FastTrack for Dynamics 365
Tenant Admin & Operations TT for Dynamics 365 apps and Common Data Service
<table>
<thead>
<tr>
<th>Objectives</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Microsoft 365 admin center</td>
<td>• 1 hour</td>
</tr>
<tr>
<td>2. Granting users access to Dynamics 365</td>
<td></td>
</tr>
<tr>
<td>3. Dynamics 365 admin center</td>
<td></td>
</tr>
<tr>
<td>4. Power Platform admin center</td>
<td></td>
</tr>
<tr>
<td>5. Dynamics 365 release waves</td>
<td></td>
</tr>
<tr>
<td>6. Restricting access with security groups</td>
<td></td>
</tr>
</tbody>
</table>

**Outcomes**
- Stay up-to date on maintenance activities and service health
- Overview of Dynamics 365 and Power Platform admin center
- Setup users and assign licenses
- Knowledge to perform administrative tasks for your Dynamics 365 instances
- Understand Release waves and weekly updates
Microsoft 365 admin center
Microsoft 365 admin center - Login

- Portal to manage your cloud subscriptions such as Microsoft 365 and Dynamics 365
- admin.microsoft.com (Add users, manage domains, licenses, access to other admin centers and much more)
Microsoft 365 admin center – Main page

Check **Current health** status for your cloud services.

Check important messages regarding your cloud services such as **Dynamics 365**.
Microsoft 365 admin center – Service health

- Health status on Dynamics and Office 365 services

Service health

Service health

Report an issue

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Service</th>
<th>ID</th>
<th>Status</th>
<th>Start time</th>
<th>End time</th>
</tr>
</thead>
<tbody>
<tr>
<td>SharePoint Online</td>
<td>Unable to access Microsoft 365 services or features</td>
<td>Office 365 Portal</td>
<td>MC194405</td>
<td>Service restored</td>
<td>October 30, 2019 1:04 PM</td>
<td>October 30, 2019 2:52 PM</td>
</tr>
<tr>
<td>Exchange Online</td>
<td>Delays when receiving messages</td>
<td>Microsoft Teams</td>
<td>TM184490</td>
<td>Investigation suspended</td>
<td>October 30, 2019 12:39 PM</td>
<td>October 30, 2019 2:52 PM</td>
</tr>
<tr>
<td>Microsoft Flow</td>
<td>PowerApps template outage</td>
<td>PowerApps</td>
<td>MS194409</td>
<td>Service restored</td>
<td>October 30, 2019 11:39 AM</td>
<td>October 30, 2019 1:58 PM</td>
</tr>
<tr>
<td>Dynamics 365</td>
<td>Organization access degradation</td>
<td>Dynamics 365</td>
<td>CX184513</td>
<td>Service restored</td>
<td>October 29, 2019 7:39 PM</td>
<td>October 29, 2019 8:41 PM</td>
</tr>
<tr>
<td>Flow in Microsoft 365</td>
<td>PowerApps performance degradation</td>
<td>PowerApps</td>
<td>MS194547</td>
<td>Service restored</td>
<td>October 29, 2019 8:57 PM</td>
<td>October 30, 2019 2:16 AM</td>
</tr>
<tr>
<td>Identity Service</td>
<td>Unable to access mailbox</td>
<td>Exchange Online</td>
<td>EX184420</td>
<td>Service restored</td>
<td>October 29, 2019 8:00 AM</td>
<td>October 29, 2019 12:40 PM</td>
</tr>
<tr>
<td>Microsoft Defender ATP</td>
<td>Unable to access the Microsoft 365 services</td>
<td>Office 365 Portal</td>
<td>MC194507</td>
<td>Service restored</td>
<td>October 29, 2019 6:41 PM</td>
<td>October 29, 2019 6:41 PM</td>
</tr>
<tr>
<td>Microsoft Forms</td>
<td>Users not populating in OAB</td>
<td>Exchange Online</td>
<td>EX184453</td>
<td>Service restored</td>
<td>October 23, 2019 2:17 PM</td>
<td>October 30, 2019 8:00 PM</td>
</tr>
<tr>
<td>Microsoft Kaizala</td>
<td>Can't access OneDrive for Business content</td>
<td>OneDrive for Business</td>
<td>OD192519</td>
<td>Post-incident report published</td>
<td>October 24, 2019 4:09 PM</td>
<td>October 24, 2019 5:00 AM</td>
</tr>
<tr>
<td>Microsoft StaffHub</td>
<td>Can't access SharePoint Online sites</td>
<td>SharePoint Online</td>
<td>SP192519</td>
<td>Post-incident report published</td>
<td>October 24, 2019 6:09 AM</td>
<td>October 24, 2019 6:00 AM</td>
</tr>
<tr>
<td></td>
<td>Outlook mobile and Mac: Outlook users can't sync or see</td>
<td>Exchange Online</td>
<td>EX192568</td>
<td>Service restored</td>
<td>October 23, 2019 4:00 PM</td>
<td>October 25, 2019 6:00 PM</td>
</tr>
<tr>
<td></td>
<td>Problems with Power BI</td>
<td>Power BI</td>
<td>PB192502</td>
<td>Post-incident report published</td>
<td>October 22, 2019 3:05 PM</td>
<td>October 28, 2019 3:00 PM</td>
</tr>
</tbody>
</table>

