



Microsoft Dynamics 365

2022 RELEASE WAVE 1 PLAN

Features releasing from April 2022 through September 2022

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Contents

2022 release wave 1 plan	25
Early access features	31
Marketing	35
Dynamics 365 Marketing	35
Overview	35
What's new and planned	35
Collaborative apps	38
Overview	38
Take action with your customers in more ways by raising triggers from a journey to run another journey or Power Automate flow	39
Trigger journeys based on data changes in any Dynamics 365 app to engage customers at the right time without writing any code	40
Personalize interactions using a unified view of customer activity across Dynamics 365 Marketing, Sales, and Customer Service	41
Collaborate across your organization to create the best marketing campaigns possible using the built-in Microsoft Teams chat	42
Data and AI	43
Overview	43
Delight your customers with hyper-personalized next-best content selection and boost your marketing ROI by optimizing with AI	43
Connect Dynamics 365 Customer Insights with customer journey orchestration when using your own data lake	44
Increase engagement using AI-powered optimization to reach each customer on the best channel based on their customer attributes	45
Quickly personalize emails using predefined dynamic text, without the need to know the underlying data structure	45
Quickly create emails with enhanced reusable content fragments	47

Win customer attention by creating conditional dynamic content with easy-to-use no-code experiences	48
Moments-based	49
Overview	49
Create individualized journeys by adding conditions based on attributes captured as part of the event trigger	49
Continue the conversation with your customers by taking action on their SMS replies	50
Easily create journeys to send reminders encouraging customers to respond to a call to action	51
Target the right contacts and leads using the reimagined, easy-to-use segmentation builder	52
Sales	54
Dynamics 365 Sales	54
Overview	54
What's new and planned	54
Conversation intelligence	58
Overview	58
Get the right insight, at the right time, at the right place	58
Facilitating digital selling	60
Overview	60
Experience Sales accelerator, conversation intelligence, and predictive scoring with Dynamics 365 Sales Enterprise license	61
Sales Hub is now preinstalled on all environments	62
Forecasting and pipeline intelligence	63
Overview	63
Assign attributes per sales stage to improve predictive score accuracy	63
Compare annual projections with actual progress over multiple periods	63
Measure the performance of predictive scoring model with accuracy reports	64
Streamline your forecasting workflow with default experiences	64
Support for yearly forecast periods	65

Update quotas quickly with inline editing and quota rollups	65
Filter the underlying opportunities of a forecast	66
Monitor stagnated deals and how they impact the predictive score	66
Migrate forecasts from one environment to another with solution awareness	67
Mobile	67
Overview	67
Capture mobile phone contacts and recent calls	67
Effortlessly log information using the mobile phone camera	68
Outlook deep-link integration with templates, autofill, and emails to meeting participants	68
Relationship intelligence.....	69
Overview	69
Discover accounts and contacts from email interactions	69
Sales Accelerator and process automation	70
Overview	70
Choose the right engagement plan for your customers	71
Move sequences between environments seamlessly to enable sellers to get started quickly ..	71
Personalize the prioritized worklist using advanced filtering	72
Enable Outlook integration to avoid double booking	73
Easier setup experience	74
Engage efficiently with your customers	74
Make quick decisions with enhancement to worklist cards.....	75
Customizable worklist cards for right contextual information to the seller	75
Update activities from sequence step and correlate it with timeline activities	76
Get notified when customers actively engage with you	79
High-quality leads ensure higher success rates.....	80
Service	81
Dynamics 365 Customer Service	81
Overview	81

What's new and planned	81
Administrator experiences	85
Overview	85
Simplify administration with the new Customer Service admin center application.....	85
Agent experiences	86
Overview	86
Enhanced experience of using email templates while composing an e-mail.....	86
Inbox enhancements to help improve agent productivity	87
Enhanced experience for creating email templates.....	87
Communities.....	88
Overview	88
Engage with customers in Dynamics 365 Customer Service Community	88
Knowledge management.....	89
Overview	89
Relevance search integration for knowledge management in portals	90
Analytics for knowledge articles and search terms	90
Usability enhancements to knowledge article search.....	91
Configure knowledge search control for application side pane.....	91
Omnichannel.....	92
Overview	92
APIs for queue and agent availability	92
Service-level agreements.....	93
Overview	93
Recalculate service-level agreements based on changes to the attribute associated with an entity.....	93
Usability enhancements in service-level agreements	94
Teams integration	94
Overview	94
AI-generated conversation summary to set the context for a Teams-based collaboration	95

Contextual collaboration using embedded Microsoft Teams	95
Provide AI-suggested contacts to agents for Teams-based collaboration	96
Unified routing	97
Overview	97
Enhancement in default queues for unified routing	97
Enhancements in diagnostics for unified routing	98
Dynamics 365 Field Service	99
Overview	99
What's new and planned	99
Windows 10 support for Field Service mobile	100
Field Service mobile usability enhancements	101
Finance and Operations	102
Dynamics 365 Finance	102
Overview	102
What's new and planned	103
Core financials	106
Overview	106
New vendor invoice management experience	106
Vendor invoice OCR – advanced configurations for OCR service	107
Vendor invoice OCR – deployment wizard for vendor invoice OCR Integration	107
Vendor invoice OCR – vendor invoice OCR hub	108
Vendor invoice OCR – business rules in staging area	109
Enhancements around ledger settlements	109
New button added to view settlement voucher	110
Post in batch for bill of exchange related journals	111
Reverse reconciled advanced bank reconciliation	113
Validate vendor bank account before submitting vendor payment journal to workflow	115
Allow positive asset depreciation	116

New vendor invoice data entity for OCR integration	116
Subscription billing – recurring contract billing.....	117
Subscription billing – revenue allocation.....	118
Subscription billing – revenue and expense deferrals.....	118
Financial tags	119
General ledger year-end enhancements – specify balance sheet dimensions and year-end close micro-service	119
Ledger settlement automation.....	120
Globalization	120
Overview	120
Tax Audit and Reporting Service.....	121
Russian Fixed Assets – integration with Asset Management lifecycle.....	122
Tax Calculation service / Core Tax – inheriting origin tax information for reversal transactions	123
Electronic Reporting – ORDER BY function in queries.....	123
Configurable Business Documents – Business Document management workspace integration with Global Repo.....	124
Russian Fixed Assets – integration with Asset Leasing.....	124
Tax Calculation service – accepting multiple documents in one API call	125
Globalization Studio	126
Dynamics 365 Supply Chain Management.....	128
Overview	128
What's new and planned	128
Inventory and logistics	131
Overview	131
Unified pricing service	132
Available-to-promise for the Inventory Visibility Add-in.....	133
Inventory allocation for the Inventory Visibility Add-in	133
Inventory Visibility support for advanced warehouse management.....	134
Global Inventory Accounting Add-in for Dynamics 365 Supply Chain Management.....	135

Landed cost integration with third-party freight forwarders	137
Enhanced warehouse execution workloads on scale units	138
Manufacturing	139
Overview	139
Material consumption and reservations in the production floor execution interface	140
Register material consumption on scale units	141
Catch weight items for the production floor execution interface	144
Planning	145
Overview	145
Planning Optimization suggestions to optimize existing supply	145
Planning Optimization centralized calendar maintenance	146
Planning Optimization support for subcontracting	147
Planning Optimization support for shelf life	148
Planning Optimization support for resource scheduling with finite capacity	149
Demand Driven Material Requirements Planning (DDMRP)	150
Make-to-order supply automation	152
Planning Optimization for select manufactured items	153
Planning Optimization support for capable-to-promise (CTP)	154
Dynamics 365 Intelligent Order Management	156
Overview	156
What's new and planned	156
Application monitoring and troubleshooting	159
Overview	159
Improved monitoring and debugging experience for admins and business users	159
Business to consumer (B2C) enhancements	159
Overview	159
Enable real-time order status communications to your e-commerce site	160
Core orchestration functionality	160
Overview	160

Expanded order actions to enable advanced order capture and processing.....	161
Fulfillment optimization using reinforcement learning.....	161
Improved integration with Inventory Visibility Add-in for Dynamics 365 Supply Chain Management.....	162
Order visibility and insights	162
Overview	162
Expanded visibility and insights in the order journey	163
Provider integrations	163
Overview	163
Expanded ecosystem of providers.....	164
Dynamics 365 Project Operations	165
Overview	165
What's new and planned	165
Modern approvals.....	167
Per diem expenses in the modern interface experience.....	167
Pay-when-paid support for resource-based non-stocked scenarios.....	168
Transfer all lines with posting errors to a new Project Operations integration journal	169
Time-zone agnostic price defaulting on Project Operations actuals.....	169
External Project Operations planning.....	170
Upgrade from Dynamics 365 Project Service Automation to Dynamics 365 Project Operations Lite Deployment - Phase 2.....	170
Date-effective overrides in Project Operations pricing and costing	171
Editing resource assignment contours	171
Revision and activation of quotes	172
Support vendor payment of expense liability in foreign currency.....	172
Project-based vendor invoice reconciliation for Project Operations for resource and nonstocked scenarios	173
Finance and Operations cross-app capabilities	174
Overview	174

What's new and planned	175
Cross-application features	176
Overview	176
Updates to client feature states with version 10.0.25	176
Updates to saved views and personalization	177
Vertically scrolling workspaces	179
Data and process integration	180
Overview	180
Specify which data is exported to Azure Data Lake.....	180
One Azure Synapse experience for all Dynamics 365 data	181
Regression suite automation tool (RSAT) improvements	181
Overview	181
Support of test case variants	181
Improved integration with Azure DevOps	182
Improvements to the Task recorder experience	183
Improved Azure DevOps experience	183
Human Resources	184
Dynamics 365 Human Resources.....	184
Overview	184
What's new and planned	184
Employee development.....	186
Overview	186
Intelligent talent management.....	186
General.....	187
Overview	187
Migration to Finance and Operations infrastructure	187
Integrations and extensibility	188
Overview	188

Enable simplified integration with learning management system (LMS) providers	189
Organization and personnel management	189
Overview	189
Improved business process automation – active employees.....	189
Improved business process automation – employees joining	190
Improved business process automation – employees leaving.....	191
Commerce	192
Dynamics 365 Commerce	192
Overview	192
What's new and planned	193
Direct fiscal integration from POS	195
Enhanced fiscal connector configuration	195
Integration with Sitecore Content Hub	196
Additional filter options in POS inventory operations	197
Integrated experimentation in Dynamics 365 Commerce	198
Order cancellation for e-commerce	200
PayPal Cart Checkout support in e-commerce	202
Show or hide tax breakdown in e-commerce when prices include sales tax.....	203
Support for catalogs in e-commerce channel	204
Chat in Commerce with Power Virtual Agents and Omnichannel for Customer Service.....	205
Payments in installments with the Dynamics 365 Payment Connector for Adyen for Brazil	206
B2B e-commerce.....	207
Edit customer information asynchronously in POS and e-commerce channels	209
Honor site and warehouse settings on trade agreement in Commerce pricing engine	210
Personalization with Dynamics 365 Customer Insights.....	210
Apple Pay with Dynamics 365 Payment Connector for Adyen.....	211
Copy CMS content using site builder and manage it with API or Power Platform connector	212
Integrated omnichannel media asset management improvements	213

Store Commerce app for Windows	215
Google Pay with Dynamics 365 Payment Connector for Adyen	216
Fraud Protection.....	218
Dynamics 365 Fraud Protection.....	218
Overview	218
What's new and planned	218
Canadian provisioning of Fraud Protection	219
Enhance ability of fraud solution providers to manage fraud at scale	220
Natively integrated case management for purchase protection	220
Protect native mobile applications against fraud	221
Protect Power Apps portals products against fraud	221
Search functionality for fraud managers	222
SMB.....	223
Dynamics 365 Business Central	223
Overview	223
What's new and planned	224
Application	230
Overview	230
Blocking deletion of G/L accounts	230
Allow the sell-to and bill-to customers to be different for jobs	231
Bank reconciliation	235
Change default company bank account on sales and service documents	236
Check documents and journals in background	236
Consolidate customer and vendor balances	237
Fixed Quantity in product bills of materials	239
Improved and extensible Adjust Exchange Rates batch job.....	240
Map to Dataverse option sets such as payment terms, freight terms, and shipping agents without code	241

More control over deferrals posting	243
New UI for entering demand forecasts to add support for variant code and other improvements.....	244
Payment reconciliation journal.....	246
Report selection for projects	246
Set default dimensions on locations.....	247
Shopify connector	248
Standardizing the bank reconciliation process in North American versions.....	249
Support inventory pick and warehouse pick operations for jobs	250
Synchronize sales quotes and orders in both directions between Business Central and Dynamics 365 Sales.....	251
Use different G/L accounts for payables and receivables transactions	252
Better with Microsoft 365	253
Overview	253
Improvements to the Teams integration and Details page.....	253
Outlook add-in – add attachments from emails directly to Business Central documents	254
Development	255
Overview	255
Auto-deploy dependent projects in workspace	255
In-client performance profiler	256
Demo tool and demo data for manufacturing scenarios	256
AL-Go for GitHub – modern DevOps for partners	257
Telemetry – company name as a custom dimension in AL LogMessage	258
Users can export report datasets to XML.....	258
Governance and administration	259
Overview	259
Customer-managed encryption key for encrypting customer data at-rest	259
Customers can consent to Microsoft Support accessing their data through a Lockbox consent flow	259

Allow security administrator to define default permission set assignments when user is signing up	260
Updating only licensed users from Microsoft 365 runs faster and more efficiently	260
Permission set handling enhancements	261
Microsoft Power Platform	261
Overview	261
Dataverse data change events	262
Improvements to the Power Automate and Power Apps connector	262
Modern clients	263
Overview	263
Introduce Copy link option in the Share menu	263
The new PWA app replaces the Windows desktop app (UWP)	263
Usability improvements to the web client	264
Onboarding	264
Overview	264
Context-aware links in the Help pane from Microsoft and partners	265
Guided tour that helps users find settings and personalization tools	266
Support for rich text in teaching tips and tours	266
Tour of the Role Explorer and how to filter it	267
Reporting	267
Overview	267
New capabilities for financial reporting with account schedules	268
Use Excel to design layouts for reports	269
Service and platform	270
Overview	270
Performance – partners can get database insights through virtual tables and in-client pages	270
Telemetry – error dialogs are logged to telemetry	270
Telemetry – support engineers can now see user IDs in telemetry	271

- Telemetry – the action of enabling detailed telemetry is logged to telemetry 271
- Telemetry – when a database deadlock occurs, this is logged to telemetry 271
- Connected Spaces 273**
 - Dynamics Connected Spaces..... 273
 - Overview 273
 - Guides 274
 - Dynamics 365 Guides..... 274
 - Overview 274
 - What's new and planned 274
 - Support for mobile devices..... 275
 - Grant guide access to third parties..... 276
- Remote Assist 277**
 - Dynamics 365 Remote Assist..... 277
 - Overview 277
 - What's new and planned 277
 - Enable a customer or vendor to join a one-time call 278
 - Support for screen sharing in the mobile app 279
 - New Restricted mode prevents HoloLens 2 users from making private calls, accessing files and assets, and signing out of the app 279
- Customer Insights 281**
 - Dynamics 365 Customer Insights..... 281
 - Overview 281
 - What's new and planned 281
 - Activities..... 283
 - Overview 283
 - Expand semantic type support for activities and entities 283
 - B2B 284
 - Overview 284

Accelerate sales through intent data and account prospecting.....	284
Provide templates and libraries of industry standard metrics	284
Consent management	285
Overview	285
Import consent data almost in real time	285
Enrichment.....	285
Overview	285
Enrich your customer data safely with safe data collaboration	286
Intelligence.....	286
Overview	286
Provide automated transaction churn out-of-the-box model	286
Supply Chain Insights.....	287
Dynamics 365 Supply Chain Insights.....	287
Overview	287
What's new and planned	287
What-if analysis	288
AI-driven survey	289
Embedded Supply Chain Management experiences	289
Smart case manager	290
Customer Voice	291
Dynamics 365 Customer Voice	291
Overview	291
Microsoft Cloud for Industry	292
Microsoft Cloud for Healthcare	292
Overview	292
What's new and planned	292
Empower health team collaboration.....	294
Overview	294

Care team collaboration	294
Guided tours for Care management.....	294
Usability improvements for Care management	295
Enhance patient engagement.....	295
Overview	295
Patient view updates	295
Expand healthcare solutions to payor and pharma verticals	296
Overview	296
Decentralized clinical trials data model support	296
Payor data model support	296
Improve clinical and operational insights.....	297
Overview	297
Enhanced data model	297
Microsoft Cloud for Financial Services.....	298
Overview	298
What's new and planned	298
Data orchestration	301
Overview	301
Data movement and transformation.....	301
Financial services data models	301
Overview	301
General insurance data model	302
Wealth management data model.....	302
General insurance	303
Overview	303
Customer intelligence for general insurance	303
Unified customer profile for general insurance	304
Retail banking	305
Overview	305

Banking customer engagement.....	305
Customer onboarding enhancements	305
Document intelligence.....	306
Intelligent scheduling.....	306
Unified customer profile for retail banking enhancements	307
Wealth management	308
Overview	308
Customer intelligence for wealth management.....	308
Unified customer profile for wealth management.....	308
Microsoft Cloud for Nonprofit	310
Overview	310
What's new and planned	310
Deliver effective programming	312
Overview	312
Program impact dashboard enhancements	312
Know your donors and supporters	312
Overview	312
Automated Azure post-deployment configuration for Fundraising and Engagement	313
New Getting Started experiences.....	313
Payment processing enhancements.....	314
Microsoft Cloud for Sustainability	315
Overview	315
What's new and planned	315
Record	317
Overview	317
Dynamic calculation service	317
Ecosystem of prebuilt data connectors	318
Common Data Model for Microsoft Cloud for Sustainability	319
Reduce	321

Overview	321
Data-driven scorecards and goals.....	322
Report	322
Overview	322
Emissions and operational-specific dashboards.....	322
Public reporting	323
Early access features	325
Power Apps	326
Overview.....	326
What's new and planned.....	326
Deliver modern business apps with unparalleled productivity for all users.....	330
Overview	330
Power Apps grid control support for editable scenarios in model-driven apps	331
Enable model-driven app redirect from Internet Explorer to Microsoft Edge.....	331
Model-driven app in-app notifications	332
Easy record sharing.....	332
Appointment description supports rich text	333
Create and join Teams meetings from in-app appointments	334
New activity dropdown to show only relevant activities	334
Power Apps read-only grid control is the default grid for read-only scenarios	336
UI improvement for business process flows	337
Explore data through modern advanced find	337
Lobe E2E to Power Apps.....	340
Co-presence in records	340
Owner field has improved on-line presence indicator and contact card.....	342
Enable experts across the organization with advanced low code.....	343
Overview	343
Intelligent formula repair in Power Fx.....	344

