple levels and support images.

Globalization

Overview

In 2020 release wave 2, we will extend the out-of-the-box Commerce localization by delivering the Commerce localization for Brazil.

Commerce localization for Brazil

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

Business value

Commerce customers with operations in Brazil will be able to move to the modern Dynamics 365 Commerce service and ensure the compliance of their implementation with local regulatory requirements in Brazil (limited to the scope of Brazilian localization published at docs.microsoft.com).

Feature details

This functionality provides the following capabilities:

- Calculation of Brazil-specific taxes and generation of fiscal documents for retail sales.
- Generation of electronic fiscal documents NFC-e/NF-e for retail sales, submission of the electronic fiscal documents via the government's web services, and printing of DANFE NFC-e/NF-e.
- Generation of electronic fiscal documents CF-e (Cupom Fiscal eletrônico) and registration of the electronic fiscal documents in the SAT fiscal device.
- Management of Brazil-specific customer registration numbers from point of sale (POS), including entering, viewing, and modifying the numbers, and printing the registration numbers in receipts for retail sales.

- EFT integration for POS, including integration with popular local and global payment providers.

The following capabilities are currently not planned for Public Preview and will only be available upon General Availability of the Commerce localization for Brazil:

- Handling of fiscal customer information.
- Generation and submission of NF-e for returns.
- Generation and submission of NFC-e/NF-e in contingency mode.
- Generation of CF-e and integration with the SAT device.
- EFT integrations.

The following capabilities are currently planned for post-General Availability of the Commerce localization for Brazil:

- Generation and submission of NFC-e/NF-e for customer orders.
- Generation and submission of linked NF-e.
- N-1 support, enabling customers running Microsoft Dynamics AX 2012 R3 in their stores to work with Microsoft Dynamics 365 Commerce headquarters after an upgrade.
- Searching customers by registration numbers in POS.
- Support for Brazil-specific fields, such as tax registration numbers, when merging customer master records in a call center.
- E-commerce capabilities for Brazil.

We are not currently planning to include retail fiscal documents into Brazilian fiscal book statements (SPED Fiscal, SPED Contributions, and ICMS-ST compensation and restitution statements for RS, SC, PR, and SP).

Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- South America

Industry excellence

Overview

Key areas of investment include centralized and in-store inventory management enhancements as well as omnichannel management and order processing improvements.

Improvements for facilitating curbside pickup store operations

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Oct 2020	Jan 2021

Feature details

This feature will bring additional capabilities to facilitate curbside pickup order capture and processing flows. Organizations will now be able to offer additional pickup options for shoppers to choose from during order capture. Shoppers will be able to choose their pickup preference (such as curbside or in-store pickup or other pickup options as configured by the organization). This feature will also allow the organization to define custom notifications to be sent to shoppers who have a specific pickup type.

Omnichannel excellence

Overview

In 2020 release wave 2, we will continue to add and improve our omnichannel capabilities. Some of the key investments include:

- PayPal payments connector
- Integration with Bing for Commerce
- Shop similar looks
- Dynamics 365 Commerce app marketplace

Shop similar looks

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

Business value

Shop similar looks can bring fresh and appealing choices to the forefront of the shopping experience using the power of artificial intelligence and machine learning (AI-ML). The effect can be transformative and can create additional selling power as shoppers find more of the things they want in an easy-to-use visual experience. This functionality uses images in the existing product catalog and will be available both at the point of sale (POS) and in online store experiences.

Feature details

Shop similar looks is a new artificial intelligence capability for Dynamics 365 Commerce that uses the images of a seed product to discover which other products in the catalog look similar. By making this functionality available for all retail channels in Commerce, retailers can increase customer satisfaction by helping customers feel like they can easily find what they want in a more intuitive way.

Dynamics 365 Commerce app marketplace

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

Business value

Dynamics 365 Commerce will enable a vibrant online marketplace for the discovery, trial, and sales of extensions, modules, and themes that can be used across the Commerce retail channels (in-store, call center, digital, and emerging). All items added to the marketplace will be certified using standard certification practices to ensure the quality of these extensions.

The marketplace will be open to non-Microsoft providers to position and sell their services, themes, and modules.

Feature details

This feature will enable Dynamics 365 Commerce customers to search for, learn about, purchase, or subscribe to and deploy certified third-party connectors, scripts, themes, modules, and more.

Examples of categories for extensions include, but are not limited to:

- Advertising
- Analytics
- Calendars
- Data Management Platforms
- Direct Marketing
- Events and Appointments
- Experimentation

- Fraud Protection
- Gift Incentives
- Journey Orchestration
- Maps
- Messaging and Chat
- Payments
- Personalization
- Ratings and Reviews
- Shipping
- Social Media Engagement
- Targeting
- Translations

In addition to extensions, the marketplace will support the sale of custom themes and modules for use in the digital channel. Bootstrap themes will cover a wide range of business sectors and markets. Modules can be developed using React, Bootstrap, and the Commerce SDK to cover any number of uses to display content and data in the digital marketplace.

Extensibility to support incremental capture during back office invoicing

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

Business value

This feature allows merchants to use the same payment authorization for multiple payment captures in cases where an order might need to be invoiced multiple times. This might result in lower processing fees for merchants due to the reduction in authorization requests. Incremental capture might also drive increased customer satisfaction by reducing confusing authorization activity on credit card statements.

Feature details

Support for incremental capture in the Commerce SDK allows the same authorization to be referenced when an order is invoiced multiple times. Extensibility will be required to uptake this feature and not all payment processors can support incremental capture. Incremental capture will not be supported by the Microsoft Dynamics 365 Payment Connector for Adyen until a later release. Incremental capture might not be added to the Adyen connector via extensions.

PayPal payments connector

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

Business value

PayPal accounts for a large portion of online payments made for e-commerce transactions. By providing a first-party connector, Microsoft can eliminate the need for custom connectors at each merchant and ensure that a critical payments need is met out-of-the-box and fully enabled for omnichannel scenarios.

Feature details

This is a first-party, out-of-the-box PayPal connector to support acceptance of PayPal transactions through the storefront or Commerce SDK for e-commerce. After an order is created, and upon fulfillment, PayPal payments will be captured from the back office as part of invoicing.

In addition to order creation and fulfillment, PayPal payments will be supported for omnichannel payment scenarios such as buy online, pickup in store, and linked refunds.

Support for adding items to purchase orders during receiving in POS

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

Business value

Retailers need the ability to receive inventory that comes into the store via purchase orders or transfer orders efficiently and easily. Occasionally, a store might receive inventory that was not on the original purchase order. In such cases, we want to provide the retailer with the flexibility of adding these unplanned items to the purchase order dynamically at the time of receiving to ensure they are properly tracked.

Feature details

This feature will enhance the **Inbound Inventory** operation in the point of sale (POS) so that users will be alerted when they attempt to receive an item on a purchase order and the item isn't on the purchase order. The user will be given the option to add the item. If they add the item, a new line will be added on the purchase order and the receiving now quantity entered in POS will be the assumed ordered quantity for that line. The lines will be tagged so that users of Commerce headquarters can tell that these lines were added during the receiving process, and they can do any necessary follow-ups or reviews with the vendor. This feature will only be enabled if the company doesn't use the workflow/change management approval processes on their purchase orders.

Dynamics 365 Commerce integration with Bing for Commerce

Enabled for	Public preview	General availability
End users, automatically	Oct 2020	Jan 2021

Business value

Product discovery functionality is a quick and easy way for a retail customer to find products by browsing through categories and using search and filtering. It is a primary tool for customer interaction across all retail channels.

Customers are used to web search engines, sophisticated e-commerce websites, and social apps that offer relevant search suggestions as you type, faceted navigation, highlighting matching terms, and more—all with near-instantaneous response times. If consumers do not find the right product quickly enough, they do not hesitate to move to another retail site that offers better performance.

This investment for enhancing product discoverability in Dynamics 365 Commerce will empower retailers to meet expectations of their consumers by assisting them in their shopping journey, which would help retailers grow their share of consumer retention and conversion rates across all channels, including both e-commerce and POS by leveraging the power of Bing intelligence and Microsoft AI.

Feature details

Microsoft Bing for Commerce is a machine learning-based natural language search with synonym support, customizable ranking, and personalization search with auto-completion. Bing for Commerce will be seamlessly integrated into Dynamics 365 Commerce to provide consistent product discovery and search experiences across all commerce channels by means of the commerce scale unit. This functionality can help retailers turn shopper frustration and site abandonment into active carts and converted sales.

Support for closing lines in purchase orders during receiving in POS

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Oct 2020	Jan 2021

Business value

When shipping an item in a purchase order, the vendor might indicate that they have purposefully under-shipped the inventory ordered and will not be shipping any additional quantity. In that case, the receiver needs to mark this item as "closed" so that the line can be fully received in Commerce headquarters. Today, this capability exists only in Commerce headquarters. Adding it to the point of sale (POS) will help eliminate unnecessary follow-up from headquarters.

Feature details

This feature will enhance the **Inbound Inventory** operation in the POS by allowing users to indicate that the remaining quantity that is open on the line and hasn't been fully received or isn't part of a current "receiving now" quantity should be closed. This process deletes the remaining "on order" inventory transactions for the closed quantity to ensure inventory is not expected at a later time. This function will trigger under-delivery tolerance validation logic to ensure the closure is allowed.

Support serial number registration on outbound transfer order shipments from POS

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Oct 2020	Jan 2021

Business value

Many retailers sell products that require serial control and need to manage serial numbers in inventory-related processes. The **Inbound Inventory** operation in the point of sale (POS) provides the ability to register or validate serial numbers during the receiving flow. This feature will add similar functionality to the **Outbound Inventory** operation to support serial number registration for shipment flow.

Feature details

This feature will allow users to enter serial numbers for serial-controlled items on the outbound transfer orders during the shipment process in the POS **Outbound Inventory** operation. Serial numbers will be validated against the shipping warehouse to ensure the store is shipping serial numbers that are known to the store's current on-hand inventory. Serial number tracking dimension-related settings in Commerce headquarters will be respected to determine whether serial number registration is supported and whether blank serial numbers are allowed.

Overview of Dynamics 365 Connected Store 2020 release wave 2

Dynamics 365 Connected Store is a software as a service (SaaS) solution that gathers and analyzes observational signals, location, and line-of-business data to create insights and automate actions for retailers in their stores. Using a combination of computer vision (eyes) and IoT signals (ears), Dynamics 365 Connected Store gathers observational signals and analyzes them in the context of business data (for example, point of sale, weather, event data) to produce actionable insights. An important goal for Dynamics 365 Connected Store is to offer benefits to retailers that are traditionally available only to online retailers, and to help bridge the physical and digital divide.

Dynamics 365 Connected Store achieves this by using the following hybrid approach:

- **Intelligent edge**: A managed appliance in the store that converts camera streams and IoT signals into observational data sent to the cloud.
- **Intelligent cloud**: A multitenant SaaS solution that correlates observational signals from the edge with business data (for example, point of sale, inventory, and shift management) to provide insights and recommended actions for the retailer.

What's new and planned for Dynamics 365 Connected Store

This topic lists features that are planned to release from October 2020 through March 2021. 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.

Better together with Dynamics 365 Commerce

Unlock efficiencies and boost CSAT and growth by combining the Dynamics 365 Commerce digital store front, product recommendations, and promotions with Dynamics 365 Connected Store insights to create a richer experience for Dynamics 365 Commerce.

Feature	Enabled for	Public preview	General availability
Product placements and promotions	End users by admins, makers, or analysts	Oct 2020	-

Front-line worker task assignment and tracing with Microsoft Teams

Provide an easy and intuitive way to convert critical insights into actionable tasks for front-line retail workers by taking advantage of task management in Microsoft Teams on iOS and Android devices.

Feature	Enabled for	Public preview	General availability
Messaging for front-line workers	End users by admins, makers, or analysts	Oct 2020	-
Notifications with context for front-line workers	End users by admins, makers, or analysts	Oct 2020	-
Push notifications for front-line workers	End users by admins, makers, or analysts	Oct 2020	-
Task management for front-line workers	End users by admins, makers, or analysts	Oct 2020	-

Integrated workflows with Microsoft Power Platform

Automate workflows using Microsoft Power Automate based on specific triggers in Dynamics 365 Connected Store.

Feature	Enabled for	Public preview	General availability
Trigger Power Automate workflows based on alerts	End users by admins, makers, or analysts	Oct 2020	-

Intelligent Command Center

Provide observational alerts based on changes in foot traffic patterns around store entrances, product displays, and checkout queues.

Feature	Enabled for	Public preview	General availability
Notifications and alerts in the Command Center	End users by admins, makers, or analysts	Oct 2020	-
Rules-based triggers in the Command Center	End users by admins, makers, or analysts	Oct 2020	-

Store analytics

Provide insights and trend information about shelf voids and customer product interactions.

Feature	Enabled for	Public preview	General availability
Customer product interactions	End users by admins, makers, or analysts	Oct 2020	-

Store insights solutions

Analyze data and understand causes by applying correlation models across various data sources (observational, promotional, line of business, point of sale, and public domain).

Feature	Enabled for	Public preview	General availability
Anomaly detection	End users by admins, makers, or analysts	Oct 2020	-
Customer acquisition funnel	End users by admins, makers, or analysts	Oct 2020	-

Feature	Enabled for	Public preview	General availability
Inventory recommendations	End users by admins, makers, or analysts	Oct 2020	-
Shift management recommendations	End users by admins, makers, or analysts	Oct 2020	-

Description of **Enabled for** column values:

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Better together with Dynamics 365 Commerce

Overview

In the 2020 release wave 2, we'll integrate alerts and tasks across Dynamics 365 Commerce and Dynamics 365 Connected Store. For example, a front-line worker using Dynamics 365 Commerce could receive a task or notification from Dynamics 365 Connected Store when cashier length exceeds a configured threshold.

Focus features for this release include:

- Customer acquisition funnel
- Product placements and promotions
- Inventory purchase decisions

Product placements and promotions

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

Feature details

Transform the shopper experience both online and in physical stores by using data from product recommendations online and observational insights in physical stores to recommend optimal store (and online) layouts for products.

Front-line worker task assignment and tracing with Microsoft Teams

Overview

For the 2020 release wave 2, we'll provide an easy and intuitive way to convert critical insights into actionable tasks for front-line retail workers by taking advantage of task management in Microsoft Teams on iOS and Android devices. For example, a store manager could create a high-priority task for a front-line worker to address a safety problem such as a spill in the store.

Focus features for this release include:

- Push notifications for front-line workers.
- Notifications with context for front-line workers.
- Messaging to front-line workers.
- Task management for front-line workers.

Messaging for front-line workers

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

Feature details

Ability to send text messages in Microsoft Teams to front-line workers to alert them to different store situations. You can also attach the relevant context (image, audio recording, or video recording) to the text message.

Notifications with context for front-line workers

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

Feature details

Ability to load the context with any front-line worker notification. For example, if the cashier queue length is greater than a defined threshold, send a picture (frame from video feed) to the front-line worker.

Push notifications for front-line workers

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

Feature details

Store supervisors will be able to automatically send push notifications for priority events that are important to the store so that high-priority tasks are completed by front-line workers. For example, they'll be able to send notifications for anomalies related to store safety (spills or misplaced equipment) or for quality issues (shelf voids or misaligned products) to a front-line worker's phone. Store supervisors will be able to specify the targeted person for a specific type of push notification.

Task management for front-line workers

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

Feature details

Regional managers and store supervisors will be able to assign tasks to a specific person and track tasks so they can be executed efficiently. They'll be able to:

- Assign tasks to a group of front-line workers so that the worker best located or suited to work on the task can pick it up.

- Set deadlines and timeline expectations so there's a clear understanding of accountability.
- Prioritize tasks in real time to respond to external events, such as changes in weather or to status of goods within a distribution center.
- Update task status.

Integrated workflows with Microsoft Power Platform

Overview

The ability to automate workflows through Microsoft Power Automate provides unlimited extensibility for Dynamics 365 Connected Store users. For example, define a Power Automate workflow that makes inventory recommendations based on dwell time around a specific product, or make shift changes based on queue-length trends.

Trigger Power Automate workflows based on alerts

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

Feature details

Automate workflows using Microsoft Power Automate based on specific triggers. For example, define a Power Automate workflow that makes inventory recommendations based on dwell time around a specific product, or make shift changes based on queue-length trends.

Intelligent Command Center

Overview

Store leaders need to be able to optimize workflows and make their stores more efficient based on significant changes in data. For the 2020 release wave 2, the Intelligent Command Center will provide observational alerts based on changes in foot traffic patterns around store entrances, product displays, and checkout queues. Store leaders will be able to customize thresholds for observational metrics and triage tasks related to these metrics. They'll also be able to customize the delivery method for alerts and notifications and understand the context for the alerts.

Focus features for this release include:

- Notifications
- Alerts
- Rules-based triggers

Notifications and alerts in the Command Center

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

Feature details

Store supervisors will receive system-generated notifications and alerts based on significant trend deviations for their store. They'll also be able to customize thresholds for observational metrics such as store traffic and dwell time to reflect the context of their retail business.

Rules-based triggers in the Command Center

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

Feature details

Create a rule for an alert that triggers a specific workflow. For example, create a rule that says when foot traffic exceeds 100 people in a 30-minute time period, page the store manager.

Store analytics

Overview

For the 2020 release wave 1, Dynamics 365 Connected Store is providing analytics and trend insights for store traffic, display effectiveness, and queue management. For 2020 release wave 2, we’ll extend store analytics to include shelf voids and customer product interactions. For example, store managers will be able to understand trends around shelf voids over different periods of time (days, weeks, and months) as well as be able to address an immediate out-of-stock item by sending an alert to a front-line worker. For customer product interactions, store managers (and even product manufacturers) will be able to get insights into a particular product based on human interaction with the product.

Customer product interactions

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

Feature details

Dynamics 365 Connected Store will be able to help business decision makers and store supervisors gauge a customer's interest about a specific product based on their interaction with the product. For example, they'll be able to know whether a customer touched a product, picked it up, and put it back on the shelf.

Store insights solutions

Overview

By combining in-store observational data with other types of data (promotional, line of business, point of sale, and public domain), Dynamics 365 Connected Store provides rich, actionable insights to improve the customer experience. For example, get a much more detailed picture of a promotion by understanding how many people walk into a store, interact with the product, and buy the product. Or understand which products to stock up on or how to adjust personnel shifts based on diverse sets of data.

Focus features for this release include:

- Customer acquisition funnel
- Inventory recommendations
- Shift management recommendations
- Anomaly detection

Anomaly detection

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

Feature details

Dynamics 365 Connected Store will be able to help business decision makers and store supervisors detect and report anomalies between what is being observed and what is being sold. For example, store traffic, dwell time, and customer interactions for a product might be high, but the product isn't selling well.

Customer acquisition funnel

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

Feature details

Dynamics 365 Connected Store will be able to help business decision makers and store supervisors understand the complete customer acquisition funnel. By combining in-store observational data with line of business, point of sale, and promotion data, Dynamics 365 Connected Store will be able to provide retailers with a much more detailed picture than they would typically have.

Inventory recommendations

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

Feature details

Dynamics 365 Connected Store will be able to help business decisions makers and store supervisors derive insights from diverse sets of data sources, such as point of sale, customer interactions, store traffic, display effectiveness, and weather. Using this data, the app will be able to suggest which inventory items to stock up on.

Shift management recommendations

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

Feature details

Dynamics 365 Connected Store will be able to help store supervisors derive insights from diverse sets of data sources, such as point of sale, customer interactions, store traffic, display effectiveness, weather, and public events. The app will use these rich insights to make shift-management recommendations for front-line workers.

Fraud Protection

Overview of Dynamics 365 Fraud Protection 2020 release wave 2

With the releases in 2020 release wave 1, Dynamics 365 Fraud Protection differentiates as a fully featured fraud protection application. Fraud Protection offers capabilities that help protect from purchase and payment fraud, account fraud, and shrinkage fraud, while maximizing revenue and delivering a smooth experience to customers of online businesses.

In 2020 release wave 2, we aim to ship updates that will improve the onboarding and usage experience of customers through better information architecture in the product. We will provide capabilities like a guided first-run experience and preloaded synthetic data sets that will light up scorecards and other insights experiences even before a customer sends in their own data, thus enabling them to quickly discover and understand product functionalities.

We will also provide capabilities that will enable Fraud Protection to work "better together" with other Dynamics 365 products and Microsoft Power Platform. These capabilities include:

- Enabling Dynamics 365 Commerce customers to easily sign up and integrate with Fraud Protection from within the Commerce app.
- Enabling Dynamics 365 customers to easily send data to Fraud Protection and consume data and insights from Fraud Protection.

In 2020 release wave 2, we will preview a new “manual review” capability that allows customers to use the Fraud Protection rules experience to flag transactions for review, and then allow expert human agents to consume and adjudicate those transactions. The manual review capability will provide a rich experience that shows all the detailed transaction data as well as fraud insights generated by Fraud Protection. The manual review experience will then be updated in a later release to include the ability to do manual reviews of clusters of anomalous transactions found via asynchronous "fraud sweeps." This capability will be useful for mitigating purchase fraud scenarios and shrinkage fraud anomalies detected by the loss prevention capability.

What's new and planned for Dynamics 365 Fraud Protection

This topic lists features that are planned to release from October 2020 through March 2021. 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
Customize and expand transaction acceptance booster	Admins, makers, or analysts, automatically	-	Oct 2020
Better together with Dynamics 365 Commerce	End users by admins, makers, or analysts	Oct 2020	To be announced
Loss prevention scale motion	End users by admins, makers, or analysts	Oct 2020	To be announced
Manual review capability	End users by admins, makers, or analysts	Oct 2020	To be announced

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 and data centers (regions), go to the Dynamics 365 and Microsoft Power Platform availability page.

Customize and expand transaction acceptance booster

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

Business value

The transaction acceptance booster feature allows the sharing of a predefined set of contextual data, known as transaction trust knowledge, with select partner banks to help increase acceptance rates and reduce fraud.

Feature details

The transaction acceptance booster feature allows users to share a predefined set of contextual data, known as transaction trust knowledge, with select partner banks to help increase acceptance rate and reduce fraud. The ability to share more contextual data in addition to the predefined transaction trust knowledge is a request from merchants and partner banks. In this release, capability will be added for merchants to enable sharing of additional contextual data. More coverage will also be added for merchants with additional partner banks.

Better together with Dynamics 365 Commerce

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

Feature details

Dynamics 365 Commerce currently has a basic integration with Dynamics 365 Fraud Protection in place. Full integration will be enabled by building out supporting functionality of manual reviews, challenges, and advanced rules. Some of this functionality is being developed in wave 1. Manual review is a major investment we are making in wave 2 based on customer demand.

Functionality relating to data ingress: We will invest in features to help both purchase protection and loss prevention gain access to data from the Commerce server either through Common Data Source or directly via connectors, as appropriate. This functionality has been a major ask from Commerce customers, especially for loss prevention, and will become another strong selling point for Commerce and Fraud Protection together.

Functionality relating to data egress: We will develop features to export Fraud Protection data and insights into Common Data Service under an appropriate Common Data Model schema. The data can then be used, for example, for better recommendations and targeted content in Dynamics 365 Customer Insights. Similarly, a customer can use the data to drive citizen apps built with Microsoft Power Platform. Customers of Fraud Protection also can build their own custom visualization and tooling based on insights generated by Fraud Protection. For example, mobile apps can be developed that consume and act on fraud alerts.

Loss prevention scale motion

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

Business value

Loss prevention scale motion will focus on the natural progression of enabling features with single-click onboarding of customers at scale.

Feature details

Scale motion provides the following functionality:

- Enables loss prevention capability automatically for Dynamics 365 customers.
- Enables loss prevention capability automatically for all point of sale (POS) systems.
- Drives insights and analytics through retail business intelligence.

Manual review capability

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

Feature details

Dynamics 365 Fraud Protection will include the capability to support manual review of transactions to augment the machine learning-based assessments across purchase protection, account protection, and loss prevention scenarios. New capability will include tools leveraging the rich app features within Dynamics 365 and workforce supply to conduct the manual reviews.

SMB

Overview of Dynamics 365 Business Central 2020 release wave 2

Dynamics 365 Business Central provides a comprehensive business application solution designed and optimized for small and midsized organizations. For 2020 release wave 2, Business Central investments center on delivering a world-class service to meet the demands of a rapidly growing customer base, improved performance, handling of file storage, geographic expansion together with support for Group VAT, top customer requested features, and deeper integration with Microsoft Teams.

Seamless service: Performance, reliability, and supportability are all three essential to ensure that the service quality remains ahead of the growth in usage. Accessibility, already in a strong position, must be preserved, and better support for resizing pages is added. The 2020 release wave 2 also incorporates 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 release wave enables further telemetry visibility for partners through Azure Insights, and it brings improvements in conflict handling for synchronization with Common Data Service.

Productivity: This release continues our commitment toward world-class productivity with enhancements to the modern clients, and requested features such as returning to the request page after previewing a report, and the ability to change the assigned printer before printing a report.

Microsoft Power Platform integration: This release includes further investments in our integration with Microsoft Power Platform. We are investing in both existing connectors as well as enabling virtual entities.

Modern development tools: As we have made the move entirely to Visual Studio Code, we continue to invest in areas that enhance productivity for developers.

Better with Office 365: We enable integration with Microsoft Teams to help teams collaborate and make decisions faster by accessing their business data from Teams channels.