Healthy
Microsoft 365 admin center – Message center

- Review upcoming changes

Dynamics 365 – Service Update 96 Refresh for EUR

MC194281, Stay Informed. Published date: 28 Oct 2019

We have planned a refresh of Service Update 96 for your Dynamics 365 (online) organization in the EUR region. Maintenance window start: 28 October 2019, 16:00 UTC
Maintenance window end: 29 October 2019, 03:00 UTC

How does this affect me?
This refresh consists of minor bug fixes which have been implemented since the last full service update. There is no expected degradation to service performance or availability and this service update is planned outside of normal business hours to help minimize any potential impact to your organization. For organizations with users around the globe, we recognize that “outside of normal business hours” might affect you differently. We apologize for the impact this may have on your users. We are working hard to improve Microsoft Dynamics 365 (online) and minimize the impact of these maintenance windows.

What action do I need to take?
Communicate as appropriate with your Dynamics 365 Admin and users. Please contact support if you experience any issues.

Additional information
• Access to all admin centers
How to grant user permissions to Dynamics 365
Creating users

• By default, Microsoft 365 manages Dynamics 365 users
Creating users

• Creating a user and assigning a license

Set up the basics

To get started, fill out some basic information about who you’re adding as a user.

First name
Last name
Display name *
Username *
Password settings:
- Auto-generate password
- Let me create the password

Assign product licenses

Assign the licenses you’d like this user to have.

Select location *
United States

Licenses (0) *
- Assign user a product license
  - Dynamics 365 AI for Customer Service Virtual Agents Viral SKU
    9999 of 10000 licenses available
  - Dynamics 365 AI for Market Insights (Preview)
    9994 of 10000 licenses available
  - Dynamics 365 Customer Engagement Plan
    17 of 50 licenses available
Assigning Microsoft 365 roles

- Your first user is a global administrator of the tenant.
- New Users are created with **no administrative privileges**
- User, Global administrator and Customized administrator

Roles

Admin roles allow people to take action in admin center. Global admins have all admin permissions for all products and services, while custom admins only have the permissions you choose. To reduce risk to your organization, limit the number of global admins and assign limited admin roles instead.

Learn more about admin roles

- User (no administrator access)  

Global admin

You should have at least two global admins in your organization, in case you need to reset another global admin's account. For all other admins, assign them limited admin roles.