Makers can collaborate together on the same app by merging changes	344
Support for data sources with dynamic schema	346
Quickly create tables and load data in Dataverse based on existing data	346
Command designer with Power Fx	347
Build forms entirely using features available in the modern form designer	349
Power Fx formulas provide richer and easier to use column calculations in Microsoft Dataverse	350
Data prefetch and cache control eliminates manual cache management	351
Power Fx named formulas to ease development and improve performance	352
Rapid delivery of flagship applications.....	353
Overview	353
Create standalone, native mobile apps with Power Apps.....	353
Power Apps application on Windows running model-driven and canvas apps with full support for offline.....	358
Safest way to digitally transform at whole-company scale.....	359
Overview	359
Conditional access policies for individual Power Apps.....	360
Enable quarantine of non-compliant Power Apps	362
Solution checker enforcement improvements.....	363
Power Automate	365
Overview.....	365
What's new and planned.....	365
Cloud flows.....	369
Overview	369
Improved home page experience	369
Copy and paste improvements in cloud flows	370
Enhanced help topics in Power Virtual Agents.....	371
Flow ownership supported for Service Principals	371

Greater control over connection reference creation and reuse during flow creation	372
Handle null values in JSON.....	372
Improved error messages across cloud flows	373
More discoverable help bot for cloud flows.....	373
OData editor improvements in cloud flows	374
Resubmit multiple failed runs at once.....	375
Solution cloud flows are shown in the My Flows experience	375
Solution list warnings are shown when connection references are not ready for use.....	376
Solution references will be visible when viewing solution resources	376
Undo feature in cloud flow designer	377
Use connections provided by run-only users with the Microsoft Dataverse connector	378
Improved Power Automate mobile app for Android	379
Desktop flows.....	381
Overview	381
Use credentials from CyberArk in desktop flow connections	381
Desktop flow machines and runs - status health, analytics, and error reporting improvements.....	382
Set screen resolution for unattended desktop flow runs	383
SharePoint connector in Power Automate for desktop	384
Use credentials from Azure Key Vault in desktop flow connections.....	385
Power Virtual Agents.....	386
Overview.....	386
What's new and planned.....	386
Bot configuration.....	388
Overview	388
Use single sign-on with Dynamics 365 Customer Service	388
Core authoring.....	388
Overview	388

Start bot conversations with proactive triggers	389
Use connectors within Power Virtual Agents or author custom connectors	389
Notify Microsoft Teams users about updates to their queries	390
Service and runtime	391
Overview	391
Create bots in Germany and United Arab Emirates datacenters	391
Microsoft Dataverse	392
Overview	392
What's new and planned	392
Bridge Microsoft Power Platform to Azure data	394
Overview	394
Export Dataverse data in Delta Lake format	394
Microsoft Dataverse data	395
Overview	395
Dataverse results in Microsoft Search	395
Improvements to dual-write UI	396
Scan, classify, and label Dataverse data	396
Governance and administration	397
Overview	397
What's new and planned	397
Purchase Dynamics 365 and Power Platform ISV offers from AppSource	398
Data integration	399
Overview	399
What's new and planned	399
Dataflows	402
Overview	402

Connections page now lists dataflows used by a connection	402
Unified dataflows platform across Power Platform and Power BI	403
On-premises data gateway.....	404
Overview	404
Automation for adding a gateway member to a cluster	404
Automation for gateway updates.....	404
Deprecation of older versions of the on-premises data gateway	405
Power Query connectors.....	405
Overview	405
Enhancements to the Azure Synapse Analytics connector	405
Azure Active Directory connector available in Power Query Online and dataflows	406
Certified connectors available in Power Query Online and dataflows.....	406
Essbase connector available in Power Query Online and dataflows	406
Hadoop Distributed File System (HDFS) connector available in Power Query Online and dataflows	407
Informix connector available in Power Query Online and dataflows	407
OLE DB connector available in Power Query Online and dataflows	407
Support for custom connectors in Power Query Online through the on-premises data gateway.....	408
Support for system-level proxy in the Power Query SDK.....	408
Sybase connector available in Power Query Online and dataflows	409
Vertica connector available in Power Query Online and dataflows.....	409
Power Query Online	409
Overview	409
Improvements for connecting to files stored in SharePoint Online.....	410
Personal query gallery	410
VNet data gateways	410
Overview	410
VNet for Power BI and Microsoft Power Platform dataflows	411

Dynamics 365 and industry clouds: 2022 release wave 1 plan

The Dynamics 365 and industry clouds release plan for the 2022 release wave 1 describes new features releasing from **April** through **September 2022**. You can either browse the release plan [online](#) or download the document as a [PDF](#) file. The PDF file also includes information about Power Apps, Power Automate, Power Virtual Agents, Microsoft Dataverse, Microsoft Power Platform governance and administration, and data integration.

The Microsoft Power Platform features coming in the 2022 release wave 1 have been summarized in a separate [release plan](#) as well as a downloadable [PDF](#).

2022 release wave 1 overview

The 2022 release wave 1 for Dynamics 365 and industry clouds brings new innovations that provide you with significant capabilities to transform your business. The release contains hundreds of new features across Dynamics 365 applications, including Marketing, Sales, Customer Service, Field Service, Finance, Supply Chain Management, Supply Chain Insights, Human Resources, Commerce, Fraud Protection, Business Central, Connected Spaces, Guides, Remote Assist, Customer Insights, Customer Voice, and Microsoft Cloud for Healthcare, Financial Services, Sustainability, and Nonprofit.

Marketing

[Dynamics 365 Marketing](#) is empowering Marketers to leverage the power of data and AI in order to improve marketing content creation and delivery. Make every interaction count, by responding at the right moment with new event triggers based on data changes in any Dynamics 365 app, taking action from journeys in more ways, using no-code conditional text to easily personalize content and taking immediate action on SMS replies through personalized experience based on responses using custom keywords. Collaborate across your organization to create and deliver the best marketing content possible using the built-in Microsoft Teams chat.

Sales

[Dynamics 365 Sales](#) focuses on enabling sales professionals to harness the power of data and intelligence which will help them to forecast, compare annual projections, and measure performance using predictive scoring. Sellers can collaborate using Teams from within Dynamics 365 to accelerate their pipeline, while managers can track team performance and provide coaching to increase customer satisfaction. Our goal is to help the seller close more deals, faster, while being as productive as possible.

Service

[Dynamics 365 Customer Service](#) focuses on the setup experience for administrators with the new Customer Service admin center app and improving agent productivity with updates to the agent inbox view. Enhancements to embedded Microsoft Teams include Dynamics 365 data integration, AI-suggested contacts, and AI-generated conversation summaries for agents.

[Dynamics 365 Field Service](#) brings innovation and usability enhancements to the schedule board, allowing for more intuitive and faster usage, as well as improved dispatcher productivity. The Field Service mobile application has enhancements that will boost technician productivity and now also is fully supported on Windows devices.

Finance and operations

[Dynamics 365 Finance](#) is launching the general availability (GA) of subscription billing to ensure organizations can thrive in a service-based economy in addition to bringing intelligent automation around vendor invoicing, ledger settlements, and year-end close services to enable our customers to maximize financial visibility. We are releasing to market the public preview of tax audit and reporting service. Other investments include enhancements to our globalization offerings in Globalization Studio such as tax calculation and electronic invoicing.

[Dynamics 365 Supply Chain Management](#) investments continue to focus on driving agility and resilience in the supply chain. Enhanced warehouse and manufacturing execution workloads enable businesses to scale mission-critical operations using cloud and edge scale units. Planning Optimization brings new manufacturing scenarios and planning strategies to help businesses, and manufacturers in particular, shorten planning cycles, reduce inventory levels, and improve customer service. The new global inventory accounting functionality allows inventory accounting in multiple representations to simplify operations for businesses working in multiple currencies or facing different local and global accounting standards.

[Dynamics 365 Intelligent Order Management](#) brings an expanded set of out-of-the-box provider integrations, enabling rapid deployment and connectivity to an ecosystem of solutions in the order capture, logistics, fulfillment, and delivery process flows. Combined with the rich ecosystem of providers, you will have the ability to achieve advanced order orchestration using the new expanded set of features and optimizations supported in inventory orchestration, order actions, and fulfillment. This release wave brings a brand-new returns and exchange management service directly integrated into e-commerce solutions. This service enables customers to orchestrate journeys that minimize operational costs related to getting merchandise back on shelves and drive clear communication with their consumers.

[Dynamics 365 Project Operations](#) is investing in enabling capabilities ranging from onboarding, estimating, and using resources from external talent pools, helping to boost efficiencies in project planning and delivery. Customers will be able to upgrade from Project Service Automation to Project Operations and integrate with leading project management

tools like Microsoft Project Desktop to help increase adoption. Customers can bring their own project management tools through a generic API where task scheduling can happen in the project management tool of choice and then integrate to Project Operations, becoming available to users in a read-only manner.

[Finance and Operations cross-app capabilities](#) are investing in improvements to the integration between Finance and Operations apps and Azure Data Lake Storage. Added ability for customers to purchase additional compute resources when Microsoft Power Platform processing needs increase. Added functionality in the Regression Suite Automation Tool (RSAT) in the areas of improved usability and better integration with Azure DevOps.

Human Resources

[Dynamics 365 Human Resources](#) will equip HR professionals with the ability to tailor experiences and automatically complete processes when employees are joining, leaving, and moving within an organization. Intelligent talent management capabilities enable companies to understand the skill set gaps to ensure the right people are in the jobs and to plan for future investments.

Commerce

[Dynamics 365 Commerce](#) continues to invest in key B2B commerce scenarios, including sales agreements, on-behalf-of ordering, and partner-specific product catalogs and pricing. This release also introduces customer segmentation and targeting with Dynamics 365 Customer Insights, and out-of-the-box A/B experimentation and analytics tools. The new Store Commerce app streamlines point of sale deployment and servicing while improving performance. New workflows in headquarters, bulk image upload, and manifest-driven upload simplify the management of media assets across channels. Customer service functionality is easily enabled on customers' e-commerce sites with Power Virtual Agents and Omnichannel for Customer Service.

Fraud Protection

[Dynamics 365 Fraud Protection](#) is delivering new capabilities that allow operators of payment service providers to offer fraud protection as a service to their businesses, including those that have a multi-hierarchy business structure. Deep search capabilities, enhancing analytics and policy settings, are now available, as well as integrated case management for purchase protection. Fraud Protection now offers support for native mobile applications as well as businesses building their offering on top of Power Apps portal. Finally, Fraud Protection is now available in Canada.

SMB

[Dynamics 365 Business Central](#) continues to simplify the customer onboarding experience by offering a modern Help pane that provides learning guidance and helps to increase productivity and process adoption. Customers using Microsoft Power Platform can also use

the newly available connector capabilities. It is also easier to trigger a Power Automate flow directly from Business Central pages, which can save time by automating processes. Collaborating on Business Central data in Microsoft Teams is improved due to the removal of licensing friction.

Customer Insights

[Dynamics 365 Customer Insights](#) invests in consent enablement features and now provides customers with the ability to integrate consent data from multiple sources and systems. With this feature, consent permissions and customer preferences can be accounted for during real-time personalization scenarios within Customer Insights. New data enrichment capabilities will allow customers to safely collaborate and share relevant data via privacy-enabled workflows.

Supply Chain Insights

[Dynamics 365 Supply Chain Insights](#) will enable early warnings around weather, natural disaster, and logistics risk signals, alerts, and predictions. Other investments include building deep integration with Supply Chain Management, ability to collaborate with stakeholders via surveys, cases, and Teams, and monitor and track sustainability metrics.

Guides

[Dynamics 365 Guides](#) will continue investing in capabilities to improve collaboration experiences for authors and operators on HoloLens 2. The application will also be updated to support guest access so that customers can share their guides with users outside of their organizations.

Remote Assist

[Dynamics 365 Remote Assist](#) is investing in B2B service scenarios by bringing one-time calling to GA and supporting additional calling policies for external users. Additionally, the Dynamics 365 Remote Assist mobile application will be updated to support improved collaboration through the ability to screen share across users on iOS and Android.

Microsoft cloud for industry solutions

[Microsoft Cloud for Healthcare](#) continues to commit to healthcare providers in enhancing patient engagement, improving data-related functionality, and further automating deployment experiences while expanding the global availability of our Microsoft Cloud for Healthcare solutions. Our investments include enhancements to Microsoft Teams to further bolster the patient experience while improving care team coordination.

[Microsoft Cloud for Financial Services](#) provides capabilities to help manage data to deliver differentiated experiences, empower employees, and help combat financial crime while facilitating security, compliance, and interoperability of financial data. This helps in enhanced

collaboration, automation, and insights to streamline processes, personalizes every customer interaction, improves customer experience, and delivers rich data insights.

[Microsoft Cloud for Nonprofit](#) is updated to reflect our commitment to delivering a great onboarding experience to new and returning Cloud for Nonprofit partner and nonprofit customers. In addition to these investments, this release reflects our continued commitment to our critical partner ecosystem by advancing our investments in tooling, APIs, and connectors to ensure seamless interoperability.

[Microsoft Cloud for Sustainability](#) launches to GA with an extensible SaaS solution that provides comprehensive, integrated, and automated sustainability management for organizations. It automates manual processes, enabling organizations to more efficiently record, report, and reduce their emissions on a path to net zero.

Key dates for the 2022 release wave 1

This release plan describes functionality that may not have been released yet. Delivery timelines and projected functionality may change or may not ship (see [Microsoft policy](#)).

Here are the [key dates](#) for the 2022 release wave 1.

Milestone	Date	Description
Release plans available	January 25, 2022	Learn about the new capabilities coming in the 2022 release wave 1 (April 2022-September 2022) across Dynamics 365 and industry clouds and Microsoft Power Platform.
Early access available	January 31, 2022	Test and validate new features and capabilities that will be part of 2022 release wave 1, coming in April, before they are enabled automatically for your users. You can view the Dynamics 365 2022 release wave 1 early access features now .
Release plans available in 11 additional languages	February 23, 2022	The Dynamics 365 and industry clouds and Microsoft Power Platform release plans published in Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	April 1, 2022	Production deployment for the 2022 release wave 1 begins. Regional deployments will start on April 1, 2022.

Just like the previous release waves, we continue to call out how each feature will be enabled in your environment:

- **Users, automatically** – These features include changes to the user experience for users and are enabled automatically.

- **Admins, makers, or analysts, automatically** – These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts** – These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

You can get ready with confidence knowing which features will be enabled automatically.

We've done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We're looking forward to engaging with you as you put these new services and capabilities to work, and we're eager to hear your feedback as you dig into the 2022 release wave 1 plan.

Let us know your thoughts. Share your feedback in the [Microsoft Dynamics 365 community forums](#). We will use your feedback to make improvements.

2022 release wave 1 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning **January 31, 2022**.

Features from the following apps are available as part of early access:

- Dynamics 365 Sales
- Dynamics 365 Customer Service
- Dynamics 365 Field Service
- Dynamics 365 Supply Chain Management
- Finance and Operations cross-app capabilities
- Dynamics 365 Commerce
- Dynamics 365 Business Central

The features from these apps update the existing user experiences. You can opt in early to enable these features in your environment. This will allow you to test these features and then adopt them across your environments. For information on how to enable these features, see [Opt in to 2022 release wave 1 updates](#).

IMPORTANT If you are using Unified Interface or Power Automate, there might be early access features that could impact your users. For Microsoft Power Platform early access features, see [2022 release wave 1 features available for early access](#).

Dynamics 365 Sales

For a complete list of the Dynamics 365 Sales features, see [What's new and planned for Dynamics 365 Sales](#).

Feature	Enabled for	Early access	General availability
Engage efficiently with your customers	Users, automatically	Jan 31, 2022	Apr 2022
Filter the underlying opportunities of a forecast	Users, automatically	Jan 31, 2022	Apr 2022
Make quick decisions with enhancement to worklist cards	Users, automatically	Jan 31, 2022	Apr 2022

Feature	Enabled for	Early access	General availability
Sales Hub is now preinstalled on all environments	Users, automatically	Jan 31, 2022	Apr 2022
Customizable worklist cards for right contextual information to the seller	Users, automatically	Jan 31, 2022	Apr 2022
Update activities from sequence step and correlate it with timeline activities	Users, automatically	Jan 31, 2022	Apr 2022

Dynamics 365 Customer Service

For a complete list of the Dynamics 365 Customer Service features, see [What's new and planned for Dynamics 365 Customer Service](#).

Feature	Enabled for	Early access	General availability
Analytics for knowledge articles and search terms	Users, automatically	Jan 31, 2022	Apr 2022
Usability enhancements to knowledge article search	Users, automatically	Jan 31, 2022	Apr 2022

Dynamics 365 Field Service

For a complete list of the Dynamics 365 Field Service features, see [What's new and planned for Dynamics 365 Field Service](#).

Feature	Enabled for	Early access	General availability
Field Service mobile usability enhancements	Users, automatically	Jan 31, 2022	Apr 2022

Dynamics 365 Supply Chain Management

For a complete list of the Dynamics 365 Supply Chain Management features, see [What's new and planned for Dynamics 365 Supply Chain Management](#).

Feature	Enabled for	Early access	General availability
Global Inventory Accounting Add-in for Dynamics 365 Supply Chain Management	Users by admins, makers, or analysts	✓ Jun 18, 2021	Apr 2022
Material consumption and reservations in the production floor execution interface	Users by admins, makers, or analysts	Jan 31, 2022	Apr 2022

Finance and Operations cross-app capabilities

For a complete list of the Finance and Operations cross-app capabilities features, see [What's new and planned for Finance and Operations cross-app capabilities](#).

Feature	Enabled for	Early access	General availability
Updates to client feature states with version 10.0.25	Users, automatically	Jan 31, 2022	Apr 2022
Updates to saved views and personalization	Users by admins, makers, or analysts	Jan 31, 2022	Apr 2022
Vertically scrolling workspaces	Users, automatically	Jan 31, 2022	Apr 2022

Dynamics 365 Commerce

For a complete list of the Dynamics 365 Commerce features, see [What's new and planned for Dynamics 365 Commerce](#).