Geographic expansion: The 2020 release wave 2 lays the foundation for future onboarding of more countries and regions. We plan to onboard Brazil, Ireland, and Lithuania for Business Central 2020 release wave 2.

Customer-requested enhancements: Business Central continues to focus on responding to top customer enhancement requests. In addition to multiple features harvested from the product Ideas portal, top feedback areas such as email setup and use is enhanced.

Customer migration tools: To simplify the journey for existing Dynamics customers to Business Central online, support is added for migration from a broader set of Dynamics GP and Dynamics NAV versions. Improvements are also made for selective migration of Dynamics GP customers and vendors along with enhanced migration of Dynamics GP Chart of Account setups.

Together, these enhancements are designed to drive further service growth by empowering the migration from various versions of Dynamics on-premises, activating partners that bring their vertical solutions to Business Central online, and further accelerating the growth of net-new customers to Dynamics 365. All of this comes with improved service quality, supportability, end-user productivity, and improved experiences for customers and partners.

What's new and planned for Dynamics 365 Business Central

This topic lists features that are planned to release from October 2020 through March 2021. 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.

Administration

The 2020 release wave 2 delivers a set of features that are designed to simplify and improve the way partners administer tenants, and the way administrators carry out administration tasks for licensing and permissions.

Feature	Enabled for	Public preview	General availability
Deprecation of the legacy Dynamics NAV Help Server component	End users, automatically	-	Oct 2020
Improved overview and management of the available database and file capacity	Admins, makers, or analysts, automatically	-	Oct 2020
Service-to-service authentication for Automation APIs	Admins, makers, or analysts, automatically	-	Oct 2020

Feature	Enabled for	Public preview	General availability
Support for an unlimited number of production and sandbox environments	Admins, makers, or analysts, automatically	-	Oct 2020
Manage irreversible features	Admins, makers, or analysts, automatically	✔ Jun 10, 2020	Oct 2020
Database access intent changed to read-only for frequently used reports	End users, automatically	Aug 2020	Oct 2020

Application

With Business Central 2020 release wave 2, we deliver enhancements that were suggested through the aka.ms/bcideas website.

Feature	Enabled for	Public preview	General availability
Business Central Company Hub extension	End users by admins, makers, or analysts	-	Oct 2020
Group VAT reporting	End users by admins, makers, or analysts	-	Oct 2020
Default unit cost for non-inventory items	End users, automatically	✔ May 1, 2020	Oct 2020
Track packages from more types of sales documents	End users, automatically	✔ May 1, 2020	Oct 2020
Bank reconciliation improvements	End users, automatically	Aug 2020	Oct 2020
Consolidation file format support for Dynamics 365 Finance	End users, automatically	Aug 2020	Oct 2020
Auto-resolve Common Data Service conflicts	End users, automatically	Aug 2020	Oct 2020

Feature	Enabled for	Public preview	General availability
Check financial journals in background	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Notify users of high-risk changes in selected setup fields	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Use recurring journals to allocate balances by dimension values	End users, automatically	Aug 2020	Oct 2020
Use the Copy Journal function on Posted General Journals and control date for reversing entries in Recurring General Journals	End users, automatically	Aug 2020	Oct 2020
Use Word document layouts to customize outgoing customer documents	End users, automatically	Aug 2020	Oct 2020
Write longer item references	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Easier to choose the right Role Center	End users, automatically	Sep 2020	Oct 2020
Improved control over how and when you post WIP entries for jobs to the general ledger	End users, automatically	Sep 2020	Oct 2020
Use contact Mobile Phone Number and Email consistently across application	End users, automatically	Sep 2020	Oct 2020
Use conversion templates to convert contacts to vendors and employees	End users by admins, makers, or analysts	Sep 2020	Oct 2020

Better with Microsoft 365

In 2020 release wave 2, we enable better cross-app productivity by using Teams as a way to interact in business processes.

Feature	Enabled for	Public preview	General availability
Business Central in Microsoft Teams	End users by admins, makers, or analysts	Oct 2020	Dec 2020

Country and regional

Global availability of Dynamics 365 Business Central has been expanding regularly with every release wave. Here we describe the plans for expansion going forward and new regulatory features and enhancements.

Feature	Enabled for	Public preview	General availability
Expanded country and regional availability	End users by admins, makers, or analysts	-	Oct 2020

Microsoft Power Platform

This area covers our investments in our integration with Microsoft Power Platform. In this release we are investing in enabling virtual entities.

Feature	Enabled for	Public preview	General availability
Common Data Service virtual entities	End users by admins, makers, or analysts	Oct 2020	-
Integrate Business Central and Common Data Service with fewer synchronization conflicts	End users, automatically	Aug 2020	Oct 2020
Support for latest Microsoft Dynamics 365 SDK	End users, automatically	Aug 2020	Oct 2020

Migrations to Business Central online

Features for migration from Dynamics on-premises products to Business Central online.

Feature	Enabled for	Public preview	General availability
Continued enhancements for migrating from Dynamics GP to Business Central	End users by admins, makers, or analysts	Oct 2020	Oct 2020
Historical data migration from Dynamics GP to Azure Data Lake	End users by admins, makers, or analysts	Oct 2020	Oct 2020
Migrate from Business Central 14.x on-premises to Business Central 16.x online	End users by admins, makers, or analysts	Oct 2020	Oct 2020
Migrate from Business Central 15.x on-premises to Business Central 16.x online	End users by admins, makers, or analysts	Oct 2020	Oct 2020

Modern clients

In 2020 release wave 2, we shift our focus toward maturing the reliability and usability of current productivity features, including more user options for printing, and ensuring clients are accessible to our diverse set of users.

Feature	Enabled for	Public preview	General availability
Pages with FactBoxes are more responsive	End users, automatically	✔ Jun 26, 2020	Oct 2020
Updates to page styling	End users, automatically	✔ Jul 28, 2020	Oct 2020
Basic auth settings deprecated for Contact Sync and Outlook Add-in	Admins, makers, or analysts, automatically	Aug 2020	Oct 2020
Changes to the action bar in dialogs	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Report request page can open multiple previews	End users, automatically	Aug 2020	Oct 2020

Feature	Enabled for	Public preview	General availability
Update the navigation experience terminology to improve usability	End users, automatically	Aug 2020	Oct 2020
Improved accessibility for low-vision users	End users, automatically	Aug 2020	Oct 2020
Role Centers open faster	End users, automatically	Aug 2020	Oct 2020
Page Inspector supports temporary tables	End users, automatically	Aug 2020	Oct 2020
Access multiple production or sandbox environments from the mobile apps	Admins, makers, or analysts, automatically	Sep 2020	Nov 2020

Modern development tools

As we have made the move entirely to Visual Studio Code, we continue to invest in areas that enhance productivity for developers.

Feature	Enabled for	Public preview	General availability
Code documentation comments	Admins, makers, or analysts, automatically	Aug 2020	Oct 2020
Delete extension data	Admins, makers, or analysts, automatically	Aug 2020	Oct 2020
Performance Regression and Application Benchmark tools	Admins, makers, or analysts, automatically	Aug 2020	Oct 2020

Seamless service

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.

Feature	Enabled for	Public preview	General availability
Data audit system fields are added to every table	Admins, makers, or analysts, automatically	-	Oct 2020
Log of admin operations in the Business Central admin center	Admins, makers, or analysts, automatically	-	Oct 2020
On-demand joining of companion tables	Admins, makers, or analysts, automatically	-	Oct 2020
Renaming environments in the Business Central admin center	Admins, makers, or analysts, automatically	-	Oct 2020
Restoring environments to a point in time in the past	Admins, makers, or analysts, automatically	-	Oct 2020
Attach to user session when debugging in sandbox	Admins, makers, or analysts, automatically	Aug 2020	Oct 2020
Debug extension installation and upgrade code	Admins, makers, or analysts, automatically	Aug 2020	Oct 2020
Sandbox environments can be updated to a Public Preview version	Admins, makers, or analysts, automatically	Sep 2020	Oct 2020
Developers can emit telemetry to Application Insights from AL code	Admins, makers, or analysts, automatically	Oct 2020	Oct 2020
Extension publishers can get telemetry in Azure Application Insights	Admins, makers, or analysts, automatically	Oct 2020	Oct 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 and data centers (regions), go to the Dynamics 365 and Power Platform availability page.

Administration

Overview

The 2020 release wave 2 delivers a set of features designed to simplify and improve the way partners administer tenants, and the way administrators carry out administration tasks for licensing and permissions. The release wave brings improvements to the administration center and for permissions management.

Deprecation of the legacy Dynamics NAV Help Server component

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

Business value

The lightweight website has served the community fairly well, but it has not matured beyond the first version that shipped 10 years ago. By deprecating the component, we simplify our story for how to deploy help for Business Central apps and solutions.

Feature details

The legacy Dynamics NAV Help Server component will be deprecated in 2021 release wave 1 (version 18). The deprecation will not affect current deployments of the website. If a customer is on a version between Dynamics NAV 2016 and Business Central 2020 release wave 2 on-premises and relying on Help Server to provide access to Help, then nothing changes. When they upgrade to Business Central 2021 release wave 1, they must host their custom Help on another type of website.

Over the course of the coming eight months, we will provide guidance, tools, and tips for moving existing content to different types of websites. Starting with the current release wave, 2020 release wave 2, we recommend that new solutions do not rely on the Help Server component due to the upcoming deprecation.

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.

Improved overview and management of the available database and file capacity

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

Feature details

This release wave makes it possible for the internal administrators or delegated administrators (partners) to get an overview of the database and file capacity available for their Business Central environments, and how much of it is currently used. This will help administrators to better control the size of the environments and purchase additional capacity in time for when it is needed.

A new storage capacity add-on for Business Central enables our customers to go beyond the current default limit of 80 GB database capacity, by purchasing additional database capacity for their environments when the default quota is exceeded.

Customers must be aware that exceeding the paid storage limit will not interrupt transaction processing. Beginning with 2020 release wave 2, we plan to block administrative actions that create additional environments or copies of the environments when paid storage limits are exceeded.

Learn more in this announcement: Extend data storage for Dynamics 365 Business Central

Service-to-service authentication for Automation APIs

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

Business value

Service-to-service authentication will be supported for Automation APIs in Business Central.

Feature details

For supporting Automation scenarios in Business Central, an application permission scope is added, called Automation.ReadWrite.All.

This will allow service-to-service authentication, having external services connect as an application without impersonating normal users. Using OAuth Client Credentials flow, an app token with Automation.ReadWrite.All scope can then be used to access Business Central.

Apps need to be registered in Business Central and the OAuth consent flow has to be completed before Business Central can be accessed.

Support for an unlimited number of production and sandbox environments

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

Business value

Allowing businesses to expand Business Central to more than three countries or three business branches by adding more than three production environments.

Feature details

This release wave introduces the option for customers to purchase additional production environments. For each newly purchased production environment, the customer can create additional sandbox environments. The specific number of sandbox environments that is allowed for each purchased production environment is still being determined.

Additional production environments will also increase the database capacity quota for the customer's organization. The actual database capacity increase for each new production environment is still being determined.

Manage irreversible features

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	✓ Jun 10, 2020	Oct 2020

Feature details

As an added safety measure for administrators who enable features ahead of time, the **Feature Management** page has been updated to include the new concept of irreversible features. These are features that cannot be turned off after they have been turned on by an administrator. Typically, they are changes that cannot be safely reverted, or changes that persist or affect data.

Administrators see a warning when they are about to enable an irreversible feature on production or sandbox environments.

Irreversible features clearly indicate that administrators will not be able to turn them off again

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

Enabling Upcoming Features Ahead of Time (docs)

Database access intent changed to read-only for frequently used reports

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

Businesses need fast access to information, and don't want to wait while the system finds or calculates it. To speed up several key reports, where you want to view but not change any information, we've changed the default database access intent to use the read-only replica.

Feature details

To improve performance in reporting we have changed the default database access intent to read-only for a number of frequently used reports. The reports will use the capacity of a read-only replica rather than share the read-write replica (also known as the primary database). Using the database replica reduces the load on the primary database.

For more information, see Managing Database Access Intent.

NOTE Read scale-out might introduce a slight delay when reading data from a database's secondary replica. The delay is caused by the way high-availability databases replicate data changes from the primary database to secondary replicas. If a delay isn't acceptable for an object, you can overwrite the default database access intent.

The following sections list the reports for which we changed the default database access intent.

Reports in W1

Report ID	Report name
3	G/L Register
4	Detail Trial Balance
6	Trial Balance
13	VAT Register
38	Trial Balance by Period
101	Customer - List
105	Customer - Summary Aging
109	Customer - Summary Aging Simp.
111	Customer - Top 10 List
112	Sales Statistics
113	Customer/Item Sales
119	Customer - Sales List
120	Aged Accounts Receivable
121	Customer - Balance to Date

Report ID	Report name
129	Customer - Trial Balance
305	Vendor - Summary Aging
310	Vendor - Labels
311	Vendor - Top 10 List
321	Vendor - Balance to Date
322	Aged Accounts Payable
705	Inventory Availability
707	Inventory - Availability Plan
712	Inventory - Sales Statistics
717	Inventory - Reorders
1001	Inventory Valuation
1008	Job Analysis
1316	Standard Statement
5757	Items with Negative Inventory
5808	Item Age Composition - Value

Reports in US, Canada, and Mexico

Report ID	Report Name
10019	G/L Register
10021	Trial Balance Detail/Summary
10022	Trial Balance
10023	Trial Balance, per Global Dim.
10026	Trial Balance, Spread Periods
10040	Aged Accounts Receivable
10046	Customer Register
10047	Customer Sales Statistics
10085	Aged Accounts Payable
10103	Vendor Account Detail
10110	Vendor 1099 Information
10130	Availability Projection
10131	Availability Status
10135	Item Sales Statistics
10139	Inventory Valuation
10143	Item List

Report ID	Report Name
10145	Item Sales by Customer
10146	Item Turnover
10155	Purchase Advice

Reports in Austria, Germany, and Switzerland

Report ID	Report name
11517	Inventory Value (Help Report)

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.

Application

Overview

With Business Central 2020 release wave 2, we improve the emailing experience, the synchronization experience with Dynamics 365 Sales, and additional enhancements that were suggested through the aka.ms/bcideas website. Additionally, we will support Group VAT reporting according to the new legislation that takes effect in October 2020.

We have seen that many partners and customers use RapidStart to bring data to the cloud, so we are improving the importing experience and performance for this feature.

Dynamics 365-Accountant Hub, which is in preview in select countries, will be discontinued.

To support the ability to access more production tenants within the same domain, we provide a new Company Hub, which will help users in multitenant environments get an overview of their different companies across tenants. From the Company Hub, users can launch Business Central for a specific tenant. The Company Hub will be available for all supported countries.

Business Central Company Hub extension

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

Business value

For some organizations, users often have access to multiple companies, either in the same tenant or in another tenant environment, such as in another country (a sales subsidiary) or a completely different tenant (a clients' company if you're an external accountant). Having an easy overview of these companies and an easy way of accessing them is key to working efficiently for these users. Business Central Company Hub gives you just that.

Feature details

Business Central Company Hub gives you a list of the companies you work in. You can easily add new companies by just providing a URL and a name for the company. The list of companies contains a few KPIs for the company that is displayed for the user if they have the needed access. You also have a list of assigned user tasks for a given company, so you can keep track of work required for each company. It's possible to run selected Excel reports for the company from the Company Hub.

The Business Central Company Hub gives you either a dedicated Company Hub role center (if you use one tenant as the main access point) or a similar task page if you use the Company Hub from within a company where your role requires you to have a different main role center. Both have the same features and the same easy access to the companies you work in.

For Dynamics 365-Accountant Hub users, Accountant Hub is deprecated in this release wave. Company Hub contains the same features, and we recommend that you use Company Hub as a replacement for Accountant Hub.

It's easy to migrate to Company Hub from Accountant Hub. When you have installed Company Hub in a Business Central tenant, use the **Edit in Excel** feature on the **Client list** page to export data from Accountant Hub and open a similar Excel spreadsheet from Company Hub. Then, use copy and paste to move the data and finally publish the spreadsheet from Company Hub to get the data into Company Hub in Business Central. For more information, see the **See also** section.

See also

Accountant Experiences in Dynamics 365 Business Central (docs)

Group VAT reporting

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

Business value

Increasingly, midsized companies start using VAT groups and thereby must adhere to certain regulations when reporting VAT to the authorities. With 2020 release wave 2, Dynamics 365 Business Central supports VAT groups with a set of features that makes this reporting not only possible, but also easy and seamless.

Feature details

Group VAT reporting in Dynamics 365 Business Central will focus on the inter-group communication and gathering of VAT data to allow for easy and secure management of VAT reporting.

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.

Default unit cost for non-inventory items

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

Business value

Service items and non-inventory items have associated costs that directly impact profits from the sale of the item or the product that it is a component of. As circumstances change so do these costs, which means it's important to quickly react and use new costs on new sales, assembly, and production documents. To do that you can specify the default values to use in new documents and journals, which reduces the need for manual updates.

Feature details

To ensure that item costs are up to date, the default unit cost for service and non-inventory items can be updated on the Item and Stockkeeping Unit pages.

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

About Item Types (docs)

Track packages from more types of sales documents

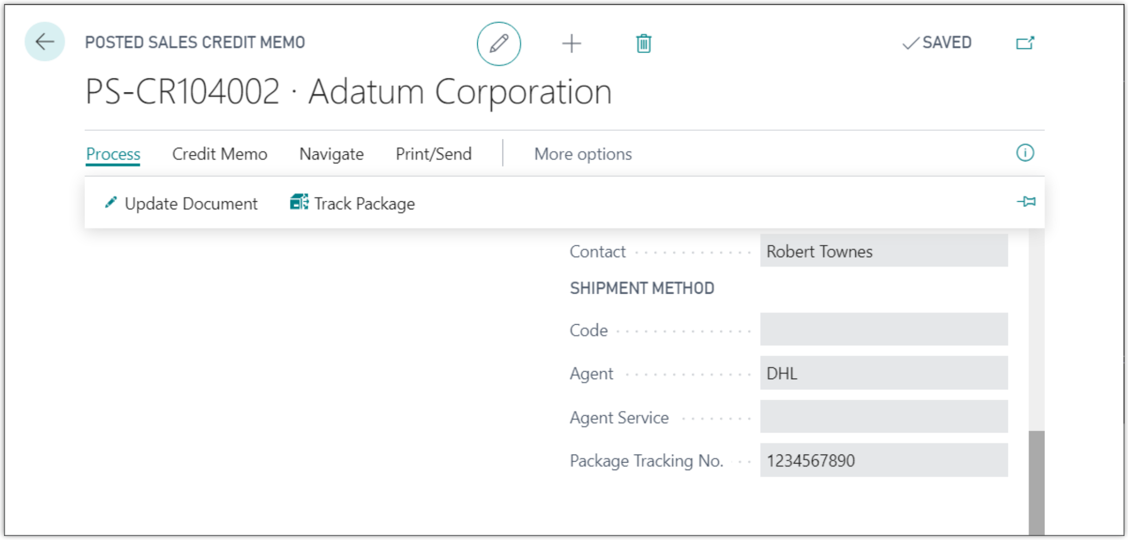
Enabled for	Public preview	General availability
End users, automatically	✔ May 1, 2020	Oct 2020

Business value

Most shipping agents provide an online service that you can use to track the status of your packages while they're en route. Knowing where a package is can be vital in many business processes, such as when you provide customer service. This means that it's important to be able to quickly get tracking information.

Feature details

To provide broader, and thereby faster, access to package tracking information from your shipping agent, the package tracking feature is available on more types of sales documents. In addition to the Posted Sales Shipments page, the tracking feature is also available on the Posted Sales Invoice, Posted Sales Credit Memo, and Posted Return Receipt pages.



Track package action

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

[Track packages]()

[Set up shipping agents]() (docs)

Bank reconciliation improvements

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

We continue to improve the user experience and feature sets for bank reconciliation and payment reconciliation, making it easier for new users to get started as well as making experienced users more efficient in their tasks.

Feature details

The **Bank Acc. Reconciliation** page will include a feature to cancel a posted bank reconciliation so that users can recover from mistakes. The bank reconciliation will automate the reconciliation of differences.

The **Payment Reconciliation** journal will support application against employee ledger entries, allow one-to-many matching, have preview posting enabled, separate number series, and user-defined document numbers.

New guides will assist users setting up a new company, setting up bank and bank opening balances, along with related setup recommendations.

Consolidation file format support for Dynamics 365 Finance

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

It is not uncommon for Dynamics 365 Business Central to be used by subsidiaries that must then report financial statements for consolidation to a company that runs Dynamics 365 Finance or Dynamics 365 Supply Chain Management. In such business constellations, it's a time saver when the data can be exported in the consolidation file format that Finance and Supply Chain Management expect so that you don't have to transform the content.

Feature details

The file format options for a business unit in Business Central will include an option for Finance and Operations.

See also

Consolidating Financial Data from Multiple Companies (docs)

Auto-resolve Common Data Service conflicts

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

Data conflicts can easily occur when business applications exchange data on an ongoing basis. For example, someone might delete or change a record in one of the applications, or both. When resolving conflicts manually, users typically follow business rules that determine what to do. Business Central can now apply those rules automatically, allowing users to focus on more important tasks.

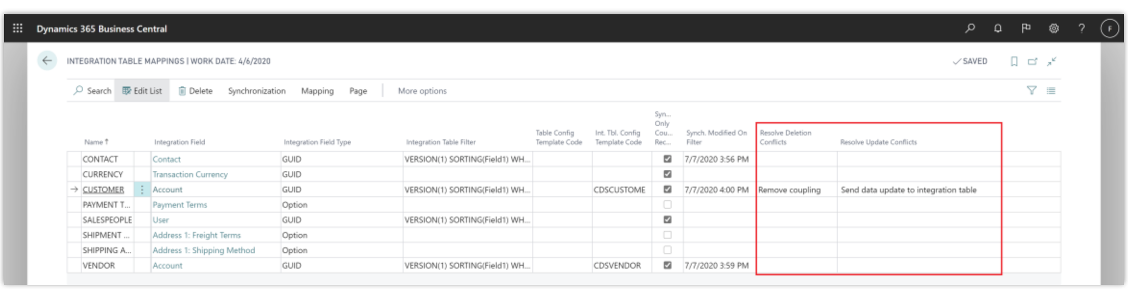
Feature details

Integration table mappings now include rules that control how synchronization jobs synchronize records in Business Central tables with entities in Common Data Service. On the **Integration Table Mapping** page, in the **Resolve Deletion Conflicts** and **Resolve Update Conflicts** columns, you can specify how Business Central will resolve conflicts that occur because records were deleted in tables in one or the other business application, or updated in both.

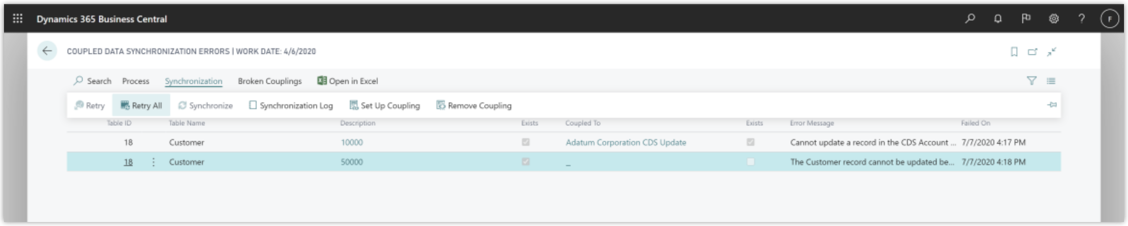
In the **Resolve Deletion Conflicts** column you can choose to have Business Central automatically restore deleted records, remove the coupling between the records, or do nothing. If you do nothing, you must manually resolve conflicts.

In the **Resolve Update Conflicts** column you can choose to have Business Central automatically send a data update to the integration table when sending data to Common Data Service, or to get a data update from the integration table when getting data from Common Data Service, or do nothing. If you do nothing, you must manually resolve conflicts.

After you specify the strategy, on the **Coupled Data Synchronization Errors** page you can choose the **Retry all** action to automatically resolve conflicts.



Integration Table Mapping page showing Resolve Deletion and Resolve Update Conflicts columns



Coupled Data Synchronization Errors page showing new Retry All action

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Check financial journals in background

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

Business value

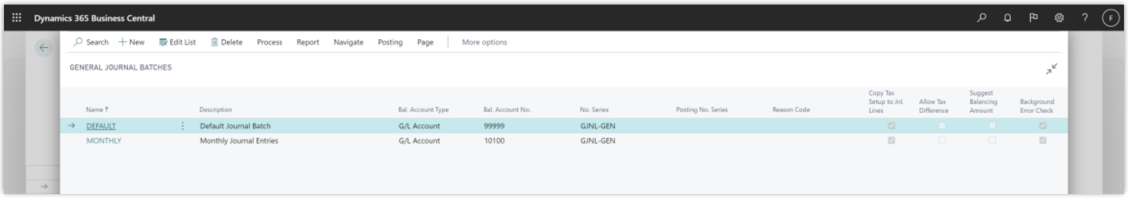
Based on product telemetry that shows where people often experience issues when processing financial journals, we've introduced validations that can help prevent issues with posting before they happen. Early, unobtrusive visual indications that there is a problem can help improve productivity.

