

Dynamics 365 Sales

2020 release wave 1
April-September 2020

In this guide, you will be able to learn the most important things about this release wave.

Top things to know

New capability highlights

The 2020 release wave 1, brings to market significant new services and capabilities to enable digital transformation for businesses. For Dynamics 365 Sales, these new capabilities include:

Simplified experiences

Adding products to opportunities

In the 2020 release wave 1, we simplify and expedite matching products to opportunities, reducing friction and motivating sellers. With this feature, sellers can add products quickly and intuitively, with minimal effort.

PDF documents

We are introducing the ability to save the PDF directly in Dynamics 365 Sales as a Notes attachment or in Microsoft SharePoint.

Kanban view of opportunities

Easily toggle between the existing grid view and the new Kanban view.

Manage activities

- Find activities quickly
- Navigate activities easily
- Update activities intuitively
- Benefit from Calendar view

Simplified administration

Easily discover specific Dynamics 365 Sales feature configuration settings within the Sales Hub application's App Settings.

Forecasting

Customize models

The native forecast capabilities provide flexible configurations and filtering to support multiple types of forecasting, rollup categories, and measurements.

Improve and adjust accuracy

- Adjust forecasts seamlessly
- Gain deeper understanding with forecast adjustments

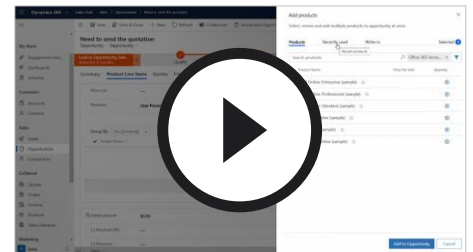
Precision pipeline management

- Benefit from a responsive forecast grid with visual cues
- Edit participating records inline
- Manage pipeline and visualization
- Benefit from near real-time updates

Watch the release overview video

Learn about the key capabilities and features in the release wave.

Visit: aka.ms/Overview/2020RW1/Sales



Read the release plan

Explore the entire set of new capabilities planned for 2020 release wave 1.

Visit: aka.ms/Plan/2020RW1/Sales



Join the Dynamics 365 community

Engage with experts and peers.

Visit: aka.ms/Community/Sales

Help us improve

Is this guide helpful?



Visit: aka.ms/Overview/2020RW1/Feedback

Dynamics 365 Sales

2020 release wave 1

April-September 2020

Release summary

Dynamics 365 Sales continues to be a highly adopted sales tool that brings value to sales teams around the globe with out-of-the-box capabilities tailor-made for several sales scenarios. It is an entire system that is much more than a mere sales application. Dynamics 365 Sales is centered around the customer relationship. It helps organizations understand customer needs, drives more relevant and authentic engagements, and improves selling efficiencies.

With the 2020 release wave 1 of Dynamics 365 Sales, we have spent time listening to customers and empathizing with their experiences to learn about what works and understand what doesn't. As with the previous release, there is a continued emphasis on simplified experiences, improved workflow, and a new mobile experience—all designed to make it more useful for users.

Dynamics 365 Sales continues to evolve to meet changing customer and sales needs. In the 2020 release wave 1, we are expanding the focus to include inside sales scenarios, including sales acceleration, automated record updating, and sales cadences. We aim to streamline the work of inside sellers and deepen their engagement with customers.

These are the 2020 release wave 1 themes:

Simplify: Get things done more easily to keep the focus on selling.

Sellers need to focus on building deeper relationships with customers. To do this, they must focus their time on personal engagements and understand customer needs to close more deals faster. Dynamics 365 Sales is committed to simplifying experiences and introducing intelligence that promotes productivity. Through close collaboration with our customers and consistently listening to their feedback, we continue to enhance the seller experience.

Enhance productivity: Leverage productivity tools to enhance selling effectiveness.

Every sales team uses a variety of productivity tools to draft proposals, communicate with customers, and collaborate internally with peripheral teams. These tools are key to meeting ever-changing customer demands. It is imperative to enable a smooth and frictionless experience, so sellers can move quickly between tasks and spend their time on building customer relationships. Dynamics 365 Sales offers seamless integration with relevant productivity tools to help sellers be more agile. They can communicate, collaborate, and analyze—leveraging the tools they love, without constantly switching context.

Accelerate: Prioritize the next best customer and next best action to accelerate sales.

Sales acceleration aims to transform the sales process with intelligent prioritization that helps convert leads and to close opportunities successfully and faster. To reach every customer, sellers benefit from cross-channel communication directly from Dynamics 365 Sales, all while enforcing consistent sales processes through sales cadences.

Transform forecasting: Track the pulse of your business accurately to inform strategic decisions.

Forecasting empowers sellers to confidently build a strong pipeline, while shortening sales cycles and improving forecast accuracy. As a result, sales leaders gain a more accurate view of their business, and can plan more effectively. Dynamics 365 Sales will introduce a Forecasting solution that offers both the flexibility to meet unique business requirements and an intuitive interface to forecast intelligently.

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

As always, we want to hear from our customers and partners. If you have any ideas or thoughts about Dynamics 365 Sales, please share with us at <https://aka.ms/SalesIdeas>.