Feature	Enabled for	Early access	General availability
Additional filter options in POS inventory operations	Users, automatically	Jan 27, 2022	Apr 2022

Feature	Enabled for	Early access	General availability
Chat in Commerce with Power Virtual Agents and Omnichannel for Customer Service	Admins, makers, marketers, or analysts, automatically	Jan 31, 2022	Apr 2022
Integrated experimentation in Dynamics 365 Commerce	Admins, makers, marketers, or analysts, automatically	Jan 27, 2022	Apr 2022
Integration with Sitecore Content Hub	Admins, makers, marketers, or analysts, automatically	✓ Nov 19, 2021	Apr 2022
Order cancellation for e-commerce	Admins, makers, marketers, or analysts, automatically	Jan 27, 2022	Apr 2022
PayPal Cart Checkout support in e-commerce	Users by admins, makers, or analysts	Jan 27, 2022	Apr 2022
Show or hide tax breakdown in e-commerce when prices include sales tax	Users by admins, makers, or analysts	Jan 27, 2022	Apr 2022
Support for catalogs in e-commerce channel	Admins, makers, marketers, or analysts, automatically	Jan 27, 2022	Apr 2022

Dynamics 365 Business Central

For a complete list of the Dynamics 365 Business Central features, see [What's new and planned for Dynamics 365 Business Central](#).

Feature	Enabled for	Early access	General availability
Blocking deletion of G/L accounts	Users, automatically	✓ Jan 4, 2022	Apr 2022

Marketing

Overview of Dynamics 365 Marketing 2022 release wave 1

Dynamics 365 Marketing combines the worlds of customer experience and marketing automation, empowering businesses to orchestrate personalized journeys across all touchpoints, strengthening relationships and earning loyalty.

Over the past two years, a large number of interactions—social and professional—have moved to a digital format. This has led to the creation of a tremendous amount of data. With this release, we aim to enable you to efficiently harness the full power of your data and out-of-the-box AI insights to not only survive, but also thrive in these times. We aim to enable you to engage with your customers on their terms, and deliver connected experiences across every customer touchpoint.

We have three themes to help you better engage your customers and create raving fans for your business:

- Enable **moments-based marketing** with real-time, event-based journey orchestration for all business scenarios.
- Use the power of **data and AI** to personalize interactions across the customer journey.
- **Collaborate** across people, departments, and applications to create engaging campaigns.

What's new and planned for Dynamics 365 Marketing

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Collaborative apps

Collaborate across people, departments, and applications to create engaging campaigns.

Feature	Enabled for	Public preview	Early access*	General availability
Take action with your customers in more ways by raising triggers from a journey to run another journey or Power Automate flow	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022
Trigger journeys based on data changes in any Dynamics 365 app to engage customers at the right time without writing any code	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022
Personalize interactions using a unified view of customer activity across Dynamics 365 Marketing, Sales, and Customer Service	Admins, makers, marketers, or analysts, automatically	Apr 2022	-	Jun 2022
Collaborate across your organization to create the best marketing campaigns possible using the built-in Microsoft Teams chat	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Sep 2022

Data and AI

Enable moments-based marketing with real-time event-based journey orchestration for all business scenarios.

Feature	Enabled for	Public preview	Early access*	General availability
Delight your customers with hyper-personalized next-best content selection and boost your marketing ROI by optimizing with AI	Admins, makers, marketers, or analysts, automatically	Jun 2022	-	
Connect Dynamics 365 Customer Insights with customer journey orchestration when using your own data lake	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022

Feature	Enabled for	Public preview	Early access*	General availability
Increase engagement using AI-powered optimization to reach each customer on the best channel based on their customer attributes	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022
Quickly personalize emails using predefined dynamic text, without the need to know the underlying data structure	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022
Quickly create emails with enhanced reusable content fragments	Admins, makers, marketers, or analysts, automatically	Apr 2022	-	Jun 2022
Win customer attention by creating conditional dynamic content with easy-to-use no-code experiences	Admins, makers, marketers, or analysts, automatically	Apr 2022	-	Jun 2022

Moments-based

Leverage the power of data and AI to personalize interactions across the customer journey.

Feature	Enabled for	Public preview	Early access*	General availability
Create individualized journeys by adding conditions based on attributes captured as part of the event trigger	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022
Continue the conversation with your customers by taking action on their SMS replies	Admins, makers, marketers, or analysts, automatically	Mar 2022	-	Apr 2022
Easily create journeys to send reminders encouraging customers to respond to a call to action	Admins, makers, marketers, or analysts, automatically	Apr 2022	-	Jun 2022

Feature	Enabled for	Public preview	Early access*	General availability
Target the right contacts and leads using the reimagined, easy-to-use segmentation builder	Admins, makers, marketers, or analysts, automatically	Jun 2022	-	To be announced

* You are able to opt in to some features as part of early access on January 31, 2022, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

Collaborative apps

Overview

- Collaborate across your organization to create the best marketing campaigns possible using built-in Microsoft Teams chat.
- Personalize interactions using a unified view of customer activity across Dynamics 365 Marketing, Sales, and Customer Service.
- Trigger journeys based on data changes in any Dynamics 365 app to engage customers at the right time without writing any code.
- Take action with your customers in more ways by raising triggers from a journey to run another journey or Power Automate flow.

Take action with your customers in more ways by raising triggers from a journey to run another journey or Power Automate flow

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022

Business value

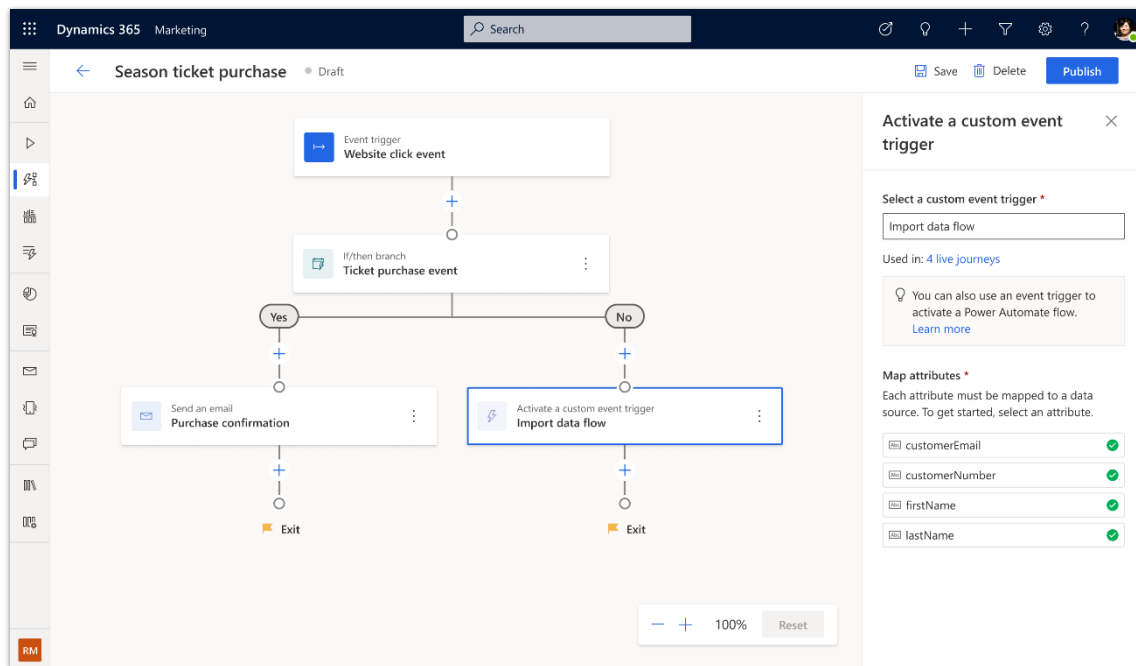
Based on the unique needs of your business, you may need to trigger custom processes or Power Automate flows at relevant points in a customer journey. Or, you might have multiple journeys that logically function together. These scenarios can now be accomplished easily with Dynamics 365 Marketing by using custom event triggers as the glue between journeys, as well as between journeys and your custom processes.

For example, a loan application journey could have various steps that require a human agent's approval. By creating a separate customer journey or Power Automate Flow for loan exception approval, you can trigger it from various points in the loan application journeys where exceptions can occur. The data you send with the event trigger can be used for populating dynamic content or as inputs to other flow actions.

Feature details

- A new journey tile will raise an event trigger at any point in a customer journey.
- Any journey or Power Automate flows connected to the event trigger will be run immediately when a customer reaches the tile. This includes event triggers used in exit criteria, goals, and if/then branches for journeys.
- Logically connect two or more journeys using custom event triggers. For instance, when a welcome journey for a new customer ends, add them to the ongoing nurture journey.
- When using this action, you can choose what data to send as part of the event trigger. You can choose customer profile data (for instance, attributes of the target audience such as contacts and leads) and data from other event triggers used in the journey (for instance, attributes of the event trigger that starts the journey).

NOTE This feature is only available in real-time marketing; it does not affect outbound marketing functionality.



Raise triggers from journey steps to run another journey or Power Automate flow.

Trigger journeys based on data changes in any Dynamics 365 app to engage customers at the right time without writing any code

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022

Business value

Interactions in any Dynamics 365 app can be used to trigger and drive customer journeys in just a few clicks, without requiring developers or customizations.

Your customers interact with several departments and functions in your company throughout their lifetime, all of which use their own CRM, ERP, and business apps. Each of these interactions, such as a service ticket being closed, represents an opportunity to engage more deeply with your customers. Now, data no longer has to remain siloed within separate apps and out of reach of your customer engagement or marketing automation tools.

Feature details

When you use Dynamics 365 applications, all of your customer data and interactions are already being captured in Microsoft Dataverse. Some of this data captures moments where you'd like to engage your customers through a journey—for instance, a support case that is

created or a new order placed. You can now create event triggers to capture these moments that matter and then use these event triggers to start and drive journeys.

- Create new event triggers based on common operations such as adding new rows to a table or updating attribute values on any audience table in Dataverse, such as contact, opportunity, account, and lead, with an easy-to-use UI.
- Trigger journeys based on one or more specified conditions on any Dataverse tables (including custom tables) that are directly related to the audience table.
- Immediately use the trigger in journeys, without requiring any development or integration.

Personalize interactions using a unified view of customer activity across Dynamics 365 Marketing, Sales, and Customer Service

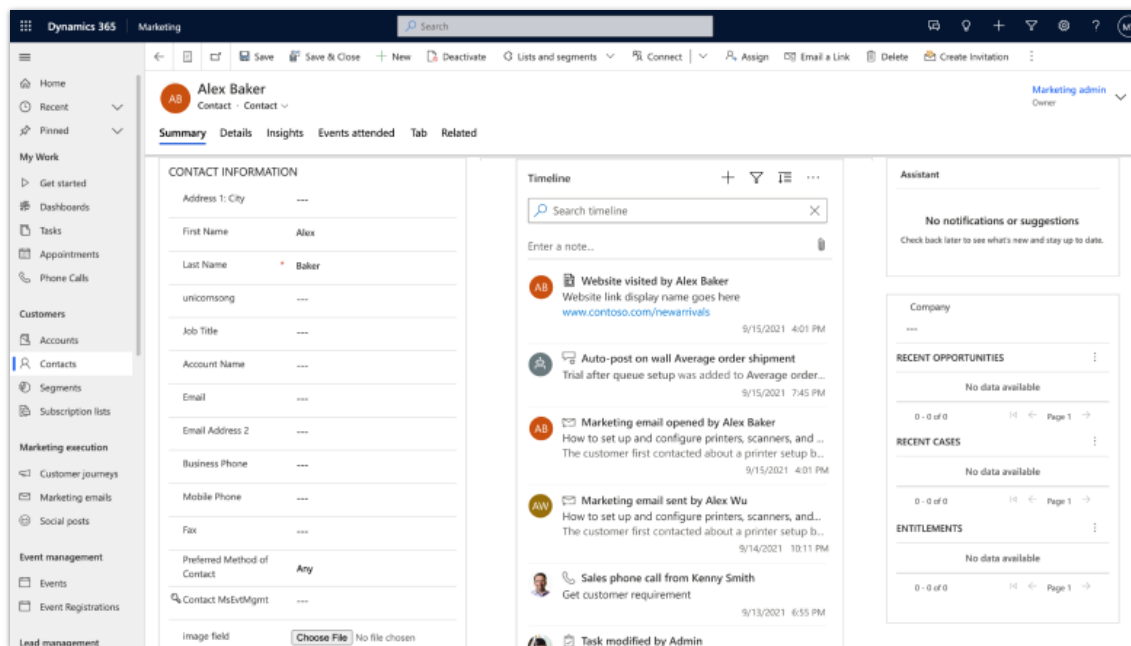
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	-	Jun 2022

Business value

Having a single view of all activities enables you to get a complete understanding of your customer. With that context, you can create deeply personalized experiences for both digital and non-digital channels. Along with Dynamics 365 Sales and Dynamics 365 Customer Service, you will now be able to view all your Dynamics 365 Marketing interactions in the unified activity timeline under your contacts.

Feature details

- View both real-time and outbound marketing activities in the Dynamics 365 unified timeline.
- Search and filter Marketing-only activities such as "All emails opened by Contact 'X'."
- Preview your email content within the timeline view.



Unified timeline view.

Collaborate across your organization to create the best marketing campaigns possible using the built-in Microsoft Teams chat

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Sep 2022

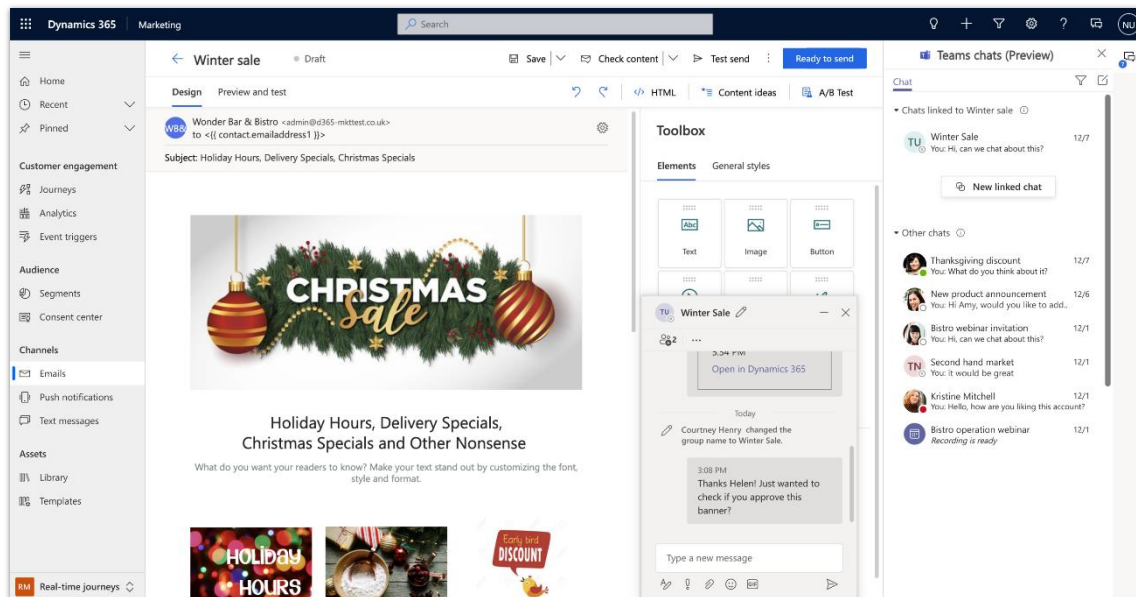
Business value

Creating great marketing content and journeys is a team effort. With Microsoft Teams chat, you can easily collaborate with your team without leaving the journey canvas or email editing experience. For example, as you create an email you can tag someone to review your content. Or, while creating a journey, you can collaborate with a coworker on which data to use in a branch. This gives you the added benefit of seeing feedback over time and referring back to comments people made.

Feature details

- Use all Teams chat capabilities directly within Dynamics 365 Marketing.
- Easily add and remove people from the chat.
- Suggest people to add to the chat.

- Show all recent chats.
- Set up which entities to include chat on.



Make collaborative content and journey creation easy with Microsoft Teams chat inline.

Data and AI

Overview

- Delight your customers with hyper-personalized next-best content selection and boost your marketing ROI by optimizing with AI.
- Quickly personalize emails using predefined dynamic text, without the need to know the underlying data structure.
- Win customer attention by creating conditional dynamic content with easy-to-use no-code experiences.
- Quickly create emails with enhanced reusable content fragments.
- Connect Dynamics 365 Customer Insights with customer journey orchestration when using your own data lake.

Delight your customers with hyper-personalized next-best content selection and boost your marketing ROI by optimizing with AI

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jun 2022	-	-

Business value

Your customers are unique and are driven by different incentives. Compelling content and offers are a marketer's most powerful tool in engaging customers or preventing them from churning. In addition to specifying manual rules for offer selection, you can leverage AI-based optimization to tailor offers to match the preferences, interests, and motivations of each of your customers based on rich customer data from all of your customer data sources via Dynamics 365 Customer Insights and past interactions with your brand. By learning how your customers engage with the offers being sent based on your defined rules, AI can start to further optimize those offer decisions, enabling you to lift the goal attainment/ROI of your journeys.

Feature details

- Simply add a few options of different content variations (that contain different offers, images, and calls to action) when composing messages using codeless conditional content and define rules on the type of customers to target with each variant.
- Use the message with content variations at any step in the journey to tailor the message for every customer going through the journey.
- Optionally, optimize the rules with AI. Every customer is delighted with the best variant, selected by AI based on their profile and past interaction data.
- Compare journey goal attainment with AI against an automatically generated control group.
- Improve the effectiveness of the AI when using 360 customer profiles from Dynamics 365 Customer Insights.

Connect Dynamics 365 Customer Insights with customer journey orchestration when using your own data lake

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022

Business value

Some customers choose to store their Customer Insights data in their own Azure Data Lake Storage so that they can manage their own infrastructure. You can now use data stored in Azure Data Lake Storage to build segments, specify conditions, and personalize messages to build rich, real-time journeys while maintaining full control over the underlying data.