Feature details

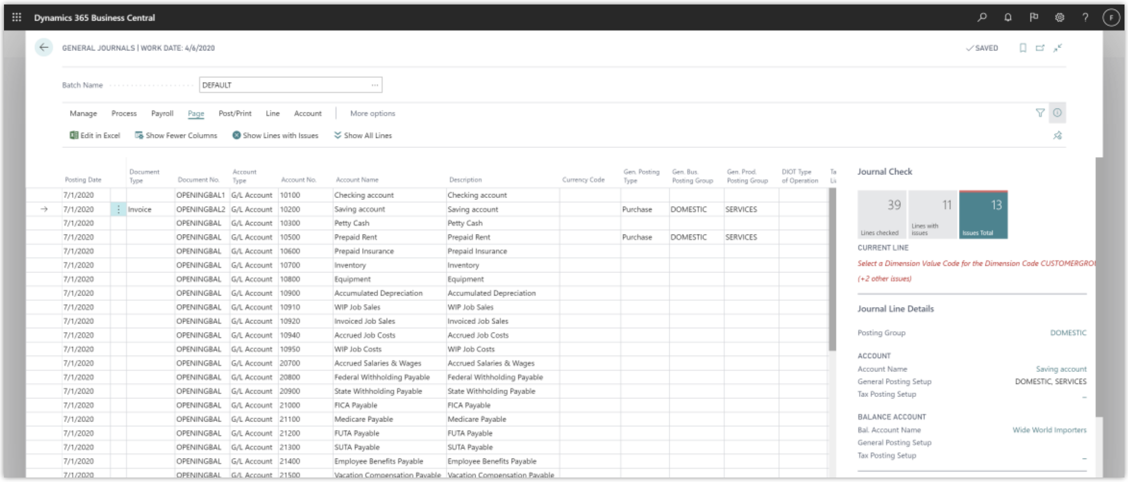
On the General Journal Batch page, you can choose **Background Error Check** to have Business Central validate financial journals, such as general or payment journals, while you're working on them. When the validation is enabled, the **Journal Check** FactBox displays next to the journal lines and will show issues in the current line and the whole batch. Validation happens when you load a financial journal batch, and when you choose another journal line. The **Issues total** tile in the FactBox shows the total number of issues that Business Central found, and choosing it will open an overview of the issues.

You can use the **Show Lines with Issues** and **Show All Lines** actions to toggle between journal lines that have or don't have issues.

The new **Journal Line Details** FactBox provides a quick overview and access to data from journal lines, such as the G/L account, customer, or vendor, as well as to the posting setup for specific accounts.



Shows General Journal Batch with Background Error Check column



Shows General Journal with Journal Check FactBox and Journal Line Details

NOTE This feature is available to be enabled as standard for all Business Central customers in Business Central 2020 release wave 2. To enable this feature, sign in to your online environment and open the [General Journal Batches](#) page to enable the feature by choosing **Background Error Check**.

Tell us what you think

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Notify users of high-risk changes in selected setup fields

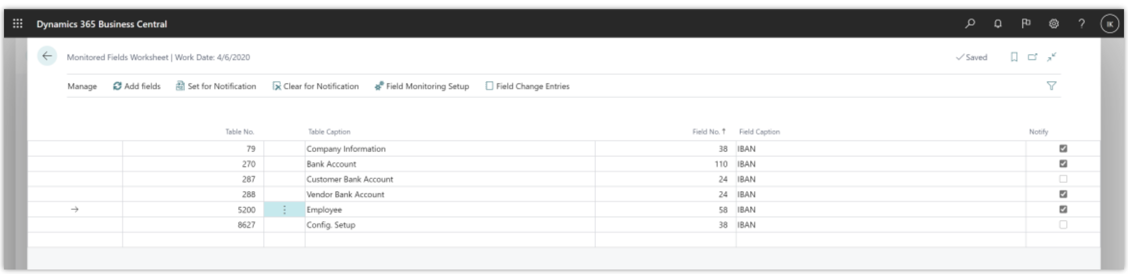
Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Aug 2020	Oct 2020

Business value

Changes to high-risk settings in Business Central can be tracked using the Change Log functionality. Sometimes, however, tracking changes is not enough and you expect to be notified of changes in fields that contain high-risk and business-critical data, such as bank account numbers, company name, and addresses.

Feature details

You can now define a list of fields that contain high-risk and business-critical data that you want to be notified about when they are changed.



Shows monitored fields worksheet page

NOTE This feature is available to be enabled as standard for all Business Central customers in Business Central 2020 release wave 2. To enable this feature, sign in to your online environment and open Field Monitoring Assisted Setup Guide page to enable the feature.

Tell us what you think

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Use recurring journals to allocate balances by dimension values

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

Allocating costs across the different dimensions that you use to track your business is key to getting correct insight on business profitability. To distribute costs correctly over dimensions, you need quality tools that give you control.

Feature details

In recurring journals, you can now specify dimension filters on the source G/L accounts from which you want to allocate costs, and you can set the **Recurring Method** field to **Balance** or **Reversing Balance**.

Tell us what you think

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Thank you for your idea

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Use the Copy Journal function on Posted General Journals and control date for reversing entries in Recurring General Journals

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

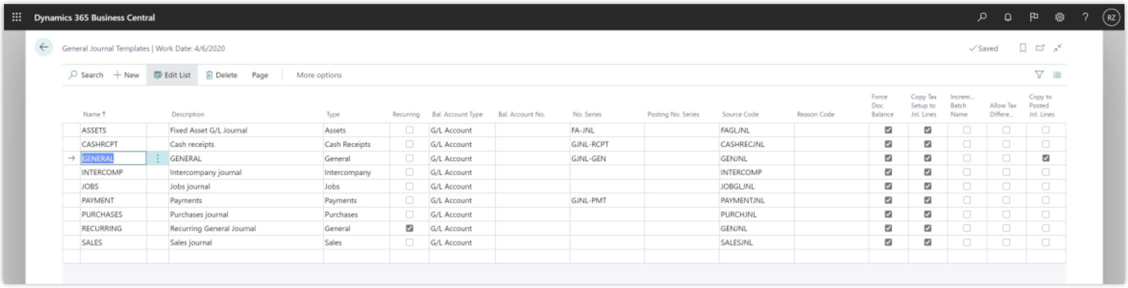
When working with large journals, it is important to have an easy way to correct mistakes. The Copy Journals function helps your accountant be more productive when correcting mistakes.

Also, when posting accruals at the end of the period, it is important to be able to have full control over reversal entries without much hassle. The Reversal Date Calculation helps your accountants be more in control when handling accruals in recurring general journals.

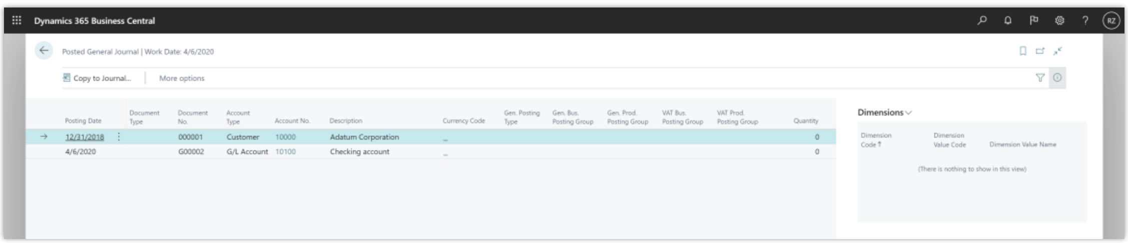
Feature details

You can choose to Copy to Posted Jnl. Lines in General Journal Templates to enable copying of journals to Posted General Journal. You can also enable or disable Copy to Posted Jnl. Lines on a specific Journal Batch that belongs to General Journal Template where Copy to Posted Jnl. Lines was enabled.

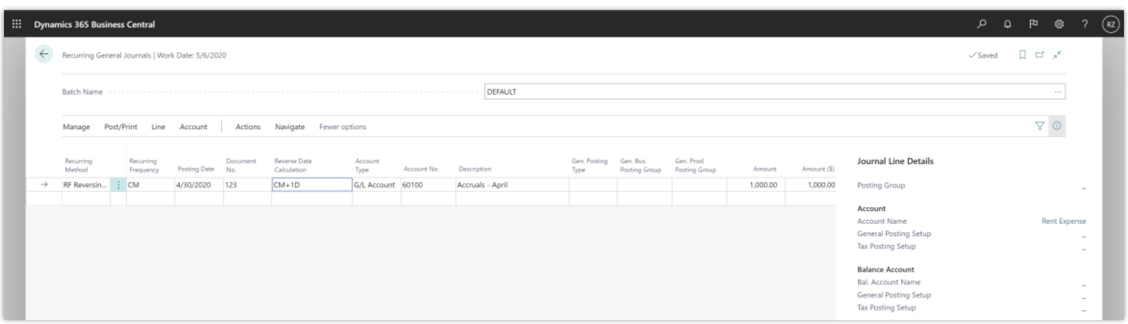
On the Posted General Journal page, you can now use the Copy Journal function to create a copy of a general journal line or a batch with opposite signs (a reversing journal), a different posting date or document number. On Recurring General Journals, you can now control the date that reversal entries will be posted where Reversal Recurring Methods are used.



Shows General Journal Templates with Copy to Posted Jnl. Lines field



Shows Posted General Journal page



Shows Recurring General Journal with Reversal Calculation Date

Tell us what you think

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Thank you for your idea

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Use Word document layouts to customize outgoing customer documents

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

Every business tailors the documents they send out to customers. This is very important for outgoing documents to customers, such as shipments, return order, service quotes, orders, invoices, and credit memos. Using Word as the document-authoring tool allows power users in Business Central to easily modify layouts of reports.

Feature details

You can now export document layout to work for the following documents: Shipments, Return Orders, Service Quotes, Orders, Invoices, and Credit Memos. Simply modify the layouts and import them back into Business Central to use next time you send, for example, a shipment, return order, or a service document.

Tell us what you think

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Thank you for your idea

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Write longer item references

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

Business value

The ability to quickly understand what is being purchased from vendors or sold to customers is key for a fast and productive supply chain. Because vendors and customers use their own item numbering, being able to send sales and purchase orders that use their item numbers helps facilitate that. Vendors and customers can quickly process your orders using their own item numbers (references). As more and more businesses use online channels, the item references they use are often long, such as GTINs or GUIDs that contain 30 or more characters.

Feature details

You can set up an item reference between your item description and the description that your customer or vendor uses. When you create a sales or purchase document, you can fill in the Item Reference No. field to automatically add the customer's or vendor's item description to the document.

NOTE This feature is available to be enabled as standard for all Business Central customers in Business Central 2020 release wave 2. To enable features that are optional for a period of time, sign in to your online environment and open Feature Management to enable the feature.

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.

Easier to choose the right Role Center

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

Feature details

The Role Center is the home page, a landing page that is designed for the needs of a specific role in an organization. Depending on your role, the Role Center gives you an overview of the business, your department, or your personal tasks.

The default role assigned for most users is Business Manager, but you can switch to another role to use a Role Center that fits your needs better.

With this release, we made the list of available roles clearer.

In the default company, a number of profiles are available to choose from that don’t have any content except the navigation menu. In earlier versions, those profiles defined the content of the Role Explorer feature, but users often choose them. To reduce confusion, those profiles are renamed by adding the wording *(navigation menu only)* as a suffix. This should help users understand that the chosen profile has limited content.

Profile ID	Old caption	New caption	Role Center ID
ADMIN	Administration	Administration (Navigation menu only)	8900
FIN	Finance	Finance (Navigation menu only)	8901
HR	Human Resources	Human Resources (Navigation menu only)	8902
MANUFACTURING	Manufacturing	Manufacturing (Navigation menu only)	8903
PROJECTS	Project	Project (Navigation menu only)	8904
PURCH	Purchasing	Purchasing (Navigation menu only)	8905
RESOURCING	Resource	Resource (Navigation menu only)	8906
SALES	Sales And Marketing	Sales And Marketing (Navigation menu only)	8907
SERVICES	Service	Service (Navigation menu only)	8908
WAREHOUSE	Warehouse	Warehouse (Navigation menu only)	8909

We slightly repurposed the existing Role Centers to make them more focused on a department's needs.

Profile ID	Old caption	New caption	New description	Role Center ID
DISPATCHER	Dispatcher - Customer Service	Service Manager	Functionality for service managers to help track progress, organize the fleet of service technicians, manage material costs, and invoice customers.	9016

Profile ID	Old caption	New caption	New description	Role Center ID
PRODUCTION PLANNER	Production Planner	Manufacturing Manager	Functionality for managers who oversee manufacturing tasks such as designing products, planning loads on the shop floor, tracking work in progress, and managing resource and material costs.	9010
SHIPPING AND RECEIVING	Shipping and Receiving - Order-by-Order	Inventory Manager	Functionality for inventory managers, including procurement, operation with multiple locations, and various warehouse tasks.	9008

Of course, just changing names is rarely enough, so we also enhanced the content of these and other Role Centers to better reflect their new purpose:

- Changes for page 9010 Production Planner Role Center:
    - New caption: Manufacturing Manager.
    - Added Machine Operator Activities part.
    - Navigation menus are extended with Consumption, Output, and Capacity Journals, both regular and recurring ones. More elements such as Work Shifts, Shop Calendars, Work Center Groups, Stop and Scrap Codes can be found under the Capacity group.
- New actions of type create are added to the Action Bar. In addition to Planned Production Order, users can create Firm Planned Production Order or Released Production Order.
- Changes for page 9016 Service Dispatcher Role Center:
    - New caption: Service Manager.
- New Service Orders - Today cue on the Service Dispatcher Activities part.
- Changes for page 9008 Whse. Basic Role Center:
    - New caption: Inventory Manager.
- Added a WMS Ship & Receive Activities part that also received new cues to show the number of unassigned warehouse picks, put-aways, and movements.
- Navigation menus are extended with all types of sales documents, such as Invoice, Quote, Order, Return, and Credit Memo, both drafts and posted. More elements, such as Item Charges and Item Attributes, can be found under the Sales group.

- New actions of type create are added to the Action Bar. Users can create new warehouse shipments and warehouse receipts straight from their home page.
- New actions of type processing are added to the Action Bar. Users can open warehouse worksheets, such as the Put-away Worksheet, Pick Worksheet, or Movement Worksheet, as well as the inventory planning worksheets: the Requisition Worksheet, Planning Worksheet and Order Planning pages.
- Changes for page 9026 Sales & Relationship Mgr. RC:
  - Navigation menus are extended with all types of warehouse documents, journals, and worksheets, and documents such as Invoice, Quote, Order, Return, and Credit Memo, both drafts and posted. More elements such as Items, Locations, Shipping Agent, Catalog Items, Stockkeeping Units, and Bin Contents can be found in the Reference Data group.
- From the navigation bar, users can open Sales Orders - Microsoft Dynamics 365 Sales.
- New actions of type create are added to the Action Bar. Users can create new sales quotes, sales invoices, sales orders, sales return orders, and sales credit memos straight from their home page.

While each Role Center consists of a unique collection of parts and actions, they also have a lot in common. The following elements apply to every Role Center:

Profiles enabled by default	**User Tasks Activities**	**Approvals Activities**	**My Job Queue**	**Power BI Report Spinner Part**	**Report Inbox Part**
page 9022 Business Manager Role Center	Added	Added	Added		
page 9027 Accountant Role Center	Added	Added			
page 9015 Job Project Manager RC	Added	Added		Added	
page 9010 Production Planner Role Center (new caption: Manufacturing Manager)	Added	Added		Added	

page 9026 Sales & Relationship Mgr. RC		Added	Added		Added
page 9024 Security Admin Role Center	Added	Added	Added	Added	
page 9016 Service Dispatcher Role Center (new caption: Service Manager)	Added	Added		Added	
page 9008 Whse. Basic Role Center (new caption: Inventory Manager)	Added	Added		Added	
page 9006 Order Processor Role Center	Added	Added			
page 9000 Whse. WMS Role Center	Added	Added			
page 9009 Whse. Worker WMS Role Center	Added	Added			
page 9028 Team Member Role Center		Added			
Role centers without profiles or where profiles are disabled by default	**User Tasks Activities**	**Approvals Activities**			
page 9001 Accounting Manager Role Center	Added				
page 9002 Acc. Payables Coordinator RC	Added				
page 9003 Acc. Receivables Adm. RC	Added				

page 9018 Administrator Role Center	Added	
page 9004 Bookkeeper Role Center	Added	Added
page 9014 Job Resource Manager RC	Added	
page 9013 Machine Operator Role Center	Added	
page 9007 Purchasing Agent Role Center	Added	
page 9021 RapidStart Services RC	Added	
page 9017 Service Technician Role Center	Added	
page 9011 Shop Supervisor Mfg Foundation	Added	
page 9012 Shop Supervisor Role Center	Added	
page 9020 Small Business Owner RC	Added	

With the changes described here, we hope users will be able to find a Role Center that fits their needs better. Remember that you can always enhance your Role Center by bookmarking a page or report, or by hiding or unhiding parts.

Important note about the upcoming upgrade

As you can see, multiple Role Centers received new elements. For these Role Centers to properly work, we must adjust permissions. The next update will include updated license, entitlements, and standard permission set.

However, it is important for administrators to update any customized permissions sets, so that users will not experience disruption once the tenant is upgraded. Here are some objects that you should consider adding to any customer-specific permission sets upfront.

Element	Objects
Approvals Activities (New page and table)	page 9144 Approvals Activities, table 9144 Approvals Activities Cue, page 658 Approval Entries, page 654 Requests to Approve, table 454 Approval Entry
User Tasks Activities	table 1170 User Task, page 1170 User Task List, page 9078 User Tasks Activities, codeunit 1174 User Task Management
My Job Queue	page 675 My Job Queue, table 472 Job Queue Entry
Power BI Report Spinner Part	page 6303 Power BI Report Spinner Part, codeunit 6301 Power BI Service Mgt., codeunit 6317 Power BI Session Manager, page 6319 Power BI Management, table 6304 Power BI User Configuration
Report Inbox Part	page 681 Report Inbox Part, table 477 Report Inbox

Tell us what you think

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See also

- Change Basic Settings
- Bookmark a Page or Report on Your Role Center
- Personalize Your Workspace
- Finding Pages with the Role Explorer
- Manage Profiles
- Designing Role Centers (development content)

Improved control over how and when you post WIP entries for jobs to the general ledger

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

Business value

You can review and specify parameters for the Job Post WIP to G/L batch job after you calculate Work in Process (WIP).

Feature details

When you close the Job WIP Entries page, Business Central displays a confirmation dialog with "You must run the Job Post WIP to G/L function to post the completion entries for this job. Do you want to run this function now?" If you choose **No**, you can manually run the function later. When you do, you can specify parameters for the function.

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Thank you for your idea

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See also

Monitor Job Progress and Performance (docs)

Use contact Mobile Phone Number and Email consistently across application

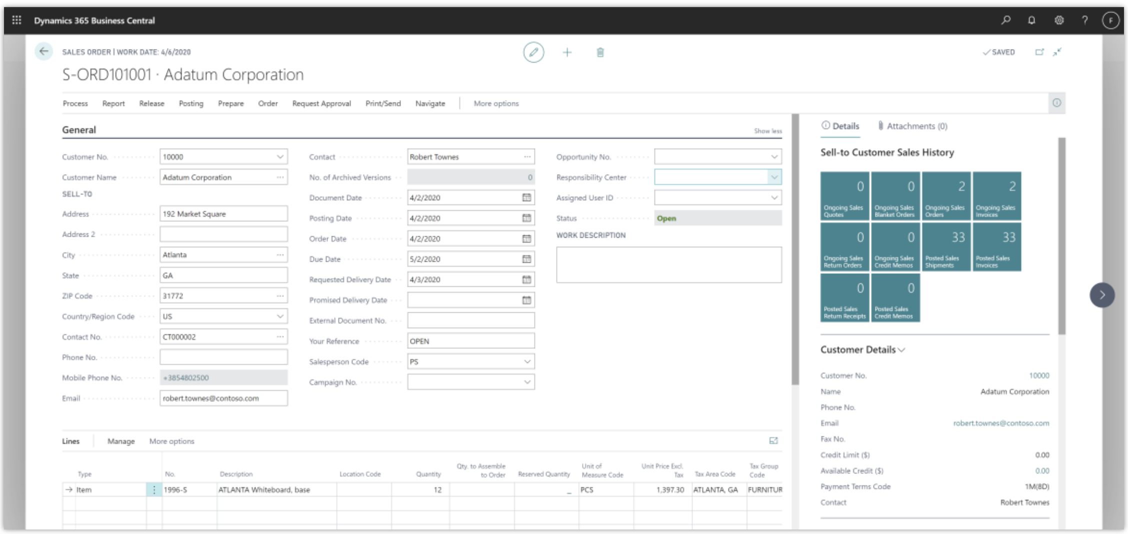
Enabled for	Public preview	General availability
End users, automatically	Sep 2020	Oct 2020

Business value

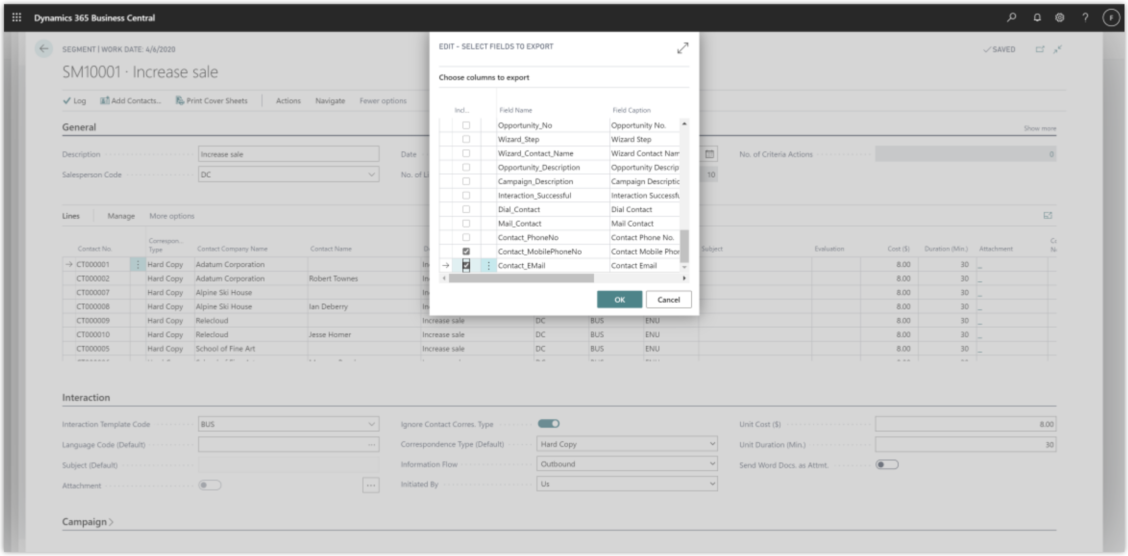
Having the right information at the right time is crucial in business management. The same applies to contacts' mobile phone and email information that is now consistently shown across data entry pages and reports in Business Central.

Feature details

You can now use the **Mobile Phone Number** and **Email** fields on data entry pages, report data sets, report layouts, and segment lines that have contact details in Business Central.