- Global administrator

Users and groups

- Helpdesk administrator
- Password administrator
- Service administrator
- User management administrator

Additional Roles

- Compliance administrator
- Compliance data administrator
- Customer Lockbox access approver
- Dynamics 365 service administrator

Detailed articles describing admins roles in Office 365
<table>
<thead>
<tr>
<th>Microsoft 365 role/feature</th>
<th>Backup &amp; restore</th>
<th>Sandbox copy</th>
<th>Configure new instances</th>
<th>Manage an instance</th>
<th>Add Dynamics 365 licenses</th>
<th>Approve Dynamics 365 mailboxes</th>
<th>Access support requests</th>
<th>Access Service health</th>
<th>Access Message center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft 365 global admin</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
<td></td>
<td></td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>Dynamics 365 service admin</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
<td>Possible with License admin role</td>
<td>Possible with Exchange admin role</td>
<td></td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>- all instances</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User with D365 CE system admin role</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
<td>Possible with License admin role</td>
<td>Possible with Exchange admin role</td>
<td></td>
<td>Only in Dynamics 365 admin center</td>
<td>❌</td>
</tr>
<tr>
<td>Microsoft 365 service admin</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>Exchange admin</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>Possible with Dynamics 365 system admin role</td>
<td>n/a</td>
<td>❌</td>
<td>❌</td>
</tr>
</tbody>
</table>
Bulk licensing users via PowerShell

- Advanced – Use PowerShell to license users in bulk
- Sample script and documentation:

Assign licenses to user accounts with PowerShell

```powershell
# Assigning Licenses in Office 365

# This first command will import the Azure Active Directory module into your PowerShell session.
Import-Module MSOnline

# Capture administrative credential for future connections.
$Credential = get-credential

# Establishes Online Services connection to Azure Active Directory
Connect-MsolService -Credential $Credential

# Before you can assign a license to a user, you must set the Usage Location for each user -
# represented by the two-character ISO code for that region. The Usage Location specifies the country
# in which the service is to be used, and determines which licensed features are available for that
# region for example, US is for the United States of America.
Set-MsolUser -UserPrincipalName user@contoso.com -UsageLocation US

# To view the list of available licenses, their SKU codes, and the quantity remaining for assignment,
# run the following command.
Get-MsolAccountSku

# You can now use the Set-MsolUserLicense cmdlet with the -AddLicenses parameter to assign the
# license, using the appropriate AccountSkuId returned from the previous step. You must replace
# user@contoso.com with the name of the actual user and replace contoso with the name of your Office
# 365 tenant.
Set-MsolUserLicense -UserPrincipalName user@contoso.com -AddLicenses contoso.ENTERPRISEPACK
```
Automatic licensing assignment through groups

- Assign licenses directly to AAD security groups
- Members will automatically get licenses
Automatic licensing assignment through groups

Azure Active Directory admin center

Dynamics 365 Customer Engagement Plan

- Dynamics 365 Customer Engagement Plan: Off → On
- Dynamics 365 Customer Service Insights for CE Plan: Off → On
- Flow for Dynamics 365: Off → On
- Microsoft Forms Pro for Customer Engagement Plan: Off → On
- Microsoft Social Engagement – Service Discontinuation: Off → On

Test 1 - Licenses

Products | State | Enabled Services | Assignment Paths
---|---|---|---
Dynamics 365 Customer Engagement Plan | Active | 10/10 | Inherited (test group 1, Group)
Granting users permission in Dynamics 365

- A user licensed for Dynamics 365 still needs permissions to access the service.
- To grant permissions:
  - Open your Dynamics 365 Sales/Service app
  - Click Settings->Security
• Now click users
Granting users permission in Dynamics 365

- Highlight a user
- To grant System Administrator access, click the Promote to Admin button.
Granting users permission in Dynamics 365

- To grant a more limited access, click the Manage Roles button.
- Choose the role you wish to assign from the list, and click OK.
Granting users permission to Dynamics 365

- A user’s privileges are determined by their license plus role assignment

<table>
<thead>
<tr>
<th>User type</th>
<th>Privileges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft 365 Administrator <strong>with</strong> Dynamics 365 license</td>
<td>Full system administrator privileges in all D365 instances</td>
</tr>
</tbody>
</table>
| Microsoft 365 Administrator **without** Dynamics 365 license | Access to settings page in all D365 instances  
|                                                 | No access to D365 data.                                                    |
| Microsoft 365 User **with a Dynamics 365 license** | Access as specified by the System Administrator of that org  
|                                                 | This could mean full access to one org, read only to another, and no access to a 3rd. By default, no access until granted privileges by an administrator inside each specific Dynamics 365 instance. |
| Microsoft 365 User **without** a Dynamics 365 license | No access                                                                 |
Dynamics 365 admin center
Dynamics 365 admin center - Overview