Feature details

Use Dynamics 365 Customer Insights data, such as customer profile and segment information, that is stored in Azure Data Lake Storage in the same way you do today with standard Customer Insights connected to Microsoft Dataverse. You can:

- Target customers based on real-time event-triggered customer journeys.
- Deeply personalize your engagement using rich Customer Insights data.
- Close the feedback loop with customer interactions from Dynamics 365 Marketing customer journeys available in the Customer Insights activity timeline.

Increase engagement using AI-powered optimization to reach each customer on the best channel based on their customer attributes

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022

Business value

Channel optimization takes the guesswork out of determining the right channel to reach each customer for the intended journey goal for deeper engagement. Channel optimization continuously monitors how each customer is responding to different communications. Now, the algorithm just got smarter. Not only does it continuously learn from the way customers engage in marketing campaigns, it also uses detailed customer attributes to determine the best communication channel for each customer.

Feature details

Channel optimization selects the right channel for each customer using deep customer knowledge, not just how customers use channels. This leads to higher goal attainment. For example, when a customer has recently made a purchase, they may be more likely to engage using SMS compared to other channels, even if they otherwise prefer email. The AI now learns from this behavior and makes smarter choices.

Quickly personalize emails using predefined dynamic text, without the need to know the underlying data structure

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022

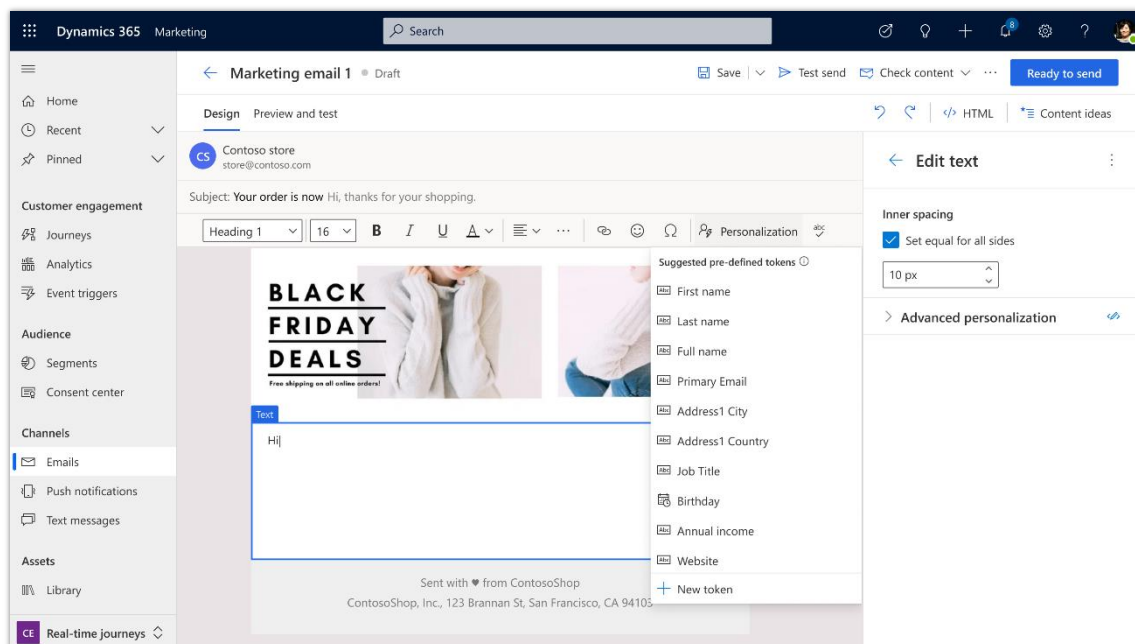
Business value

Delivering personalized content is a top goal for marketers. Now, anyone can add the power of personalization to their content with a quick list of the most commonly used dynamic text. For example, adding "first name" from the list will personalize your message with the customer's first name. Additionally, teams can create and share dynamic text that is unique to their business. This makes it quick and easy to add common personalization to your messages.

Feature details

With predefined dynamic text, marketers will have a quick list of the most commonly used tokens to select from. Marketers familiar with the data model can create and share additional tokens so that the rest of the team can focus on authoring content rather than learning database concepts.

- Select and insert a token from a list of predefined tokens.
- Update a token's default value if needed.
- Share created tokens with everyone.



Easily author personalized content with predefined dynamic text.

Quickly create emails with enhanced reusable content fragments

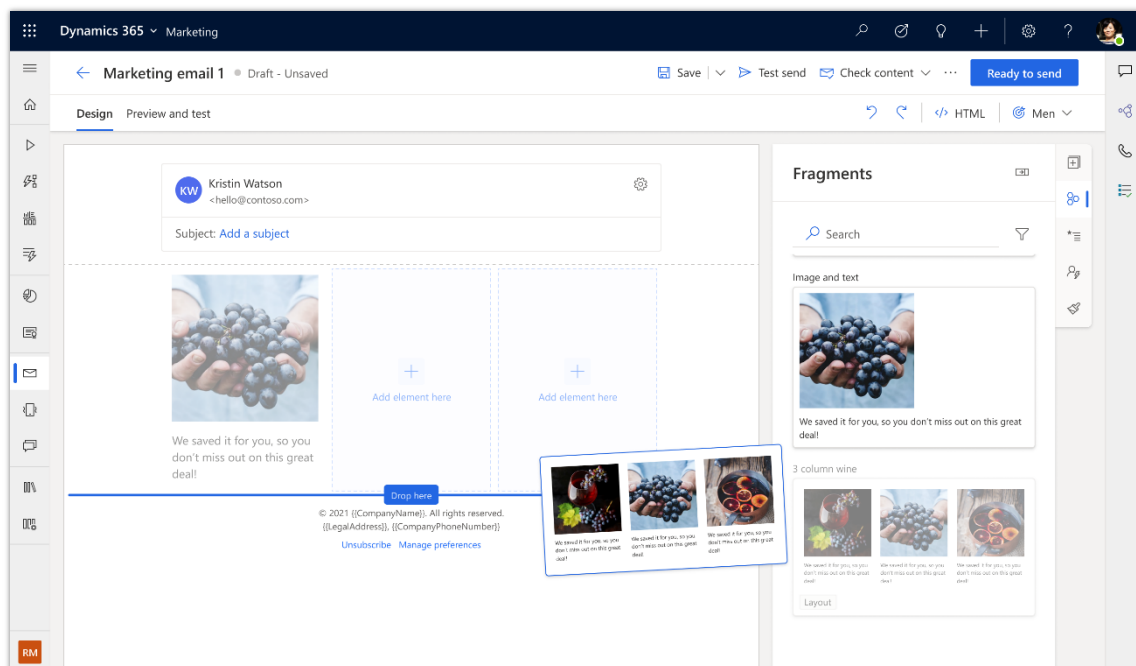
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	-	Jun 2022

Business value

Now it's easy to create rich, reusable blocks of content allowing your team to quickly assemble beautiful emails with a few clicks. New content fragments can include layout, advanced elements, and personalization, so there is no limit to the content you can create for reuse.

Feature details

- Create content blocks that include layout, text, buttons, and personalization.
- Easily save new content blocks directly from your email message.
- View and insert content blocks from the asset library.



Improve the efficiency of email creation with content fragments and themes.

Win customer attention by creating conditional dynamic content with easy-to-use no-code experiences

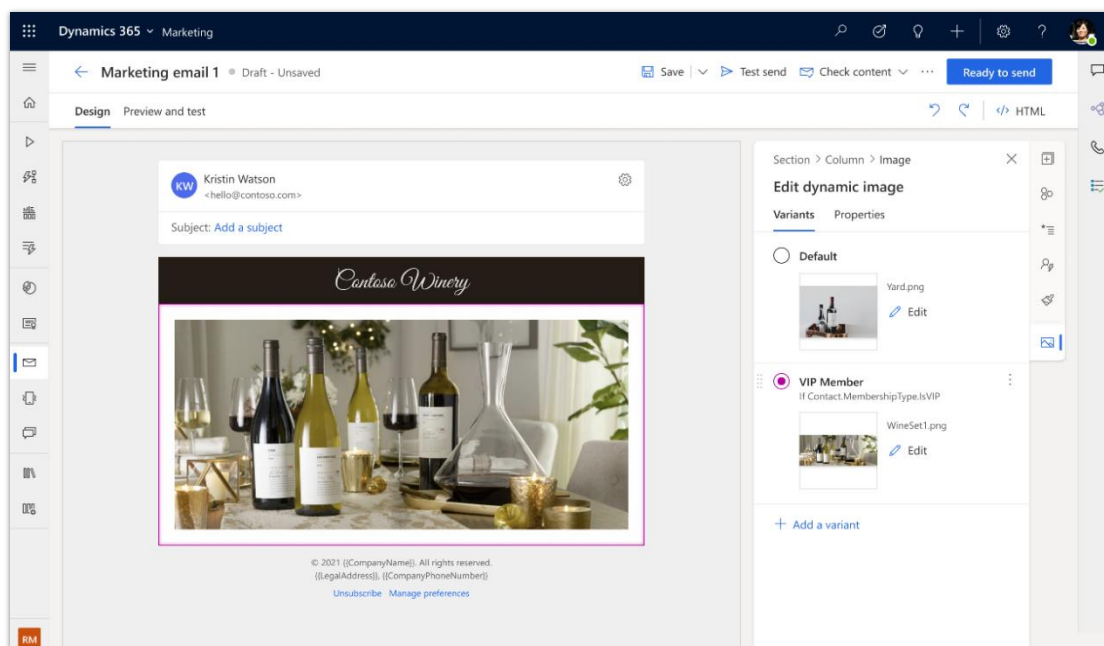
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	-	Jun 2022

Business value

Conditional dynamic content is key to delivering highly personalized messages to customers. Creating content where entire sections target specific customer segments allows you to craft messages that align with your customers' interests and preferences, driving engagement and brand loyalty. Until now, achieving this level of dynamic content was complex and required coding. With the new conditional content experience, marketers can easily create messages targeted to specific segments or attributes, bringing content that is truly unique to each customer without writing any code.

Feature details

- Personalize sections of content to a specific segment or attribute.
- Personalize images to a specific segment or attribute.
- Target variation to any segment, attribute, or combination.
- View content variations in the email designer.



Easily author dynamic content with advanced personalization without any code.

Moments-based

Overview

- Create individualized journeys by adding conditions based on attributes captured as part of the event trigger.
- Continue the conversation with your customers by taking action on their SMS replies.
- Easily create journeys to send reminders encouraging customers to respond to a call-to-action.
- Target the right contacts and leads using the reimagined, easy-to-use segmentation builder.

Create individualized journeys by adding conditions based on attributes captured as part of the event trigger

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022

Business value

Dynamics 365 Marketing enables you to trigger journeys using a large catalog of event triggers, including out-of-the-box triggers and custom triggers that you create. Now, you can also control what type of action that causes an event trigger should qualify a customer for a journey. For instance, to re-engage buyers who have abandoned carts, you may only qualify buyers who have more than \$20 in their cart for a journey that gives a \$10 coupon incentive. This feature eliminates the need for a developer to add qualifying logic where the event trigger happens (the cart page in the above example), empowering you and your marketing team to more flexibly reuse the same event trigger for a variety of scenarios.

Feature details

- Add one or more filter conditions on top of an event trigger to further qualify who can enter a customer journey.
- Gain more control over your journeys by filtering triggers that are used to start, exit, branch, or measure journey goals.

Create a new journey

Name the journey
Customer case: High-priority incident

Choose the type of journey

Event-based
Respond in real time to customer actions, like form submitted, cart abandoned, and purchase made.

Segment-based
Reach out to targeted audiences, like loyalty members, with high-impact, personalized journeys.

Select an event trigger *

Case added

Audience: Contact

Match all

Clear all

Condition

Priority

Equals

High

+ Add condition

Trigger and drive journeys for a specified customer action.

Continue the conversation with your customers by taking action on their SMS replies

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2022	-	Apr 2022

Business value

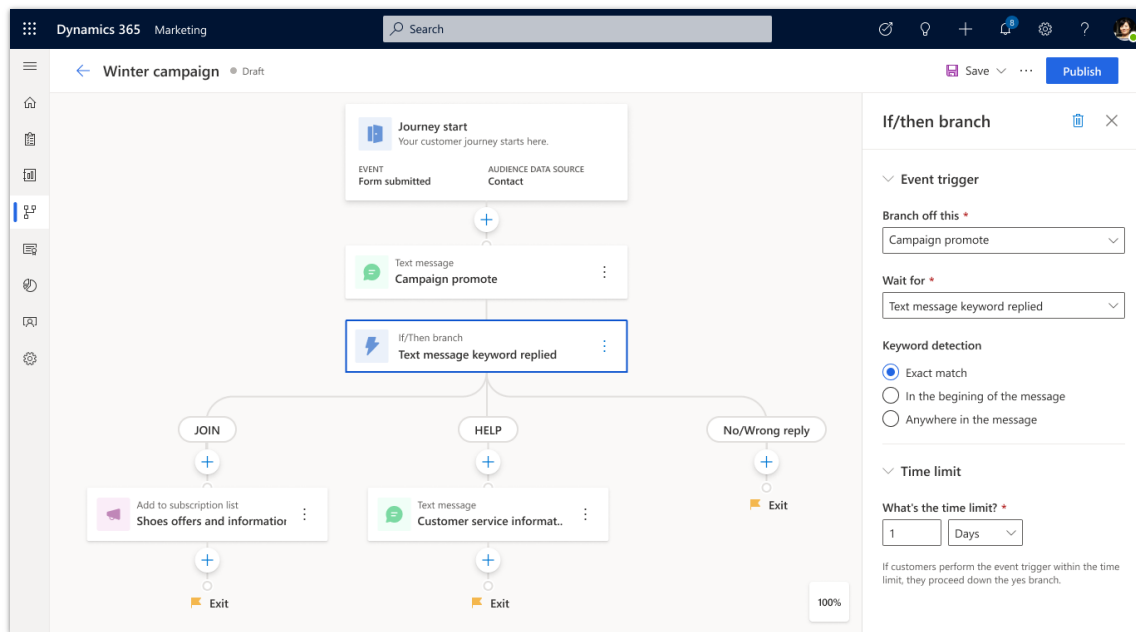
SMS allows you to quickly communicate with your customers. However, it's not enough to just send messages out, you also need to act on their responses. Now you can interact with your customers by creating journeys based on their replies to your SMS messages. Easily create custom keywords and add them to your messages and journey branches to continue the conversation with your customers.

Feature details

Allow your customers to respond to your SMS messages. Personalize their experience by defining custom keywords that will guide their journey based on their responses.

- Set up communication keywords in a unified SMS admin experience.
- Define how keywords will be used in the journey.

- Set up a default SMS reply for unrecognized keywords.
- Fuzzy matching and semantic analysis of keywords.



Branch your journey based on the SMS keyword response.

Easily create journeys to send reminders encouraging customers to respond to a call to action

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	-	Jun 2022

Business value

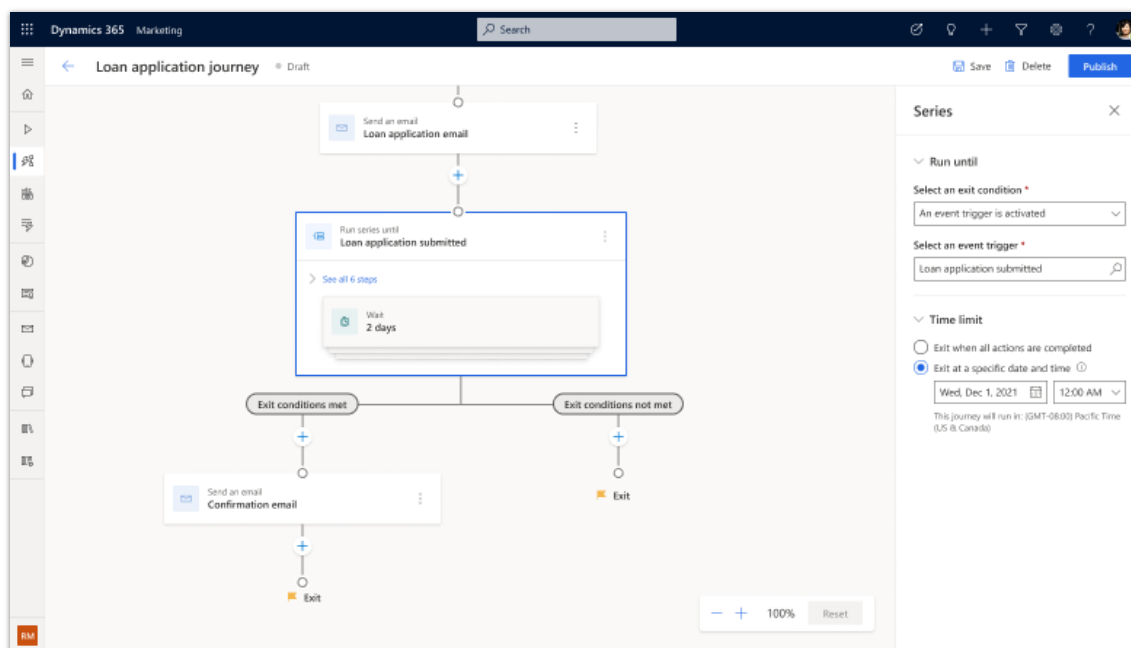
You can now create more action-oriented customer journeys, reminding the customer until they complete the call to action. This feature eliminates the need to create cascading branches that check for the qualifying action after each step or to specify conditions with more than two possibilities. This simplifies not only the journey logic and creation but also analysis when journeys are live.

Feature details

For instance, an abandoned shopping cart journey starts with customers adding items to a shopping cart. Using the reminder feature, if a customer abandons the cart, the journey can remind them to check out and send multiple messages, including messages with certain offers, until they check out. Similarly, a customer that has started registering for a conference

can be reminded to complete registration until they finish it or until the registration window closes.

You can also create more than two branches at any given step in the journey, creating more fine-grained personalization and engaging each customer differently based on their unique profile and behavioral signals. In addition, you can merge the branches back so that customers can continue the common journey steps after going through their specialized branch.



Run-series-until tile including six steps for a loan application submission example.

Target the right contacts and leads using the reimagined, easy-to-use segmentation builder

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jun 2022	-	To be announced

Business value

To improve marketing return on investment, it's important to target the right audience. This can often be complicated, requiring marketers to understand database and SQL concepts and operators. The new segmentation builder simplifies segment creation and empowers you to build segments for your campaigns without requiring assistance from data analysts or scientists, no matter how complex the logic. You can build segments on leads, without requiring the lead to have a parent contact. You can then market to these leads directly

using customer journeys. Finally, the segmentation builder enables you to take an iterative approach to building the segment logic through member previews that populate as you build the segment.