Shows Mobile Phone Number and Email on Sales Order page



Shows export of contacts' Mobile Phone Number and Emails from segments

Tell us what you think

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See also

[Create Contacts](#) (docs)

Use conversion templates to convert contacts to vendors and employees

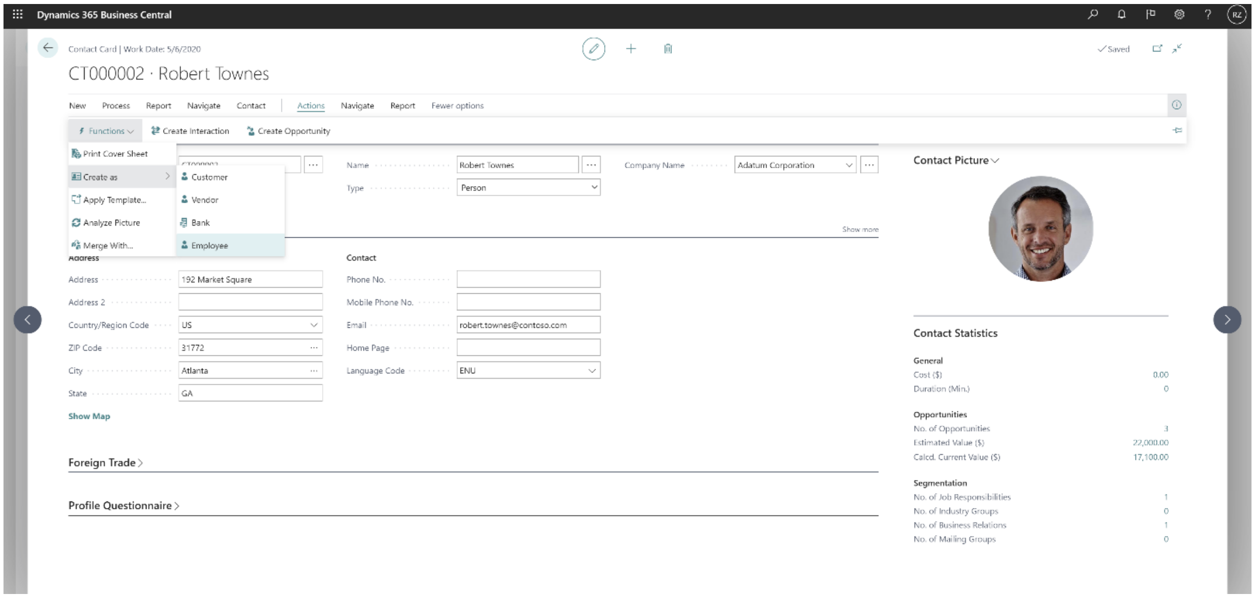
Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Sep 2020	Oct 2020

Business value

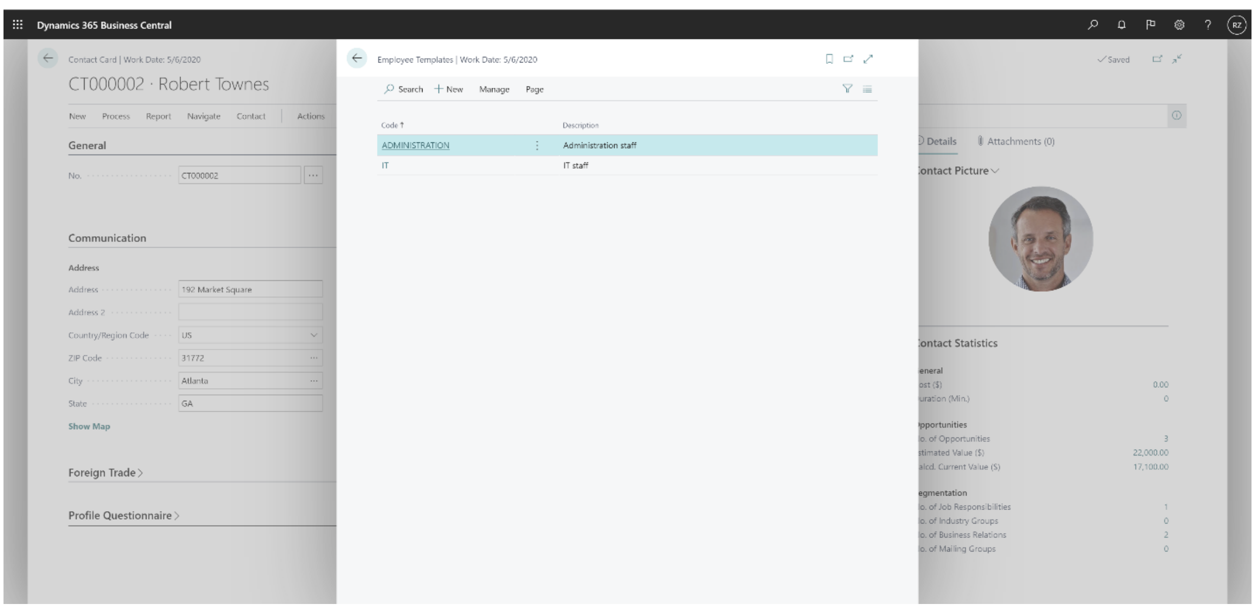
When your prospect customer becomes a real customer, you can easily convert the prospect customer or contact to a customer. Often, your contacts represent your suppliers or your employees who you also want to convert to vendors or employees and thereby avoid duplicate data entry.

Feature details

When selecting a contact, you can now convert it to a vendor or employee. During conversion, you can choose a contact conversion template to use when the contact is converted to a vendor or employee.



Shows Contact Card page with Action to create new Employee from contact



Shows employee templates list page

NOTE This feature is available to be enabled as standard for all Business Central customers in Business Central 2020 release wave 2. To enable features that are optional for a period of time, sign in to your online environment and open the [Feature Management] page to enable the feature.

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Better with Microsoft 365

Overview

Dynamics 365 together with the Microsoft productivity cloud provide an unparalleled suite of secure and compliant business and productivity apps for SMBs.

In 2020 release wave 2, we expand our portfolio of cross-app scenarios, which today includes integration to Excel, Outlook, Word, and others, by introducing Microsoft Teams as a way to interact with coworkers and improve efficiency of collaborative business processes.

Business Central in Microsoft Teams

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

Feature details

Bring Business Central data into Microsoft Teams conversations to make decisions faster as a team.

Country and regional

Overview

Global availability of Dynamics 365 Business Central is expanding regularly. Here are the plans for expansion going forward and new regulatory features and enhancements.

Expanded country and regional availability

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

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and mid-sized businesses across the world can achieve more.

Feature details

Expansion into 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 2, Business Central becomes available in four new countries.

See also

Country/Regional availability and supported languages (docs)

Microsoft Power Platform

Overview

In 2020 release wave 2, we are investing in the integration with Microsoft Power Platform at multiple levels. We are enabling entities from Business Central to be exposed as virtual entities to Common Data Service. In Common Data Service, virtual entities will appear as if they were physical entities, enabling consumption for Common Data Service solutions.

Common Data Service virtual entities

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

Business value

Entities from Business Central are exposed as virtual entities to Common Data Service. In Common Data Service, virtual entities will appear as if they were physical entities, enabling consumption for Common Data Service solutions.

Feature details

With the capability of consuming virtual entities from Business Central in Common Data Service, Power Apps can leverage Business Central virtual entities directly, as if they were native Common Data Service entities.

The underlying infrastructure to expose virtual entities from Business Central is based on API pages. Enabling the virtual entities on Common Data Service will require that a Common Data Service solution is installed. The solution will be able to generate virtual entities based on the metadata of the APIs exposed on the connected Business Central tenant. This will enable developers to create APIs for Business Central and then generate virtual entities on Common Data Service.

Integrate Business Central and Common Data Service with fewer synchronization conflicts

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

The data exchanged between Business Central and Common Data Service is easy to update, and can be enriched by other Power Apps or Power Apps connectors. Occasionally, that can lead to conflicts in the data, and resolving conflicts requires user attention. This feature decreases the number of conflicts that can occur in integrations between Business Central and Common Data Service, making users more productive.

Feature details

The process of synchronizing data between Business Central and Common Data Service is better at recognizing conflicts caused by changes to data in either Business Central or Common Data Service. It now enforces business rules set for unidirectional field mappings, and detects changes only in fields with bidirectional field mappings. Synchronization generates fewer conflicts, enabling users to focus on their jobs rather than resolving conflicts.

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.

Support for latest Microsoft Dynamics 365 SDK

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

Keeping data secure and up to date with the latest security patches is important to business owners. When exchanging data with Dynamics 365 business applications, there are no compromises when it comes to securing your data.

Feature details

The online version of Business Central always uses the latest version of the Dynamics 365 SDK when connecting to Common Data Service and other business applications that are based on Common Data Service. You can view the version on the Connection Setup page. In the on-premises version of Business Central, you can choose the Dynamics 365 SDK version to use when connecting to legacy Dynamics 365 products.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Migrations to Business Central online

Overview

Moving from an on-premises solution to Business Central online is a major area of focus for our partners and customers. With the 2020 release wave 2, 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, go to Upgrading to Dynamics 365 Business Central On-Premises.

Continued enhancements for migrating from Dynamics GP to Business Central

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

Business value

Customers will be able to see the check books and open purchase orders from Dynamics GP in Business Central after the migration. This will reduce the amount of manual setup that is required after the migration.

Feature details

We will build out the extension to:

- Have the Dynamics GP check books migrated as check books in Business Central.
- Have open purchase orders migrated to Business Central.

Historical data migration from Dynamics GP to Azure Data Lake

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

Feature details

A customer can move their historical Dynamics GP data into Azure Data Lake during the migration process. This will give the customer the option to no longer have to maintain their own system in-house but to have access to their data for reporting, tax, and auditing standpoints.

The customer can report on the data within Azure Data Lake.

Migrate from Business Central 14.x on-premises to Business Central 16.x online

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

Feature details

We will add support for customers who are on version 14.x of Business Central on-premises to migrate their data to 16.x Business Central online. We will implement the upgrade logic from 14 to 16 so customers don't have to upgrade their 14.x version on-premises environment to 16 in order to migrate.

Migrate from Business Central 15.x on-premises to Business Central 16.x online

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

Feature details

We will add support for customers who are on version 15.x of Business Central on-premises to migrate their data to 16.x Business Central online. We will implement the upgrade logic from 15 to 16 so customers don't have to upgrade their 15.x version on-premises environment to 16 in order to migrate.

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 2, we shift our focus toward maturing the reliability and usability of current productivity features, including more user options for printing, and ensuring clients are accessible to our diverse set of users.

Pages with FactBoxes are more responsive

Enabled for	Public preview	General availability
End users, automatically	✓ Jun 26, 2020	Oct 2020

Business value

Users can start viewing and interacting with page content quicker.

Feature details

We've optimized how and when FactBoxes are loaded to give priority to the primary content of the page. With this optimized design:

- Content on the hosting page displays first, followed by any visible FactBoxes in the order in which they are shown on the page.
- FactBoxes continue to run within the same session unless a developer has explicitly implemented a Page Background Task for a FactBox.
- If the FactBox pane is collapsed, no FactBoxes are run upon opening the page. Instead, they are run on-demand when the FactBox pane is expanded.

See also

Adding a FactBox to a Page (docs)

Updates to page styling

Enabled for	Public preview	General availability
End users, automatically	✔ Jul 28, 2020	Oct 2020

Feature details

We're styling things slightly differently for the browser experience to align with those of other Dynamics 365 apps, including:

- Rendering task dialogs, such as pages run modally, or advanced look-up pages, in the middle.
- Adjustments to fonts and font sizing, including removing use of the Bahnschrift font.
- Minor adjustments to message dialogs such as choice or error dialogs.

Some adjustments might be needed to your control add-ins if you have implemented add-ins that seamlessly integrate into the Business Central client and that imitate Business Central's styling.

Basic auth settings deprecated for Contact Sync and Outlook Add-in

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

Feature details

Exchange Web Services online, the technology that Contact Sync as well as automated deployment of the Outlook Add-in rely on to connect to Exchange Online, will no longer offer basic authentication as of October 1, 2020. As a result, we are deprecating the fields used to set this up in this release wave.

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

Minimum Requirements for Using Business Central (docs)

Changes to the action bar in dialogs

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

Feature details

We are simplifying how actions are presented in the action bar on certain dialog boxes. This only applies to pages that display as dialogs with a pair of OK and Cancel buttons. Examples of these pages include:

- Advanced lookups, such as when you choose **Select from full list** in a lookup drop-down list.
- Pages that are launched by code using the RunModal method where the return value is referenced by that code. Learn more about the RunModal (Page) Method.

It is common to reuse standard page objects to power these dialogs, which often come with a large number of actions that might mislead or distract the user when they are trying to look up something. By starting out with fewer actions displayed, users get a cleaner interface that does not draw focus away from their primary task, which is to choose a record. Users can still expand the action bar to get access to the full set of available actions, and Business Central will remember that preference.

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.

Report request page can open multiple previews

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

This feature helps you be more flexible and productive when it comes to reports.

Feature details

With Business Central 2020 release wave 2, a report request can open multiple previews one by one without closing the main window. This unblocks users who try out different report parameters, so that they stay focused on a given report and become more productive. When a set of parameters is finalized, the user has an opportunity to print or export the report. Printing or downloading is also possible from the report preview page.

Update the navigation experience terminology to improve usability

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Feature details

Customer feedback tells us that the experience and terminology related to navigation in the product would benefit from some clarification. We made improvements to this experience in the previous release, and 2020 release wave 2 continues this effort. We improve the usability of the service by differentiating various navigation experiences, such as the navigation menu and action bar, to align closer with our customers' expectations.

Improved accessibility for low-vision users

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Feature details

In 2020 release wave 2, we continue our commitment to accessibility with improvements for low-vision users in the following areas:

- **Operating with limited screen space**

  More pages and page content can be presented without loss of information or functionality on small form factors or high-zoom browser settings, where a maximum of 400% browser zoom or browser width of 320 pixels are supported. At these screen sizes:

  - The navigation menu is more responsive to reduced screen width. At the minimum width, only the link to the Role Explorer is shown.
  - The FactBox pane and Filter pane remain accessible and functional, snapping to an overlaid pane when screen width is reduced, or taking up all available horizontal space at the minimum width. When screen space is reduced, only one of the two panes can be shown at any given time.
  - The action bar on various page types is more responsive to the reduced screen width, ensuring that all actions are reachable. Specifically for list pages that include additional system actions, the Search box remains accessible and overlays the list so that users can view or refine their search terms while still displaying search results.
  - Contextual notifications are more responsive to reduced screen widths and ensure the notification text and action hyperlinks remain reachable.
  - System actions displayed in the outer chrome of a page, such as the edit toggle or navigating to next record on card and document pages, are more responsive to reduced screen widths and are displayed within a drop-down menu at minimum width.

- **Improved color contrast**

  The difference in color contrast between adjacent colors now meets accessibility guidelines, improving readability of non-text elements in the browser, such as charts, tiles, context menu items, and row selection.

With these changes, Business Central is on track to meet new WCAG 2.1 recommendations for accessibility on the web.

See also

Accessibility and Keyboard Shortcuts (docs)

Role Centers open faster

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

When navigating to Business Central or opening up the app in another browser window, users expect only a brief waiting time until the app loads and is ready for interaction.

Feature details

Users will find that the Role Center home page is now quicker to open when signing in to Business Central. The structure of the page is shown first, giving context until data is loaded.

Based on the success of technical performance improvements made available throughout 2020 release wave 1, where pages are cached to the user's browser storage, we are extending the ability to cache the layout of a page also to the Role Center. Technically, the rendered Role Center 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. The next time the Role Center opens, it will immediately render from the cache while the latest data is fetched from the service.

While it is busy fetching data from the service, Business Central displays a spinner in the middle of the Role Center. Users can activate links and navigate to other pages once data has completed loading.

Business Central customers using kiosks, where multiple users may sign in to that terminal with their own identity, are advised to apply private browsing or browser profiles to ensure an appropriate level of isolation between users. While no data from one user will be shown to another, this ensures that the Role Center layout cached to the browser is not briefly shown to the next user signing in to that same browser.

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)

Page Inspector supports temporary tables

Enabled for	Public preview	General availability
End users, automatically	Aug 2020	Oct 2020

Business value

The Page Inspector is a valuable tool for power users, consultants, and developers to learn about the structure of a page, including the page type, full record information, which extensions affect the page, and which filters are currently active.

Feature details

With this update, the inspection pane now displays valuable record information also for pages that are implemented to use temporary tables. Information about the current record is displayed in a consistent way and is not different from inspecting pages that use physical source tables.

Additionally, the usability of the pane has been improved:

- The inspection pane is now significantly faster at refreshing when you choose to inspect a different record or page part.
- A visual cue indicates that the pane has completed refreshing, and that data in the pane now reflects the currently selected record.

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.

Access multiple production or sandbox environments from the mobile apps

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

Feature details

Users of mobile devices can now choose between their sandbox and production environments without the need to use the precrafted URL as before. Partners running their own apps based on Business Central can also let their users explore it from mobile devices.

This change requires an updated version of the Business Central mobile app (version 3.x), which can be downloaded on the user's device from the relevant app stores for Android and iOS.

Modern development 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.

Code documentation comments

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

Business value

Adding code documentation tags to objects provides inline help when consuming the objects from calling code, helping understand both intent and usage.

Feature details

Using /// inserts a basic XML doc template, based on the object or member signature. Additional documentation tags can be inserted using IntelliSense support.

Furthermore, when using IntelliSense for object and members, the provided documentation comments will be shown in addition to signature.

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.

Delete extension data

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

Business value

We receive a number of support requests to delete extension data in production or sandboxes, either because an application is not in use or, more commonly, because there is a desire to reinstall it from scratch without data—for example, after testing or trial.

Feature details

On the Extension Management page, when you select an extension and choose to uninstall it, we have added a new **Delete Extension Data** option in the uninstall dialog.

If you select this option, and confirm both at selection and subsequently on selecting Uninstall that you understand that data will be deleted, the service will delete all data owned by the extension. This is equivalent to invoking an extension uninstall on-premises with the "clean" 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.

Performance Regression and Application Benchmark tools

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

Business value

The performance of the Business Central service is in everyone's interest. Microsoft delivers a scalable platform on top of which ISVs and VARs deliver vertical solutions and customizations for specific customers. In order to keep customer tenants performant and current with major and minor updates in ISV solutions and customizations, we must ensure that changes in code do not negatively impact performance in customer tenants. The Performance Regression tool helps you track and compare performance between different builds of your solutions.

When onboarding new customers to Business Central, especially bigger customers, both the partner and the customer must trust that Business Central is able to support current and projected loads to satisfy business needs. With the Application Benchmark Tool, partners can simulate such loads and gain confidence in Business Central's ability to support specific customer loads.

Feature details

The Performance Regression and Application Benchmark tools are partner tools made available on a GitHub repository with a set of sample tests covering key application 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.

Seamless service

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 empowering both users and their partners to troubleshoot and fix issues. In addition to this we continue to invest in boosting the performance, reliability, and scalability of Business Central, across the platform and business application.

Business Central runs much faster with a focus on typical business scenarios and usage patterns. The experience in the browser is more responsive thanks to on-demand loading of page elements, server resources that are optimized for fast user interaction, and the database being tuned to handle more data and faster load times. We will continue to improve the application performance and are prioritizing common usage scenarios.

Users experience an even more stable service with scheduled upgrades that suit the individual business, maintenance during non-working hours, and matured service health practices to ensure maximum uptime. Users requiring assistance now have a single screen through which to find self-help material, share ideas with the community, and request support with streamlined response time.

The Business Central security team works behind the scenes to safeguard the security of your data. In addition to continual improvements of our security infrastructure and processes, we ensure Business Central continues to meet ISO 27001, ISO 27017, ISO 27018, SOC 1 and 2 Type 2, HIPAA BAA, and FERPA industry security and privacy compliance standards. For more details and a list of all certificates, see Microsoft Dynamics 365 service compliance.

Data audit system fields are added to every table

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

Business value

This gives developers an easy and performant way to program against historical data, such as writing AL queries that return changed data since some specified point in time.

Feature details

Four new system fields are added to all tables:

- SystemLastModifiedOn
- SystemLastModifiedBy
- SystemCreatedBy
- SystemCreatedOn

The platform will populate the content of the fields when a record is created and modified. It isn't possible for a developer to control the values that are saved to the database.

Log of admin operations in the Business Central admin center

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

Feature details

The Business Central admin center will show a log of operations, performed by the customer admins and delegated admins (partners) in the admin center and through the admin center API. The log will initially include the operations that we enable with this release:

- Renaming environments
- Restoring environments
- Updating apps (pending)

The goal is to eventually log all admin operations available on the admin center there as well.

The admins will be able to see which operations were created, when, and by whom. We will also surface detailed error messages in this log, should any operation fail.

On-demand joining of companion tables

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

Business value

Some of the performance issues that customers have observed with many table extensions on a base table will go away with this optimization.

Feature details

The data stack inside the Business Central server will not always join all data from table extensions.

Renaming environments in the Business Central admin center

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

Feature details

This release adds an option for admins to rename environments in the Business Central admin center. The new option is related to the point-in-time restore feature, which we are also shipping in this release wave. Renaming an environment can be convenient in the initial phases of the implementation projects, when customers might be dissatisfied with the default name that was assigned to their environment during setup, or when an administrator wants to restore an environment and, accordingly, must rename the original environment to prevent it from being used. The new name will be applied to the environment immediately, so the administrators must make sure they plan all the necessary communications about the new name well in advance.

The renaming of an environment will be logged and shown in the operations log of the Business Central admin center.

Restoring environments to a point in time in the past

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

Business value

To help protect business continuity, customers can recover their data to a point in time in the past, in case it was damaged as a result of an unintended action by a user or developer.

Feature details

Protecting your business-critical ERP data in Dynamics 365 Business Central environments and providing continuous availability of the service are extremely important to our customers.

In some situations, the data in the production environment can be damaged in a way that makes it difficult or impossible to recover by simply undoing the changes one by one. Such changes are typically introduced unintentionally, as a result of a developer or an application user mistake. To help customers recover their data, we are introducing a new data recovery feature in the Business Central administration center.

All your online environments are backed up. System backups occur continuously by the underlying technology used by the Business Central service: Azure SQL Database. Find the documentation about the Azure SQL Database automatic backups at FAQ for Dynamics 365 Business Central.

With this release, Business Central local and delegated administrators (partners) can restore any environment (sandbox and production) to a certain point in time up to 30 days in the past. The restore can be performed within the same Azure Region and the same country (localization). The restore operation permission is granted to admin users, who also have a specific permission set assigned to them within the environment. The log of restore operations will be visible in the Business Central administration center.

In some situations, the users might not know exactly to what date and time they need to restore a specific environment. So before restoring the environment, they'll be able to restore it into another environment first—for example, into a sandbox environment. The admins, with the help of other company users, can then validate the data in the newly created sandbox environment. They can repeat the attempt if they discover that they need an earlier or later point in time. If the data is confirmed to be correct, the admin can then decide to restore the production environment to the same point in time. The number of restore attempts will be limited to 10 attempts per environment/per month.

When restoring a production environment, the admins follow these steps:

1. Rename the original production environment (for example, MyProdEnv-DONOTUSE).
2. Do a point-in-time restore of the original environment into a new production environment with the original name (MyProdEnv).

At this point, the admins will have both environments available side-by-side, so they can investigate the data. If needed, they can bring in missing data from one environment to another by using, for example, the RapidStart feature.

The recovery is allowed within a maximum of three immediately preceding versions of Business Central (including minor and major updates), but still within a maximum of 30 days (from the point of the environment creation).

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://experience.dynamics.com/ideas/idea/?ideaid=7d2b14ec-1705-e811-80c0-00155d7c7f0c.

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.

Attach to user session when debugging in sandbox

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

Business value

Currently, when you debug with the Visual Studio Code AL debugger, you cannot attach to a user session, making it much harder to troubleshoot issues that are dependent on users and user permissions. This feature enables attaching to an active user session on the sandbox.

Feature details

Allows attaching to an active user session when debugging on a sandbox.

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.

Debug extension installation and upgrade code

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

Business value

It is currently not possible to debug extension install or upgrade code by just adding breakpoints and deploying a new application. Instead, some workaround is required to manually trigger the install and upgrade code, possibly commenting out upgrade tags and so on, making it tedious to properly test install and upgrade during development, as well as to troubleshoot issues.

Feature details

With this feature you can set breakpoints in install or upgrade code, attach and trigger publishing of an extension to debug install or upgrade code.

Sandbox environments can be updated to a Public Preview version

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

Feature details

Public Preview of Business Central 2020 release wave 2 becomes available 1 month before the official date of general availability. Internal administrators and delegated administrators (partners) can repeatedly test the update process and extensions on their production data by copying their production environment to a sandbox and updating that sandbox environment to the Public Preview version.

This will give customers and partners an extra month to prepare for the major update and ensure smooth rollout when the official version is available.

Developers can emit telemetry to Application Insights from AL code

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

Business value

App developers can now instrument their code both for their own use and to make it possible for reselling partners to troubleshoot potential issues.

Feature details

In this wave, we add a new function, Session.LogMessage, that has the following signature:

```
Session.LogMessage(
\$\$Indent\$\$       EventID : String
\$\$Indent\$\$     , Message: String
\$\$Indent\$\$     , DataClassification: DataClassification
\$\$Indent\$\$     , Scope: ExtensionPublisher|All
\$\$Indent\$\$     , Verbosity: Verbosity
\$\$Indent\$\$     , Dimensions: Dictionary of [String, String]
)
```

If the Verbosity level is set to Normal and DataClassification is set to SystemMetadata, then the platform will emit telemetry. The value of the Scope parameter determines where telemetry will be sent. If set to ExtensionPublisher, telemetry is only sent to the Application Insights account specified in the app.json file. If set to All, telemetry is also sent to the Application Insights account specified in the Business Central administration center.

See also

Environment Telemetry in the Business Central administration center (docs)

Extension publishers can get telemetry in Azure Application Insights

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

Business value

Extension publishers can get telemetry about issues in their extension before partners and customers report it.

Feature details

You can now add an instrumentation key for Azure Application Insights in the app.json file for an extension.

When events such as the following happen in code units that are part of the extension, then this signal will be sent to the Azure Application Insights account that has the supplied instrumentation key:

- Long-running SQL queries
- Report execution
- Extension updates
- Update errors due to exceptions thrown in upgrade code in the extension
- Web service requests

Customer data platform

Overview of Dynamics 365 Customer Insights 2020 release wave 2

Customer Insights enables every organization to unify and understand their customer data to harness it for intelligent insights and actions.

Eliminate data silos and unify customer data

Use connectors to ingest and unify data, bringing in transactional, observational, and behavioral data from various data sources.

Transform customer data intelligently to build a unified customer profile conforming to Common Data Model.

Enrich customer profiles

Build richer customer profiles by incorporating aggregated audience intelligence from first-party and third-party enrichments.

Enable powerful AI and insights

Derive insights about your business using capabilities like segments and measures that are built on top of unified profiles.

Accelerate business processes with out-of-the-box AI models or custom algorithms using Azure Machine Learning.

Extend business processes and personalize customer experiences

Enable marketing, sales, and service professionals to drive personalized engagements across channels. Work with contextual customer insights and tailored customer profile cards that integrate with Microsoft and non-Microsoft business applications.

Build on existing connectors, a variety of APIs, and Microsoft Power Platform to enable and extend line-of-business experiences. For example, you can gain deeper customer insights with Power BI, build custom apps with Power Apps, and trigger workflows based on insights 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 October 2020 through March 2021. 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.