• Dynamics 365 admin center is to review & manage Dynamics 365 instances, solutions, and apps
• All admin functionality will be moved to Power Platform admin center which is in public preview
• Power platform admin center is recommended way of managing Dynamics 365 & CDS instances
Dynamics 365 admin center – Access

- Manages your Dynamics 365 instances
- Administrative tasks, Updates, Service Health, Applications and more

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Azure Active Directory</td>
<td>Go deep with identity management. Enable multi-factor authentication, self-service password reset, and edit company branding.</td>
</tr>
<tr>
<td>Compliance</td>
<td>Manage your compliance needs using integrated solutions for data governance, encryption, access control, eDiscovery, and more.</td>
</tr>
<tr>
<td>Device Management</td>
<td>A single-management experience for the End User Computing team in IT to ensure employees' Microsoft 365 devices and apps are secured, managed, and current.</td>
</tr>
<tr>
<td>Exchange</td>
<td>Manage advanced email settings, such as quarantine, encryption, and mail flow rules.</td>
</tr>
<tr>
<td>Flow</td>
<td>View activity and manage user licenses and data policies for Flow, the Microsoft app that automates workflows.</td>
</tr>
<tr>
<td>Microsoft Search</td>
<td>Manage Microsoft Search settings including services and content that are available for people in your organization. Make finding internal tools, documents, and people just as easy as searching the web in Bing.</td>
</tr>
<tr>
<td>OneDrive</td>
<td>Control access and sharing settings, default storage, and allowed file types.</td>
</tr>
<tr>
<td>PowerApps</td>
<td>View activity and manage user licenses and data policies for PowerApps, which enables users to create business apps that connect to your data and work across web and mobile.</td>
</tr>
<tr>
<td>Power BI</td>
<td>This admin center enables Power BI service admins to manage a Power BI tenant for your organization. The portal includes items such as usage metrics and settings.</td>
</tr>
<tr>
<td>Security</td>
<td>Get visibility into your security state, investigate and protest against threats, get recommendations on how to increase your security, and more.</td>
</tr>
<tr>
<td>SharePoint</td>
<td>Manage site collections, list and library permissions, file storage and sharing.</td>
</tr>
<tr>
<td>Dynamics 365</td>
<td>Use the Dynamics 365 admin center to review the status of your apps and solutions, apply updates, and manage your Dynamics 365 instances, solutions, and apps.</td>
</tr>
</tbody>
</table>
Dynamics 365 admin center – Manage instances

Each instance is a Dynamics 365 organization in your tenant.

An instance can be: Production, Sandbox or Trial.
Dynamics 365 admin center – Delete an instance

- Deleting a CRM Organization
  - Deletes the organization database and all data/metadata
Dynamics 365 admin center – Notifications

• Set additional recipients for email notifications
  • By default, all System Administrators will receive email notifications

Suitable for mail-enabled groups and/or individuals
Notifications for Service Incidents, Planned Maintenance, Service Updates, etc.
Dynamics 365 admin center – Solutions

- Install/Upgrade Solutions
- Portal Add-on etc. is installed from here
Dynamics 365 admin center – Service health

- Service Health allows you to review:
  - Current Health Status for each organization
  - Storage consumed per organization / Total Storage Used
Dynamics 365 admin center – Backup & restore

• Backup & Restore allows you to:
  • Create a backup and restore a backup to an instance
Dynamics 365 admin center – Applications

- Applications allows you to:
  - Configure and manage applications and add-ons

Specific application settings can configuration can be done here
Power Platform admin center
Introduction to Power Platform admin center

- admin.powerplatform.microsoft.com
- **Portal to** manage environments & settings for Dynamics 365 Apps, Power Apps & Power Automate (Flow)
  - Common Data Analytics
  - Help + Support
  - Managing data integration
  - Managing data gateways
  - Enabling early access
  - Advanced instance settings
## Overview of Power Platform admin center