Dynamics 365 Sales

2020 release wave 1
April-September 2020

New capability highlights

The following capabilities demonstrate our continued investment to power digital transformation for our customers and partners. To learn more about the entire set of capabilities being delivered during this release wave, visit: aka.ms/Plan/2020RW1/Sales

Simplified experiences

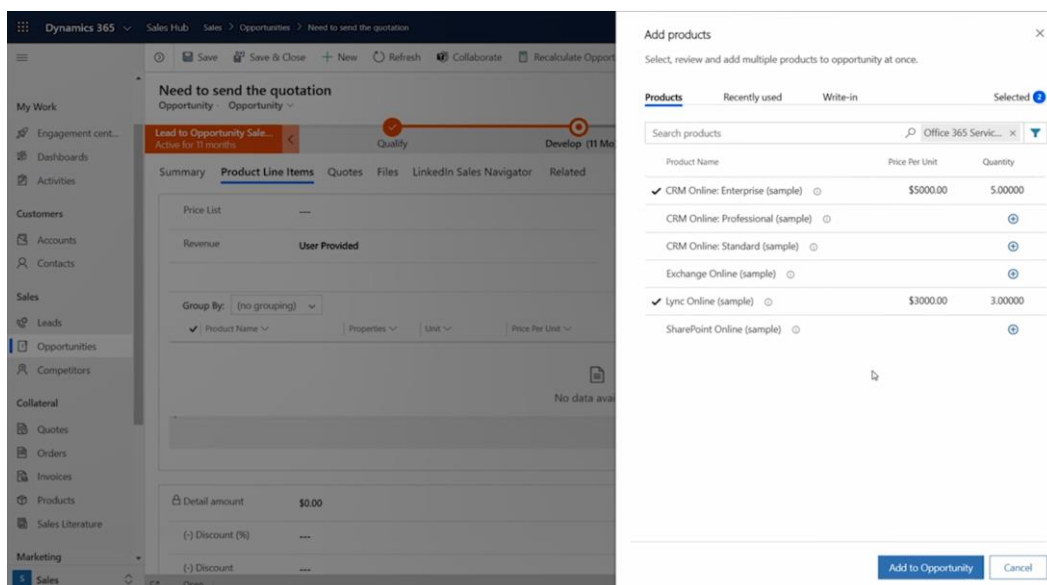
Enhanced experience for adding products to opportunities

Dynamics 365 Sales holds a vast amount of customer information that feeds into pipeline management, product procurement, and overall sales tracking. To ensure these are managed properly, opportunities must accurately reflect customer interest. To achieve this, sellers are required to update opportunities regularly to reflect the purchase intent for every product, as it arises, even if sellers manage a wide range of products.

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

- **Look up products directly from the catalog:** Search and find products based on free text across name and description columns within the Product entity. Filter products based on product family or predefined views to simplify and expedite finding the right product.
- **Explore product details inline and compare products to make an informed selection:** View additional information for each product before selecting it.
- **Add multiple products at once:** Select multiple products at the same time to save time and increase productivity.

