

# Finance & Operations Feature adoption strategy

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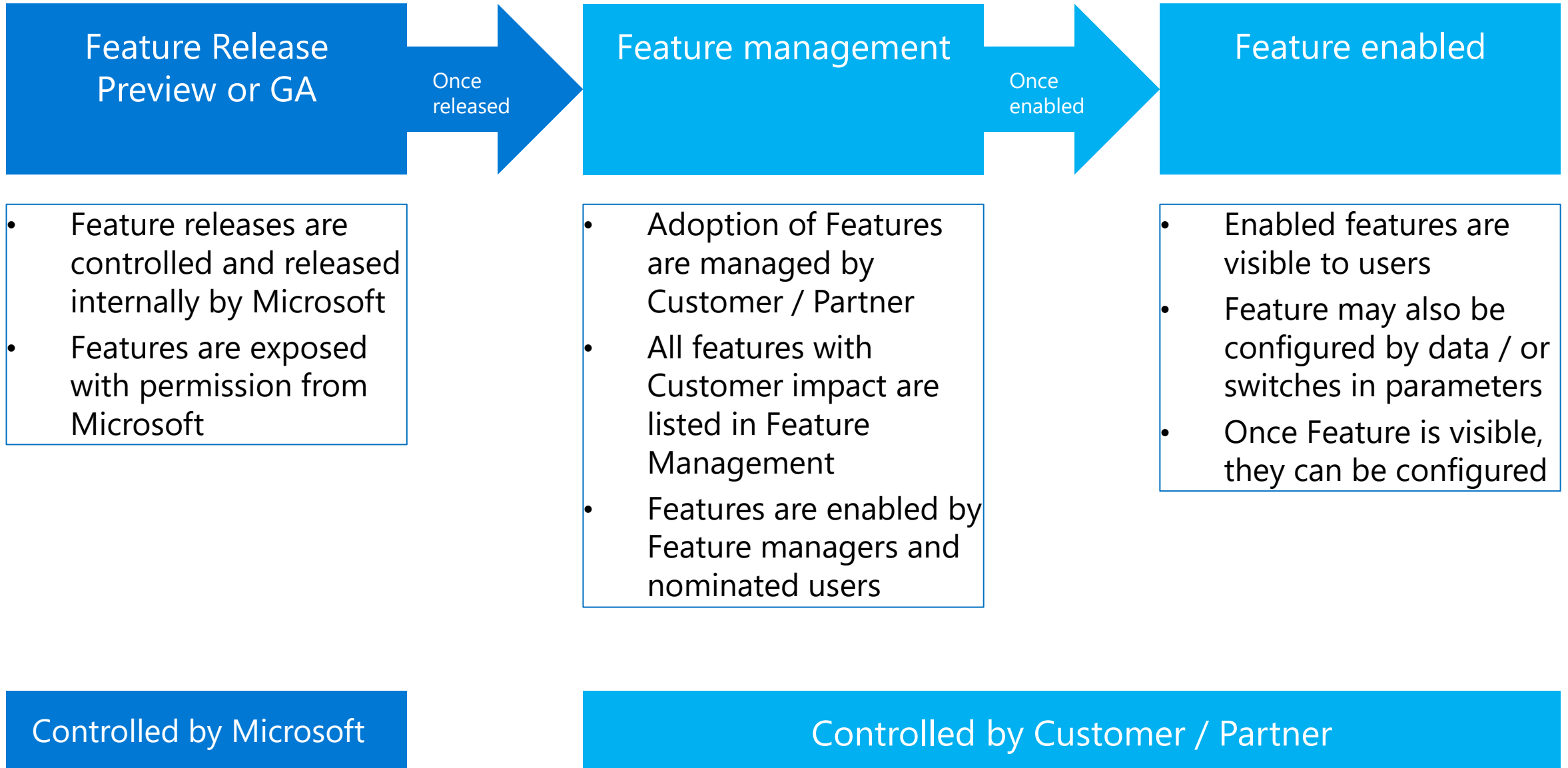
# Agenda

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- Basic principles
  - Feature exposure
  - What has changed
  - Different approaches
  - Guidance
  - References

# Basic principles

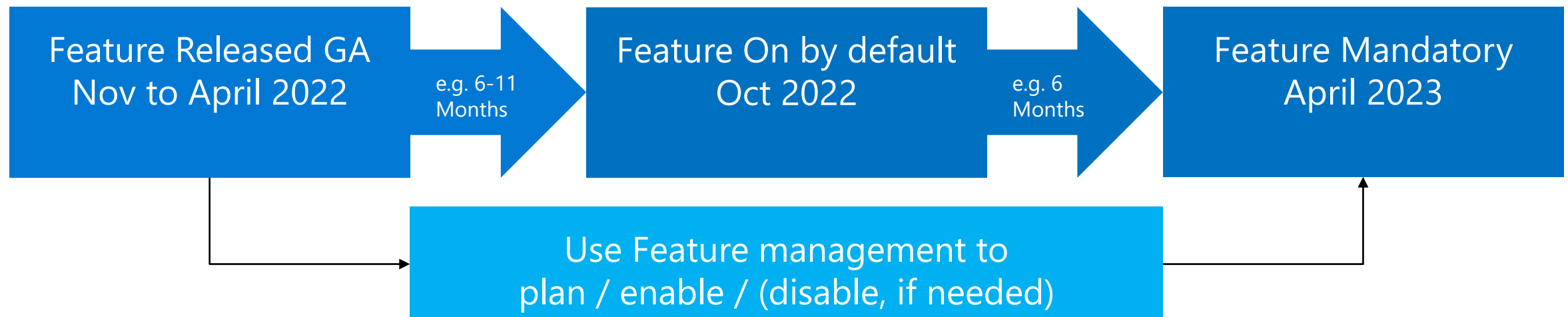
- Code changes with each update
- Features are added with each service update
- Each Feature is different in nature
- Product teams can decide to initially start a new feature as a preview feature (Feature state = Preview and could stay longer)
- License configuration will continue to be used (Maintenance mode required)
- Feature management workspace has been introduced 2019 intended to help with controlled roll out of new features