### Environments

<table>
<thead>
<tr>
<th>Environment</th>
<th>Type</th>
<th>State</th>
<th>Region</th>
<th>Created on</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZeroCostMarketing</td>
<td>Sandbox</td>
<td>Ready</td>
<td>Europe</td>
<td>2019/08/20 14:59</td>
</tr>
<tr>
<td>Vanilla</td>
<td>Sandbox</td>
<td>Ready</td>
<td>Europe</td>
<td>2019/09/11 14:12</td>
</tr>
<tr>
<td>trash</td>
<td>Production</td>
<td>Ready</td>
<td>Europe</td>
<td>2019/09/17 18:16</td>
</tr>
<tr>
<td>to_delete</td>
<td>Production</td>
<td>Ready</td>
<td>Europe</td>
<td>2019/09/11 10:31</td>
</tr>
<tr>
<td>Test_Test_Org</td>
<td>Sandbox</td>
<td>Ready</td>
<td>Asia</td>
<td>2018/03/14 09:31</td>
</tr>
<tr>
<td>TestOrgLib</td>
<td>Production</td>
<td>Ready</td>
<td>Europe</td>
<td>2019/09/16 17:53</td>
</tr>
<tr>
<td>TestLutz</td>
<td>Trial</td>
<td>Ready</td>
<td>Europe</td>
<td>2019/10/28 08:43</td>
</tr>
<tr>
<td>Teste_CDS</td>
<td>Production</td>
<td>Ready</td>
<td>Europe</td>
<td>2017/10/16 16:01</td>
</tr>
<tr>
<td>Test</td>
<td>Production</td>
<td>Ready</td>
<td>Europe</td>
<td>2019/06/26 16:32</td>
</tr>
</tbody>
</table>
Each instance is a Dynamics 365 organization in your tenant. An instance can be: Production, Sandbox or Trial.
Power Platform admin center – Edit org

- Editing a Dynamics 365 Organization
  - Modify name, URL, Instance Type and Security Groups

**Instance Type Switcher** allows you to switch a production instance to sandbox and vice-versa depending upon your licenses.

**Administration Mode:** Only users with System Administrator or System Customizer security roles will be able to sign into that instance.
Power Platform admin center – Reset org

- Resetting a Dynamics 365 Organization
- Deletes the current org (all data in this org is lost!)

Instance will be deleted and reset to specified target version

Choose individual apps or all
Power Platform admin center – Copy org

- Copying a Dynamics 365 Organization
  - Copies all metadata (and data) to a target instance

**Everything:** All data and customizations (metadata) are copied from the source to the target

**Customizations & Schema:** Only customizations (metadata) is copied from source to the target
Power Platform admin center – Delete org

- Deleting a Dynamics 365 Organization
  - Deletes the organization database and all data/metadata
Power Platform admin center – Create org

- Creating a Dynamics 365 Organization
- Customers having new capacity-based licenses.
Power Platform admin center – Create org

Add database

Language
Default language for user interfaces in this environment

- English

Currency
Reports will use this currency

- EUR (€)

Enable Dynamics 365 apps
In addition to PowerApps. Learn more

- Yes

Automatically deploy these apps

- Sales

Security group
Restrict environment access to people in this security group. Otherwise, everyone can access. Learn more

- Select

New environment Vanilla D365 Sales Environment is getting prepared. It can be used once active.

Environments

<table>
<thead>
<tr>
<th>Environment</th>
<th>Type</th>
<th>State</th>
<th>Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vanilla D365 Sales Environment</td>
<td>Production</td>
<td>PreparingInstance</td>
<td>Europe</td>
</tr>
</tbody>
</table>
Power Platform admin center – Capacity

- Storage consumed per storage type

---

**Capacity**

**Summary**

See where your org is using storage and add-ons that could impact your capacity. Learn more

**Storage capacity**

- **Database**: 108.82/125.63 GB (13.38% available)
- **File**: 0.18/120 GB (99.85% available)
- **Log**: 1.28/2 GB (35.89% available)