▶ Watch the overview video: aka.ms/Overview/2020RW1/Sales/Products



Dynamics 365 Sales

2020 release wave 1
 April-September 2020

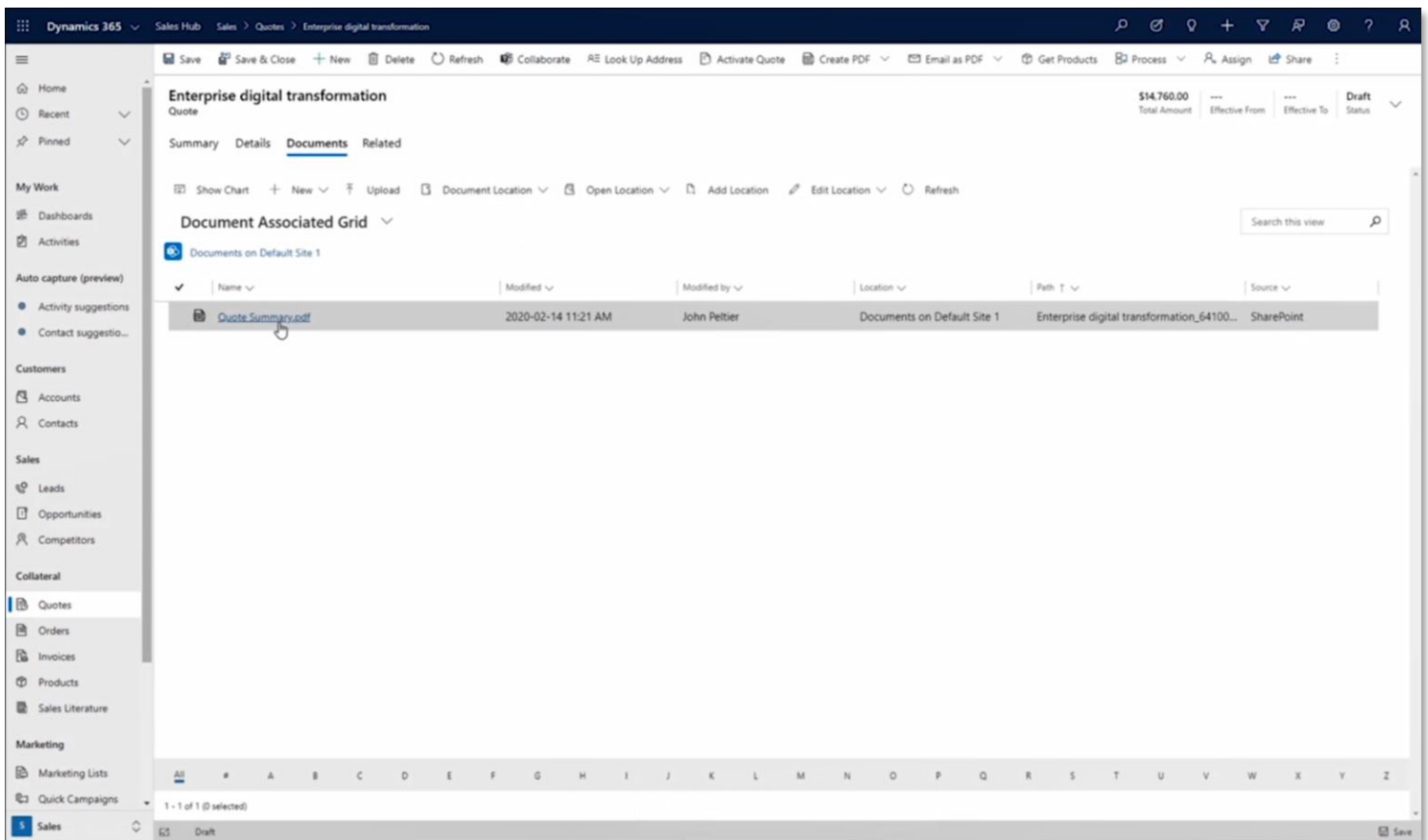
Save standardized PDF documents to Dynamics 365 Sales or Microsoft SharePoint

Over the last few months, Dynamics 365 Sales made it easier for sellers to create and email standard PDF documents based on quotes and other entity records. To make it even easier to collaborate on these PDF-generated documents, we are introducing the ability to save the PDF directly in Dynamics 365 Sales as a Notes attachment or in Microsoft SharePoint.

With this enhancement, salespeople will be able to:

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

▶ Watch the overview video:
aka.ms/Overview/2020RW1/Sales/PDFDocuments



Dynamics 365 Sales

2020 release wave 1
 April-September 2020

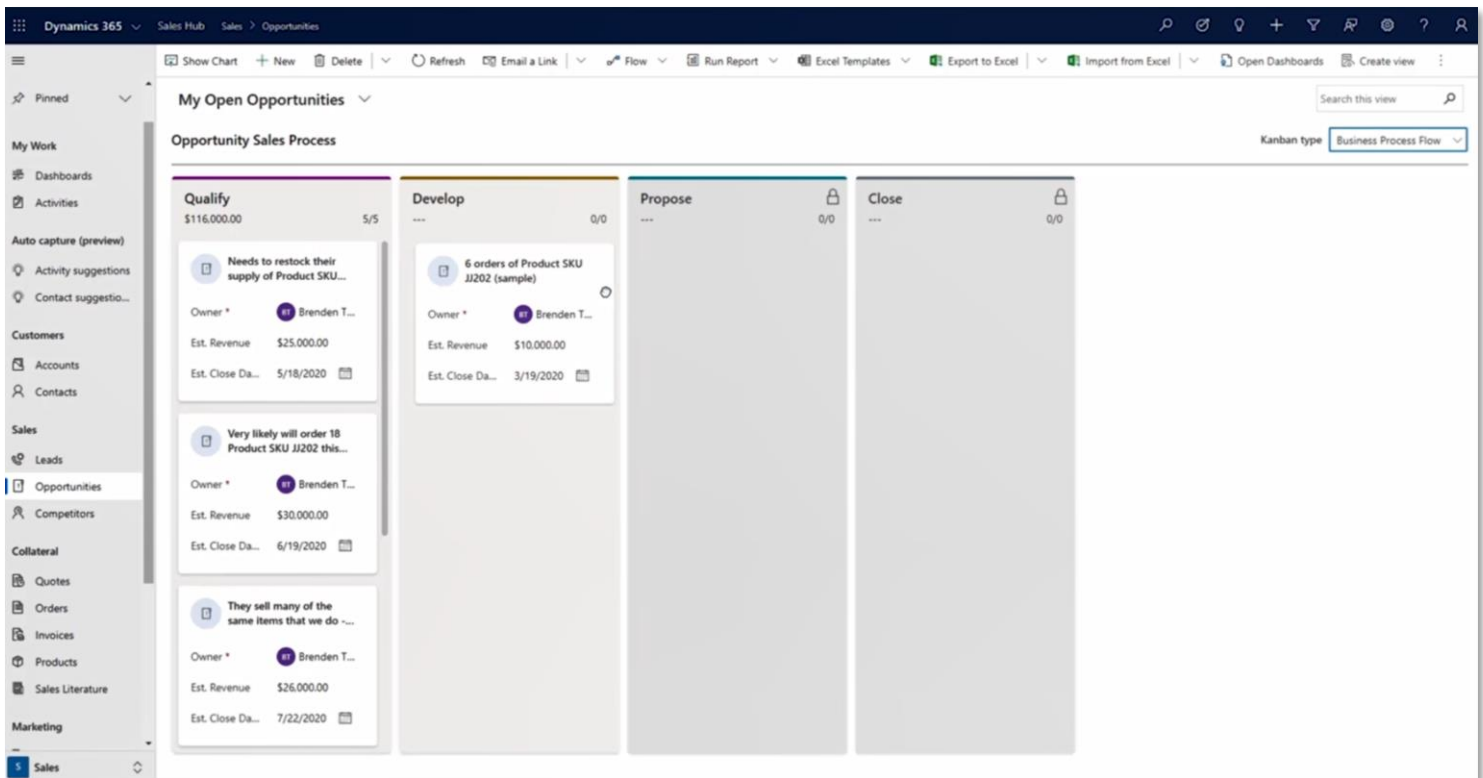
Work with opportunities in the Kanban view