# Feature exposure flow



# What has changed with 10.0.21

- New Status “On by default” and “Mandatory”
- Features get enabled by default (e. g. 6-11 Months after release GA; with the next Major release)
- Features get mandatory (e. g. 12-17 Months after release GA; with the next Major release)



# Different Customers / different approaches

## Pessimistic approach:

- Service updates are adopted only 2 times a year (3 are paused)
- New Features are ignored or only adopted when mandatory
- Manually performed regression testing

## Optimistic approach:

- Every Service update is automatically pushed
- Features are automatically enabled
- Regression testing mainly automated

# General Guidance

- Sync the feature adoption with scheduled UAT test cycles
- Sync the feature adoption with the planned release schedule
- [Service update availability - Finance & Operations | Dynamics 365 | Microsoft Docs](#)
- Learn from mistakes and adjust the plan accordingly
- Conduct a business analysis with technical impact analysis on the existing solution and customizations for new features (sample below)

Security and compliance	ALM	Admin and governance	User readiness and change management	Environment strategy	Limits and capacity	Data and integrations
High	Low	Low	Medium	Low	Low	Medium
Usually no impact except when connecting to external data sources	No major impact expected	No expected impact as long as the data boundaries don't change	User readiness effort is required to use the new features	No impact	Usually no impact, sometimes features might require additional storage and capacity	Features might generate additional data but shouldn't impact integrations

# General Guidance

- Influence towards more optimistic approach

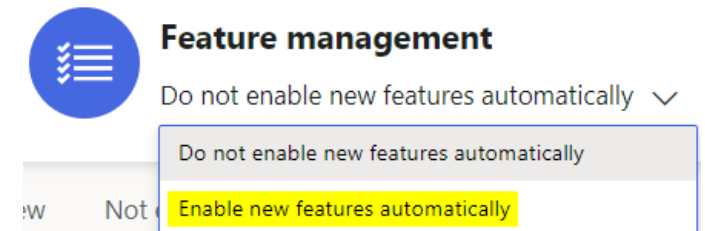
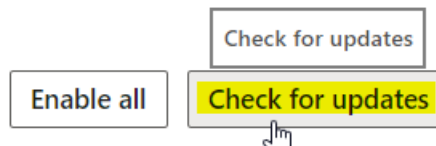
Feature name	↑
(Belgium) CODA bank statement processing performance improvement	
Collection letter creation performance improvement	
Performance improvements for customer orders and customer transactions.	
Performance improvements for VAT register transactions form	
Sales history cleanup performance improvements	
Performance improvements for rebuilding financial dimension sets	
Sales tax payment performance improvement	
(Poland) Simplified date control (performance improvement) when creating a...	
(Poland) Simplified check (performance improvement) for create of customer...	

Feature name	↑
Budget Control - performance enhancement for pending documents	
Sales quotation details performance enhancement	
Performance enhancement for large consolidations	
Sales order details performance enhancement	
Project invoice proposal performance enhancement feature	
Enable project resource scheduling performance enhancement feature	
Performance enhancement for activation of Budget control configuration	
Performance enhancement for free text invoice to avoid tax re-calculation	
Customer aging performance enhancement	



# Guidance for Architects / Consultants

- Review Service update what's new with the Customers eyes
  - [What's new or changed in Finance and Operations apps home page](#)
  - [Removed or deprecated features home page](#)
- Test the new release planner and provide feedback
  - [Release planner \(BETA\) \(dynamics.com\)](#)
- Install the PEAP / FIRST release / GA version on Vanilla / Contoso to learn and decide (e. g. Features automatically enabled)
- Check for updates after each deployment

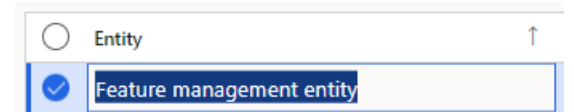


# Guidance for Architects / Consultants

- Split the list of available features by Feature teams (Modules)
- Decide about the planned adoption of a feature early in the release planning and communicate to release management
- Install the update and enable the planned features on Sandbox environment, test, resolve issues and once decided
- Install the update and enable the planned features on UAT / regression test Sandbox, test and resolve issues

# Guidance for Release / Change manager

- Decide about the adoption of a feature early in the release planning and communicate
- Add the released feature decisions to your release documentation (e. g. Azure DevOps)
- Test and Document the changes for the organization
- Plan for changes that need to happen after a feature is enabled (e. g. settings; if required)
- Use the Feature management entity to move settings between Environments e. g. UAT and PROD for release
- Use data packages to move settings between Environments e. g. UAT and PROD for release



# References

[Feature management overview - Finance & Operations | Dynamics 365 | Microsoft Docs](#)

[Feature management in Finance and Operations apps - Learn | Microsoft Docs](#)

Thank you