**Storage capacity, by source**

<table>
<thead>
<tr>
<th>Source</th>
<th>Database</th>
<th>File</th>
<th>Log</th>
</tr>
</thead>
<tbody>
<tr>
<td>Org (tenant) def</td>
<td>10 GB</td>
<td>20 GB</td>
<td>2 GB</td>
</tr>
<tr>
<td>User licenses</td>
<td>&gt; 15.63 GB</td>
<td>&gt; 100 GB</td>
<td>N/A</td>
</tr>
<tr>
<td>Additional capacity</td>
<td>100 GB</td>
<td>0 MB</td>
<td>0 MB</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>125.63 GB</td>
<td>120 GB</td>
<td>2 GB</td>
</tr>
</tbody>
</table>
Power Platform admin center – Capacity

- Storage consumed per environment
• Backup & Restore allows you to:
  • Create a manual backup
Power Platform admin center – Backup/Restore

- Backup & Restore allows you to:
  - Restore a backup (sys or manual) to an instance
Power Platform admin center – Settings

- Settings

- Environments > Last Samurai > Settings

- Product
  - Behavior, Features, Languages, Privacy + Security

- Business
  - Business closures, Calendar, Connection roles, Currencies

- Users + permissions
  - Business units, Hierarchy security, Mobile configuration, Positions

- Audit and logs
  - Audit log management, Audit settings, Audit summary view, Entity and field audit settings

- Templates
  - Access team templates, Article templates, Contract templates, Data import templates

- Email
  - Email settings, Email tracking, Mailboxes, Server profiles

- Integration
  - Enable server-based SharePoint integration, Document management settings, Manage document suggestions, Microsoft Social Engagement

- Data management
  - Add ready-to-use business processes, Announcements, Auto numbering, Automatic record creation policies

- Encryption
  - Data encryption

- Resources
  - All legacy settings, Dynamics 365 for Outlook
Power Platform admin center – Settings

- **Settings**

### Basic behavior
- Auto save: On
- Load default static content from: On
- Share reassigned records with: Off
- Open in application mode: Off
- Use Unified Interface only: On
- Use legacy form rendering: Off

### Formatting
- Full Name Display Order: First Name
- Display Currencies Using: Currency symbol
- Pricing decimal precision: 2

### Auditing
- Enable logging for Common Data Service data
  - Start Auditing
  - Log access
  - Read logs

### Help features
- Custom help for customizable entities: Off
- Global custom help URL:
- Append parameters to URL: Off
- Learning path:
  - On
  - Off
- Learning path authoring:
  - On
  - Off

### PowerApps component framework for canvas apps
- Enables PowerApps component framework that allows the execution of code that may not be generated by Microsoft when a user adds code components to an app. Make sure that the code component solution is from a trusted source.
- Allow publishing of canvas apps with code components: Off
Power Platform vs Dynamics 365 admin center

- **Common features**

<table>
<thead>
<tr>
<th>Admin Center</th>
<th>Backup &amp; restore</th>
<th>Sandbox copy</th>
<th>Configure new instances</th>
<th>Manage an instance</th>
<th>Delete an Instance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Power Platform</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Dynamics 365</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Power Platform vs Dynamics 365 admin center

- Features only available within Dynamics 365 admin center

<table>
<thead>
<tr>
<th>Admin Center</th>
<th>Notification E-Mail Setting</th>
<th>Managing Solutions</th>
<th>Managing Applications</th>
<th>Service Health per Instance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Power Platform</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>Dynamics 365</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Power Platform vs Dynamics 365 admin center

- Features only available within Power Platform admin center

<table>
<thead>
<tr>
<th>Admin Center</th>
<th>Common Data Analytics</th>
<th>Help + Support</th>
<th>Managing Data Integration</th>
<th>Managing data gateways</th>
<th>Enabling Early Access</th>
<th>Advanced Instance Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Power Platform</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Dynamics 365</td>
<td>×</td>
<td>×</td>
<td>×</td>
<td>×</td>
<td>×</td>
<td>×</td>
</tr>
</tbody>
</table>
Release waves and service updates
Release waves