We are actively listening to our customers to learn how we can make Dynamics 365 Sales better, easier, and more efficient. Dynamics 365 Sales aims to help sellers develop deeper relationships and improve their productivity.

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

- Easily toggle between the existing grid view and the new Kanban view.
- Sellers can view their opportunity pipeline by sales path on the Kanban board.
- Simplified and intuitive experience to move opportunities into a different stage. The Kanban view allows your sales team to move opportunities from one stage to another by simply dragging them.

▶ Watch the overview video:
aka.ms/Overview/2020RW1/Sales/Kanban



Dynamics 365 Sales

2020 release wave 1
April-September 2020

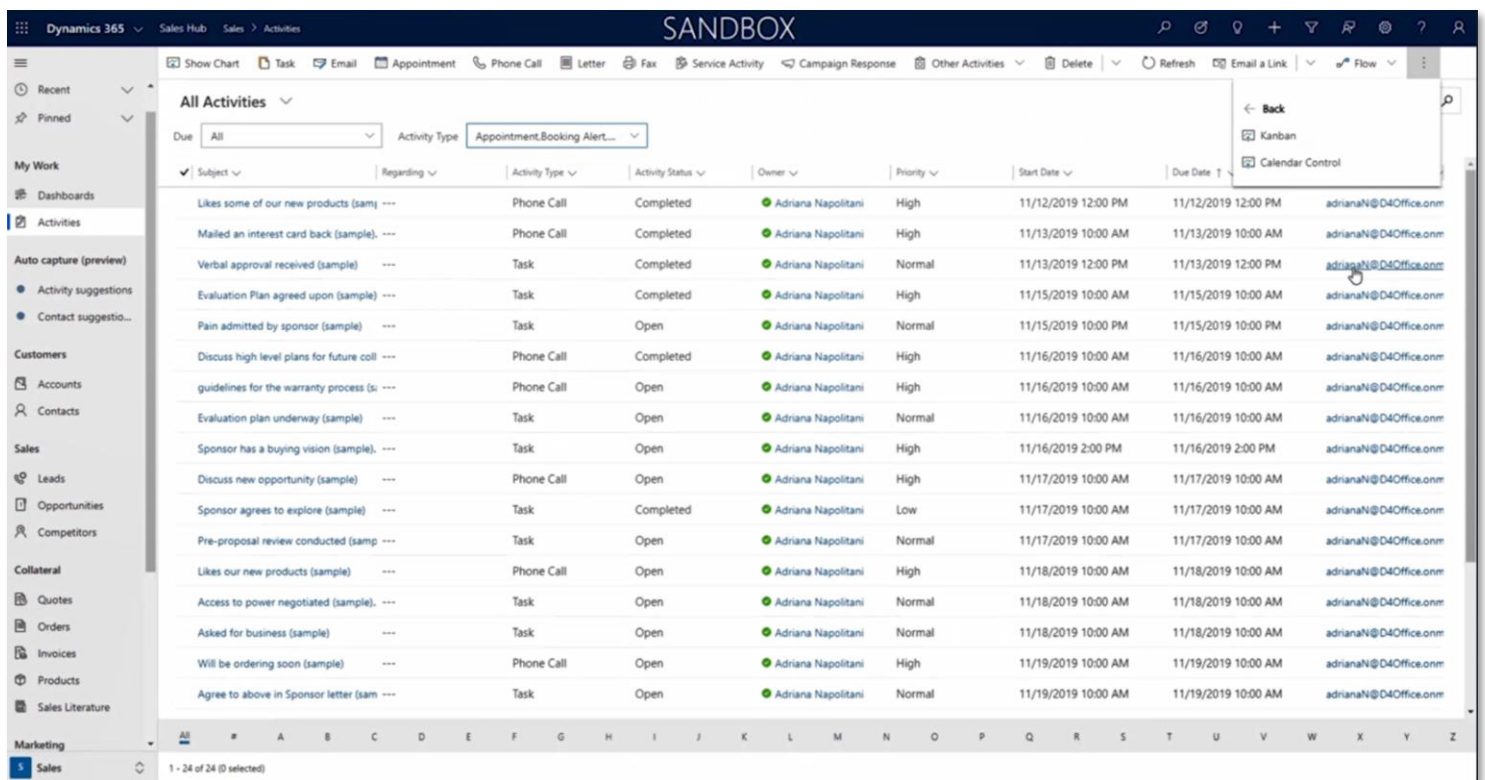
Manage activities with ease

Working collaboratively on opportunities and leads means there are tasks that must be completed by multiple team members. Creating new tasks, assigning these tasks, and completing them is critical to the overall success of customer engagements. Activity management in Dynamics 365 Sales provides an efficient way to manage and assign tasks across the team to ensure harmony.