Feature details

- Directly create segments based on attribute data for both contacts and leads.
- Discover and search across all attributes in the right pane and add them to your queries.
- Preview and estimate the number of segment members as part of your segment creation process.

The screenshot displays the Dynamics 365 Marketing Segment Builder interface. The top navigation bar shows 'Dynamics 365 Marketing' and a search bar. The main header indicates the segment is a 'Draft' named 'Westcoast Leads'. Below this, a message states: 'This segment will return a list of the target audience, Leads [Edit](#)'. The central area shows the segment criteria: 'Leads that meet the following criteria'. The criteria are: 'Business Email contains data' and 'City is in Seattle, Los Angeles'. Below the criteria, it shows '3,310 members' and a 'Refresh' button. A table displays a sample of 100 members, showing columns for Contact name, City, and Business Email. The right pane, titled 'Segment builder', shows a search bar and a list of attributes for the 'Lead' target audience, including Address 1, Address 2, AAD object ID, Access Fail Count, Account, Annual Revenue, Annual Revenue (Base), Auto-created, Budget, Business phone, City, and Code.

Easily author personalized content with predefined tokens.

Sales

Overview of Dynamics 365 Sales 2022 release wave 1

Dynamics 365 Sales is the market-leading sales application that empowers every organization to sell more by understanding their customers and the way they want to buy—powered by data, intelligence, and experiences that people love. Dynamics 365 Sales brings the power of business data everywhere the seller is working—across their favorite productivity tools like Office 365 and Teams. It helps organizations get to the heart of in-the-moment customer needs, and prioritizes and refines focus to the most relevant and authentic engagements, enabling sellers to sell more efficiently.

The world's way of working has transformed dramatically in the last decade and even more so within the last couple of years. The role of the seller is evolving too because buyers expect a blend of digital and personalized experiences throughout their journey. The seller evolution requires a need for several shifts in their current experience: prioritization of their work, intelligent digital communication tools, better collaboration to improve productivity, and spend more time becoming trusted advisors to their customers. To do this, sellers cannot be overwhelmed trying to make sense of too much data and information; rather they need the data to work for them by providing value in every customer interaction.

For this release, we have focused on enabling the seller to do just that. Sellers will be able to harness the power of data and intelligence that will help them before, during, and after each interaction. Sellers will focus on the highest priority activities and will collaborate using Teams from within Dynamics 365 to accelerate their pipeline. Our goal is to help the seller close more deals, faster, while being as productive as possible.

We want your feedback! We encourage you to continue to reach out at [Sales Ideas](#) because your feedback is invaluable to us.

What's new and planned for Dynamics 365 Sales

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Conversation intelligence

Talking directly with customers is an integral part of any sales cycle. Conversation intelligence allows your organization to capture customer interactions, automatically transcribe calls, analyze content, and deliver intelligent insights.

Feature	Enabled for	Public preview	Early access*	General availability
Get the right insight, at the right time, at the right place	Users by admins, makers, or analysts	May 2022	-	Sep 2022

Facilitating digital selling

Sellers today need digital tools to meet customer expectations. Selected Dynamics 365 Sales Premium features will be available to customers with Dynamics 365 Sales Enterprise licenses to help showcase the value.

Feature	Enabled for	Public preview	Early access*	General availability
Experience Sales accelerator, conversation intelligence, and predictive scoring with Dynamics 365 Sales Enterprise license	Users by admins, makers, or analysts	-	-	Apr 2022
Sales Hub is now preinstalled on all environments	Users, automatically	-	Jan 2022	Apr 2022

Forecasting and pipeline intelligence

Provide sales teams with predictability to their revenue forecasts, and a workspace that provides comprehensive views and insights into their sales pipeline.

Feature	Enabled for	Public preview	Early access*	General availability
Assign attributes per sales stage to improve predictive score accuracy	Users by admins, makers, or analysts	-	-	Apr 2022
Compare annual projections with actual progress over multiple periods	Users by admins, makers, or analysts	-	-	Apr 2022

Feature	Enabled for	Public preview	Early access*	General availability
Measure the performance of predictive scoring model with accuracy reports	Users by admins, makers, or analysts	-	-	Apr 2022
Streamline your forecasting workflow with default experiences	Users by admins, makers, or analysts	-	-	Apr 2022
Support for yearly forecast periods	Users by admins, makers, or analysts	-	-	Apr 2022
Update quotas quickly with inline editing and quota rollups	Users by admins, makers, or analysts	-	-	Apr 2022
Filter the underlying opportunities of a forecast	Users, automatically	-	Jan 2022	Apr 2022
Monitor stagnated deals and how they impact the predictive score	Users by admins, makers, or analysts	Jan 2022	-	Apr 2022
Migrate forecasts from one environment to another with solution awareness	Users by admins, makers, or analysts	-	-	Aug 2022

Mobile

Enable sellers to be productive and collaborative from anywhere, whether on the go or on their couch.

Feature	Enabled for	Public preview	Early access*	General availability
Capture mobile phone contacts and recent calls	Users by admins, makers, or analysts	Aug 2022	-	Sep 2022
Effortlessly log information using the mobile phone camera	Users by admins, makers, or analysts	Aug 2022	-	Sep 2022
Outlook deep-link integration with templates, autofill, and emails to meeting participants	Users by admins, makers, or analysts	Aug 2022	-	Sep 2022

Relationship intelligence

Build better relationships with customers with predictive relationship intelligence, engagement signals, and LinkedIn data.

Feature	Enabled for	Public preview	Early access*	General availability
Discover accounts and contacts from email interactions	Users by admins, makers, or analysts	Apr 2022	-	-

Sales accelerator and process automation

Guide sellers with predictive analytics and process automation in a single workspace to close more deals.

Feature	Enabled for	Public preview	Early access*	General availability
Choose the right engagement plan for your customers	Users by admins, makers, or analysts	-	-	Apr 2022
Move sequences between environments seamlessly to enable sellers to get started quickly	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Personalize the prioritized worklist using advanced filtering	Users by admins, makers, or analysts	-	-	Apr 2022
Enable Outlook integration to avoid double booking	Users by admins, makers, or analysts	✓ Dec 14, 2021	-	Apr 2022
Easier setup experience	Users by admins, makers, or analysts	Jan 2022	-	Apr 2022
Engage efficiently with your customers	Users, automatically	-	Jan 2022	Apr 2022
Make quick decisions with enhancement to worklist cards	Users, automatically	-	Jan 2022	Apr 2022
Customizable worklist cards for right contextual information to the seller	Users, automatically	-	Jan 2022	Apr 2022

Feature	Enabled for	Public preview	Early access*	General availability
Update activities from sequence step and correlate it with timeline activities	Users, automatically	-	Jan 2022	Apr 2022
Get notified when customers actively engage with you	Users by admins, makers, or analysts	Feb 2022	-	Apr 2022
High-quality leads ensure higher success rates	Users by admins, makers, or analysts	Apr 2022	-	Jun 2022

* You are able to opt in to some features as part of early access on January 31, 2022, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

Conversation intelligence

Overview

Talking directly with customers is an integral part of any sales cycle. Conversation intelligence allows your organization to capture customer interactions, automatically transcribe calls, analyze content, and deliver intelligent insights.

Get the right insight, at the right time, at the right place

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	May 2022	-	Sep 2022

Business value

With conversation intelligence in Dynamics 365 Sales, your sellers already have access to tools for more productive and efficient customer engagements. But for this to be truly effective, the data and insights gathered from conversations need to be presented where your sellers spend most of their time—and at the right time and in the right context. In this release, we are making conversation intelligence more discoverable while breaking down the silos between the Sales Insights Add-in for Dynamics 365 Sales experience and the Dynamics 365 Sales app. With improved collaboration and a new powerful search, your sellers can better take advantage of the full value of conversation intelligence.

Feature details

Discoverability

- Increasing conversation intelligence discoverability within Dynamics 365 and surfacing relevant and valuable tools and insights at the right time in the seller's workflow.
- Introducing in-app notifications and emails to make sure sellers and managers don't miss valuable insights and follow up on their commitments.

Break the silos

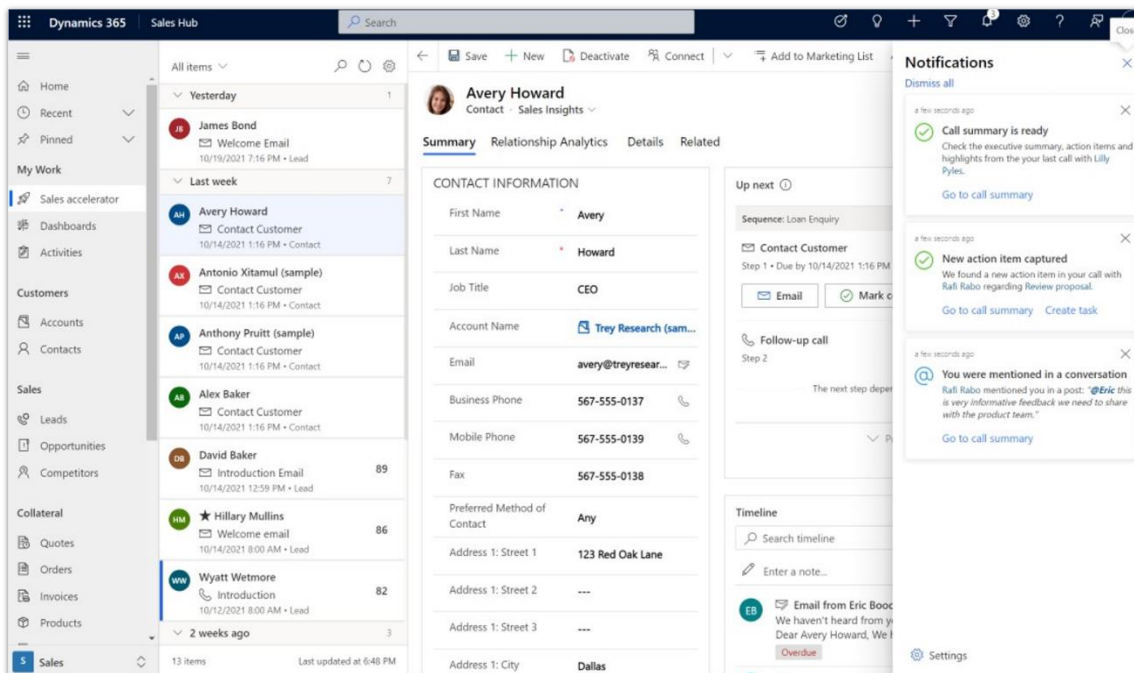
- Bringing the valuable strategy and coaching dashboards from Sales Insights into Dynamics 365 to introduce value where sellers and managers spend their days.

Collaboration

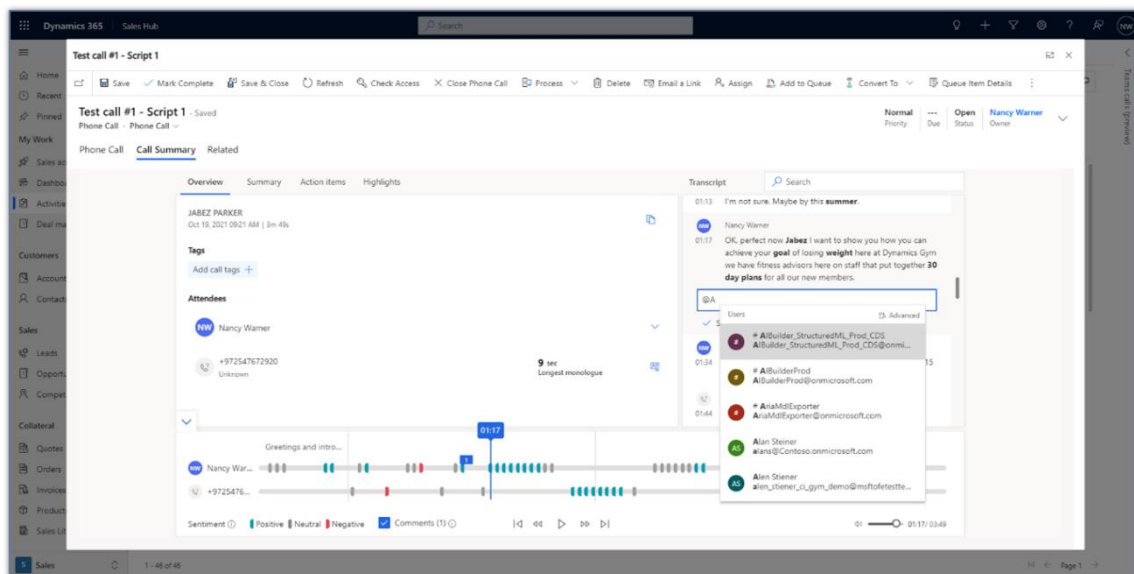
- Enabling comments, mentions, and sharing of conversation intelligence artifacts will make it an integral part of sellers' and managers' day-to-day work and contribute to coaching and collaboration culture.

Powerful search

- A powerful search and filter toolset over conversation intelligence and Dynamics 365 rich data will help sellers and managers get even more valuable insights out of conversation intelligence's most valuable asset—the call recordings and insights.



Notifications.



User selection.

Facilitating digital selling

Overview

Dynamics 365 digital selling capabilities spearhead the digital transformation of sales organizations and constitute the data and productivity first revolution. Digital selling

offerings allow customers with Dynamics 365 Sales Enterprise licenses to experience the best of these capabilities in production and feel their value.

Experience sales accelerator, conversation intelligence, and predictive scoring with Dynamics 365 Sales Enterprise license

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

Sellers today need digital tools to meet growing customer expectations. Selected Dynamics 365 Sales Premium features will be available to customers with a Dynamics 365 Sales Enterprise license to help showcase the value with a defined monthly capacity limit. Conversation intelligence, sales accelerator, and predictive scoring for lead and opportunity use AI to help sellers prioritize their worklist, provide real-time analysis during calls, automate action notifications, and programmatically generate meeting summaries. Sellers take advantage of these offerings to gain insight, reduce manual efforts, and improve data quality.

Feature details

Enabled through the Sales Hub app, each feature can be activated and configured from the **App Settings** area. Grouped under Digital Sales, we have a new **Get Started** site map entry to set up each feature and configure as per your business needs. Each of the premium features will have a capacity limit as follows:

- Users who access and use conversation intelligence will be able to do so with three hours per user per month.
- Sales accelerator provides access to the workspace and up to 1,500 records connected to any defined sequence per environment per month.
- View up to 1,500 leads or opportunity records scored per environment per month with predictive scoring.
- Access to view capacity usage monitoring will also be provided.

NOTE

- Teams collaboration is also accessible from the new **Get Started** site map entry.
- If you require more capacity than the limited ones, you can purchase the Dynamics 365 Sales Premium license.
- If you do not find the Sales Hub app within your tenant, install the Sales solution by following the steps mentioned at: [Install the Sales solution](#)

Sales Hub is now preinstalled on all environments

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Jan 2022	Apr 2022

Business value

Sales Hub is a Microsoft app designed and configured for ideal seller experiences. The built-in Sales Hub app comes configured with several core sales and sales insights features to help you get started quickly. The app has a modern and interactive interface, designed to simplify your day-to-day sales activities. It shows you all the vital information in one place and lets you focus on the key activities that require your attention. Sales Hub is based on the Unified Interface framework, which is adaptable and accessible.

To ensure all our customers can benefit from the new and innovative Dynamics 365 Sales capabilities, we are making Sales Hub available and preinstalled in all existing and new environments.

Feature details

If your organization already has the Sales Hub model-driven app installed, there will be no changes. If not, the Sales Hub app will be preinstalled in your environment and set to be visible only to users with the following security roles:

- System administrator
- System customizer
- Sales, Enterprise app access
- Salesperson
- Sales manager
- Vice president of sales

As an administrator, you can:

- Decide which users or security roles should have access to the Sales Hub app. The app will honor the access permissions defined in the security role of the user.
- Quickly enable new and innovative Sales Premium capabilities.

As a seller or manager, you can:

- Access the Sales Hub app from the Published Apps page once access is granted.

Forecasting and pipeline intelligence

Overview

Provide sales teams with predictability to their revenue forecasts, and a workspace that provides comprehensive views and insights into their sales pipeline.

Assign attributes per sales stage to improve predictive score accuracy

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

By assigning the relevant sales stages to each attribute that trains the model, the accuracy of the predictive scoring model is improved. Furthermore, users can view statistics on how the attributes impact the model at each stage of the sales lifecycle. This helps the administrators in assigning the attributes to the correct sales stages.

Feature details

As an administrator, you can:

- Activate the per-stage modeling feature from the **Add model** page.
- Select the attributes you want to use for training the model and select the relevant stages for each attribute from the **Edit model** page.
- View the impact of each attribute on the model per stage by selecting the link in the **Prediction influence** column on the **Edit model** page.

Compare annual projections with actual progress over multiple periods

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

Your sellers and managers need a high-level view of their projections to ensure that annual projections meet the company's sales objectives and to know if the progress completed to date is nearing expectations. Your sellers will be able to select a view of their projections that spans multiple periods.

Feature details

As an administrator, you can enable the capability for sellers to toggle a full year and year-to-date view of their forecast.

As a sales manager or seller, you can switch to a high-level view of your organization's annual projections and visually compare that with your year-to-date performance from period to period.

Measure the performance of predictive scoring model with accuracy reports

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

By validating the AI predictions with actuals, you will gain more confidence about the accuracy of the AI-driven insights. This helps you to convey and convince the leadership team and sellers to adopt the model and motivate them to use the AI model's insights more often for improved business outcomes.

Feature details

As a sales operation team member, you can:

- Access the chart on the **Model configuration** home page of the predictive score to view the model's predicted success rate versus the actual results.
- Compare the business outcomes before and after using the model with the help of historical data.

Streamline your forecasting workflow with default experiences

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

Sales operation teams want to design an efficient forecasting experience for their sellers so that they can quickly access their sales projections and opportunities. With default views, administrators can set default selections that the sellers would see on the forecast page. This helps streamline their experience and free up time for them to spend meeting with customers and closing sales.

Feature details

As an administrator, you can make the following default selections in the forecast configurations:

- Setting the default drill-down.
- Setting the default group-by.