Activities

This section lists changes to activities in Customer Insights.

Feature	Enabled for	Public preview	General availability
Activity timeline improvements	Admins, makers, or analysts, automatically	-	Mar 2021

B2B

This section covers capabilities around account records and organization profiles.

Feature	Enabled for	Public preview	General availability
Insights and unified profiles for accounts and contacts	End users by admins, makers, or analysts	Mar 2021	-

Data unification

This section lists updates to the data unification scenarios in Customer Insights.

Feature	Enabled for	Public preview	General availability
Data unification improvements	Admins, makers, or analysts, automatically	-	Mar 2021

Extensibility

This section lists updates to the extensibility scenarios in Customer Insights.

Feature	Enabled for	Public preview	General availability
Additional third-party export destinations	End users by admins, makers, or analysts	Mar 2021	

Intelligence

This section lists updates to the intelligence scenarios in Customer Insights.

Feature	Enabled for	Public preview	General availability
Additional predictions	Admins, makers, or analysts, automatically	Mar 2021	

Measures

This section lists updates to measures in Customer Insights.

Feature	Enabled for	Public preview	General availability
Measure enhancements	Admins, makers, or analysts, automatically	-	Mar 2021

Relationships

This section lists updates to relationships in Customer Insights.

Feature	Enabled for	Public preview	General availability
Improvements to relationship management	Admins, makers, or analysts, automatically	Mar 2021	

Segments

This section lists updates to new and updated capabilities around segments in Customer Insights.

Feature	Enabled for	Public preview	General availability
Segment enhancements	Admins, makers, or analysts, automatically	-	Mar 2021

System administration

This section lists improvements to administration in Customer Insights.

Feature	Enabled for	Public preview	General availability
System administration enhancements	Admins, makers, or analysts, automatically	-	Mar 2021

Description of **Enabled for** column values:

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Activities

Overview

Activity enhancement includes improvements such as support for extended attributes and customer-provided icons.

Activity timeline improvements

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

Activity timeline improvements include:

- Multiple filter values on ActivityType and the count of the matching activities.
- Support of multi-hop relationships.
- Ability to create and update relationship names in the app.

B2B

Overview

Get more actionable insights for organizations and individuals.

Insights and unified profiles for accounts and contacts

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Mar 2021	-

Feature details

Create unified profiles and insights for both organizations and individuals and switch between them to get a holistic view of accounts and contacts. The combined view shows segments, measures, activities, and more.

Data unification

Overview

Updates and improvements in this area include advanced configuration options:

- Manual overrides for merge.
- Additional merge policies.

- Improved status updates on match and merge runs.

Data unification improvements

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

Advanced configuration options include:

- Enable or disable match rules.
- Manual overrides for merge rules.
- Additional merge policies.
- Improved status updates on match and merge runs.

Extensibility

Overview

Customer Insights provides new extensibility options for Azure Synapse and options to take action on unified profiles.

Additional third-party export destinations

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Mar 2021	-

Feature details

Additional third-party export destinations include out-of-the-box integrations to marketing technology and advertising technology services.

Intelligence

Overview

Generate predictions based on unified profiles in Customer Insights to get a better understanding of customer patterns.

Additional predictions

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2021	-

Feature details

Easily generate predictions based on unified profiles in Customer Insights to get a deeper understanding of customer patterns. These capabilities include:

- Guided experience for transactional churn prediction.
- Guided experience for product recommendations.

Measures

Overview

Updates and new features for measures include new filters, improvements to the creation experience, and support for additional operators.

Measure enhancements

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

Measure enhancements include:

- Improved measure-creation experience.
- Support for additional operators.
- Additional filters.

Relationships

Overview

Relationship enhancements include a visual browser for relationships and the ingestion of relationships from source systems.

Improvements to relationship management

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2021	-

Feature details

Relationship enhancements include:

- Visual browser for relationships.
- Ingestion of relationships from source systems.

Segments

Overview

Segment enhancements for this release include improvement to the segment-creation experience and support for new operators.

Segment enhancements

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

Segment enhancements include:

- Improved segment-creation experience.
- Suggested segments.
- Support for new operators.

- Additional segment insights.

System administration

Overview

Administration enhancements for this release include:

- Retire inactive profiles.
- Add more access controls for consumption scenarios.
- Cancel long-running processes.

System administration enhancements

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

Administration enhancements include:

- Retire inactive profiles.
- Add more access controls for consumption scenarios.
- Cancel long-running processes.

Overview of Dynamics 365 Product Insights 2020 release wave 2

Dynamics 365 Product Insights enables organizations to understand their customers' journey, usage, and experience across all channels of their products (web, mobile, and connected devices). With Product Insights, organizations 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 experience 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 their 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 to provide users with full understanding of their customers, their interests, and their activities.

More details will follow. Please stay tuned!

Customer Voice

Overview of Dynamics 365 Customer Voice 2020 release wave 2

Dynamics 365 Customer Voice is an enterprise feedback management application that enables you to infuse the voice of your customers into your day-to-day business decision making. With an always-on customer feedback loop, you can easily keep track of the customer metrics that matter most to your business based on survey response data, and respond to the customers in a timely manner. With deep integration with the Dynamics 365 line-of-business applications, Dynamics 365 Customer Voice adds rich insights by feeding real-time survey data into customer records. Dynamics 365 Customer Voice provides an easy and friction-free experience from creating surveys to generating actionable insights based on customer feedback, with minimal setup time. It helps you to keep a pulse on what customers value, and how they view your products and services, and you can rest assured that your data is supported by Microsoft security and compliance policies.

What's new and planned for Dynamics 365 Customer Voice

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Collect feedback

Survey distribution capabilities that enable you to send surveys across multiple customer engagement channels.

Feature	Enabled for	Public preview	General availability
Multichannel survey distribution	End users, automatically	-	Oct 2020
Send a survey to Dynamics 365 customer lists	End users, automatically	-	Oct 2020

Insights and follow-up

Define standardized customer satisfaction metrics and enable timely follow-up actions for customer issues.

Feature	Enabled for	Public preview	General availability
Close the feedback loop through alerting and follow-up management	End users, automatically	-	Oct 2020
Customer Insights integration	End users, automatically	-	Oct 2020

Simplified survey authoring

Simple-to-use experience to create personalized surveys based on customer information from your business application.

Feature	Enabled for	Public preview	General availability
Support for group ownership	End users, automatically	-	Oct 2020

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Collect feedback

Overview

Enables you to send personalized surveys to the right customers at the right time through the right channel.

Multichannel survey distribution

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

Feature details

Dynamics 365 Customer Voice enables you to collect customer feedback across multiple channels where your customers are. In addition to the email survey, web embed, and QR Code, you can send embedded surveys through Omnichannel for Customer Service.

Send a survey to Dynamics 365 Marketing lists

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

Feature details

Dynamics 365 Customer Voice makes it easy for a survey owner to send a survey to customer lists created in Dynamics 365 Marketing. In addition to looking up customer contact views, you can now select segments from Dynamics 365 Marketing lists when distributing surveys.

Insights and follow-up

Overview

Enables businesses to define standardized customer satisfaction metrics and get insights including trends and specific follow-up actions to make sure customer issues are addressed in a timely manner.

Close the feedback loop through alerting and follow-up management

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

Feature details

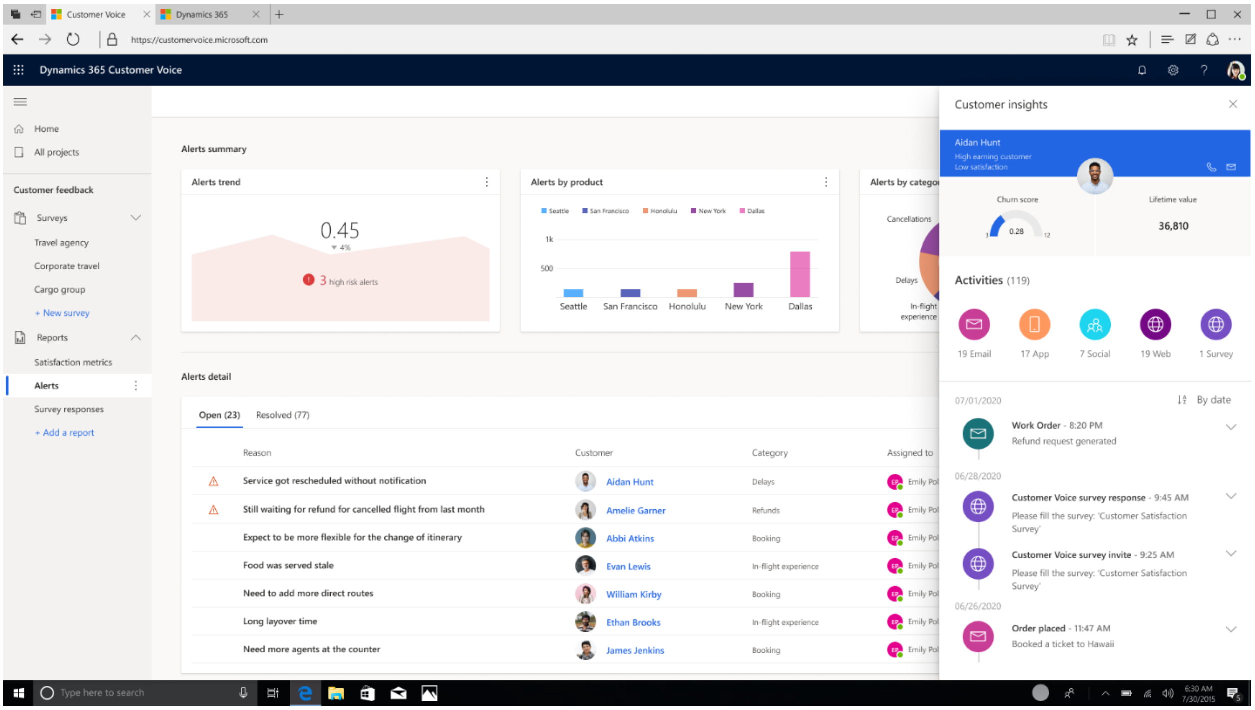
Dynamics 365 Customer Voice includes built-in follow-up management to ensure you follow up to your customer feedback in a timely manner. Each customer satisfaction metric includes support for a real-time alert to notify business users upon receiving customer feedback within the specified alert range. Business users can manage and resolve alerts with follow-up action notes using the built-in alert management dashboard.

Customer Insights integration

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

Feature details

Dynamics 365 Customer Voice includes built-in integration with Dynamics 365 Customer Insights. When receiving an alert, business users can view a 360-degree customer profile based on the customer data aggregated in Dynamics 365 Customer Insights.



Integration with Customer Insights

Simplified survey authoring

Overview

Enables business users to create and personalize surveys for each customer to improve survey response rates.

Support for group ownership

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

Feature details

A project owner can share the project with a group to enable collaboration. The project and surveys are owned by a group and anyone who is a member of the group can manage the project and its surveys.

Industry accelerators

Overview of Dynamics 365 nonprofit accelerator 2020 release wave 2

The nonprofit accelerator enables you to develop nonprofit solutions based on entities and attributes that nonprofit organizations commonly leverage for constituent management, fundraising, awards, program delivery, and impact tracking. These entities include but are not limited to donor commitments, designations, transactions, awards, disbursements, delivery frameworks, results, indicators, benefit recipients, and more. The accelerator includes Common Data Model for Nonprofits, sample apps, sample data, dashboards, and documentation.

In the previous release wave, we continued to evolve our offering at a rapid pace and include the most comprehensive and interoperable nonprofit data model available, allowing nonprofits to manage program delivery, beneficiary management, fundraising, volunteer management, and finance and operations while building to included standards like the global International Aid Transparency Initiative (IATI) and the United Nations Sustainable Development Goals.

In June 2020, we released features focused on program delivery lifecycle management from proposal development to case management to monitoring, learning, and evaluation (MEL). We delivered further refined Volunteer Management and the Nonprofit Operations Toolkit while extending the nonprofit Common Data Model to include the Humanitarian Data Exchange standard. We also add features across constituent management, revenue management, gifts-in-kind, recognition and benefits, award management, financial management, project accounting, gift processing, donor reporting, and business reporting.

For 2020 release wave 2, we continue to expand capabilities across constituent, donor and grant management, program delivery, finance and operations, collaboration, and measurement and learning to deliver nonprofit back office and front-line workers and volunteers with mission-critical technology that measures impact and builds transparency between organizations and their funders.

What's new and planned for Dynamics 365 nonprofit accelerator

This topic lists features that are planned to release from October 2020 through March 2021. 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
Humanitarian logistics	End users by admins, makers, or analysts	Sep 2020	Oct 2020
Volunteer management	End users by admins, makers, or analysts	Jan 2021	To be announced
Disaster relief, disaster preparedness, and field services	End users by admins, makers, or analysts	Feb 2021	To be announced

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Humanitarian logistics

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

Business value

Front-line workers from international non-government organizations (NGO) are able to better manage and understand inventory levels and fund reporting from donors.

Feature details

This feature aids nonprofit organizations with the management of goods and services procurement, warehousing, distribution, inventory reconciliation, and donor and funder reporting.

See also

Nonprofit accelerator (docs)

Volunteer management

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Jan 2021	To be announced

Business value

Nonprofit volunteer managers want to easily match, schedule, and track their volunteers as well as get insights into the volunteer efforts.

Feature details

Nonprofit volunteer managers can now match volunteer jobs and projects to individuals with matching skills, availability, and desire. This feature will also provide scheduling and tracking capabilities and volunteer engagement insights.

See also

Nonprofit accelerator (docs)

Disaster relief, disaster preparedness, and field services

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Feb 2021	To be announced

Business value

This enables nonprofit organizations in the disaster and international relief space to better understand resources and coordination among other agencies.

Feature details

This feature helps nonprofit organizations to create and maintain a resource catalog, deploy resources during a disaster, optimize routes, and coordinate between supporting nonprofits and government agencies.

See also

Nonprofit accelerator (docs)

Overview of Dynamics 365 media and communications accelerator 2020 release wave 2

The initial release of the Dynamics 365 media and communications accelerator, launched in May 2020, allows you to easily build solutions around a variety of use cases supporting intelligent fan engagement. The accelerator comes with more than 60 out-of-the-box data entity mappings focused on driving popular scenarios used by various event venues, theme parks, sports teams, sports leagues and clubs, stadiums, and large brand advertisers as they work to better understand their fans, how best to target them, how to drive better responses and return visits, and extend overall reach to their customer base.

Included with the accelerator is a data model, sample apps, dashboards, and a connected experience related to fan and customer engagement.

For 2020 release wave 2, we continue to expand upon our initial offerings, which will enable deeper customer engagement at events both virtual and in person, branching out into corporate events, webinars, and more as well as the ability to gather and understand important patterns around attendee analytics.

What's new and planned for Dynamics 365 media and communications accelerator

This topic lists features that are planned to release from October 2020 through March 2021. 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
Event management and attendee analytics	End users by admins, makers, or analysts	Nov 2020	Mar 2021

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Event management and attendee analytics

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Nov 2020	Mar 2021

Business value

Event producers want to support and more easily manage different event types and content while enabling better online experiences for event attendees.

Feature details

This feature supports the management and production of various events (virtual, live, webinars, hackathons, and more) including attendee registration, payment, badging, and speaker management. This will also enable a better understanding of important attendee patterns and analytics to drive more relevant virtual content for your audience.

Overview of Dynamics 365 manufacturing accelerator 2020 release wave 2

The initial release of the Dynamics 365 manufacturing accelerator enabled manufacturers to quickly develop solutions to onboard and intelligently manage their suppliers. The offering we released in May 2020 includes a manufacturing data model, sample apps, dashboards, and a connected experience related to intelligent supplier management and supplier onboarding.

For 2020 release wave 2, we are introducing new scenarios with enhancements to our data model focused on manufacturing sales. This release will bring new capabilities for sales representatives and managers to make better sales decisions through the ability to view sales and trade agreements, on-hand inventory, discounted items, warranty and field services requests, and more.

What's new and planned for Dynamics 365 manufacturing accelerator

This topic lists features that are planned to release from October 2020 through March 2021. 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
Manufacturing sales	End users by admins, makers, or analysts	Oct 2020	Nov 2020

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Manufacturing sales

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

Business value

Enable manufacturing sales representatives and their managers with the ability to make better decisions through insights into their sales and warranty operations.

Feature details

With this feature, manufacturing companies can view sales and trade agreements and make more informed sales decisions. Sales representatives can easily view descriptions for available inventory so that they can manage sales and discounted items. This feature will also give sales managers a central view of warranty and field service requests, as well as visibility into the operations and manufacturing process for outstanding orders.

Overview of Dynamics 365 healthcare accelerator 2020 release wave 2

The Dynamics 365 healthcare accelerator that launched in July 2018 focused on use cases and workflows based on enhanced care coordination and the ability to segment patients and providers based on Electronic Medical Record (EMR) data. We 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.

In 2019, we released updates including enhancements to the model-driven app with an updated look and feel and new forms and controls with added functionality for care coordination. We also began a formal feedback process with partners and customers to help ensure we are taking input in a consistent manner to drive increased innovation and usability for the upcoming releases.

In May 2020, we further expanded our offering to include new scenarios focused on customer service and provider call center, physician referrals, and patient segmentation and outreach.

In the 2020 release wave 2, we introduce new capabilities specific to payor organizations, home health, and care management as well as build enhancements on the current version of the accelerator. This will expound even further how we are providing a comprehensive offering in the healthcare industry.

What's new and planned for Dynamics 365 healthcare accelerator

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Feature	Enabled for	Public preview	General availability
Home health	End users by admins, makers, or analysts	Aug 2020	Oct 2020

Feature	Enabled for	Public preview	General availability
Member 360	End users by admins, makers, or analysts	Aug 2020	Oct 2020
Care coordination	End users by admins, makers, or analysts	Mar 2021	To be announced
Life sciences workloads	End users by admins, makers, or analysts	Mar 2021	To be announced
Revenue cycle and talent management	End users by admins, makers, or analysts	Mar 2021	To be announced

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Home health

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

Business value

Providers and payers will have a robust solution for home health and remote care.

Feature details

This feature helps with home healthcare use cases, including resource scheduling, management, optimization, and monitoring. It also provides virtual visit tools and patient and resource tools to view specifics on home healthcare appointments.

Member 360

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

Business value

Gives providers and payers the ability to build financial specifics into their applications.

Feature details

This feature provides additions to the healthcare data model based on the HL7/FHIR financial model that's specific to claims, benefits, and eligibility aspects to the solution.

Care coordination

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Mar 2021	To be announced

Business value

Provider and payor organizations will have the ability to proactively provide care through our tools.

Feature details

Customers can provide care plan development, personalization, analytics, expanded care team collaboration, and utilization management, including benefit usage, and care gaps.

See also

Healthcare accelerator (docs)

Life sciences workloads

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Mar 2021	To be announced

Business value

Enable the ability to drive improvements for the quality and standard of life through clinical trials and commercialize important medications.

Feature details

The life sciences workloads will support better insights for researchers during clinical drug trials. This will also enable some of the complex processes needed to drive the commercialization of medications.

See also

Healthcare accelerator (docs)

Revenue cycle and talent management

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Mar 2021	To be announced

Business value

Providers and payers want to ensure a steady stream of revenue as well as attract, develop, and retain top talent in their organizations.

Feature details

Healthcare providers and payors can get better insights into their revenue cycle management from capturing, management, and collection of patient service revenue. This feature will also enable an operating model for talent management.

See also

Healthcare accelerator (docs)

Overview of Dynamics 365 financial services accelerator 2020 release wave 2

The initial release of the Dynamics 365 financial services accelerator focused on retail and commercial banking to optimize customer experience, improve collaboration within a bank, and gain customer insights. The accelerator includes sample apps, dashboards, and customer journeys that showcase popular scenarios in the financial services industry. In 2020 release wave 1, we added new entity mappings to support popular insurance scenarios including claims, policies, and producers.

For 2020 release wave 2, we are introducing new capabilities around wealth management and the mortgage experience.

What's new and planned for Dynamics 365 financial services accelerator

This topic lists features that are planned to release from October 2020 through March 2021. 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
Mortgage and lending	End users by admins, makers, or analysts	Oct 2020	To be announced
Wealth management	End users by admins, makers, or analysts	Jan 2021	To be announced

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Mortgage and lending

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

Business value

Loan officers and mortgage consultants can better engage with borrowers and collaborate within the bank throughout the loan process.

Feature details

This release provides new customizations and experiences to support mortgage and lending.

See also

Financial services accelerator – banking (docs)

Wealth management

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Jan 2021	To be announced

Business value

Wealth advisers can engage with their clients, make recommendations on financial planning and investments, and help their clients achieve their financial goals.

Feature details

This release provides new customizations and experiences to support wealth management.

See also

Financial services accelerator – banking (docs)

Overview of Dynamics 365 education accelerator 2020 release wave 2

The initial release of the Dynamics 365 education accelerator in November 2018 centered on improving student and faculty engagement and enhancing institutional effectiveness for higher education institutions. The data model supports common entities related to students, faculty, courses, test scores, and more. In January 2020, we added new scenarios around business partner management in the areas of internships, scholarships, and grants for higher education.

In June 2020, we launched a new scenario for K-12 and enabled partners and customers to create a holistic student profile, automate attendance, track student behaviors, and apply a skills-based learning framework based on learning experiences and assessments. We added entities to the model to help track alumni and engage them via fundraising. We also worked on a scenario to improve communication between schools and families, making it easier to schedule conferences and offer volunteer opportunities at school for parents and guardians.

Following this, in July 2020 we continue to evolve our offering in higher education and added new scenarios to support an expanded student profile, student wellness (predicting risk of failing to complete course requirements), student recruitment, and degree audit. We believe these additional entities will empower our partners and customers to better understand the student experience in universities and help students thrive.

In 2020 release wave 2, we continue to broaden the work for the education accelerator by expanding our efforts in higher education to drive learning and skill development as well as enabling a more seamless admissions process in the K-12 space.

What's new and planned for Dynamics 365 education accelerator

This topic lists features that are planned to release from October 2020 through March 2021. 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
Higher education tele-advising	End users by admins, makers, or analysts	Oct 2020	Jan 2021
K-12 admissions	End users by admins, makers, or analysts	Jan 2021	Mar 2021

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Higher education tele-advising

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Oct 2020	Jan 2021

Business value

This scenario helps students connect with advisors to help plan their academic journey and achieve their career goals after graduation. Due to COVID-19, many schools are quickly adapting the services and support they typically offer to students, and this scenario can help fill that urgent need.

Feature details

Students can sign in to the online advising tool. This tool allows them to view degree and certificate requirements and track their completed coursework toward completion of their chosen degree or certificate program. Advisors can schedule, create personalized plans, and monitor their students' performances against their graduation plan.

Students can view their personalized plan, schedule meetings with advisors, meet online, and update progress toward their goals. University leaders can anonymize data and then use the aggregate data to show the percentage of students who are on track to graduate.

See also

Education accelerator – higher education (docs)

K-12 admissions

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Jan 2021	Mar 2021

Business value

This feature supports students, parents, and schools in identifying the right school placement for students. It helps ensure a good match between prospective students and schools.

Feature details

You will now be able to help K-12 schools recruit and retain students through this admissions offering.

See also

Education accelerator – K-12 (docs)

Overview of Dynamics 365 automotive accelerator 2020 release wave 2

We released the automotive accelerator in July 2019 to enable partners to quickly develop solutions using an industry data model based on scenarios that were needed for car dealerships and original equipment manufacturers (OEMs) to deliver a better customer experience and enable more seamless business processes. The first release included an automotive data model with important entities and business logic needed to enable scenarios for dealers and OEMs, sample canvas and model-driven apps, Power BI templates, and more, all based on a connected customer experience.

We updated this accelerator in May of 2020 to include a new B2C Power Apps Portal, a redesigned canvas app as well as updated forms and dashboards that will further enable a more personalized customer experience for optimal brand experience.

With 2020 release wave 2 we will continue to focus on enabling customer engagement with more features coming soon.

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 Microsoft Power Platform Change history online.

2020 release wave 2 features available for early access

This topic lists the Microsoft Power Platform features that can be enabled for testing in your environment beginning **August 3, 2020**. Features from the following apps are available as part of early access:

- Power Apps
- Power Automate

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 2 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 2 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
Ability to interact with emails in mobile app	End users, automatically	Aug 1, 2020	Oct 2020
Address key chart customization gaps in Unified Interface	End users, automatically	Aug 1, 2020	Oct 2020
Improved model-driven app header, sitemap, and app switching	End users, automatically	Aug 3, 2020	Oct 2020

Feature	Enabled for	Early access	General availability
Transition to Unified Interface	End users, automatically	Aug 1, 2020	Dec 2020
UX improvements to sub grids and form tabs in Power Apps mobile app	End users, automatically	Aug 1, 2020	Oct 2020

Power Automate

For a complete list of the Power Automate features, see What's new and planned for Power Automate.

Feature	Enabled for	Early access	General availability
UI flows add support for copy and paste	End users, automatically	Aug 3, 2020	Oct 2020
UI flows support do until loops	End users, automatically	Aug 11, 2020	Oct 2020

Power Apps

Overview of Power Apps 2020 release wave 2

Microsoft 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, a deep data platform in 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 2 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 October 2020 through March 2021. 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.

Power Apps portals improvements

Power Apps portals are enabling low-code makers to roll out experiences to broad external audiences.