As part of our commitment to simplifying experiences across the product, we are introducing enhancements to activity management. These improvements offer productive and intuitive ways to manage tasks across the team, offering sellers peace of mind knowing that team tasks are organized, prioritized, and delivered.

- **Find activities quickly:** View activities listed in a newly improved grid. Benefit from a newer interface for managing and filtering activities to help quickly find the right activity to work on.
- **Navigate activities easily:** Simplified process to create new activity, edit existing activity, complete or delete an activity without having to navigate away from the main page.
- **Update activities intuitively:** Use drag-and-drop pipeline management with a Kanban board to drag and drop activities and instantly update the status. Ideal for managing many activities.
- **Benefit from Calendar view:** See all activities in a visualized calendar view to easily get a clear understanding of daily to-dos.

📺 Watch the overview video:
aka.ms/Overview/2020RW1/Sales/Activities



Dynamics 365 Sales

2020 release wave 1
 April-September 2020

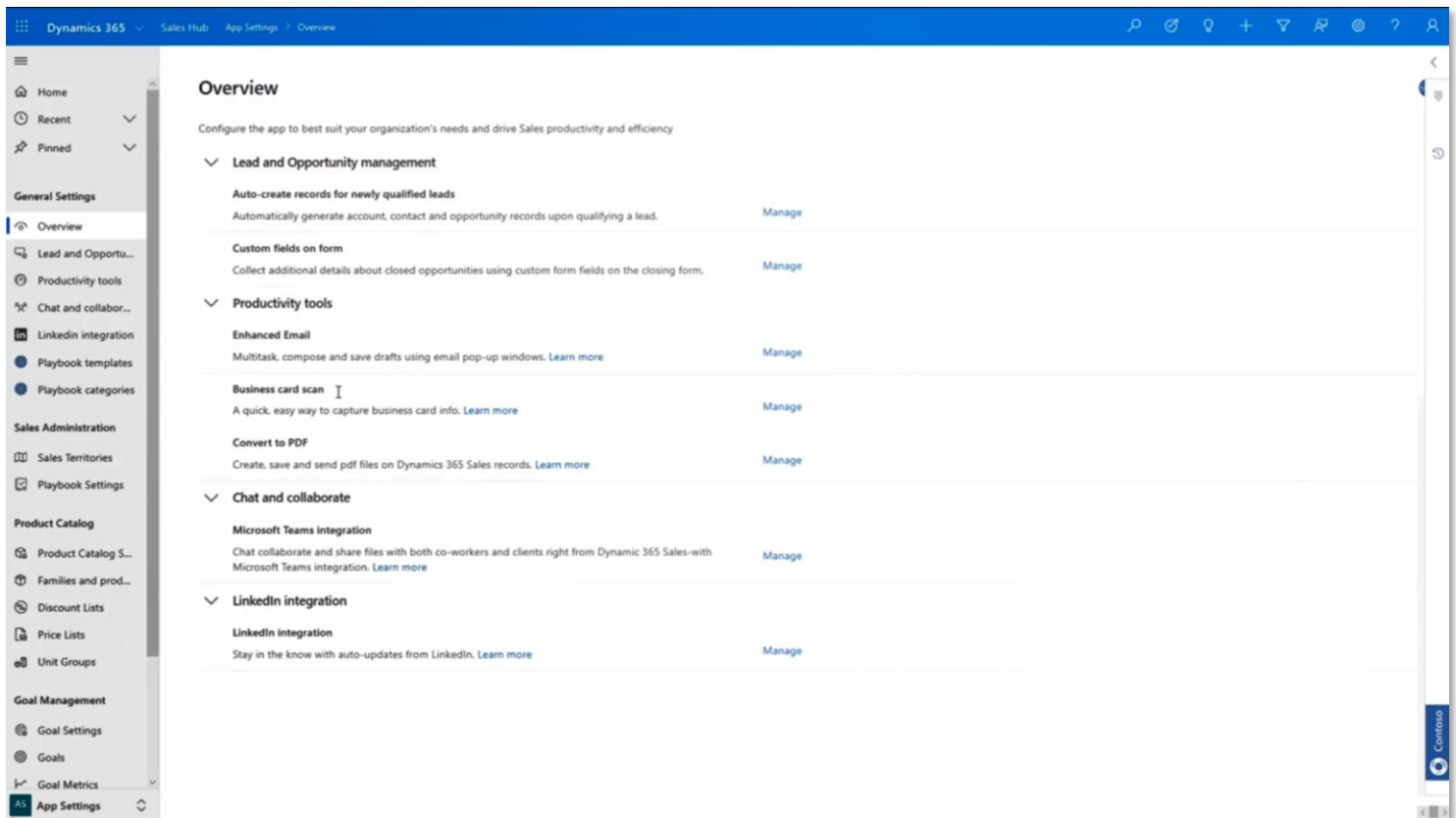
Manage feature settings and configure the Sales Hub application from a centralized location