- Setting Kanban as the default over the underlying record grid.
- Keeping the last selected or viewed forecast as default.
- Setting the default forecast configuration for your users.

Support for yearly forecast periods

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

Some organizations track their sales objectives on an annual basis. Previously, forecasts could only be configured on a monthly or quarterly basis. With this enhancement, forecasts can be configured to span the whole year by selecting a yearly forecast period in the forecast configuration.

Feature details

As an administrator, you can configure a forecast that spans a whole year by selecting the **yearly** period option in the forecast scheduling section. Your sellers then have access to their full year projections and opportunities in a single forecast view

Update quotas quickly with inline editing and quota rollups

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

When planning for an upcoming sales period, organizations may need to access various sources for quota information, which can be difficult to pull into the forecast module. By providing the ability to edit quotas and simple columns inline, team members with the most current information can seamlessly update forecasts in seconds.

Furthermore, sometimes quotas for managers and leaders are simply rollups of all their teams' quotas. Instead of manually entering these, you can now set these quotas (and simple columns) as rollups for auto-calculating.

In addition, a manager's quota often needs to remain current as sellers may move from team to team and take their quota with them. A new capability to roll up a simple column will allow managers to see constantly updated views of their quotas.

Feature details

As an administrator, you can:

- Enable inline editing of quotas directly in the forecast configuration.
- Determine if quotas should be rolled up across the hierarchy in the forecast configuration.

As a manager or seller, you can:

- Edit quotas and simple columns directly inline in the forecast grid.

Filter the underlying opportunities of a forecast

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Jan 2022	Apr 2022

Business value

Sellers in an organization may have to manage a large volume of opportunities and make updates on a regular basis. Being able to quickly find and update the right opportunities is critical for keeping the organization's records current while also increasing the time sellers have for doing other activities, such as working on a new deal or closing a sale.

Feature details

As a sales manager or seller, you can toggle column-level filter controls to further filter relevant opportunities in the underlying records grid.

Monitor stagnated deals and how they impact the predictive score

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Jan 2022	-	Apr 2022

Business value

Within a sales organization, sellers are juggling a multitude of different leads and opportunities simultaneously. There's a risk of sellers losing a deal if they don't attend to it in a timely fashion. Sellers need to know the number of days since the deal has moved to the current stage and how the stagnation of the deal impacts the predictive score of the deal. This analysis will help them take appropriate actions to move the deal.

Feature details

As a seller, you can:

- Access an analysis in the predictive scoring widget that helps you understand the number of days since the deal has moved to the current stage and if it's at risk of harming the predictive score.
- Access a deal's historical data on the number of days the deal stayed at each stage by selecting the **Details** link in the predictive scoring widget. This helps to benchmark the deal against other deals.

Migrate forecasts from one environment to another with solution awareness

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Aug 2022

Business value

Many organizations have complex requirements that call for them to validate multiple permutations of forecasts in a sandbox environment first. With this enhancement, you can configure the forecast in one environment and then easily move it to another when ready, thus avoiding the need to manually recreate the forecast in each environment.

Feature details

As an administrator, you can:

- Include the forecast component when creating solutions.
- Move forecast configurations from one environment to another—for example, sandbox to production environment.

Mobile

Overview

Enable sellers to be productive and collaborative from anywhere, whether on the go or on their couch.

Capture mobile phone contacts and recent calls

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Aug 2022	-	Sep 2022

Business value

Streamline data capture by integrating your mobile users' contacts and recent calls so those who call customers directly from their phone can get the information logged into Dynamics 365 Sales. By allowing your salespeople to create contacts based on their mobile phone contact lists and logging their recent calls with customers, you can reduce the friction between your sales team's actions and the captured data while increasing the completeness and value of the information stored in Dynamics 365 Sales.

Feature details

- Easily capture phone contacts and make them part of Dynamics 365 Sales with one click.
- Easily log calls from a mobile phone's recent calls.

Effortlessly log information using the mobile phone camera

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Aug 2022	-	Sep 2022

Business value

Sellers can spend too much time manually logging essential information in Dynamics 365 Sales. In this release, we improve how sellers can use their phone camera to intelligently extract information from business cards and handwritten notes, and then associate the captured information to the corresponding record or activity. This increases data quality and completeness, and frees your sellers to focus more on building relationships and winning deals.

Feature details

- Improved experience for capturing business cards with better models, more languages, and better user experience.
- Scan handwritten notes using the phone camera and get the text digitized into Dynamics 365 Sales.

Outlook deep-link integration with templates, autofill, and emails to meeting participants

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Aug 2022	-	Sep 2022

Business value

Sellers communicate with their customers by email through Outlook, often doing that directly from their phone. Each interaction is full of business-related information from Dynamics 365 Sales, and unfortunately, sellers need to switch back and forth between apps to pull relevant information to include in their communications. In this release, we improve the Dynamics 365 Sales mobile app to provide deep-link integration with Outlook and make it context-aware. This will reduce the amount of manual work and the switch between apps your user has to do when authoring an email to customers.

Feature details

- Email composer deep links directly into Outlook.
- Support for email templates when composing emails.
- Autofill relevant information from the Dynamics 365 Sales mobile app in Outlook emails to save time.

Relationship intelligence

Overview

Build better relationships with customers with predictive relationship intelligence, engagement signals, and LinkedIn data.

Discover accounts and contacts from email interactions

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Apr 2022	-	-

Business value

Sellers interact with contacts every day over email. Unless the seller manually creates these contacts in Dynamics 365, this data can remain hidden in the email server. With this enhancement, your sellers can query their entire network based on interactions gleaned from Dynamics 365 and Exchange in order to uncover hidden relationships, obtain warm introductions into target accounts, and accelerate opportunities by locating additional key stakeholders.

Feature details

As a seller, you can:

- Query for accounts that you and your colleagues have interacted with over email, and uncover all known contacts at those accounts.
- Query for contacts that you and your colleagues have interacted with over email and uncover colleagues who have connections with those contacts.

- View an interaction score that tells you how well your organization is connected to an account or contact or how strong the relationship is between an external contact or colleague.
- Access a summary of the relationship between your organization and other organizations or individual contacts.

The screenshot shows the Dynamics 365 Accounts interface for 'A. Datum Corporation'. The top navigation bar includes options like Save, Save & Close, New, Open Org Chart, Deactivate, and Connect. The account details section shows an annual revenue of \$35,000,000.00 and 2,000 employees, with Kenny Smith1 as the owner. The 'Who knows Whom' tab is active, displaying a 'Summary' section with the account name and website. Below this is a 'Relationship Overview' section showing an interaction score of 54, the next meeting date (11/4/2021 3:45 PM), and a list of last interactions with Kayla Lewis and Serena Davis. To the right, the 'Top Contacts' section lists Kayla Lewis (score 99), Eugenia Lopez (score 95), and Corey Gray (score 79). At the bottom, the 'Connected Colleagues' section lists Serena Davis (score 66) and Henry Ross (score 65).

Discovered contacts and connections displayed in the Accounts page.

Sales accelerator and process automation

Overview

Sales accelerator is a sales engagement platform that makes your sales team productive and helps your sellers engage with customers efficiently. Sales accelerator enables your sellers to engage with prospects and customers across multiple channels. Prioritized worklist guides sellers to connect with the right customers and help them streamline workflow through automation and integration.

To learn more, go to the [Sales accelerator overview](#).

Process automation allows you to automatically assign leads and opportunities to the right sellers. Easily configurable rules allow you to smartly distribute leads and opportunities among sales teams based on business logic. You can also maintain availability and capacity to balance the workload of your team members.

Choose the right engagement plan for your customers

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

Automation has proven to help sellers be more effective. Dynamics 365 Sales now provides flexible ways to assign the best cadence to the best customer, including seller-driven cadence selection. This helps your sellers feel more empowered to drive tailored experiences that emulate their style best.

Feature details

In the sales accelerator workspace:

- Sellers have the ability to define their own sequence based on their personal preference.
- Sellers can view and choose from the list of available sequences to suit specific business needs.

Move sequences between environments seamlessly to enable sellers to get started quickly

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

Accelerate the lifecycle of sequences between environments by enabling administrators with better deployment solutions. This functionality will ease the deployment of sequences to sales organizations. Administrators will be able to easily move finalized sequences from test to production environments, or any other environment.

Feature details

This feature provides an easy way for you to select sequences and related entities and move them between environments. For example, if you create a sequence in a development environment, you can move it to quality assurance (QA) and production environments.

Personalize the prioritized workload using advanced filtering

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

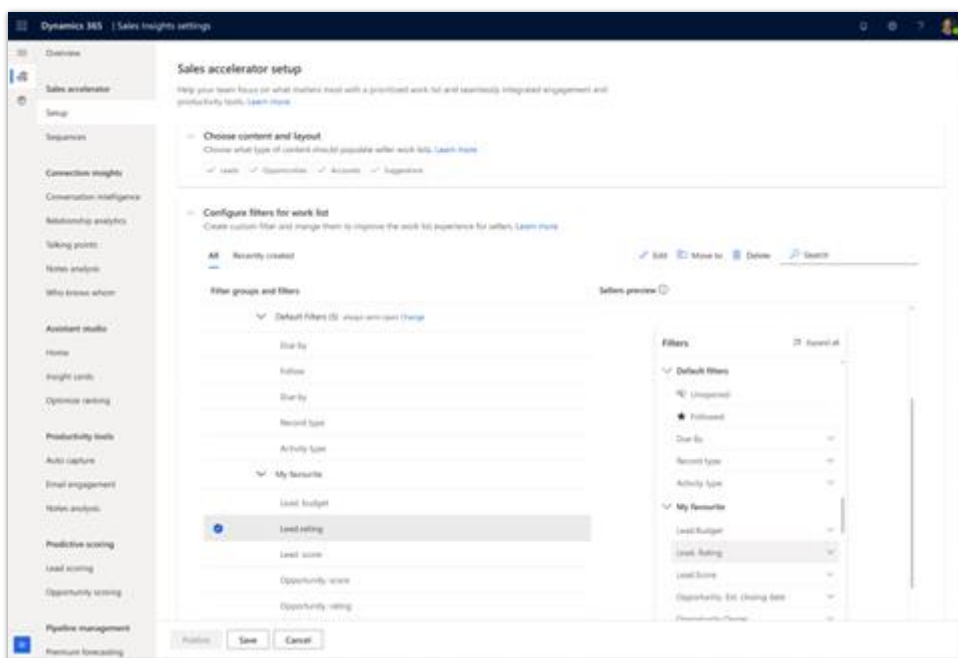
Every seller has a way of working that can be different. Advanced filtering capability helps your sellers quickly arrive at a personalized workload to work from. Your sellers can use their preferred parameter based on the business scenario to arrive at the correct set of workload items. Sales engagement managers (SEMs) will have the flexibility to provide users with the right filtering and sorting parameters based on the unique business needs.

Feature details

This functionality will enable your sellers to easily filter information based on standard as well as custom fields. The functionality can be enabled from the settings where SEMs can define filters relevant for business scenarios. SEMs will be able to extend the current filter based on the following:

- Standard fields
- Custom fields
- Combination of fields

Your sellers will then be able to personalize and choose these filters.



Filter personalization.

Enable Outlook integration to avoid double booking

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Dec 14, 2021	-	Apr 2022

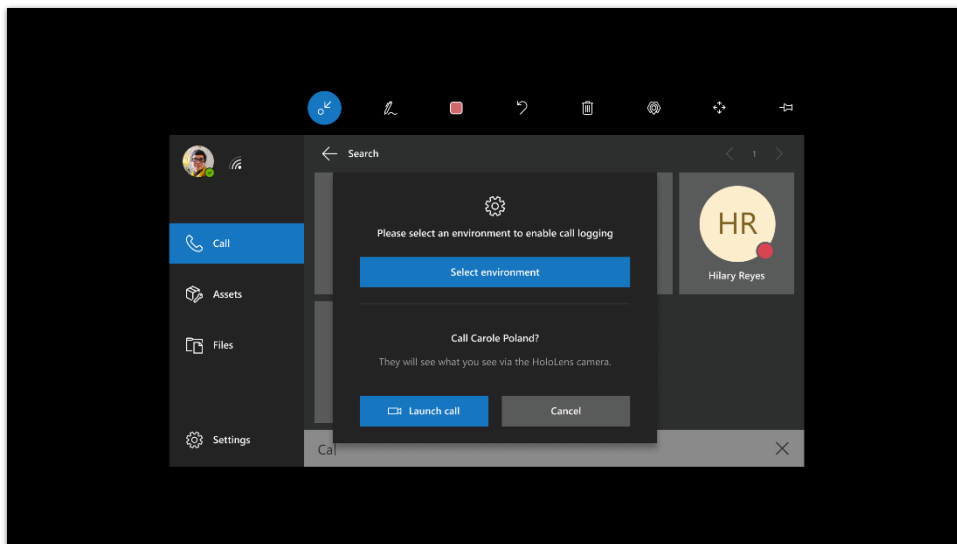
Business value

Sellers are used to maintaining their availability in Outlook. The sales accelerator Outlook integration ensures that the sales accelerator can read the Outlook calendar while assigning tasks. This will avoid the need for double maintenance of availability in both tools. This will also ensure any out-of-office signals are captured while creating activities for your team to work on.

Feature details

In the sales accelerator setup screens, you can select the option to automatically pick availability from the Outlook calendar. Once you enable this for any seller who has an Exchange license, the Outlook integration will ensure the following:

- The sequence tasks are scheduled honoring the Outlook calendar of the seller.
- When the seller pauses a task, the sales accelerator takes into the account the working days in the Outlook calendar.
- If you are using process automation, this would also ensure that seller availability for lead or opportunity assignment is based on the Outlook calendar.



Outlook integration.

See also

[Through personal settings \(Sales Enterprise\)](#) (docs)

Easier setup experience

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Jan 2022	-	Apr 2022

Business value

The new sales accelerator setup experience is designed to enable sales engagement managers to quickly and easily complete the setup for sellers. They'll be able to more easily discover the sales accelerator features and configure them using templates. This will help organizations accelerate their implementation and deployment of the sales accelerator.

Feature details

This feature will include the following functionality:

- Redesign the sales accelerator configuration page for quick setup.
- Streamline configuration for sales accelerator features, making the process easy and intuitive.
- Template sequences.
- Auto-connect sequences.

Engage efficiently with your customers

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Jan 2022	Apr 2022

Business value

Sales accelerator is an engagement platform that helps you understand your customers' needs and respond in meaningful ways. It allows your sellers to engage with your customers using multiple channels within one workspace. Currently your sellers are dependent on your sales operation or admin team to enable sales accelerator because only limited team members can have this optimal engagement experience. After this enhancement, if you are an enterprise or premium customer, all your users would get access to sales accelerator by default.

Feature details

- The sales accelerator setting will be enabled for all users by default.
- All users would see the sales accelerator side map entry and can use sales accelerator to engage with customers.

- Your sales operation or admin team would still be able to disable this feature for select or all users.

Make quick decisions with enhancement to worklist cards

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Jan 2022	Apr 2022

Business value

It is important to help sellers make quick decisions and enable them to perform their activities efficiently to maximize the business impact. Sellers need relevant information for different entities to efficiently accomplish the task at hand. By having relevant information on the card, your sellers can now make quicker decisions.

Feature details

Worklist cards will be enhanced and will have more relevant information for each scenario. For example, an opportunity will have title information while a contact will have role information.

The relevant information based on the entity provides contextual information to the sellers.

Customizable worklist cards for right contextual information to the seller

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Jan 2022	Apr 2022

Business value

Sellers need relevant information for different entities to efficiently accomplish the task at hand. For different customers, the information that needs to be shown can vary. Customizable worklist cards provide the capability to sales engagement managers to provide the most relevant and important information in the worklist cards.

Feature details

Customizable worklist cards for different entity types will be available for sellers. Sellers will get contextual information on the work items. Businesses can configure these cards to suit their requirements.

