POWER PLATFORM APRIL 2020 UPDATE

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SOCIAL/CRM

But first a little bit about us………

About enCloud9

- 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

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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

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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

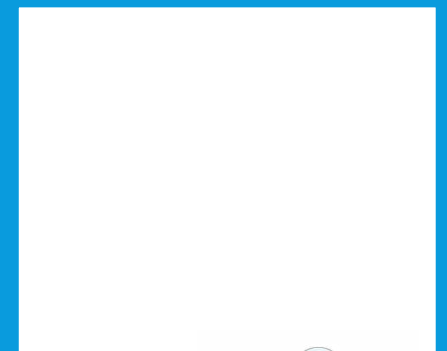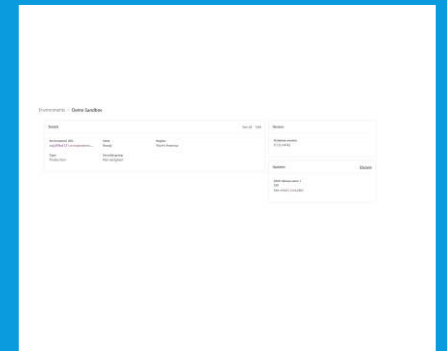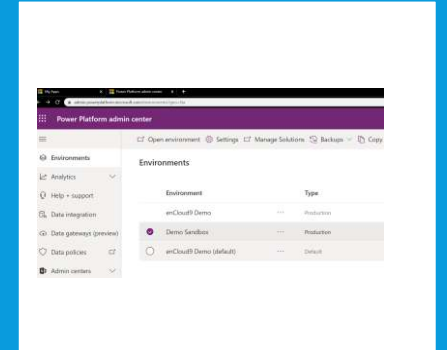Customize the close case form for your business process

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

Improved Knowedgebase Search and creation

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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 – enCloud9 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/

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