Administrators need to configure the sales application per their organization's needs. Providing a centralized location for discovering and managing Dynamics 365 Sales settings aims at simplifying the administrators' experience and helps them to be more productive.

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

- Easily discover specific Dynamics 365 Sales feature configuration settings within the Sales Hub application's App Settings.
- Easily discover entities and features that support configurability and navigate to their settings and configure them.

▶ Watch the overview video:
aka.ms/Overview/2020RW1/Sales/Settings



Dynamics 365 Sales

2020 release wave 1
 April-September 2020

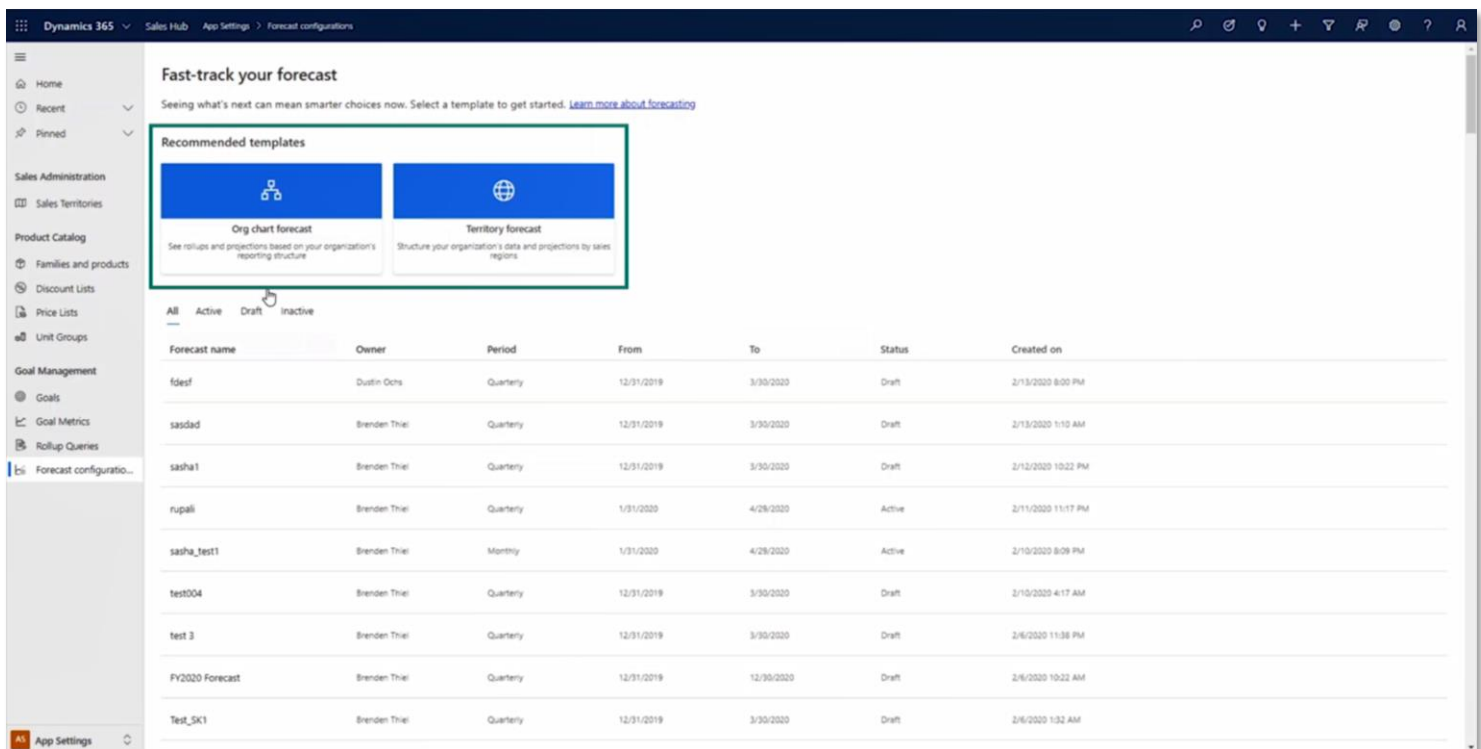
Forecasting

Customize forecast models

Although many organizations follow a common methodology of requiring sellers to forecast best, most likely, and worst-case revenue, there are variations to this approach across industries, products, and geographies. The native forecast capabilities provide flexible configurations and filtering to support multiple types of forecasting, rollup categories, and measurements.

