

POWER PLATFORM APRIL 2020 UPDATE

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But first a little bit about us.....

Microsoft
Partner

Silver Cloud Customer Relationship Management
Silver Small and Midmarket Cloud Solutions



DYN 365
SUPPORT

About enCloudg

- Dynamics 365 Cloud Customer Relationship Management – Silver 2014 - present
- 15 years experience working with small to mid-sized businesses to modernize sales, marketing, and customer service
- Work with companies throughout the US and Canada
- Primary focus is on Cloud-based Dynamics 365 Customer Engagement Platform

About Dynamics365Support.com

- Premier provider of low-cost fixed fee support services for Dynamics 365, PowerApps, and Flow



Lots and lots of improvements to the user experience, but not any extreme user interface changes



If you have not migrated to the Unified Interface, you are not going to see much if any changes.



Biggest non-user experience change – Team Member license enforcement



Check out our comprehensive blog on Team Members – included in our final page.



Will not be enforced until JUNE 2020

APRIL 2020 RELEASE HIGHLIGHTS



The Save Button is back where it belongs



New ways to filter views in CRM – by date, by lookup etc.



Timelines have better filtering – keyword search



Enhanced email function makes it easy to create emails in Dynamics 365



Email template chooser completely rebuilt – preview before selecting



NOTES – Finally allows RICH TEXT – use fonts, bullets, color!

ACTIVITY TIMELINE AND GENERAL IMPROVEMENTS

SALES IMPROVEMENTS



Kanban Board allows opportunities to be viewed in a grid-like view and easily moved from stage to stage



Sales Forecasting expands on the built in Goals to allow managers to build more flexible forecasting for sales

CUSTOMER SERVICE IMPROVEMENTS



Customize the close case form for your business process



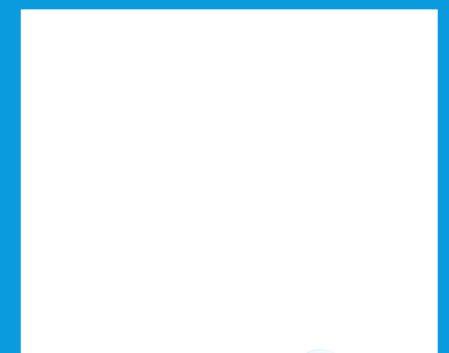
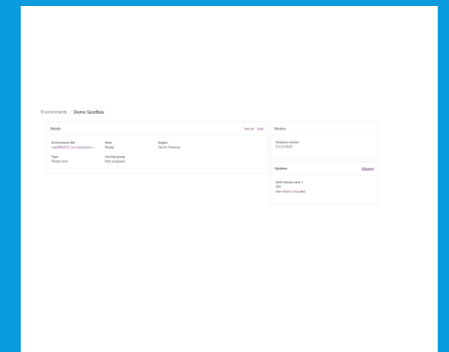
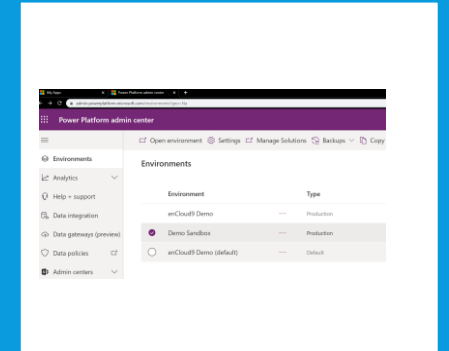
Better Queue management – fewer clicks to get to see the details



Improved Knowledgebase Search and creation

TESTING THE UPDATE IS EASY...

- Visit admin.powerplatform.microsoft.com
- Go to "Environments."
- Select the Environment you wish to update.
- Click on "Manage."
- And then Select "Update Now."
- The process takes about an hour.
- Update is not reversible!!
- You can do this in production if you are willing to take the risk – enCloudg has been using the update for weeks and has only seen a few issues.



Next steps and resources

- Contact us at enCloud9/Dynamics 365 support with any questions
- support@encloud9.com
- Sign up for our April 17th webinar – Working with Sales Forecasting in the April 2020 Update

Resources

Microsoft Release Notes

<https://docs.microsoft.com/en-us/dynamics365-release-plan/2020wave1/>

Release notes pdf

<https://go.microsoft.com/fwlink/?linkid=2116924>

Blog Entries

<https://www.dynamics365support.com/5-new-features-to-be-excited-about-in-the-april-2020-dynamics-365-update/>

<http://www.dynamics365support.com/dynamics-365-team-member-enforcement-a-walkthrough/>