Feature	Enabled for	Public preview	Early access*	General availability
Power Virtual Agents as a component of the Power Apps portals Studio	Admins, makers, or analysts, automatically	Oct 2020	-	

Feature	Enabled for	Public preview	Early access*	General availability
Support for entity permission configuration using the Power Apps portals Studio	Admins, makers, or analysts, automatically	Oct 2020	-	-
Power Apps component framework control support in Power Apps portals	Admins, makers, or analysts, automatically	Dec 2020	-	-
Power Apps portals web API (General availability)	Admins, makers, or analysts, automatically	-	-	Feb 2021

Sophisticated apps on a unified platform

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 Common Data Service.

Feature	Enabled for	Public preview	Early access*	General availability
Organize business logic in your app with components	Admins, makers, or analysts, automatically	Oct 2020	-	
Makers can add a custom page in the model-driven app designer	End users by admins, makers, or analysts	Dec 2020	-	-
Preview modern model-driven app designer and sitemap enable is more productive	Admins, makers, or analysts, automatically	Dec 2020	-	-
Ability to interact with emails in mobile app	End users, automatically	-	Aug 2020	Oct 2020
Address key chart customization gaps in Unified Interface	End users, automatically	-	Aug 2020	Oct 2020

Feature	Enabled for	Public preview	Early access*	General availability
UX improvements to sub grids and form tabs in Power Apps mobile app	End users, automatically	-	Aug 2020	Oct 2020
New, improved global search experience in model-driven apps	End users by admins, makers, or analysts	-	-	Oct 2020
Improved model-driven app header, sitemap, and app switching	End users, automatically	-	Aug 2020	Oct 2020
Enable Power BI report or dashboard to be a model-driven app system dashboard	End users by admins, makers, or analysts	Aug 2020	-	Nov 2020
Transition to Unified Interface	End users, automatically	-	Aug 2020	Dec 2020
Recurring appointment support on mobile app	End users by admins, makers, or analysts	Oct 2020	-	Dec 2020
Power Apps component framework for canvas apps	End users by admins, makers, or analysts	✔ Feb 26, 2020	-	Mar 2021

* Some features are available for you to opt-in as part of early access on August 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 and data centers (regions), go to the Dynamics 365 and Microsoft Power Platform availability page.

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.

Power Virtual Agents as a component of the Power Apps portals Studio

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

Feature details

This feature will allow portals makers to drag and drop a Power Virtual Agents bot component on their portal, similar to the Power BI component.

Support for entity permission configuration using the Power Apps portals Studio

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

Feature details

As a part of this feature, we'll enable a simplified experience of setting up complex entity permissions from within portals Studio.

Power Apps component framework control support in Power Apps portals

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

Feature details

Power Apps component framework enables app makers to create code components to use across apps. As part of this release, we'll support code components created using Power Apps component framework inside Power Apps portals.

Power Apps portals web API (general availability)

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	-	-	Feb 2021

Feature details

This feature will make Power Apps portals CRUD web API generally available for all customers.

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 Common Data Service.

Organize business logic in your app with components

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

Feature details

Use the Power Apps formula language to create reusable business logic across apps tied to data events. Reusable logic enables makers to build apps with complex business logic quickly, using the Excel-like language in reusable components within and across apps.

Makers can add a custom page in the model-driven app designer

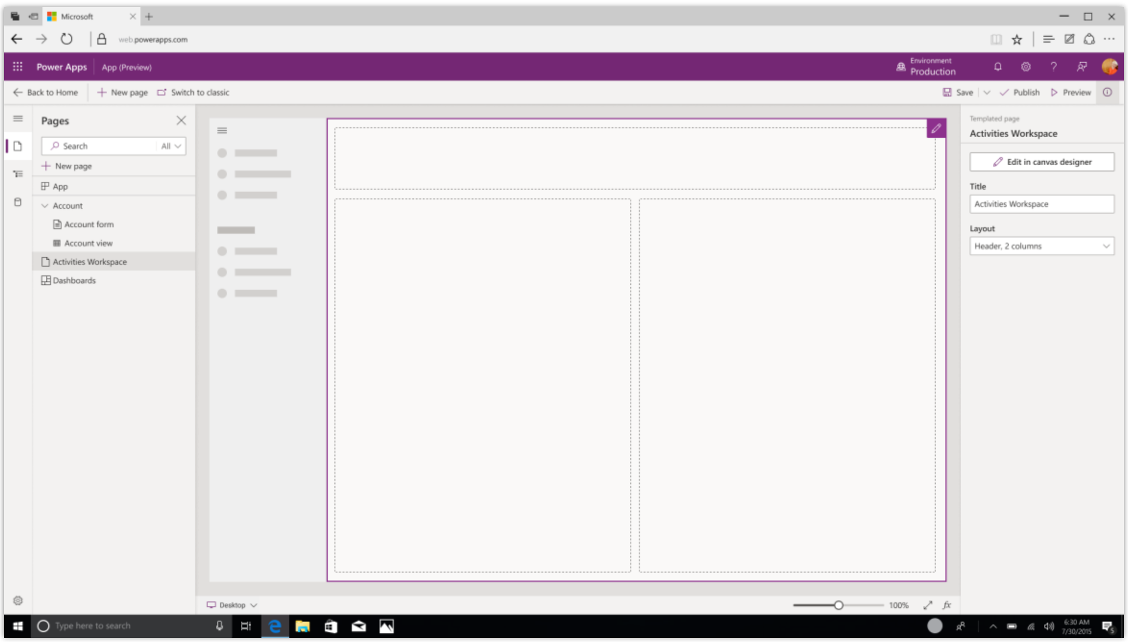
Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	Dec 2020	-	-

Business value

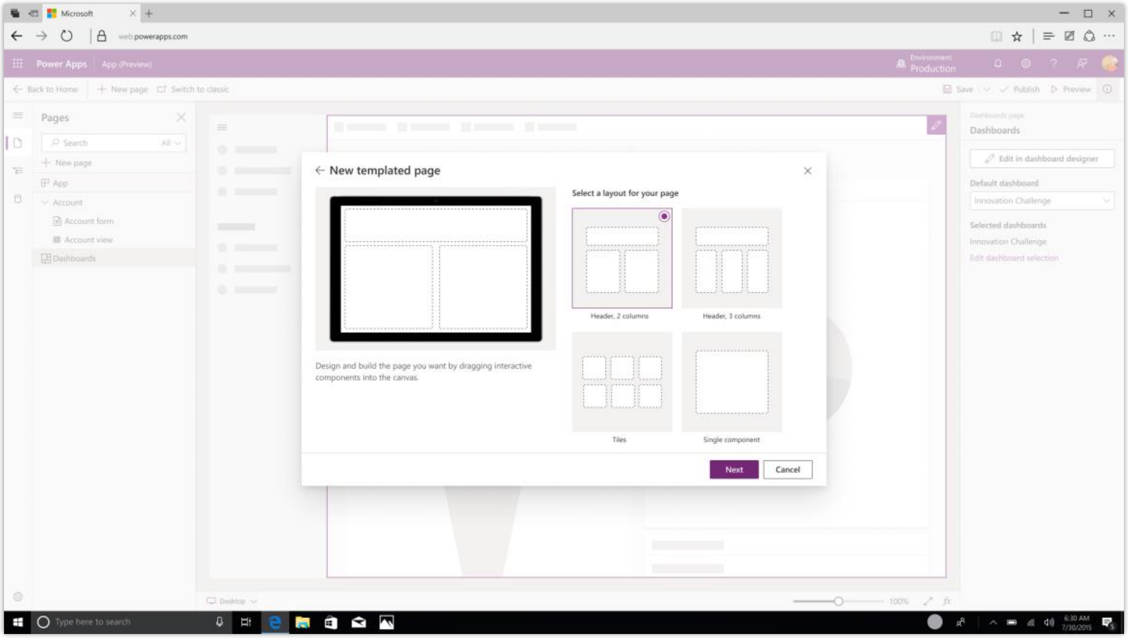
Enables model apps to create custom layouts and use PCF controls in ways that are not possible with the model-driven app form and dashboard pages.

Feature details

Using a modern app and sitemap designer, makers can add custom pages into their model-driven app. The custom page enables more flexibility in the components, behavior, and visuals. Custom pages are authored using the canvas designer, which support no/low code configuration of controls and components.



App designer showing custom page preview



App designer prompting to create new custom page

Preview modern model-driven app designer and sitemap enable is more productive

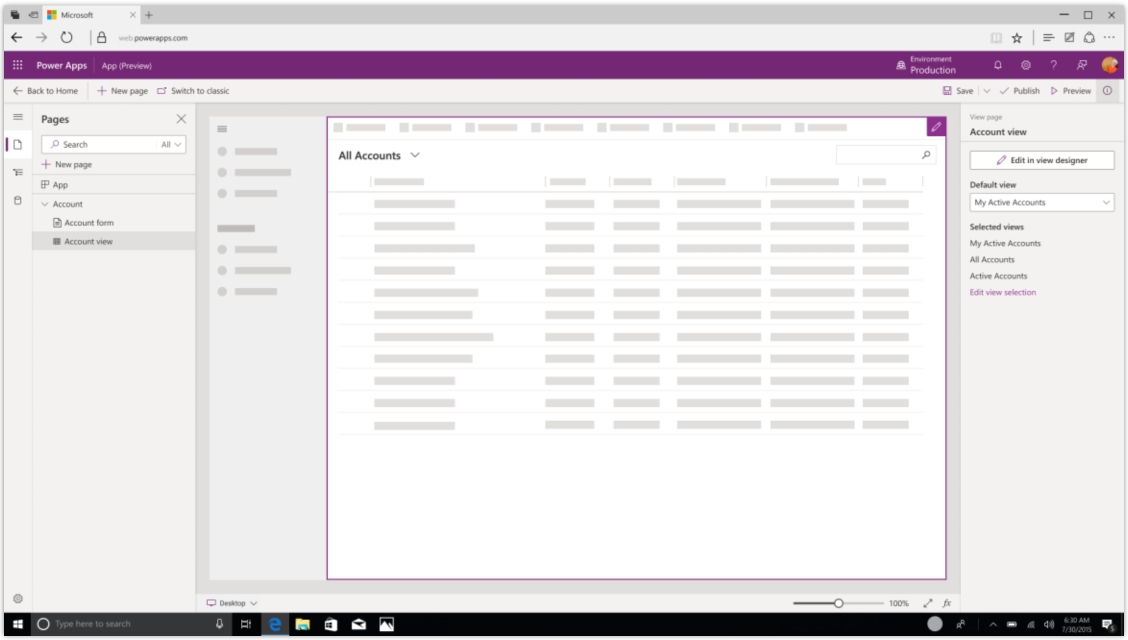
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	Dec 2020	-	-

Business value

Enable authoring model-driven app and sitemap in context and aligned with other designers in the Power Apps shell. Reduce the barrier for adding new features and enabling new page experiences.

Feature details

This new app designer is making app authoring easier with several key changes. It adds a page-based authoring approach that complements existing sitemap/entity authoring. A preview canvas is added to clarify the parts of the app that are being edited. It leverages the modern entity, form, and view designers as well as providing access to the other classic designers.



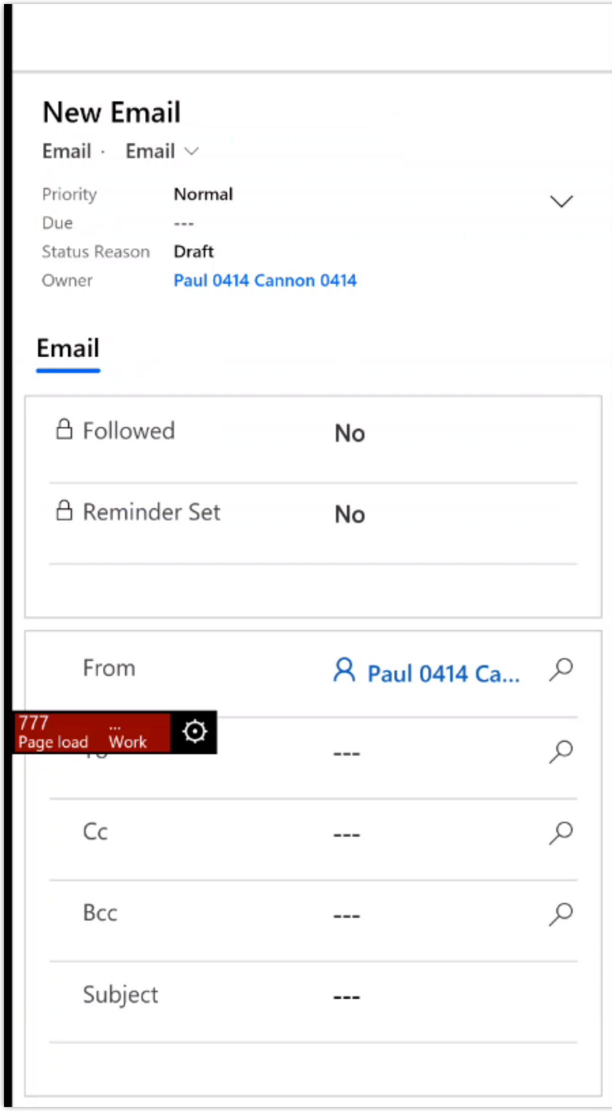
App designer with view page preview

Ability to interact with emails in mobile app

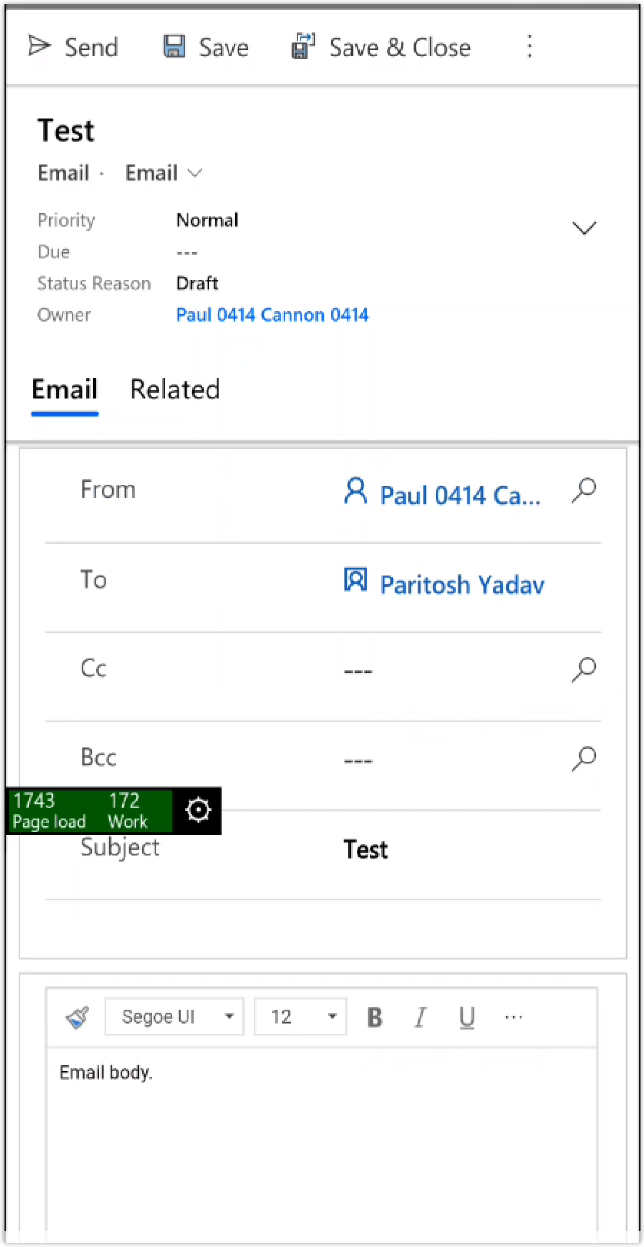
Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Feature details

Users will be able to create, edit, send, and reply to emails using the Power Apps mobile app for both canvas and model-driven apps.



Email on mobile example



Email on mobile

Address key chart customization gaps in Unified Interface

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Feature details

With this release, Unified Interface charting has been updated to support common non-designer customizations available in the legacy web client. These customizations are more advanced since they are only available through XML editing from export and import of the chart definition. This included adding X and Y axis support for grid line color, grid tick marks, data label color, data label hiding, axis label hiding, and axis line color. On the Y axis, support was enabled for minimum, maximum, and intervals. On funnel charts, the neck height and neck width can be defined to adjust the bottom tapering. On the pie, funnel, and multiple donut charts, support was added for border width and border color to enable more visual definition.

UX improvements to sub grids and form tabs in Power Apps mobile app

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Feature details

Usability improvements on how data is presented on a form for model-driven apps in mobile app.

- Sub grids have a prominent header that separates them from the rest of the sections on the form.
- Empty sub grids display the option to add a new record inline, reducing the number of taps needed to add a record.
- Commands on the sub grid are also updated to show up in a drawer from the bottom of the screen, consistent with the page-level commands.
- Form tabs are more discoverable; with the tabs, you can scroll and span horizontally across the screen. When you select a tab, it adjusts the header just enough to reveal the next few tabs.

New, improved global search experience in model-driven apps

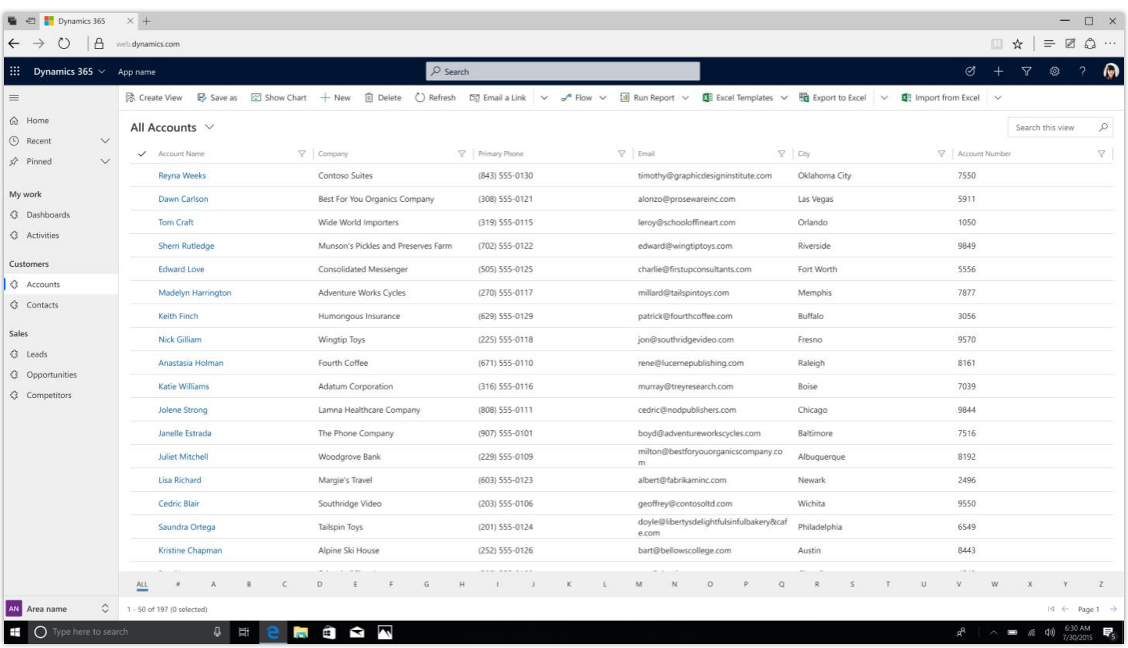
Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	-	-	Oct 2020

Feature details

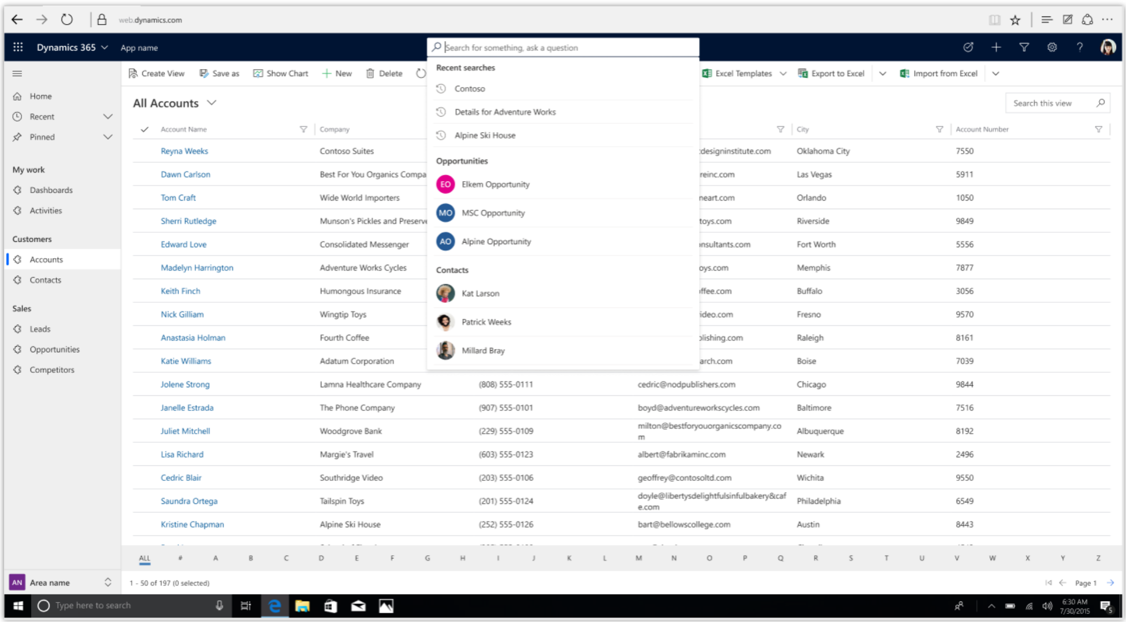
Global search experience in model-driven apps is easy, intuitive, and modern. Prominent search bar, zero query experience with suggestions on recent searches and records, automatic record suggestions based on the typed query, improvements to the search results page, and high-quality results allow users to search for their information easily and quickly. Improvements to search experience will be available for users using relevance search on desktop.

High level details:

- When relevance search is enabled on the environment then it will be available by default to users.
- Prominent and globally discoverable search bar in the header.
- Zero query experience with support for recent searches and recently accessed records.
- Automatic suggestions of records based on the typed query.
- New, improved search results page with easy display and selection of records.
- High quality results with improved ranking and support for basic capabilities, such as spell check.



Prominent search bar



Recent searches and records

Improved model-driven app header, sitemap, and app switching

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Business value

Improved reliability and usability of model-driven app header, sitemap, and app switching.

Feature details

The model-driven app shell has had several enhancements for usability and reliability. The header has an updated Office app launcher, and when clicking on the app name, it will open the inline app switcher. When the website is opened without an app parameter, the message bar enables switching to a specific app. The classic sitemap controls have been replaced with the modern sitemap control for better usability. The embedded mode is updated to an experience aligned with the web browser providing a neutral styling to blend into the host.

Enable Power BI report or dashboard to be a model-driven app system dashboard

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

Business value

Enable rich analytics to be included in model-driven apps as part of solution application lifecycle management (ALM).

Feature details

We are now adding support for customizers to define a system dashboard referencing a Power BI report or dashboard. There is now a new type of dashboard that prompts for the workspace and either a report or dashboard. The workspace and report/dashboard can either be stored statically, which works for a single environment or using an environment variable, which allows configuration per environment.

Transition to Unified Interface

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Dec 2020

Feature details

Unified Interface for model-driven apps will be the standard in 2020 release wave 2. The legacy web client will not be available after 2020 release wave 2. As part of this process we want to make it as easy as possible for you to make the move; therefore, we've introduced a new transition service to switch environments across to Unified Interface prior to December 1, 2020. Environments that aren't transitioned prior to December 1, 2020, will be automatically switched to Unified Interface. This will be applied by location across a multi-week schedule.

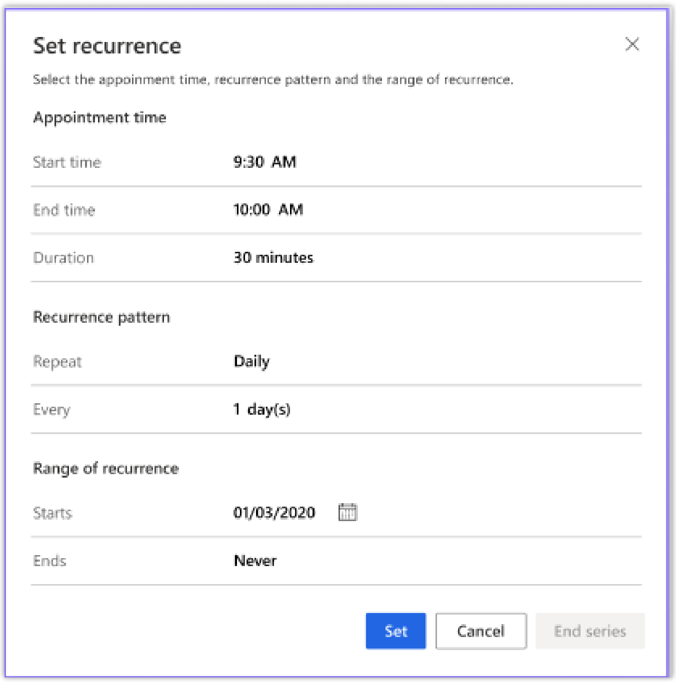
For more information, see Moving forward with your transition to Unified Interface.