- Two release waves per year - April and October
- Release plans are published ahead of release waves which contain all information about upcoming features
  - **Dynamics 365**: Sales, Marketing, Customer Service, Field Service, Project Service Automation, F&O, Talent, Retail, Commerce and Business Central, Forms Pro, artificial intelligence and mixed reality
  - **Power Platform**: Power Apps, Power BI, Power Automate (Flow), Power Virtual Agents, AI Builder, Business intelligence and Common Data Model and data integration
## What's new and planned for Dynamics 365 Sales

10/24/2019 • 2 minutes to read • 

This topic lists features that are planned to release from October 2019 through March 2020. 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.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Enabled for</th>
<th>Public preview</th>
<th>Early access*</th>
<th>General availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make informed decisions with manual sales forecasting</td>
<td>End users by admins, makers, or analysts</td>
<td>✓ Oct 1, 2019</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Customization of Opportunity Close dialog box</td>
<td>End users by admins, makers, or analysts</td>
<td>-</td>
<td>✓ Aug 1, 2019</td>
<td>✓ Oct 1, 2019</td>
</tr>
<tr>
<td>LinkedIn Sales Navigator integration enhancements</td>
<td>End users, automatically</td>
<td>-</td>
<td>✓ Aug 2, 2019</td>
<td>✓ Oct 1, 2019</td>
</tr>
<tr>
<td>Out-of-the-box hierarchical relationship on the Territory entity</td>
<td>End users, automatically</td>
<td>-</td>
<td>✓ Aug 2, 2019</td>
<td>✓ Oct 1, 2019</td>
</tr>
<tr>
<td>Simplified lead management experience</td>
<td>End users, automatically</td>
<td>-</td>
<td>✓ Aug 2, 2019</td>
<td>✓ Oct 1, 2019</td>
</tr>
<tr>
<td>Business card scan</td>
<td>End users, automatically</td>
<td>-</td>
<td>✓ Aug 1, 2019</td>
<td>✓ Oct 6, 2019</td>
</tr>
<tr>
<td>Enhance the adding or editing Opportunity/Quote/Order/Invoice products experience</td>
<td>End users, automatically</td>
<td>-</td>
<td>✓ Aug 1, 2019</td>
<td>✓ Oct 6, 2019</td>
</tr>
</tbody>
</table>
Release waves – Key dates

- **1st wave:** April-September
  - Release plans: December-January
  - Early Access: February
- **2nd wave:** October-March
  - Release plans: June-July
  - Early Access: August
- Environments are **automatically updated** during one of the maintenance windows over a weekend
- Exact dates are according to the geo region
Release waves – Key dates

(April-September & October-March)

- April’19
  - 2019 Release wave 1
- Aug’19
  - RW 2 Early Access
- Oct’19
  - 2019 Release wave 2
- Feb’20
  - RW 1 Early Access
- April’20
  - RW 1 Early Access
- Oct’20
  - 2020 Release wave 1
Release waves – How features are enabled

• End users / automatically
  • Features include change(s) to the *end user* experience
  • Enabled *automatically*

• End users / by admins, makers, or analysts
  • Features include change(s) to the *end user* experience
  • Enabled or configured by the administrators, makers, or business analysts

• Admins, makers, or analysts / automatically
  • Features are meant to be used by administrators, makers, or analysts
  • Enabled *automatically*
Release waves – Early access

• Available 2 months before release wave start
• To validate features which update existing user experience
• Opt-in using any environment
  • No rollback!
  • Use an environment;
    • Which is not being used within release cycle
    • Has the latest customization
Release waves – Early access

- Enable Early Access
**Product updates – Service updates**

- **Dynamics 365 service updates**
  - Regularly throughout the year
  - Security, bug fixes and minor enhancements
  - Different deployment date per region
Product updates – Service updates

• Dynamics 365 service updates
  • Can be tracked using released versions page

Released Versions of Dynamics 365 for Customer Engagement

11/05/2019 • 3 minutes to read • 🍂🍂

1 Important

We are working on new ways to bring transparency into our weekly deployments. If you have any feedback, please fill out our survey, and share your thoughts! Note: This page is updated every Tuesday.

