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Dynamics 365 and Power Platform 2020 Wave 1 goes into April. To prepare for this we're putting together some video guides on some of the new features. In the first video review of the series we cover the installation of the 2020 Wave 1 preview, including how to create a canary environment and install a preview. Give us your feedback, all of this: good, bad and ugly, I'm sure we can accept it. Suggest new topics either in the comments or by sending your ideas [jar@crmtipoftheday.com](mailto:jar@crmtipoftheday.com). Don't forget to subscribe to . Cover photo by George Keating Because of the COVID-19 related precautions, it may take longer than usual to hear from our support agents. See help articles. They detail new features that will be introduced between October and March 2021 with general availability, or new features that will initially be released in public preview. Early access will begin on August 3, allowing some of the new features to be tested in the sandbox environment before they are automatically included. It is also important to note that release plans may be changing! Recent wave releases have seen several changes in the original documentation. These included changes in timing for individual items, as well as additional feature announcements. We will seek to keep this post updated when additional information is passed on. Using the original documentation, in this post we provided an overview covering: D365 Sales, Sales Research, Marketing, Customer Service, Omnichannel customer service, Field Service, Project Operations, Power Apps, Portals, Power Automate, Virtual Agent, Forms Pro and Power Apps Administrative Center. For more information, visit The Dynamics 365 Docs website to download Wave 2's 2020 plans. Timeline Dynamics 365 Sales General Availability release from October 2020, including: Simplified duplicate detection and merger - with more details to highlight why the record is flagged as a potential duplicate. It will also combine entries from duplicate warnings. Improved email experience - The newly introduced email overlay experience will support viewing and response actions from record deadlines. Improvements to e-mail attachments will include a quick preview feature and the option of selecting multiple attachments. Creating PDF Improvements - Updates will include a simplified selection of document templates, a PDF preview, email settings, and the preservation of PDF files for custom entities. It will also automate the workflow by generating standard pdf files using the API. Forward-looking statements and - Forecasts will be recorded back to the General Data Service (CDS), which will allow you to report on the dashboard and automatic Power Automate triggers. Forecast improvements include new multi-currency support, custom entity support for predictive windings and forecasting for specific measurements, including the product. Product. Preview Feature: New Mobile Sales Experience - A special app to help sellers find information, update CRM and perform tasks. This will include quick and quick editing features as well as an improved search experience that will include grouping results. Sales Insights Dynamics 365 Sales Insights provides additional AI capabilities to help sales departments automate tasks, analyze data, and build relationships. In the 2020 Release Wave 2, new features and features will include: General Availability: Advanced Forecast Forecasting and Updated Lead/Scoring Infrastructure and Experience Capabilities. Public preview features include: Sales Accelerator - a new, unified workspace for sellers combining CRM features, hints, AI-driven, work lists, and automated sales sequences. Dynamics 365 Marketing Total Availability from October including: Recycled Customer Travel Canvas - providing a more intuitive experience. This will also include a new option for negative travel paths that allow you to monitor the actions of recipients who do not meet specific requirements. Updated Email Editor - Improvements include flexibility for additional email columns and faster downloads. Extended form entity settings - allowing you to display forms for entities other than leads or contacts. Integrating Microsoft teams - creating webinar events as a live team event or team meeting. Improved social wiring - including a reworked planning experience. The public preview feature - from October: Creating segments using natural language queries - offers a potentially faster way of identifying audiences for marketing campaigns using natural language expressions. D365 Customer Service - Customer Service Research General Availability From October 2020 including: Timeline of Improvement - Cool Image Support for Text Notes, Expand/Roll All Records and highlight appropriate text for the search filter. Timeline Configuration - New Admin Settings that will include extending the default timeline entries, hiding status tags, and adding/removing new activity items by type. Rich Text Control is a customizable control for any rich text, multi-step input that will also support images. Improvements to the email template - including rich text formatting for templates, updated toolbar, and saved formatting when entwined from Word/Excel. Knowledge offers - knowledge offers, managed by AI based on Case. Improved knowledge editing - allows folding sections to show/hide content and additional editor controls. Insert knowledge articles into email - adding outdated features to a single interface. The new Multi-session app is designed to help service agents work on multiple cases at once and switch between problems. Monitoring automatically created records - additional submissions to verify the status of the rules of automatic case creation and other records. Public preview: Similar case suggestions - AI-driven AI-driven based on the context of the case. Embedded Research - Analytics and Analytics from Customer Service Insights will be built into the D365 Customer Service applications. Omnichannel For Customer Service This supplement app helps agents support customers through a variety of channels including web chat, and has customer identification with real-time notifications. Shared availability includes: Embed chat into the mobile experience - allowing a omnical chat widget that will be built into mobile apps for iOS and Android. Persistent Messaging - providing additional context by showing previous conversations with the customer in a new chat session. Pro Surveys forms - inclusion in online surveys from web chat sessions. Language Translation is a real-time translation feature using the API to engage third-party translation services and implement native data through Azure cloud services. Dynamics 365 Field Service Total Availability from October 2020 