- **Use flexible column modeling:** Create custom rollup and calculated columns.
- **Support different organizational structures:** Create forecasts based on territory or reporting hierarchy.
- **Benefit from quota management:** Enable quotas in the forecast grid or upload quotas for entire forecast time periods using an Excel template.
- **Benefit from advanced filtering:** Use limits to filter out specific opportunities included in the forecast with the new query builder.
- **Adapt security modeling to meet business needs:** Select who has access to specific forecast models and fields.

▶ Watch the overview video:
aka.ms/Overview/2020RW1/Sales/CustomizeForecast



Dynamics 365 Sales

2020 release wave 1
April-September 2020

Improve and adjust forecast accuracy

Although bottom-up forecasting is based on existing opportunity data, sales managers know that in certain cases their experience requires subjective judgment. Sellers may not have the expertise required to accurately predict the confidence or the value of a deal. This may lead some sellers to hide ongoing deals until the period comes to an end, to increase their chance of exceeding quota.

To ensure sales managers can provide leadership with meaningful forecast numbers that they trust, forecasting offers great flexibility. Sales managers are empowered to adjust any of the enabled forecast values.

- **Adjust forecasts seamlessly:** Easily make adjustments to any forecasted values that are propagated based on existing forecast or organizational hierarchy, including deleting adjustments or reverting back to an older adjustment.
- **Gain deeper understanding with forecast adjustments:** Identify the underlying records that contribute to changes and capture the reasons for the changes in order to analyze the history of adjustments.

▶ Watch the overview video:
aka.ms/Overview/2020RW1/Sales/ImproveForecast

User	Quota	Won	Predicted	Best case	Pipeline	Gap To Quota	Pipeline Coverage
Brenden Thiel	\$1,500,000.00	\$852,685.00 (57%)	\$3,646.95	\$401,955.00	\$241,500.00	\$647,335.00	0.37
Brenden Thiel	\$300,000.00	\$131,000.00 (44%)	\$1,276.73	\$22,000.00	\$89,500.00	\$168,000.00	0.53
Vatsal Nagda	\$150,000.00	\$46,320.00 (31%)	\$221,186.00	\$0.00	\$52,000.00	\$103,680.00	0.50
Dustin Ochs	\$300,000.00	\$131,500.00 (44%)	\$963,075.00	\$105,001.00	\$40,000.00	\$168,500.00	0.24
Dustin Ochs	\$150,000.00	\$70,000.00 (47%)	\$875,500.00	\$45,000.00	\$10,000.00	\$80,000.00	0.13
Stan Hadden	\$150,000.00	\$61,500.00 (41%)	\$87,575.00	\$40,001.00	\$30,000.00	\$88,500.00	0.34
Samuel Strom	\$700,000.00	\$381,000.00 (54%)	\$829,205.00	\$69,945.00	\$40,000.00	\$319,000.00	0.13
Samuel Strom	\$300,000.00	\$185,000.00 (62%)	\$345,816.00	\$29,888.00	\$10,000.00	\$115,000.00	0.09
Malcolm Homer	\$150,000.00	\$95,000.00 (63%)	\$194,716.67	\$10,000.00	\$10,000.00	\$55,000.00	0.18
Terlochan Singh	\$150,000.00	\$55,000.00 (37%)	\$127,216.67	\$20,057.00	\$10,000.00	\$95,000.00	0.11
Vance Carrico	\$150,000.00	\$46,000.00 (31%)	\$161,455.23	\$10,000.00	\$10,000.00	\$104,000.00	0.10
Sales Person	\$450,000.00	\$161,845.00 (36%)	\$356,757.42	\$86,000.00	\$20,000.00	\$288,155.00	0.07