Update activities from sequence step and correlate it with timeline activities

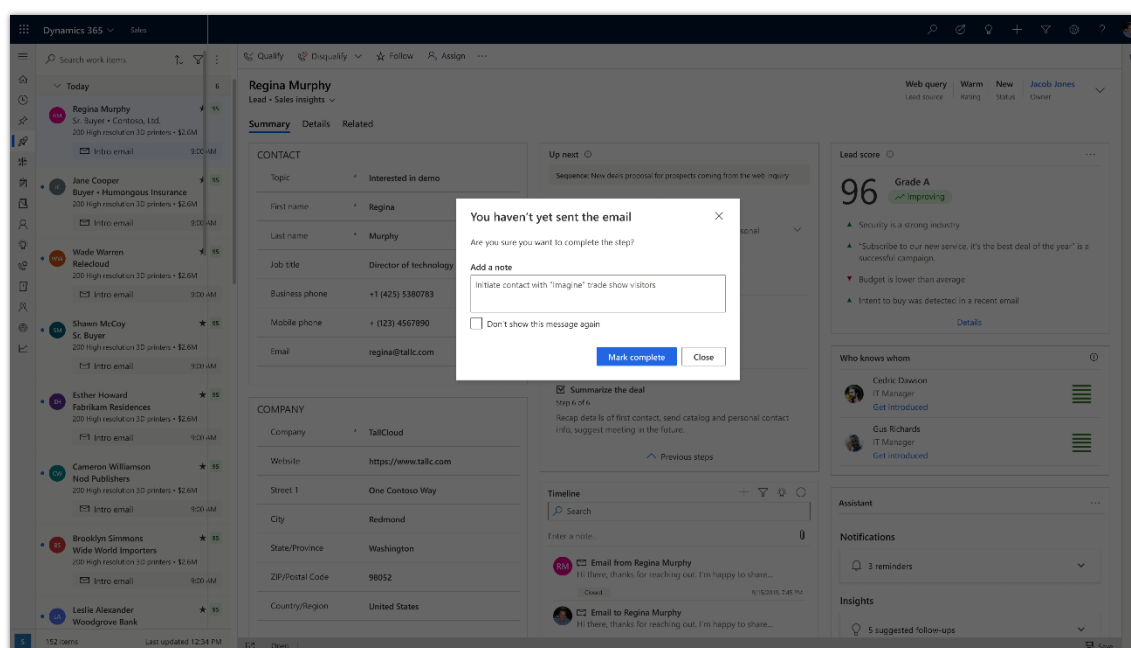
Enabled for	Public preview	Early access	General availability
Users, automatically	-	Jan 2022	Apr 2022

Business value

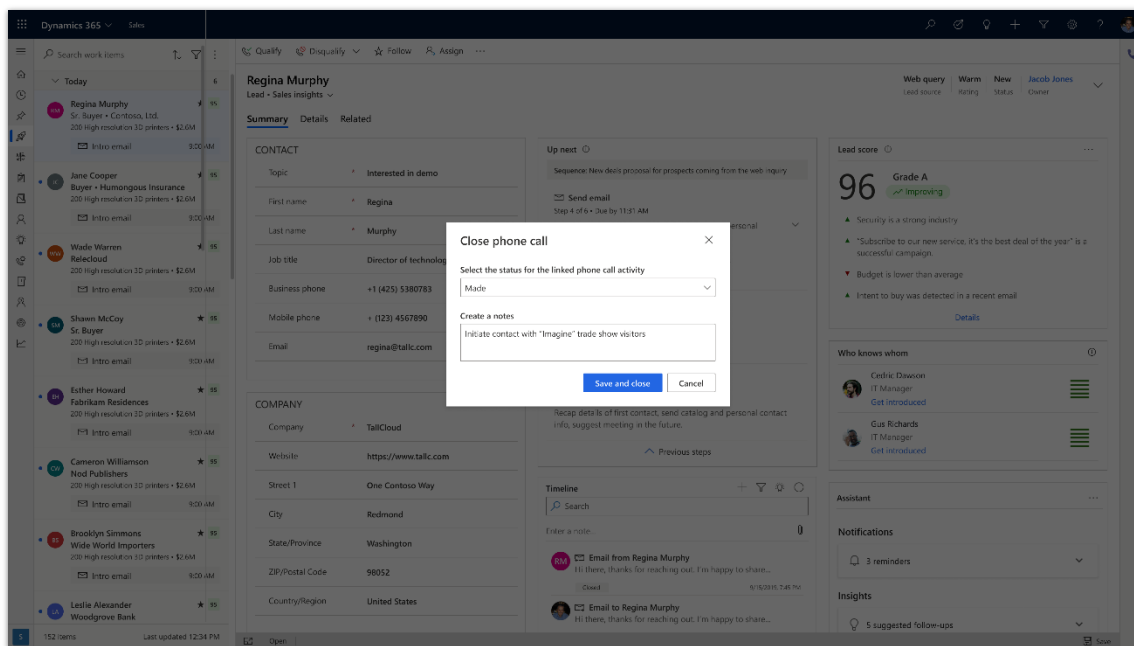
Sales managers want to guide sellers to consistently execute the go-to-market message throughout the customer journey. Sequences allow sales managers to automatically create these activities that appear under the Up next widget in sales accelerator. This enhanced functionality automatically updates activity with details from sequence step description and allows sellers to efficiently update notes and correlate these activities with timeline.

Feature details

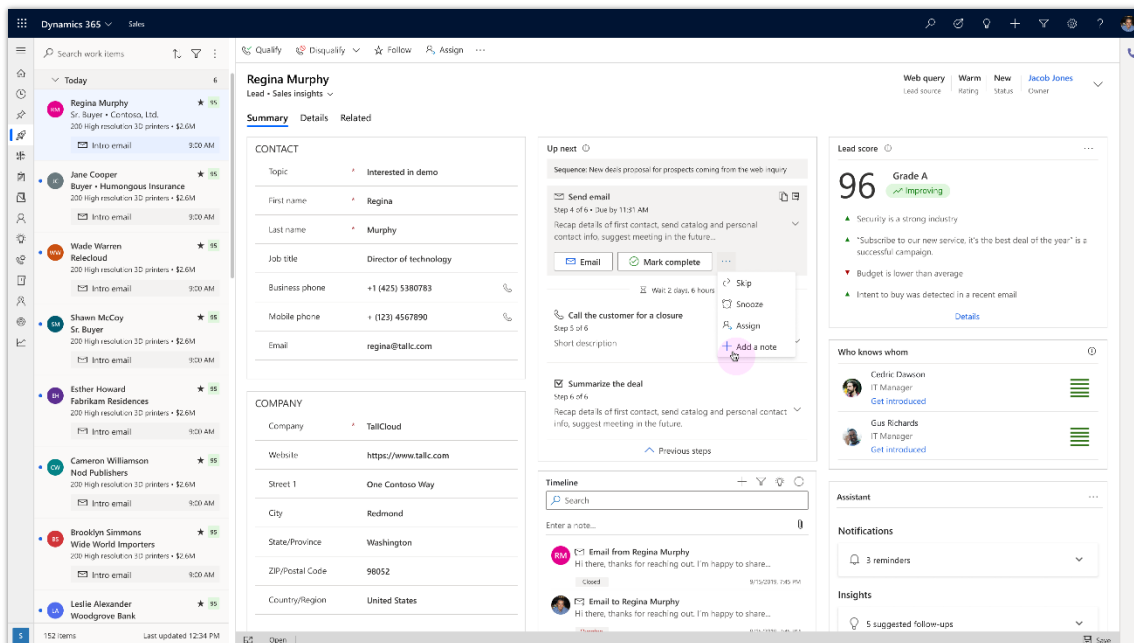
- Automatically update activity description from sequence step description.
- Allow sellers to add activity notes while completing Up next activity.
- Open activity details with one click from the Up next widget.
- Enhanced timeline control in Sales Insight form to easily correlate activity with Up next widget.



Users can add a note while marking an activity as complete.



Users can add a note while marking a phone call as complete.



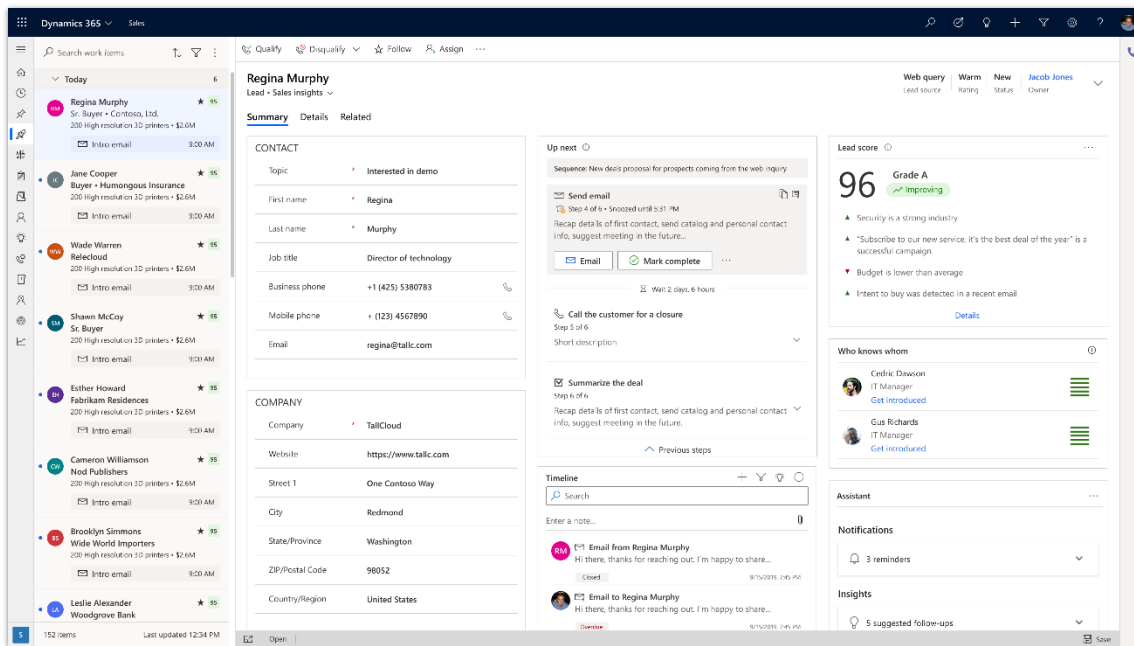
Users can add a note directly from the Up next widget.

The screenshot shows the Dynamics 365 Sales interface. On the left, a list of leads is visible, including Regina Murphy, Jane Cooper, Wade Warren, Shawn McCoy, Esther Howard, Cameron Williamson, Brooklyn Simmons, and Leslie Alexander. The central pane displays the details for Regina Murphy, including her contact information (First name: Regina, Last name: Murphy, Job title: Director of technology, Business phone: +1 (425) 5380783, Mobile phone: +1 (123) 4567890, Email: regina@tallic.com) and company information (Company: Tallicloud, Website: https://www.tallic.com, Street 1: One Contoso Way, City: Redmond, State/Province: Washington, ZIP/Postal Code: 98052, Country/Region: United States). The right-hand pane shows a sequence of tasks, including 'Send email' and 'Call the customer for a closure', and a lead score of 96 Grade A.

Snooze an upcoming task.

The screenshot shows the Dynamics 365 Sales interface with a dialog box titled 'Snooze email activity for selected contacts'. The dialog box contains a message: 'This will postpone the email activity for these 3 contacts until the time and date you set below.' It has two sections: 'Date' and 'Time'. The 'Date' section shows a calendar for March 2020, with the 10th selected. The 'Time' section shows a dropdown menu for 'Set time'. There are 'Snooze' and 'Cancel' buttons at the bottom of the dialog box.

Snooze an upcoming task and select a date.



Snoozed item.

Get notified when customers actively engage with you

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Feb 2022	-	Apr 2022

Business value

Sellers should be notified when customers interact with a sent email so that they can take further actions when the customer is ready to engage. In this release, we are enabling just that. Sellers will be notified when a customer opens an email or selects a link or downloads an attachment and get suggested next steps.

Feature details

Your sellers will get notifications when customers engage with their emails so that they can take further actions with customers.

Notifications will be for:

- Failed automated email or workflow.
- Customer response to emails.
- Opened, read, or forwarded email.
- Downloaded attachment.
- Selected link in the email.
- Contact updated the phone number in the signature and updated contact information.

High-quality leads ensure higher success rates

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Apr 2022	-	Jun 2022

Business value

Leads are captured from multiple sources like websites, landing pages, and incoming calls. Sometimes, unfiltered sources provide junk leads. Accurate data is one of the key components to meaningful communications with potential customers. High-quality leads are critical for the effectiveness of the sales process, for sales productivity, and for optimizing the time sellers spend on each customer.

Our AI-based models will filter out junk data, like leads with incorrect email addresses, no contact information, or substandard quality data, and will help your sellers focus on the right customers.

Feature details

By enabling this feature in the sales accelerator settings, junk leads are removed from the system based on:

- Wrong email addresses
- Incomplete data
- Bad quality information like leads with known fictitious names (for example, Mickey Mouse)

Service

Overview of Dynamics 365 Customer Service 2022 release wave 1

Dynamics 365 Customer Service is an end-to-end service for customer support, spanning self- and assisted-service scenarios across multiple channels of customer engagement. Customer Service provides comprehensive and efficient case routing and management for agents, a knowledge base where users can author and consume knowledge articles, and robust insights through AI suggestions and rich, embedded analytics. It also provides add-ons for omnichannel engagement through chat, social channels, and voice.

For 2022 release wave 1, we plan to:

- Deliver the all-in-one contact center.
- Transform contact center routing.
- Enable reliable self-service at scale.
- Improve agent experiences with automation and knowledge management.

What's new and planned for Dynamics 365 Customer Service

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Administrator experiences

An intuitive, modern administration experience is the key to quickly setting up Dynamics 365 Customer Service and using its features.

Feature	Enabled for	Public preview	Early access*	General availability
Simplify administration with new Customer Service admin center application	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022

Agent experiences

The agent experience is the heart of Dynamics 365 Customer Service. The key to improving satisfaction in service delivery is enabling agents to be able to handle multiple interactions at a time, interact with multiple apps without losing context, and enhance their workflows with productivity tools.

Feature	Enabled for	Public preview	Early access*	General availability
Enhanced experience of using email templates while composing an e-mail	Users by admins, makers, or analysts	-	-	Apr 2022
Inbox enhancements to help improve agent productivity	Users by admins, makers, or analysts	-	-	Apr 2022
Enhanced experience for creating email templates	Users by admins, makers, or analysts	May 2022	-	Jul 2022

Communities

Enable effortless and reliable self-service at scale with company and community-generated content like Q&A, knowledge articles, and product/service feedback.

Feature	Enabled for	Public preview	Early access*	General availability
Engage with customers in Dynamics 365 Customer Service Community	Users by admins, makers, or analysts	-	-	Apr 2022

Knowledge management

A robust and detailed knowledge base helps agents find answers for customers faster and enables customers to self-serve through support portals.

Feature	Enabled for	Public preview	Early access*	General availability
Relevance search integration for knowledge management in portals	Users by admins, makers, or analysts	-	-	Apr 2022
Analytics for knowledge articles and search terms	Users, automatically	-	Jan 2022	Apr 2022

Feature	Enabled for	Public preview	Early access*	General availability
Usability enhancements to knowledge article search	Users, automatically	-	Jan 2022	Apr 2022
Configure knowledge search control for application side pane	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022

Omnichannel

Omnichannel engagement enables instant engagement and connectivity between agents and customers and gives supervisors real-time visibility into operational efficiency.

Feature	Enabled for	Public preview	Early access*	General availability
APIs for queue and agent availability	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Service-level agreements

Service-level agreements (SLAs) enable businesses to track support policies and ensure that customers are supported as per their entitled support policy.

Feature	Enabled for	Public preview	Early access*	General availability
Recalculate service-level agreements based on changes to the attribute associated with an entity	Users by admins, makers, or analysts	-	-	Apr 2022
Usability enhancements in service-level agreements	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Teams integration

Provide your agents with best-in-class business process automation, collaboration, and communication through seamless integrations between Dynamics 365 and Microsoft Teams.

Feature	Enabled for	Public preview	Early access*	General availability
AI-generated conversation summary sets context for Teams-based collaboration	Users by admins, makers, or analysts	Apr 2022	-	-
Contextual collaboration using embedded Microsoft Teams	Users by admins, makers, or analysts	-	-	Apr 2022
Provide AI-suggested contacts for Teams-based collaboration	Users by admins, makers, or analysts	-	-	Apr 2022

Unified routing

Intelligent work item classification and omnichannel routing capabilities enable the flexibility and automation of AI-enabled workflows that increase routing efficiency and decrease human effort.

Feature	Enabled for	Public preview	Early access*	General availability
Enhancement in default queues for unified routing	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Enhancements in diagnostics for unified routing	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

* You are able to opt in to some features as part of early access on January 31, 2022, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

Administrator experiences

Overview

A modern administration experience should provide a consistent setup experience that unifies the management of Dynamics 365 Customer Service, unified routing, and omnichannel activities. The Customer Service admin center app consolidates all administrator experiences that are relevant to customer support into a single app. It provides an intuitive and guided, wizard-like experience to enable rapid first-time and incremental setup.

Simplify administration with new Customer Service admin center application

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022

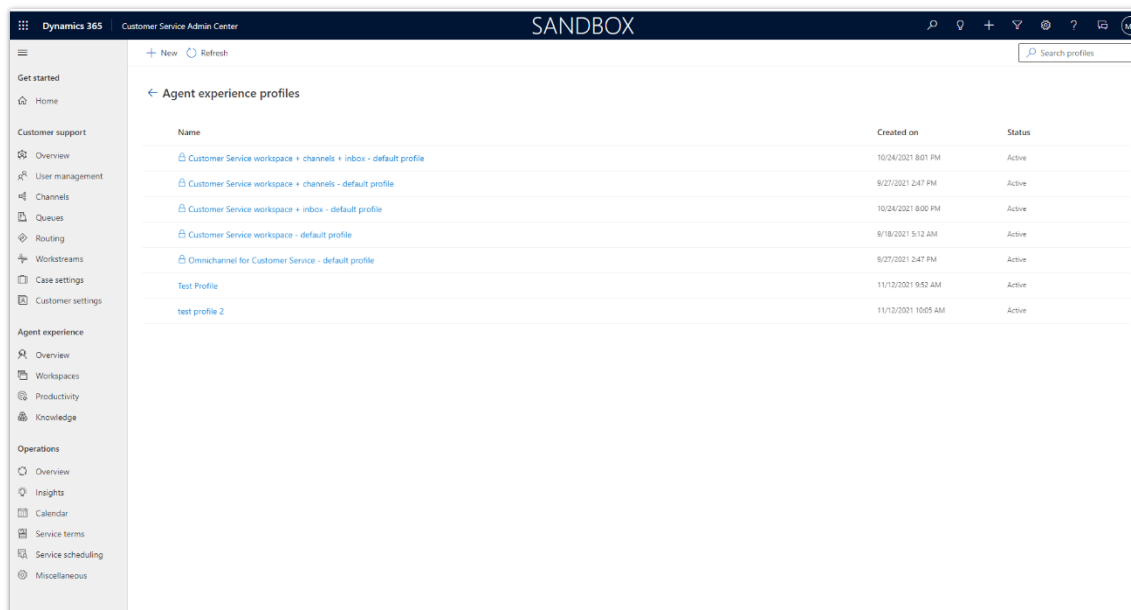
Business value

The Customer Service admin center application unifies and simplifies the setup tasks with a guided experience. The app co-locates related settings and takes a task-based approach for an effortless application setup.

Feature details

Some of the key capabilities of the Customer Service admin center app are as follows:

- Consolidated administration experiences across Customer Service Hub, Omnichannel admin center, and app profile manager.
- Task-oriented site map.
- Overview pages for each area that list at-a-glance information with deep links to manage features.
- Feature landing pages with an overview of the feature-specific capabilities.
- Wizard-like getting started experience.



Customer Service admin center agent experience profile screenshot.

Agent experiences

Overview

Agent experience is at the heart of Dynamics 365 Customer Service. Enhancing employee confidence is key to improving customer service satisfaction. Dynamics 365 Customer Service provides intuitive collaboration capabilities in a customizable workspace and elevates your team's effectiveness with the productivity tools needed to deliver seamless, personalized customer experiences across any channel.

In 2022 release wave 1, we're making enhancements to the inbox view and the Customer Service workspace app.

Enhanced experience of using email templates while composing an e-mail

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

Email templates are a fast and easy way to send repetitive and recurring emails to multiple customers. They help save time and provide a way to create consistent, professional, preformatted email messages that can be used when communicating with customers. Users can insert an existing template while composing an email.

Feature details

The new insert template experience will provide you with a new template gallery that has multiple views and search capabilities that are based on title, subject, and content. It also includes a standard set of filters that can be enhanced with custom fields. Users can choose to save the set of filters as a new query that they can use to filter templates in the future.