Recurring appointment support on mobile app

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

Feature details

Users will be able to set up recurring appointments using the Power Apps mobile app.



Recurrence appointment dialog in Unified Interface

Power Apps component framework for canvas apps

Enabled for	Public preview	Early access	General availability
End users by admins, makers, or analysts	✔ Feb 26, 2020	-	Mar 2021

Business value

By taking advantage of the Power Apps component framework, professional developers can now procure or build their own custom UI extensions for canvas apps.

Feature details

Power Apps code components are reusable, metadata-driven, and solution-aware so they can easily be packaged and moved across organizations to support multiple form factors. Once imported, any canvas app maker can simply add these components to their app, enabling custom functionality that is not available out of the box.

Public preview of Power Apps component framework allows developers and makers to add data sets and test their custom components in canvas apps, taking advantage of the growing list of supported framework APIs. Pro-dev extensibility on a low-code platform opens up possibilities enabling the best of both worlds.

See also

Feature exploration (video)

Announcing the public preview of canvas components and Power Apps component framework (blog)

Code components for canvas apps (docs)

Power Automate

Overview of Power Automate 2020 release wave 2

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 (RPA).

At Build 2020, we announced the acquisition of Softomotive, the maker of **WinAutomation**. WinAutomation is a leading low-code RPA offering, used by thousands of customers with thousands of features built over 15 years. It has a rich desktop-based IDE for customers to build out powerful automation over their applications and is available for free for all Power Automate RPA customers. In 2020 release wave 2, we will update the offering to combine the best of WinAutomation with the cloud-based AI builder and connector-based capabilities in automated flows. This new version will offer customers a way to automate everything from Office apps to legacy terminal applications that haven't been updated in decades.

In addition, there are further enhancements coming to automated flows running in the cloud, including richer automation and approval experiences in other offerings from Microsoft Teams to Dynamics 365 Finance and Operations. Power Automate is the world's first cloud-native automation platform that can meet the needs of end users and developers alike, spanning from their PCs to planet-scale services running in Azure.

What's new and planned for Power Automate

This topic lists features that are planned to release from October 2020 through March 2021. 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.

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Improved integration with Microsoft Power Platform products

Improved and deep integration with other Microsoft Power Platform products, such as Power Apps and Power BI.

Feature	Enabled for	Public preview	Early access*	General availability
Smoother on-ramps for Power Automate and Power Apps	Admins, makers, or analysts, automatically	-	-	Oct 2020

Integration with Microsoft Teams

Create and use Power Automate flows within Microsoft Teams.

Feature	Enabled for	Public preview	Early access*	General availability
Templatizing and distributing common business process scenarios	Admins, makers, or analysts, automatically	-	-	Oct 2020

New UI flows (RPA) capabilities

Increase scale and app compatibility with these new robotics process automation (RPA) capabilities.

Feature	Enabled for	Public preview	Early access*	General availability
Add support to pass arguments to the launch application step in UI flows	Admins, makers, or analysts, automatically	✔ Jul 5, 2020	-	Oct 2020
Add WinAutomation actions to UI flows	Admins, makers, or analysts, automatically	✔ Jul 5, 2020	-	Oct 2020
UI flows allow users to customize the retry and the timeout settings for each action	Admins, makers, or analysts, automatically	✔ Jul 5, 2020	-	Oct 2020
Add delay actions to UI flows	Admins, makers, or analysts, automatically	✔ Jul 14, 2020	-	Oct 2020

Feature	Enabled for	Public preview	Early access*	General availability
UI flows adds support for copy and paste	End users, automatically	-	Aug 2020	Oct 2020
UI flows support do until loops	End users, automatically	-	Aug 2020	Oct 2020
Native support for widely used business applications in UI flows	Admins, makers, or analysts, automatically	Sep 2020	-	Oct 2020
Run UI automation scripts on Remote Desktop	Admins, makers, or analysts, automatically	✔ Jul 8, 2020	-	Oct 2020
Easier setup, creation, and runtime configuration of UI flows	Admins, makers, or analysts, automatically	Sep 2020	-	Oct 2020
New and improved management and monitoring for UI flows	Admins, makers, or analysts, automatically	Sep 2020	-	Oct 2020
Scale unattended UI flows	Admins, makers, or analysts, automatically	Sep 2020	-	Oct 2020

* Some features are available for you to opt-in as part of early access on August 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.
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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 and data centers (regions), go to the Dynamics 365 and Microsoft Power Platform availability page.

Improved integration with Microsoft Power Platform products

Overview

Power Automate will provide improved and deep integration with other Microsoft Power Platform products to enable better application lifecycle management (ALM) scenarios and simpler inclusion of flows within Power Apps and Power BI.

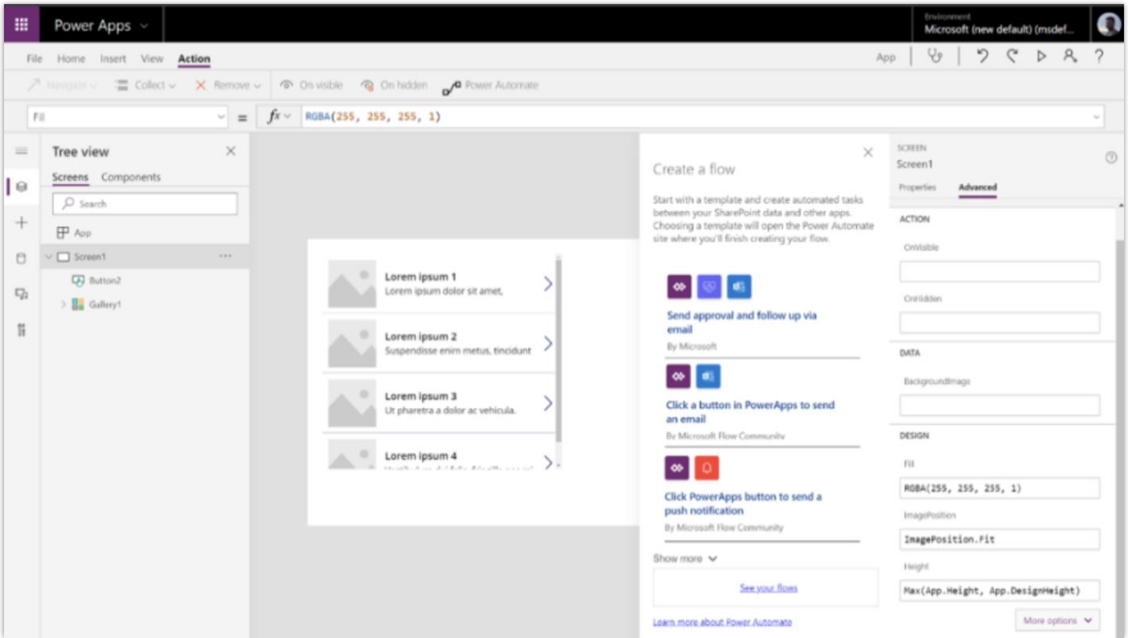
Smoother on-ramps for Power Automate and Power Apps

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

Feature details

Customers are looking to build better, more-integrated apps that seamlessly work with existing capabilities in the Microsoft Power Platform; however, integrating the Power Apps and Power Automate together to make a more robust application can be a challenging experience for a maker.

We are planning a more integrated solution for Power Automate within Power Apps that utilizes existing Power Automate widget solutions to onboard users and more easily add a flow into a canvas app from within the studio experience. The widget would help makers get started by providing inline templates for popular scenarios, considering the context and the data sources with which the user is working. The goal is to provide users with a fully integrated experience, so that they can create and add a flow to Power Apps completely in context.



Power Apps and flows

After the flow is added, there will be first-class knowledge of the flow in the app itself. This means the app can automatically respond to changes in the connections or parameters in the flow. Users will never need to delete and re-add the flow from their app to make it work after changes in the flow.

Integration with Microsoft Teams

Overview

Create and use Power Automate flows within Microsoft Teams, including in-context flow triggers, simpler template acquisition, and integrated approvals experiences.

Templatizing and distributing common business process scenarios

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

Feature details

There are common tasks that most organizations need, from recruitment to vacation management. We will provide templates for administrators and makers to build these processes directly from within applications such as Microsoft Teams, allowing them to customize the experiences to fit their needs.

These templates include building blocks for a variety of industries, such as retail. These integrations will be done using a dedicated app to acquire, customize, and manage business processes within integration points.

Unlike the current experience, these templates will leverage the "diet designer" – a streamlined way to provide configuration to a template without having to see the full designer experience.

New UI flows (RPA) capabilities

Overview

Robotics process automation (RPA) with UI flows enables customers to automate their legacy applications at the UI layer. With these new capabilities, you will be able to increase the scale as well as benefit from new programmability and compatibility features.

Add support to pass arguments to the launch application step in UI flows

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	✔ Jul 5, 2020	-	Oct 2020

Feature details

The first step in a UI flow is always the **launch application** step. Sometimes, the maker needs to pass command line arguments to the **launch application** step. With this feature, we are adding a new input textbox under the **Show advanced options** section to allow makers to provide command line arguments that will be passed to the application during launch.

See also

[New WinAutomation action in UI flows is now available](#) (blog)

Add WinAutomation actions to UI flows

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	✔ Jul 5, 2020	-	Oct 2020

Business value

First step to integrate WinAutomation into Power Automate.

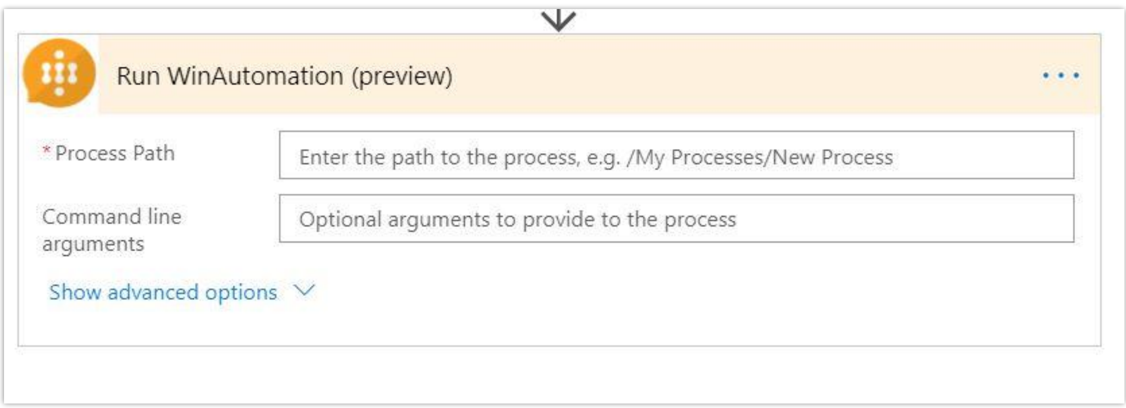
Feature details

This is the first step that enables makers to use WinAutomation processes with Power Automate. A new **WinAutomation** action is added into UI flow designer to allow users to run a WinAutomation process. Follow these steps to use this feature:

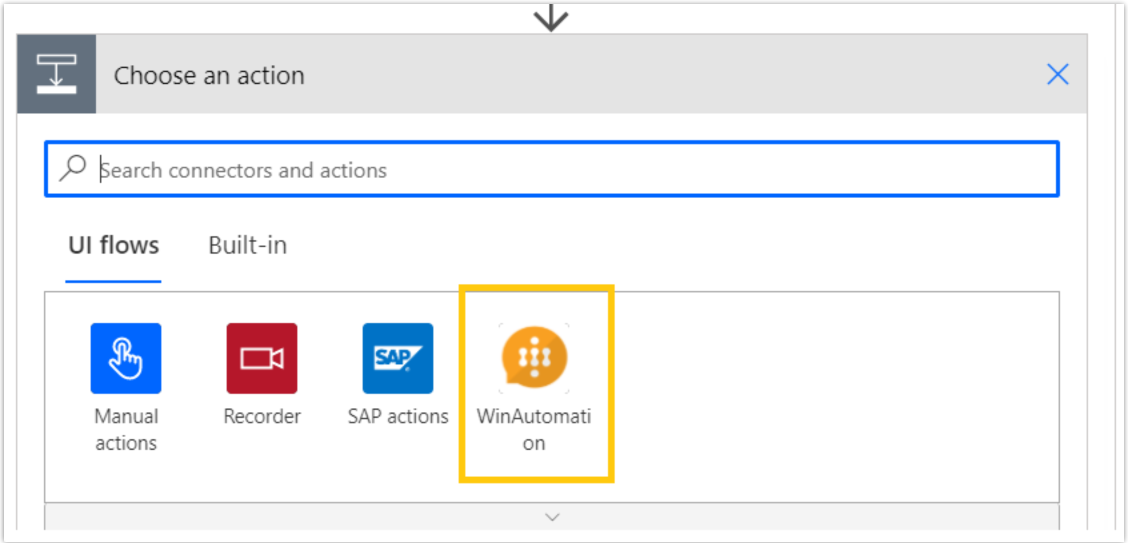
1. Create a WinAutomation process outside of Power Automate.

2. Create a UI flow, and then select the new **WinAutomation** action.

3. Configure the action to with the path and any optional parameters for the WinAutomation process to be run. UI flows will automatically kick off the process through the gateway on the local machine as well as monitor the process run to completion.



Configure the WinAutomation action



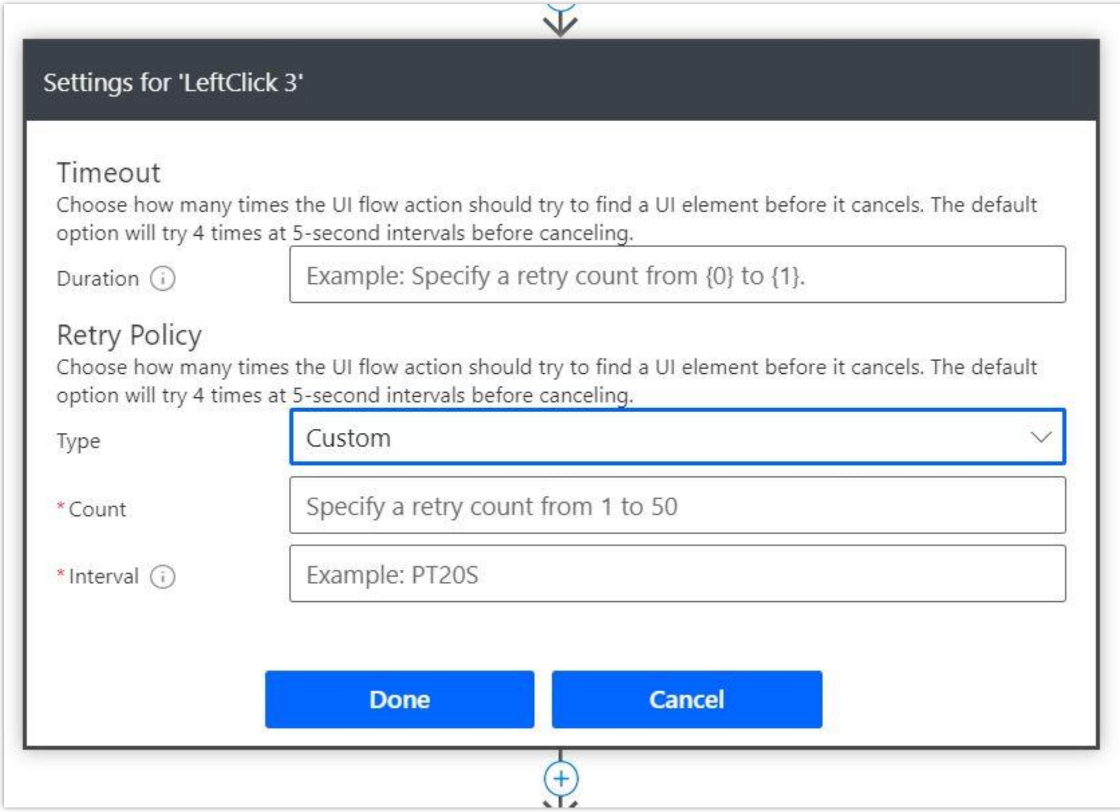
New action for WinAutomation

UI flows allow users to customize the retry and the timeout settings for each action

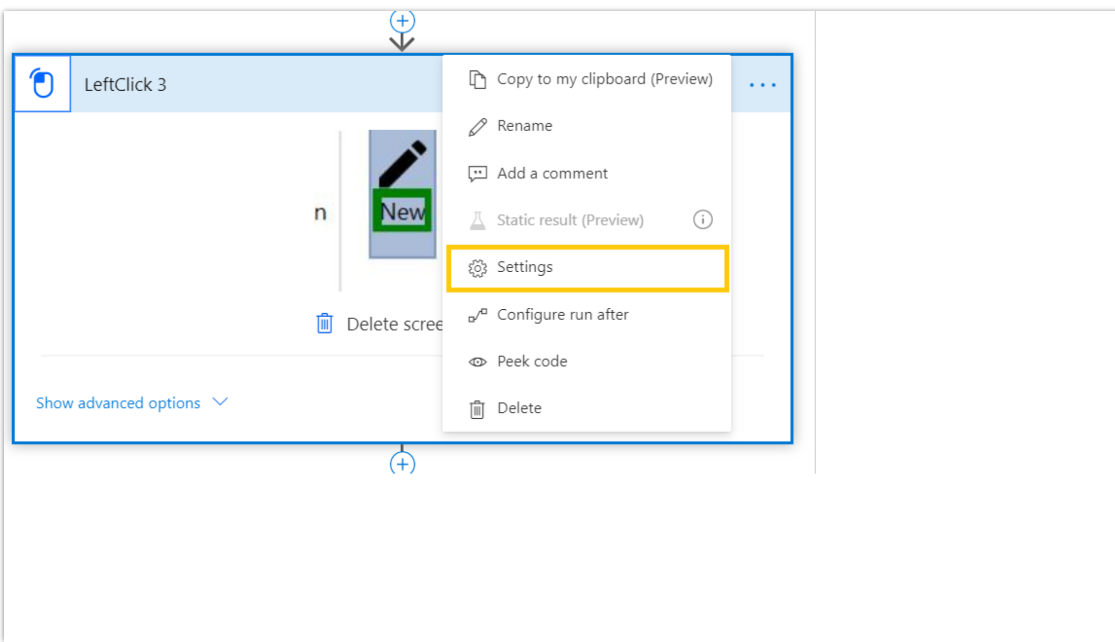
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	✔ Jul 5, 2020	-	Oct 2020

Feature details

Users can customize the retry policy and the timeout settings for each action in a UI flow. These customizations include setting different retry counts or retry intervals for any steps that are likely to fail. These customizations will improve the reliability and performance of UI flow scripts at runtime.



Users can specify a custom retry policy or timeout value



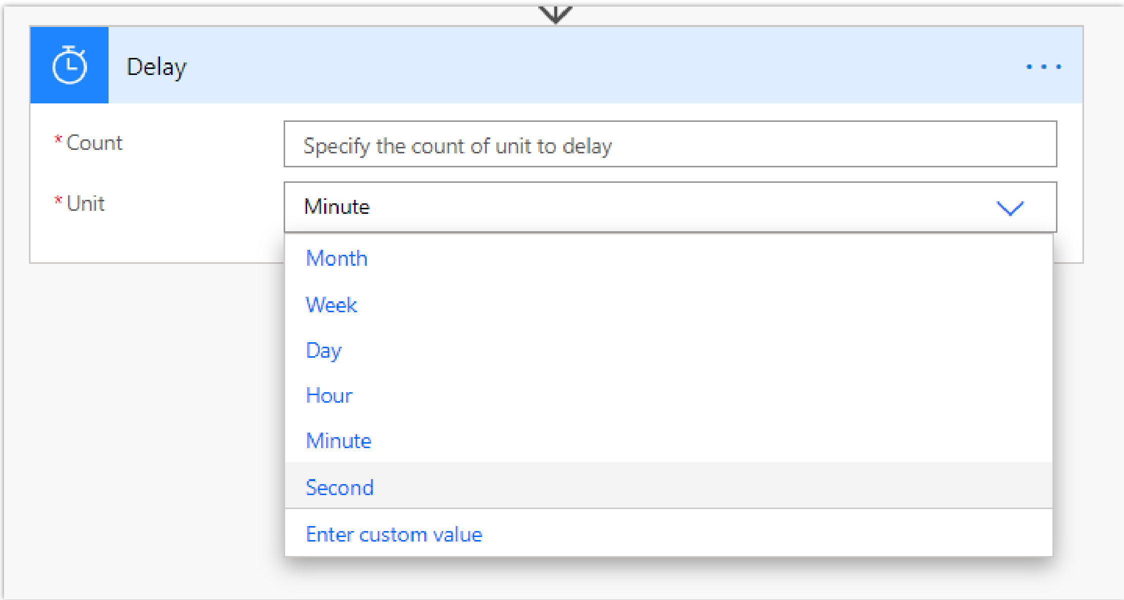
Users can customize this setting from UI flow designer

Add delay actions to UI flows

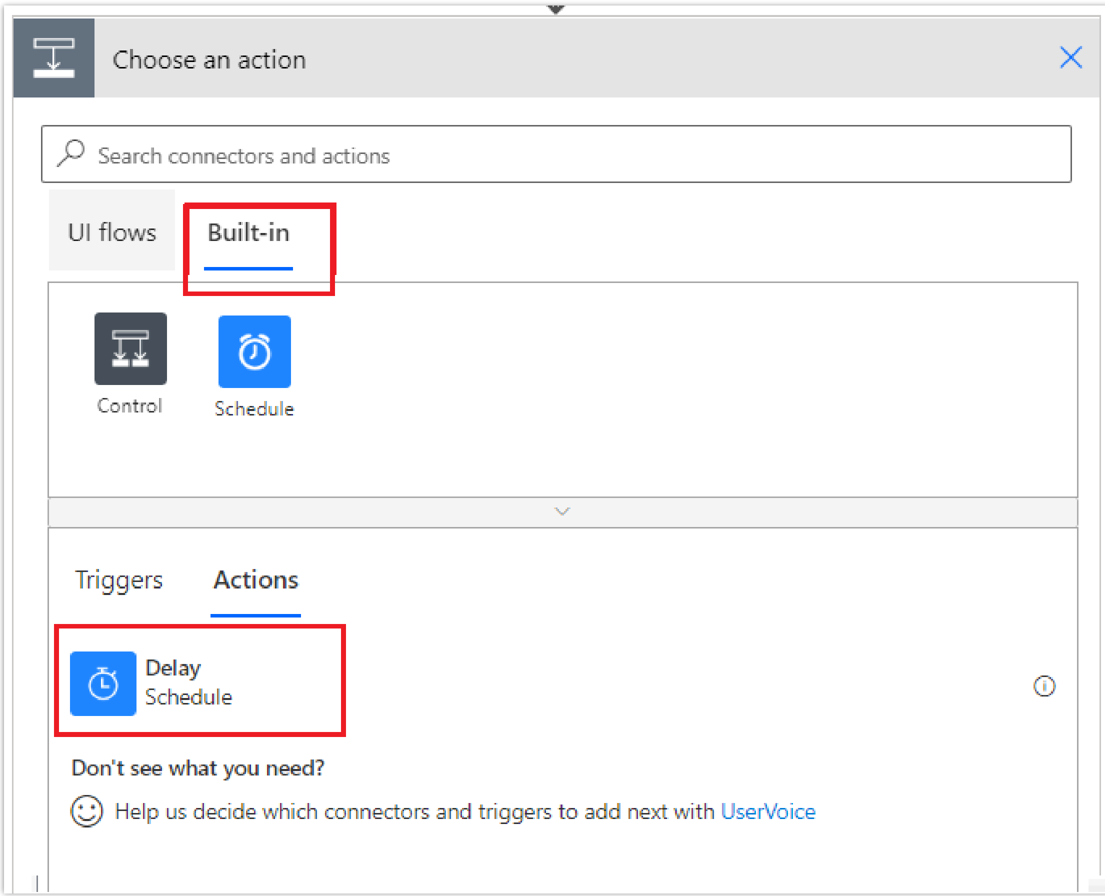
Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	✔ Jul 14, 2020	-	Oct 2020

Feature details

With this feature, makers can add **delay** actions wherever they are needed in UI flows. Add the **delay** action wherever your UI flows need additional time to get the application into the correct state.



Configure delay action



Select new delay action

UI flows adds support for copy and paste

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Feature details

You can copy actions and scopes and use **Add an action** to select the copied actions and scopes from **my clipboard** to insert into another location or UI flow. The copied actions and scopes will be given unique names automatically. If a scope has another scope inside of it, the nested structure is retained when you paste items from **my clipboard**.

UI flows support do until loops

Enabled for	Public preview	Early access	General availability
End users, automatically	-	Aug 2020	Oct 2020

Feature details

With this feature, you can use do until loops in UI flows.

Native support for widely used business applications in UI flows

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

Feature details

We are adding built-in automation support for key applications that are leveraged across businesses, such as SAP and Excel. This feature enables users to build UI flows which use libraries for these commonly used applications in frequently used scenarios. This up-levels concepts, so that instead of working with basic keyboard or mouse-click interactions, users can interact with the logic components of an application instead. This will mean businesses can create more resilient automation of their business-critical processes.

Run UI automation scripts on Remote Desktop

Enabled for	Public preview	Early access	General availability
Admins, makers, or analysts, automatically	✔ Jul 8, 2020	-	Oct 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.