includes: Job Order Completion Reviews - allowing survey offers to be sent using Pro.Work Order Metrics forms - new time-tracking time-tracking metrics throughout the lifecycle of each job order and a new dashboard field service. Sub Grids Field Services - Improving usage to open field service children's records in subnet-shaped overlays to reduce clicks and avoid navigation from the main record. Improved skill-based mapping is optimizing resource planning to automatically match a technician with a job order with the lowest common skill denominator in the first place. This is designed to help planners maintain backup capacity for resources that have multiple or unique skills for emergencies and other types of bookings. Asset Hierarchy - Location - Extended author's experience to determine hierarchy models and location of assets on job orders that can cover plots, buildings, floors, and rooms. Field inspections are the general availability of this preview feature, including the functionality to link inspections to job orders and capture inspection results. Improvements in the presentation of the calendar - including presenting an agenda that shows all the details for each meeting. Predictive travel time is the use of historical travel data provided by Bing Maps to more accurately predict travel times between bookings. Travel outside of working time - allows technicians travel time to be scheduled regardless of a certain working time. An improved work hour calendar is to improve your user experience by managing the Power Apps calendar. Connected Field Service Mobile App - Microsoft says its Generation Field Service mobile app built on the Power Apps platform and 2020 Release Wave 2 will include: Mobile access to telemetry devices and maintenance data to help diagnose and resolve issues on established assetsCustom reporting real-time technical location sharingPush notifications for important updates including new/cancelled field box orders Public previews include: Built-in Optimizer as part of the Council Schedule AI-Driven Predictive Dynamics Of Operation 365 Project Operations, built on microsoft Power Platform, D365 Operation Project will enter into general availability during the next wave of release. This will include project-based sales, project resources, Microsoft project capabilities, project accounting, integration with MS Teams, and AI features. From March 2021, existing Dynamics 365 Project Service Automation customers will be able to upgrade to the new Project Operations product. Power Apps Portals General Availability from February 2021: Portals, create, read, update and delete (CRUD) web API, are usually available to all customers. Public preview features include: Add the Power Virtual Agent bot component to the portal. Simplified experience in configuring complex entity permissions in Portals Studio.Support for code components created using Power Apps (PCF) components inside Power Apps portals. Shared power Apps from October 2020: Switching to a single interface - a new transitional service will help administrators switch to a single interface by December 1. After this date, Wednesdays will be automatically switched. Improved global desktop search for model-driven Apps - includes a prominent search bar, offers based on the latest searches/records, automatic entry suggestions and improved page results. Chart Settings - Updates to support frequent non-designer settings previously available in a classic web client. This includes X/Y axis support for mesh color lines, mesh tick marks, data labels lurking. For the Y axis, support is enabled for minimum, maximum, and intervals. Improve usability for sub grids and tabs form on a mobile phone - including prominent blanks for subnets and more detectable form tabs. Power BI Report/Dashboard as System Dashboard is a new type of dashboard for model-driven applications to identify a system dashboard that references a Power BI report or dashboard. Repetitive meetings in the mobile app are new ways to record repetitive encounters using a mobile app. PCF for Canvas Apps - allows user, reusable interface controls and extensions to be added to canvas apps. (Total availability from March 2021) Public preview from December 2020: Add custom pages to the Model-Driven App Designer - extra flexibility to use custom no/low-configuration code controls and components. Early access from October 2020: Integrating business behind with a search for CDS relevance that supports natural language requests, return instant answers. The release guide outlines a series of simple and complex natural language requests that will be supported. This assumes similar functionality to the Dynamics request bot available in Microsoft teams. Selected examples of queries include: Who owns x (accounts)? or or There is no e-mail. The overall availability of Power Automate includes: easier customization, creation and configuration of flows.Delay user interface activities - setting up thread latency activities using new built-in delay actions from a few seconds to months, as well as user values support. Consolidated view of user interface streams and common errors. Power Platform Admin Center Public Preview: CDS Errors and Diagnostics in Azure Application Insights - beyond the Information Built in the Administrator Center reports, telemetry from model-driven applications on a single interface will be available through Azure Application Insights. By choosing, it will export a production environment of registered bugs and performance data to user interface plugins, API calls and load forms. Using Application Insights, this will allow you to analyze these performance-based metrics and alerts in more detail when thresholds are breached. Power Virtual Agents General Availability includes: setting up the main bot theme and welcoming the message at the beginning of the conversation. Add images/videos on the theme. Improved theme offerings - including bot scanning sites to extract software suggestions from CSV, DOCX and PDF files posted on the website. Public preview: Deploy powered virtual agents like Alexa Skills - interact with bots using Amazon's Alexa app and devices. Microsoft Pro Forms also announced the Form Pro will become a Dynamics 365 Voice customer. The next steps early access to selected new features in the 2020 Release Wave 2 will be available from Monday August 3. Visit The Dynamics 365 Docs website to learn more about what's new and what items can be tested before the October release. If you have any questions about this update, or an update from an earlier edition of The Dynamics, please contact us on 0800 381 1000, or request a call back. Get our emails about the latest updates and events of Microsoft Dynamics 365 Sign-Up Now

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