Dynamics 365 Sales

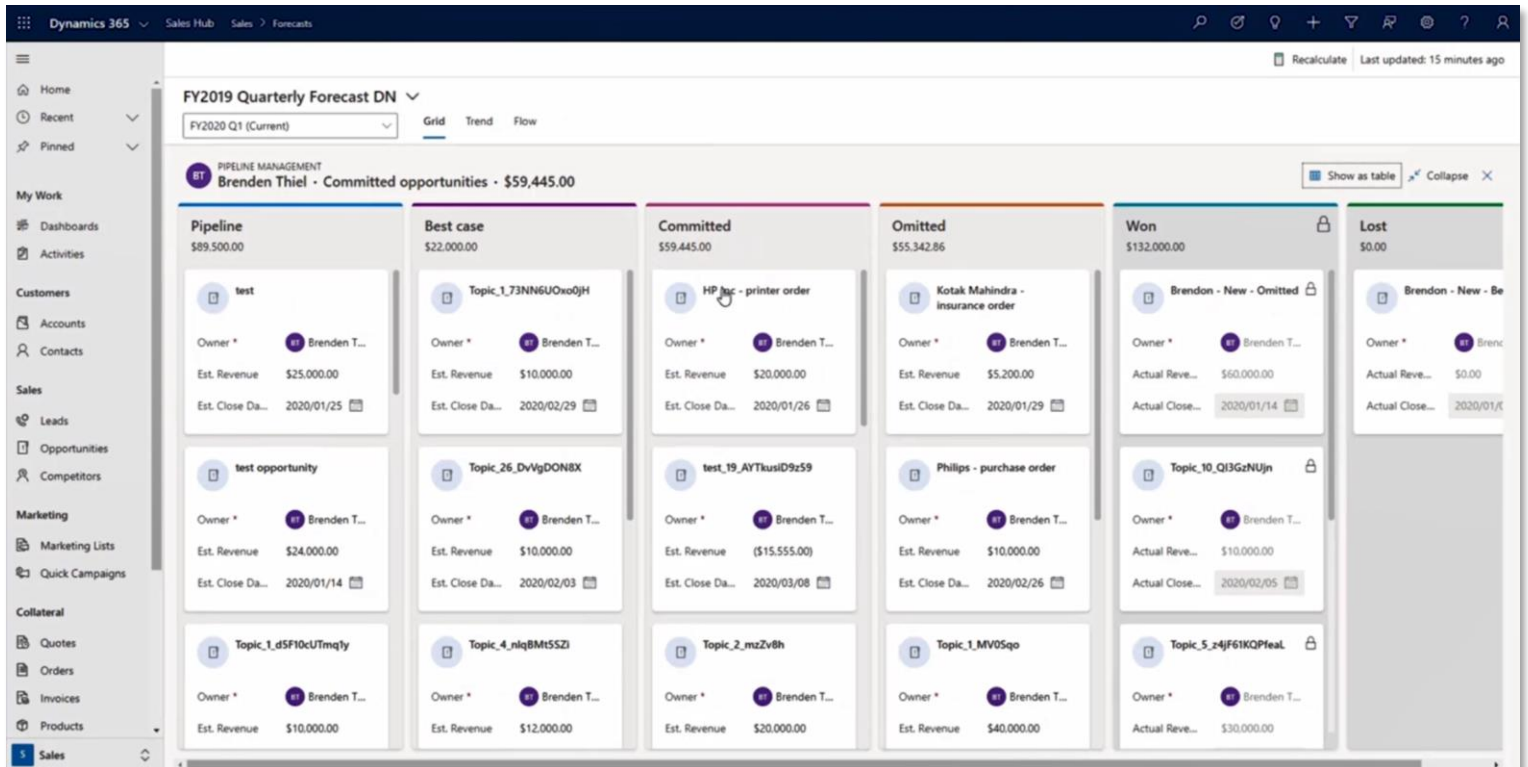
2020 release wave 1
April-September 2020

Understand forecasts with precision pipeline management

A forecast can contain a lot of information and in some cases, a deep hierarchy. Often, the organization’s forecast and opportunities are disjointed. Sellers and sales managers need to understand where forecast values are coming from in order to introduce necessary changes that can help to resolve these gaps. In the forecasting capabilities for Dynamics 365 Sales, both the forecast and the underlying opportunity data are part of one fluid experience, allowing sellers to directly modify deal information in the flow and to instantly see changes to the forecast reflected.

- **Benefit from a responsive forecast grid with visual cues:** Enable visual representation of the whole forecast hierarchy and quota attainment in each cell, directly from the grid.
- **Edit participating records inline:** View and edit underlying opportunities for any calculated metric to instantly modify the forecast.
- **Manage pipeline and visualization:** Easily manage and update the full forecast with the drag-and-drop feature to move opportunities across different stages, to instantly update forecast data.
- **Benefit from near real-time updates:** Enjoy automatic recalculation of forecast values to ensure data is always as fresh as possible.

▶ Watch the overview video:
aka.ms/Overview/2020RW1/Sales/ForecastPrecision



Dynamics 365 Sales

2020 release wave 1

April-September 2020

Update process and global rollout

Release schedule

Learn about the 2020 release wave 1 schedule and early access opt-in period. Visit: aka.ms/EarlyAccessFAQ

For application administrators

End-user impacting features to the user experience enabled automatically

End-user impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged “End users, automatically” in the release plan.

Features that must be enabled by application administrators

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their end users. For the complete list, look for all features tagged “End users by admins, makers, or analysts” in the release plan.



Dynamics 365 Sales

2020 release wave 1

April-September 2020

Get the most out of Dynamics 365

Release plan

View all capabilities included in this release.

aka.ms/Plan/2020RW1/Sales

Product updates

Stay up to date on latest product updates.

aka.ms/Updates/Sales

Release calendar

Know important release milestones.

aka.ms/Updates/Calendar/Sales

Licensing

Improve your understanding of how to license Dynamics 365.

aka.ms/Licensing/Sales

Product documentation

Find documentation for Dynamics 365.

aka.ms/Documentation/Sales

User community

Engage with Dynamics 365 experts and peers in the community.

aka.ms/Community/Sales

Upcoming events

Find and register for in person and online events.

aka.ms/Events/Sales

Product trials

Get started with Dynamics 365.

aka.ms/Trials/Sales