Easier setup, creation, and runtime configuration of UI flows

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

Feature details

We are making the following improvements across UI flow setup, creation, and configuring a UI flow as part of a flow:

- When creating new UI flows, makers will be notified if there is a new version of the UI flow app so they can take advantage of the new features.
- Users can cancel or resubmit a UI flow, see the screenshots of a failed run, and know the connection status of a flow run.
- When adding a UI flow as part of a flow, users can see the gateways that have the UI flow app so they can be confident about the configuration.

New and improved management and monitoring for UI flows

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

Feature details

Makers need a consolidated view to see how their UI flows are doing. It is necessary to see an overview of your UI flow runs, flows using the UI flows, and most common errors. This will help to understand the bot utilization, identify error patterns, and troubleshoot issues.

Scale unattended UI flows

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

Feature details

We will make it easier for organizations to scale unattended UI flows with improved reliability and remediation.

Power Virtual Agents

Overview of Power Virtual Agents 2020 release wave 2

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.

The 2020 release wave 2 brings expanded capabilities in the authoring experience including tools to create richer content, Adaptive Cards capabilities, topic suggestions from documents, improved Power Automate integration, voice integration with smart speakers, theming to customize the look and feel of the bot, and much more.

Use Power Virtual Agents documentation to get detailed information and answers to address your needs, from basic authoring tips all the way to complex bot configuration topics.

What's new and planned for Power Virtual Agents

This topic lists features that are planned to release from October 2020 through March 2021. 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
Automatically start a bot conversation with a welcome topic	End users by admins, makers, or analysts	-	Jan 2021
Basic bot theming	End users by admins, makers, or analysts	-	Jan 2021

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
Adaptive Cards	End users by admins, makers, or analysts	-	Jan 2021
Add images and videos to topics	End users by admins, makers, or analysts	-	Jan 2021
Understand and handle Power Automate flow integration	Admins, makers, or analysts, automatically	-	Jan 2021
Use list variables	End users by admins, makers, or analysts	-	Jan 2021

Enable voice interactions

Enable bots to use voice interactions for your users.

Feature	Enabled for	Public preview	General availability
Deploy Power Virtual Agents as Alexa Skills	End users by admins, makers, or analysts	Oct 2020	-

Enhanced natural language capabilities

Enhanced natural language capabilities

Feature	Enabled for	Public preview	General availability
Multi-turn topic suggestions from a webpage	End users by admins, makers, or analysts	-	Oct 2020
Topic suggestions from files (CSV, DOCX, PDF) hosted on a webpage	End users by admins, makers, or analysts	-	Oct 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 and data centers (regions), go to the Dynamics 365 and Microsoft Power Platform availability page.

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.

Automatically start a bot conversation with a welcome topic

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Jan 2021

Feature details

Configure your bot to automatically show a message at the start of a conversation.

This can be used as a welcome message to express the business's voice and to suggest some initial questions that customers can ask the bot.

Basic bot theming

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Jan 2021

Feature details

Bot authors will be able to customize the look and feel of their bot to match their brand colors and style as well as change the bot icon with bot theming.

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.

Adaptive Cards

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Jan 2021

Feature details

Easily author rich content without needing to write code by using Microsoft Adaptive Cards directly from within the authoring experience. Adaptive Cards will be displayed consistently wherever your customers are and tailored to their screen size and device capability.

Add images and videos to topics

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Jan 2021

Feature details

Enhance bot conversations by adding the URLs to online-hosted images and videos in your topics. By including an image or video in a bot's response (instead of using a long textual description), you can handle complex scenarios while keeping messages concise.

Understand and handle Power Automate flow integration

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Jan 2021

Feature details

Use the **Call an action** node to refresh and replace Power Automate flows directly in a conversation without removing or replacing the flow, and see changes made in Power Automate directly in the Power Virtual Agents authoring canvas.

For example, if you change the variable names, input, and output of a flow, the changes will be reflected directly in the authoring canvas. You'll also receive notifications about these changes from within Power Virtual Agents.

Use list variables

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	-	Jan 2021

Feature details

Bot authors can use a list variable to take array outputs from Power Automate and Bot Framework Skills and present them as a list of choices in a bot question.

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.

Deploy Power Virtual Agents as Alexa Skills

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

Feature details

Bot authors can use the new Alexa channel to deploy Power Virtual Agents bots as Alexa skills. This means users can have voice interactions with bots in the Amazon Alexa app and on Alexa-compatible devices.

Enhanced natural language capabilities

Overview

Power Virtual Agents is powered by conversational AI and natural language capabilities, which enable the system to understand complex language, parse it for the appropriate information, and ask for clarification when needed.

Multi-turn topic suggestions from a webpage

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

Feature details

Today, you can point Power Virtual Agents at an FAQ webpage, and it will crawl the site and extract question and answer pairs to bring suggestions into the bot to help "seed" it with content quickly. So far, those suggestions have been single turn as a question and answer.

In 2020 release wave 2, Power Virtual Agents will add the ability to extract multi-turn topic suggestions, automatically generating more elaborate dialogs that are valuable for troubleshooting and other scenarios.

Topic suggestions from files (CSV, DOCX, PDF) hosted on a webpage

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

Feature details

Today, you can point Power Virtual Agents at an FAQ webpage, and it will crawl the site and extract question and answer pairs to bring suggestions into the bot to help "seed" it with content quickly.

In 2020 release wave 2, Power Virtual Agents will add the ability to extract suggestions from CSV, DOCX, and PDF files hosted on a webpage.

Governance and administration

Overview of Microsoft Power Platform governance and administration 2020 release wave 2

Power Platform admin center provides an architecture, a functional, and a user experience model that spans across Power Apps, Power Automate, and Common Data Service to enable all components related to an environment to participate in environment lifecycle operations, such as create, reset, and copy. With this capability, you can move your complete solutions, apps, and flows between development, test, user acceptance, and production environments more seamlessly.

What's new and planned for Microsoft Power Platform governance and administration

This topic lists features that are planned to release from October 2020 through March 2021. 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 a unified admin experience for Microsoft Power Platform product offerings as well as customer engagement apps.

Feature	Enabled for	Public preview	General availability
Common Data Service errors, performance data, and diagnostics data in customer's own Azure Application Insights	Admins, makers, or analysts, automatically	Oct 2020	

Description of **Enabled for** column values:

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An enhanced, unified Power Platform admin center

Overview

The Power Platform admin center is a unified admin experience for Microsoft Power Platform product offerings as well as customer engagement apps. It is offering a unified experience to manage environments, deployments, users, capacity, and usage. Powerful analytics empower 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.

Common Data Service errors, performance data, and diagnostics data in customer's own Azure Application Insights

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

Business value

By making it possible to gain insights into errors and performance issues with Common Data Service and model-driven apps, your business can improve the user experience through better monitoring and resolution of production issues as well as proactive maintenance. In addition, since the platform logged data is itself available, in many cases it will reduce the need for you to write custom code for errors and performance.

Feature details

You can opt-in to export production environments platform logged error and performance data for Unified Interface form-loads, plug-ins, and platform APIs through the Microsoft Power Platform admin center. This data in Application Insights will allow your team to gain deeper insights, through both out-of-box and custom reports. The key is that this enables self-serve and improved outcomes for both reactive and proactive scenarios.

Reactive scenario: when an incident is raised by users, your support team can leverage Application Insights to quickly view metrics based off the user ID and gain insights into details like:

- Was the issue specific to a single user or applicable to all users?
- Has a particular API call from Unified Interface form been failing in a certain region causing poor form performance?
- How was the API performing prior to a reported issue based on the time of day and location? Was API degradation gradual or sudden?

Support can now triage issues to understand if the issue was caused by custom code or platform code. If custom code, the issue can be redirected to the internal engineering team. If platform code is the issue, raise a support ticket with Microsoft.

Proactive scenario: alerts based off performance thresholds for form-loads, APIs, and plug-ins can be set up in Application Insights. When these thresholds are reached, the alerts will allow proactive maintenance. For example, when a custom form load performance drops below a predefined value, your own DevOps team can be alerted, to allow for triage and proactive resolution.

The data available in your Application Insights will also light up out-of-box reports for user activity with specific forms and will allow admins to understand adoption blockers and drivers.

Data integration

Overview of data integration 2020 release wave 2

The 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 allow other Microsoft products to leverage this data.

We are investing in a few key pillars:

- Microsoft 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 Microsoft Power Platform.
- 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, and ML algorithms.
- Enhanced data integration by enabling analytics on Common Data Service data through Export to Data Lake in Common Data Model form, Office data integration to enable new insights, new and enhanced connectors, improvements in connectivity platform, extending dual-write for more entities, improving Data Export Service, and enhancing Gateway for enterprises and Robotics Process Automation (RPA).
- Gateway and Azure Virtual Network (VNet) connectivity in Microsoft Power Platform will allow enterprises to scale out their cloud to cloud integrations without leveraging the Gateway, removing complexity and administration effort in building a true, democratized data platform.

What's new and planned for data integration

This topic lists features that are planned to release from October 2020 through March 2021. 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.

Dual-write

Dual-write provides a tightly coupled near real time and bi-directional integration between Dynamics 365 Finance and Supply Chain Management and Common Data Service.

Feature	Enabled for	Public preview	General availability
Dual-write support for Microsoft Government Cloud	Admins, makers, or analysts, automatically	Mar 2021	-
Common Data Model authoring experience	Admins, makers, or analysts, automatically	Nov 2020	Mar 2021
Ability to sequence writes	Admins, makers, or analysts, automatically	-	Mar 2021

Export to Data Lake

The Export to Data Lake service enables continuous replication of Common Data Service entity data to Azure Data Lake Storage Gen2, which can then be used to run analytics like Power BI reporting and machine learning (ML).

Feature	Enabled for	Public preview	General availability
Ability to link Export to Data Lake to Azure Synapse	Admins, makers, or analysts, automatically	-	Mar 2021
Configurable snapshot intervals	Admins, makers, or analysts, automatically	-	Mar 2021
Cross-tenant support	Admins, makers, or analysts, automatically	-	Mar 2021
Dashboard showing count and trend of records	Admins, makers, or analysts, automatically	-	Mar 2021

Feature	Enabled for	Public preview	General availability
Export to Data Lake support for GCC-L4	Admins, makers, or analysts, automatically	-	Mar 2021
Parquet format	Admins, makers, or analysts, automatically	-	Mar 2021
Smart partitioning	Admins, makers, or analysts, automatically	-	Mar 2021
Support exporting audit data to Azure Data Lake	Admins, makers, or analysts, automatically	-	Mar 2021
Support for entities with attachments	Admins, makers, or analysts, automatically	-	Mar 2021
Support for soft delete	Admins, makers, or analysts, automatically	-	Mar 2021
Time series data	Admins, makers, or analysts, automatically	-	Mar 2021
Update to the latest version of Common Data Model	Admins, makers, or analysts, automatically	-	Mar 2021

Microsoft Power Platform connectors

A critical part of data integration and the suite of products it supports — Power Apps, Power Automate, Power BI, and Power Query — is connectivity to external data sources. The connector platform has two key objectives – providing a platform that allows partners and customers to develop connectors.

Feature	Enabled for	Public preview	General availability
Connection string support for SQL Server	Admins, makers, or analysts, automatically	Mar 2021	
Service principal support for SQL Server	Admins, makers, or analysts, automatically	Mar 2021	
Use the Microsoft Excel Online connector in Power Apps	Admins, makers, or analysts, automatically	Mar 2021	
Better process for handling versions during connector certification	Admins, makers, or analysts, automatically	-	Mar 2021
Feedback for certified connectors	Admins, makers, or analysts, automatically	-	Mar 2021
More certified and custom connectors in our open source repository	Admins, makers, or analysts, automatically	-	Mar 2021
Provide in-product guidance when connectors and operators are deprecated	Admins, makers, or analysts, automatically	-	Mar 2021
Submit connector templates as part of connector certification	Admins, makers, or analysts, automatically	-	Mar 2021
User interface within the Connector Certification Portal to add authors	Admins, makers, or analysts, automatically	-	Mar 2021

Microsoft Power Platform dataflows

Microsoft 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 Common Data Service and Azure Data Lake Storage in Common Data Model format.

Feature	Enabled for	Public preview	General availability
Dataflow output profiling statistics	Admins, makers, or analysts, automatically	Mar 2021	
Dataflows management capabilities for admins	End users, automatically	Mar 2021	-
Power Platform dataflows grow up into Azure Data Factory	Admins, makers, or analysts, automatically	Mar 2021	
Publish a dataflow from Desktop	End users, automatically	Mar 2021	-
Spark-based compute support for Power Platform dataflows	Admins, makers, or analysts, automatically	Mar 2021	

Microsoft Power Platform gateway

On-premises data gateway.

Feature	Enabled for	Public preview	General availability
Gateway diagnostics	End users by admins, makers, or analysts	Mar 2021	

Power Query Online

Power Query is the data connectivity and data preparation experience for users across a wide variety of Microsoft products and services, including Power BI, Excel, Customer Insights, and several more.

Feature	Enabled for	Public preview	General availability
Certified connectors in Power Query Online	Admins, makers, or analysts, automatically	Dec 2020	

Feature	Enabled for	Public preview	General availability
Custom connectors in Power Query Online	Admins, makers, or analysts, automatically	Dec 2020	
Diagram view for authoring	Admins, makers, or analysts, automatically	Mar 2021	
Import/export custom dataflows templates	Admins, makers, or analysts, automatically	Mar 2021	
Semantic types and transforms (Phase 1)	Admins, makers, or analysts, automatically	Dec 2020	Mar 2021
Semantic types and transforms (Phase 2)	Admins, makers, or analysts, automatically	Mar 2021	To be announced

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Dual-write

Overview

Customers use and monitor their sales processes with the strength of Common Data Service while all aspects of fulfillment and invoicing take place using the rich functionality of Dynamics 365 Finance and Supply Chain Management. Dual-write allows our customers to not think about these applications as different systems to write to independently; rather, the underlying infrastructure makes it seamless for these apps to write simultaneously. It provides a tightly coupled near real time and bi-directional integration between Dynamics 365 Finance and Supply Chain Management and Common Data Service. Once an entity map (for example, Account – Customer) is enabled for dual-write, any create or update change in the **Customer** entity in Dynamics 365 Finance and Supply Chain Management results in writes in near real time to the **Account** entity in Common Data Service and vice versa.

Dual-write support for Microsoft Government Cloud

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2021	-

Feature details

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

Common Data Model authoring experience

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Nov 2020	Mar 2021

Feature details

Increased focus on growing Common Data Model ecosystem requires enabling users to work with Common Data Model in their native data environments, such as Power Query, Insights Apps, Azure Synapse, and Power BI. Having a standardized way to author and manage the lifecycle for Common Data Model definitions across relevant products will increase adoption, lower barriers to entry, reduce support cost, and encourage contributions to the growing adoption of Common Data Model.

Ability to sequence writes

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

With this feature, you'll have the ability to sequence writes while writing from 1:Many maps (for example, Dynamics 365 Finance and Supply Chain Management Worker to Worker and Worker person on Common Data Service).

Export to Data Lake

Overview

The **Export to Data Lake** service enables continuous replication of Common Data Service entity data to Azure Data Lake Storage Gen2, which can then be used to run analytics, such as Power BI reporting, machine learning (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 your Data Lake. Any data or metadata changes (initial and incremental) in Common Data Service is automatically pushed to the Data Lake without any additional actions.

This service also empowers our first party AI apps (Customer Insights, Sales Insights, CCA and AI Builder, and so on) by continuously pushing Common Data Service data to Azure Data Lake Storage Gen2.

Ability to link Export to Data Lake to Azure Synapse

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

Azure Synapse is a limitless analytics service that brings together enterprise data warehousing and big data analytics. It gives you the freedom to query data on your terms using either serverless on-demand or provisioned resources at scale. In 2020 release wave 2, we're doing a basic integration to provide the ability to use Azure Synapse SQL on-demand to explore and query the data in your Data Lake and also serve your data warehousing needs.

Configurable snapshot intervals

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

Up until now, we only provided hourly snapshots for larger analytical workloads. In 2020 release wave 2, you'll be able to configure snapshot intervals based on the needs of your business.

Cross-tenant support

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

Up until now, we required your Common Data Service environment to be in the same tenant as your Azure Data Lake Gen2 storage. This was a problem for customers who maintain their Azure storage in a separate tenant that cannot be moved. With this feature, we're alleviating these requirements and no longer requiring them to be in the same tenant.

Dashboard showing count and trend of records

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

To help you review the progress of writes, especially for larger data sets from Common Data Service to Azure Data Lake Storage Gen2, we will provide you with a dashboard showing the count and a visual trend of records.

Export to Data Lake support for GCC-L4

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

With 2020 release wave 2, we are making investments in Export to Data Lake to support government cloud GCC (Level 4) and DoD.

Parquet format

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

Until now, we supported exporting Common Data Service entity data to the Azure Data Lake Storage Gen2 in .csv format. In 2020 release wave 2, we'll support exporting data in parquet format to improve efficiency and performance in both storage and large-scale query processing.

Smart partitioning

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

While exporting data to Azure Data Lake Storage Gen2, we partition the data by year to improve efficiency in data consumption. In 2020 release wave 2, based on the amount of data, we'll smartly partition the data, adding more granular level partitions, such as partitioning by month.

Support exporting audit data to Azure Data Lake

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

Common Data Service supports an auditing capability where entity and attribute data changes within an organization can be recorded over time for use for analysis and reporting purposes. In 2020 release wave 2, we'll support exporting entity audit data to Azure Data Lake Storage Gen2.

Support for entities with attachments

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

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.

Support for soft delete

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

In 2020 release wave 2, we will provide an option to soft delete data for situations in which you need to remove data from the source but keep the data in the Data Lake for reporting purposes.

Time series data

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

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

Update to the latest version of Common Data Model

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

Export to Data Lake using Common Data Model to provide semantic meaning alongside the data makes it easier for other systems and applications to understand and use data stored in a Data Lake. Common Data Model is the shared data language used by business and analytical applications. In 2020 release wave 2, we're updating to the latest version of Common Data Model.

Microsoft Power Platform connectors

Overview

A critical part of data integration and the suite of products it supports — Power Apps, Power Automate, Power BI, and Power Query — is connectivity to external data sources. The connector platform has two key objectives: providing a platform that allows partners and customers to develop connectors efficiently and providing a rich set of connectors for customers.

As part of platform investments, we provide a rich set of tools, samples, and documentation to help partners and customers build connectors. We also invest in our certification processes and tools for connectors so that partners can get their connectors certified and make it available on the platform. A key investment here is also geared towards leveraging the larger community by open sourcing connectors.

Along with strengthening the ISV community's ability to create their own connectors, we plan to continue to invest in enterprise-grade data connectors like SQL Server, SAP, Oracle Database, Outlook, and more.

Connection string support for SQL Server

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2021	-

Feature details

In 2020 release wave 2, the SQL Server connector accepts a connection string to be used. This provides additional flexibility to users where they can specify many native SQL connection properties.

Service principal support for SQL Server

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2021	-

Feature details

With support for Azure AD based authentication in the SQL Server, users can now also connect to the SQL Server using a service principal.

Use the Microsoft Excel Online connector in Power Apps

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2021	-

Feature details

Although Excel Online documents can be accessed from Power Automate, it hasn't been possible to use the Excel Online connector in Power Apps until recently. In 2020 release wave 2, we will include support for the Excel Online connector in Power Apps; therefore, we now provide a capable, reliable, quick-start approach to building apps over data in Excel spreadsheets. This will unlock the vast set of unstructured data that we have in Excel today and benefit users who are familiar with Excel, allowing them to take advantage the low-code, no-code app building experience that we provide through Power Apps.

Better process for handling versions during connector certification

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

Currently, partners are only able to submit one version of a connector at a time for certification. We're looking to provide a process that will make this a friendlier experience. This feature will define a better experience for partners who are looking to certify versions of a connector simultaneously.

Feedback for certified connectors

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

We often receive requests from partners regarding feedback 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 feedback to owners through the connector certification portal.

More certified and custom connectors in our open source repository

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

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.

Provide in-product guidance when connectors and operators are deprecated

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

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'll provide an in-product experience that clearly warns users that the connector or operation is deprecated. Additionally, we'll recommend a supported connector or operation to replace the deprecated features.

Submit connector templates as part of connector certification

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

Partners will be able to submit connector templates for certification after their connector has been certified in a unified certification experience.

User interface within the Connector Certification Portal to add authors

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	-	Mar 2021

Feature details

Previously, partners would have to request changes to authorship permissions of their connector submissions in the certification portal. With this feature, partners will be able to manage authors themselves within the portal experience.

Microsoft Power Platform dataflows

Overview

Microsoft 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 Common Data Service and Azure Data Lake Storage in Common Data Model format.

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

Dataflow output profiling statistics

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2021	-

Feature details

Data profiling is one of the most acclaimed features by Power Query customers. Now, we're continuing to expand data profiling capabilities into Microsoft Power Platform analytical dataflows to enable both storage and consumption of data profiling statistics for dataflow output entities.

Dataflows management capabilities for admins

Enabled for	Public preview	General availability
End users, automatically	Mar 2021	-

Feature details

We are introducing administration capabilities to Microsoft Power Platform dataflows to enable environment administrators to view all dataflows created in environments, reassign dataflows to new owners, and certify dataflows that are the authoritative source for critical information in the organization.

Microsoft Power Platform dataflows grow up into Azure Data Factory

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2021	-

Feature details

Ability to further extend or optimize a dataflow created within the Microsoft Power Platform by a citizen user into Azure Data Factory data flows managed by an ETL Pro developer.

Publish a dataflow from Desktop

Enabled for	Public preview	General availability
End users, automatically	Mar 2021	-

Feature details

Microsoft Power Platform dataflows are familiar and simple to author. Their authoring experience is based on Power Query, which several customers use in several Microsoft products, including Power BI and Microsoft Excel.

With the introduction of this **Publish** feature, Excel and Power BI customers will be able to publish their Power Query work from existing artifacts (for example, Excel workbooks, Power BI reports) to the cloud as a dataflow. Their existing Power BI and Excel artifacts will point to the latest snapshot/output of those dataflows, thus making sure their data is kept refreshed on a schedule.

Spark-based compute support for Microsoft Power Platform dataflows

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2021	-

Feature details

This feature will allow enhanced compute capabilities powered by Spark to unlock very large scale data transformations in Microsoft Power Platform dataflows.

Microsoft 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, like Power BI, Power Apps, Power Automate, Logic Apps, and others. Based on enterprise requests, we plan to continue to focus 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.

Gateway diagnostics

Enabled for	Public preview	General availability
End users by admins, makers, or analysts	Mar 2021	-

Feature details

We released a performance monitoring feature in May 2019 that provided insights to gateway admins on gateway utilization; however, this information is saved in log files. In 2020 release wave 2, we plan to improve on this feature by centralizing gateway diagnostics on the admin center and stream this data online to a cloud storage for long term analysis.

Power Query Online

Overview

Power Query is the data connectivity and data preparation experience for users across a wide variety of Microsoft products and services, including Power BI, Excel, Customer Insights, and several more. You can read more about Power Query.

Certified connectors in Power Query Online

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

Feature details

Our large library of certified connectors (45+ connectors) will be coming to Power Query Online. These connectors are developed and maintained by partners and bring a great variety of new capabilities and sources to the platform.

You can find out more about these certified connectors by looking at the Power Query connectors page (all items built by others besides Microsoft).

Custom connectors in Power Query Online

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

Feature details

We'll bring the ability to use custom connectors to Power Query Online. This will allow users and developers to create connectors that connect to any data source they want in line with the current capabilities in Power Query Desktop (for example, within Power BI). To get started with custom connectors, start here.

Diagram view for authoring

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2021	-

Feature details

A new diagram view will be added to the Power Query editor as an alternative view to author queries. This view allows users to very easily understand dependencies between queries and data sources. This view will be fully interactive and will allow users to add/remove queries and steps within these queries, reference and combine existing queries, and so on, much like they can do today through other surfaces in the Power Query editor.

Import/export custom dataflows templates

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2021	-

Feature details

Microsoft Power Platform dataflows authors will be able to easily reuse dataflow definitions to create multiple dataflows in different environments, tenants, and products. This includes the ability to define parameters in dataflow templates that can drive different output results based on user-specific values for those parameters.

Query parameters and templates are very successful features that have been available within Power Query (Desktop) for the last few years. In 2020 release wave 2, we're expanding this feature to Microsoft Power Platform dataflows.

Semantic types and transforms (Phase 1)

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Dec 2020	Mar 2021

Feature details

As customers combine data from different sources, they want the data to be structured in a standard, consistent format and often want to augment/enrich with additional data to provide more meaning and gather insights.

As part of Phase 1, we are providing enterprise data enrichment where we are leveraging dataflows as a knowledge base to augment your data with additional columns from a dataflow entity.

Semantic types and transforms (Phase 2)

Enabled for	Public preview	General availability
Admins, makers, or analysts, automatically	Mar 2021	To be announced

Feature details

As customers combine data from different sources, they want the data to be structured in a standard, consistent format and often want to augment/enrich with additional data to provide more meaning and gather insights.

As part of Semantic transforms Phase 2, we are providing data enrichments from data sources, such as Azure Maps, to augment your data with smart transforms like address geocoding, reverse geocoding, address standardization, and more.

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.

Microsoft