Latest version availability

The table below gives an overview of the current version and next version of Dynamics 365 Customer Engagement for your organization. If you would like to review the release notes for any release just click on the version number for either current or next. To find the window that your next scheduled update will occur in please click here.
Dynamics 365 – Service Update 105 for EUR

MC194167, Stay Informed, Published date: 27 Oct 2019

We have a minor service update planned for your Microsoft Dynamics 365 (online) organization in the EUR region. Maintenance window start: 22 November 2019, 18:00 UTC
Maintenance window end: 23 November 2019, 03:00 UTC

How does this affect me?
As part of this service update, the following feature areas may be affected: The version number for your Microsoft Dynamics 365 (online) organization will update to version 9.1.0.10501 or higher after the background database operations complete. Although there is no expected degradation to service performance or availability, this service update is planned outside of normal business hours to help minimize any potential impact to your organization. During this maintenance window users may see short, intermittent impact such as transient SQL errors or a redirect to the login screen. If an impact occurs outside of this maintenance window, please contact Microsoft Support. For organizations with users around the globe, we recognize that "outside of normal business hours" might affect you differently. We apologize for the impact this may have on your users. We are working hard to improve Microsoft Dynamics 365 (online) and minimize the impact of these maintenance windows.

What action do I need to take?
Communicate as appropriate with your Dynamics 365 Admin and users. Please contact support if you experience any issues.

Service Update 105 for Microsoft Dynamics 365 9.1.0

INTRODUCTION
Service Update 105 for Microsoft Dynamics 365 9.1.0 is now available. This article describes the hotfixes and updates that are included in Service Update 105.
Please note that our naming conventions have changed to clarify the link between the version number and service update. For example, Service Update 105 will correlate to version number 9.1.0.10501. Occasionally a Service Update will be cancelled and all the associated fixes will be rolled into the next Service Update; thus Service Update numbers will not always increase incrementally.
As this release is deployed globally, we will continue to add fixes and the version number may change. Check this article regularly as we continue to document fixes added to this release.

MORE INFORMATION
Update package  
Service Update 105 for Microsoft Dynamics 365 9.1.0
Service Update 105 for Microsoft Dynamics 365 9.1.0  

To determine whether your organization had this update applied, check your Microsoft Dynamics 365 version number. Click the gear icon in the upper right corner, and then click About.
Please note that an "x" at the end of a fix statement denotes that this repair item was incorporated into multiple service-update releases.

Service Update 105 resolves the following issues:

Repaired Functionality

The following list details issues whose resolutions repair items in Dynamics that are not functioning.

Dynamics 365
- After initiating a chat conversation with a customer and closing the chat, and then navigating to the chat's transcript through a search, the transcript text in the search results were not cleaned up.
- Selecting a link within a page did not open the link in a new tab.
Advanced topic - Restricting Access with Security Groups
Restricting Access to an environment

- Office 365 Security Groups can help managing user access to different Dynamics 365 orgs

- Sample Scenario:
  - **Developers** should have access to **Sandbox** org only.
  - **Prod Users** should have access to **Production** org only.
Restricting Access to an environment

- **First Step**: Create your Users in Microsoft 365
  - Steps are different if Federation is established
  - Ensure users have assigned licenses
Restricting Access to an environment

- **Second Step**: Create security groups
Restricting Access to an environment

- **Third Step**: Assign users to the security groups
Restricting Access to an environment

- **Fourth Step**: Associate the Security Group with the Dynamics 365 Instance in the Dynamics 365/Power Platform Admin Center

![Image of settings and security group settings]
Restricting Access to records via teams

Sandbox Access Group

Membership type: Assigned
Source: Cloud
Type: Office
Object id: 296b734b-2e08-4e2d-9ebc-155640e45b8
Creation date: 11/4/2019, 12:07:29 PM
Email: sandboxaccessgroup@nmicrosoft.com

Manage Team Roles
What roles would you like to apply to the team you have selected?

As you assign security roles to your users, you will enable access and the ability to extract your data. Access is enabled through multiple clients (e.g., Dynamics 365 for Outlook, Dynamics 365 for tablets with user). You may administer these access enabled by

Company Name: Coho Winery (sample)