Inbox enhancements to help improve agent productivity

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

As organizations adopt more support channels with Omnichannel for Customer Service, alongside cases and email, customer service agents need to be able to efficiently triage and address multiple conversations. The inbox capability in the Customer Service workspace and Omnichannel for Customer Service apps is designed to address this need. With a set of customized views, filters, and sort capabilities across all channels of contact, the inbox capabilities allow agents to rapidly work through multiple issues across channels while maintaining a focus on customers.

Feature details

In October 2021, the inbox feature was released as an experience for agents to help prioritize work across digital channels with an organized work list and simple navigation. In April 2022, we'll be extending the inbox with additional capabilities, such as:

- Support for email as a conversation channel with configuration capabilities.
- The ability for agents to pick and assign open conversations from the inbox.
- Enablement of real-time translation of conversations in the inbox.

Enhanced experience for creating email templates

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	May 2022	-	Jul 2022

Business value

Email templates are a fast and easy way to send repetitive and recurring emails to multiple customers. They help save time and provide a way to create consistent, professional, preformatted email messages that can be used when communicating with customers. You can create, view, and edit email templates.

Feature details

Customers can now enable the new email template creation experience. It provides an advanced, digital content designer for creating and styling the templates. It includes advanced layouts that are responsive and adapt to any screen size.

Communities

Overview

Self-service is a critical first step in the customer service journey, as it helps deliver high up-front resolution rates and increased customer satisfaction due to speed and convenience. Communities are the engine that powers self-service since it enables peer-to-peer support and the creation of relevant and high-quality content at scale. Online communities of customers, partners, and employees offer a "wisdom of the crowds" approach to rapid, user-generated content creation through formal and informal knowledge articles, Q&A forums, and blogs. And by leveraging feedback-sharing, communities can impact and drive your future investments, building trust and brand loyalty by demonstrating that you listen to your customers.

Engage with customers in Dynamics 365 Customer Service Community

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

In October 2021, we announced the preview release of Dynamics 365 Customer Service Community, a new app that provides community managers and moderators with the necessary tools to invite customer suggestions and quickly respond to feedback on products and services, building customer trust with process transparency. Community managers can now create and manage idea forums, moderate content, and close the feedback loop.

In addition, we announced the Modern Community portal template, which enables organizations to offer out-of-the-box delightful experiences for customers to post suggestions in community forums and collaborate to shape the future of products they use by upvoting, commenting, sharing, and flagging ideas posted in the community.

With these two capabilities, organizations can build vibrant communities and ensure that their investment decisions are informed by customer demand. In April 2022, we will generally release the Dynamics 365 Customer Service Community app and the Modern Community portal template.

Feature details

Capabilities for community managers and moderators

The Dynamics 365 Customer Service Community app provides community managers and moderators with the necessary capabilities to capture and evaluate ideas. They can be responsive and close the loop as community members give input.

Now, community managers can:

- Configure the portal to fit their organization's brand, including colors, a custom header and footer, and quick links to digital assets.
- Enforce acceptance of terms of use and privacy statements by users.
- Create and manage idea forums.
- Manage content, including content moderation and merging of duplicate ideas.
- Update the status of ideas or requests and respond to community feedback.
- Manage users and assign security roles at the forum level.

Users experience a vibrant community

The Modern Community (preview) portal template offers all the functions needed to delight users as they post new ideas and collaborate at scale.

Users can:

- Browse, search, filter, and sort idea lists.
- Post new ideas. This flow includes autosuggestion of existing ideas to prevent duplicates.
- Collaborate and engage in a community that includes upvoting, commenting, sharing, and following ideas.
- Flag inappropriate content.
- Track the status of ideas that they are engaged with.

Knowledge management

Overview

Knowledge management plays a vital role in enabling organizations to deliver world-class customer care. Allowing the agents to create rich, high-quality knowledge resources and showing the right knowledge content across engagement modalities (including self-service, assisted service, and onsite service) expedites issue resolution and drives customer and agent satisfaction and productivity.

The ability to create, import, and share knowledge bases is a core capability of successful support delivery. With knowledge management, agents and supervisors can author knowledge articles from templates, add knowledge search providers from multiple sources

(SharePoint, Microsoft search, and other Dynamics 365 organizations), and receive AI-triggered knowledge suggestions to speed up support delivery.

In 2022 release wave 1, we are providing search integration for knowledge management in portals and historical analytics on knowledge articles and search terms.

Relevance search integration for knowledge management in portals

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

Relevance search delivers fast and comprehensive search results, sorted by relevance. With relevance search, portal users can have a consistent and seamless search experience while searching for knowledge base articles. Additionally, portal users can benefit from the ongoing improvements being made to relevance search.

Feature details

The key capabilities of this feature include:

- **Content access levels:** Provides another level of access control to knowledge articles on a portal. This is separate from web roles.
- **Filters:** Filters knowledge articles by product, rating, and modified on date.

NOTE Relevance search support will replace the current portal global search functionality.

For more information on relevance search support in the Power Apps portals, see [Dataverse search integration in portals](#) in the [Microsoft Power Platform: 2021 release wave 2 plan](#).

Analytics for knowledge articles and search terms

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Jan 2022	Apr 2022

Business value

Knowledge authors must keep their knowledge bases relevant, accurate, and easy to access from different channels. By leveraging the built-in, historical view of knowledge article usage and other related metrics, knowledge authors and managers can understand the effectiveness of knowledge content and identify opportunities for improving their knowledge bases.

Feature details

The following are some of the key capabilities of knowledge article analytics:

- Dedicated reports that provide historical trends for key metrics, such as the number of views, number of visitors, average feedback rating, and so forth.
- Ability to drill into each article to understand its detailed trends.
- Ability to navigate to the KB authoring page from the embedded analytics report to make relevant changes.
- Ability for authors to drill into the key search phrases used by users from knowledge search analytics, which provides insights about the articles that are chosen from search results.

Usability enhancements to knowledge article search

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Jan 2022	Apr 2022

Business value

Agents will be able to understand how to search for knowledge articles to get relevant results.

Feature details

Key capabilities:

- Agents can search for articles using search phrases or terms. The search results are returned when the search term matches with the title, content, keywords, descriptions, or attachments. Agents can analyze the search term matches and the article search results and view only the relevant articles, which helps the customer issue at hand.
- Agents can view the article number displayed on the search results card.

Configure knowledge search control for application side pane

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022

Business value

The ability to configure the knowledge search control in the application side pane will improve the user experience for agents who use knowledge search to resolve customer issues.

Feature details

This feature enables administrators to configure the knowledge search control for the application side pane in the Customer Service workspace.

The key capabilities that administrators can configure are:

- Set default search display count.
- Set actions, such as link, unlink, send email, copy URL, and send content for the tables (entities).

Omnichannel

Overview

Omnichannel for Customer Service enables organizations to instantly connect and engage with their customers via channels like live chat, SMS, voice, and social channels. By providing a seamless agent experience and valuable conversation insights across channels, omnichannel capabilities enable organizations to deliver a true, all-in-one contact center.

Omnichannel for Customer Service provides a modern, customizable, high-productivity app that offers contextual customer identification, real-time notification, integrated communication, and agent productivity tools like knowledge search, macros, and case creation to ensure agents are effective.

Supervisors get real-time and historical visibility and insights into the operational efficiency of agents and their utilization across various channels.

The enterprise-grade routing and work distribution engine allows customers to configure agent presence, availability, and routing rules, thus ensuring that agents are working on the most relevant engagements.

APIs for queue and agent availability

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

Customers who want to have a finer grain of control over the display of the chat widget on their portals based on the current queue backlog and agent availability can build customizations to meet their business requirements.

Feature details

This feature allows customers to programmatically access the availability of the target queue based on operating hours and availability of agents to take requests in the target queue and get details on the average wait time and position in queue. Customers can show or hide the chat widget on their portal.

Service-level agreements

Overview

Service-level agreements (SLAs) enable businesses to track support policies and ensure that customers are supported as per their entitled support policy. Businesses use SLAs to govern support products that customers receive either as part of their purchase or as add-ons to their purchase. SLAs include policy details, such as how quickly a customer is entitled to receive support, how many support requests a customer can make, and how long after a purchase a customer can be supported as part of the agreement.

Recalculate service-level agreements based on changes to the attribute associated with an entity

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

Service-level agreements (SLAs) help businesses define the level of service or support that they agree to offer to a customer in Customer Service. The enhancements in SLAs will enable service administrators and customer service agents to serve customers better.

Feature details

Service administrators can now enable the recalculation of SLAs for an update made to an attribute associated with an entity. This will help customers in scenarios where they operate cross-geography while working on a single case. When a case is transferred from one location to another with an update in the country field associated with the case, SLA KPIs will be readjusted to use the new associated business hours for the selected country.

Usability enhancements in service-level agreements

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

Service-level agreements (SLAs) help businesses define the level of service or support that they agree to offer to a customer. The enhancements in SLAs will enable service administrators and customer service agents to serve their customers better.

Feature details

The enhancements in the SLAs include:

- Customize the **Succeeded** or **Expired** display text of the SLA timer:
SLA timer control displays **Succeeded** or **Expired** as a text, based on whether the SLA KPI was met. Customers can now use the maker experience to customize the values to display when SLAs succeed or expire. For example, when SLAs succeed, the text can be displayed as **Met**, and when SLAs expire, the text can be displayed as **Missed**.
- Export and import of holiday schedule and customer service schedule with SLA:
Customers can now export and import the holiday and customer service schedules from the source environment to the target environment along with the SLA configurations in Unified Interface.
- Define success conditions in SLA items based on related entities:
In SLAs, at the item level, service administrators can now define the success conditions based on not only the fields of the primary entity but also its related entity. This will provide more flexibility to the administrators while configuring the conditions. This is enabled by default for service administrators.

Teams integration

Overview

Provide your agents with best-in-class business process automation, collaboration, and communication with Microsoft Teams embedded in Dynamics 365 Customer Service. Conversations in embedded Teams are linked directly to Customer Service records, enabling a contextual experience.

In 2022 release wave 1, we're improving embedded Microsoft Teams with Dynamics 365 data integration, AI-suggested contacts, and AI-generated conversation summaries for agents.

AI-generated conversation summary sets context for Teams-based collaboration

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Apr 2022	-	-

Business value

Reading through a long conversation transcript to understand the context can be time-consuming. On top of that, writing a summary of the conversation adds even more time. With an AI-generated conversation summary, when an agent has a conversation with a customer and wants to collaborate with other agents, supervisors, SMEs, and so on using embedded Microsoft Teams, AI automatically provides a summary of the conversation for agents to share with their collaborators.

Feature details

Some of the key capabilities of this feature are:

- Auto-generated summaries that agents can use to share the context of their service conversations.
- A summary format structure that provides insights about the customer's issue and any solutions that the agent tried.
- The ability for agents to edit the auto-generated summary.

Contextual collaboration using embedded Microsoft Teams

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

Agents who use Dynamics 365 Customer Service can easily collaborate with anyone within their organization, such as agents from other departments, supervisors, customer service peers, or support experts, over Microsoft Teams to resolve customer issues without leaving the case or conversation. Chats over Teams will be linked directly to Customer Service records, enabling a contextual experience.

Feature details

The following key features enable users to:

- Chat with contacts from within Dynamics 365.

- Access key Customer Service contacts, such as supervisors, queue members, and support experts.
- Access AI-driven suggestions of agents who resolved similar cases.
- Access recent Microsoft Teams chat lists.
- Link and unlink chats to case and conversation records.
- Access linked Microsoft Teams chats.
- View message avatars and presence, where users can easily see profile pictures of a chat participant and their availability (presence).

Provide AI-suggested contacts for Teams-based collaboration

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

When agents need help in finding a solution for customer issues, one common approach is for them to reach out to others who've resolved similar cases. However, if the agent isn't acquainted with those contacts, finding them can be challenging and time-consuming. Using AI, when agents start a Teams chat on an active case or a service conversation, they're proactively provided with suggestions of other agents who've resolved similar cases.

Feature details

In October 2021, we released the capability to suggest contacts when agents work on an active case. In 2022 release wave 1, this capability will be available when agents have conversations with customers through multiple channels, such as live chat, messenger, and voice.

Some of the key capabilities of this feature are:

- Suggestions of contacts who've resolved similar cases based on the context of an active case or a service conversation and multiple factors, including how recent similar cases are resolved, time to resolution, and so on.
- Direct links for agents to view similar cases resolved by the suggested contacts. (Certain permissions are required for agents to view similar cases.)
- Detailed explanation of the key factors behind why a contact is suggested.

Unified routing

Overview

Traditionally, organizations use queue-based routing, where incoming service requests are routed to a relevant queue, and agents work on those service requests by picking them from the queue. Organizations can miss service-level agreements if agents pick the easier service requests and leave the higher-priority requests in the queue. To address this scenario, organizations either create custom workflows to periodically distribute service requests among their agents or have dedicated personnel to distribute the service requests equitably among agents while adhering to organizational and customer preferences. Both methods are inefficient and error prone and necessitate continuous queue supervision.

The intelligent routing service in Customer Service uses a combination of AI models and rules to assign incoming service requests from all channels (cases, entities, chat, digital messages, and voice) to the best-suited agents. The assignment rules take into account customer-specified criteria, such as priority and auto-skills matching. The new routing service uses AI to classify, route, and assign work items with full automation, eliminating the need for constant queue supervision and manual work distribution to offer operational efficiencies for organizations.

In 2022 release wave 1, we're enhancing unified routing diagnostics and default queues to simplify routing management.

Enhancement in default queues for unified routing

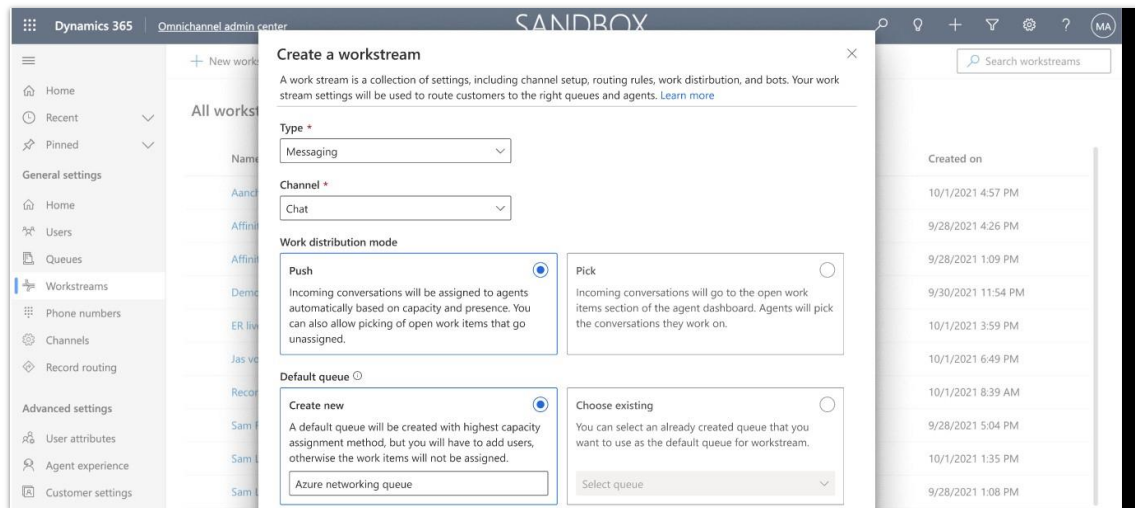
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

Default queues are used to handle misrouted work items and routing errors gracefully. With the upcoming enhancements, every workstream will have a default queue, and supervisors can monitor them for misrouted items. These updates will simplify the management experience and minimize the time taken to reroute items to the right destination.

Feature details

With the enhancements in the default queues, administrators will be able to set a default queue for every workstream. Work items that don't match any routing conditions or work items that encounter any error during the routing process will be routed to the default queue. Supervisors can monitor a fixed set of default queues and mitigate issues for the incorrectly routed work items.



Mockup showing the default queue.

Enhancements in diagnostics for unified routing

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

The logic used in routing and assignment of work items can be complex. Organizations want insights into the happenings at each of the decision points. When some work items take longer to be assigned or are incorrectly assigned, it's critical to understand the rules that were evaluated so that the system runs as expected.

Feature details

With the new enhancements in diagnostics for unified routing, administrators and supervisors will be able to see the errors and exceptions that occur during the routing process. They'll be able to look at the assignments in detail to understand how the work items were assigned and why some of them remained unassigned.

Overview of Dynamics 365 Field Service 2022 release wave 1

Dynamics 365 Field Service is an industry-leading field service management application that allows companies to transform their service operations by connecting people, places, and things to deliver customer-centric experiences. It includes capabilities such as work order management, resource scheduling, and asset management. Dynamics 365 Field Service allows organizations to move from paper-based reactive service to deliver proactive and predictive world-class service, empowering digital transformation and allowing innovative business models such as outcome-based service.

In this next release, the focus will be on usability improvements, enhancements on the new schedule board, and the general availability of the Windows app for Field Service mobile.

For official product documentation and training, see:

- Dynamics 365 Field Service [product page](#).
- Dynamics 365 Field Service training on [Microsoft Learn](#).

What's new and planned for Dynamics 365 Field Service

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Feature	Enabled for	Public preview	Early access*	General availability
Windows 10 support for Dynamics 365 Field Service mobile	Users by admins, makers, or analysts	✓ Oct 1, 2021	-	Apr 2022
Dynamics 365 Field Service mobile usability enhancements	Users, automatically	-	Feb 2022	Apr 2022

* You are able to opt in to some features as part of early access on January 31, 2022, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

Windows 10 support for Dynamics 365 Field Service mobile

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Oct 1, 2021	-	Apr 2022

Business value

Dynamics 365 Field Service mobile is a next-generation app built on Microsoft Power Platform that provides a modern and intuitive user interface. Technicians on Windows devices, such as Microsoft Surface tablets, will be able to see their bookings, manage their work orders, and perform inspections with this rich application deeply integrated with the rest of their Dynamics 365 applications.

Feature details

The Windows Field Service app will be available for the new Power Platform-based mobile app and will include:

- Offline support.
- Outlook-style calendar for bookings, with intuitive user interface for quick service tasks completion and more.
- Tailored user experiences available with Power Apps component framework with hundreds of powerful controls out of the box.
- Access to device camera to take pictures and scan barcodes.
- Deep-link support into the Dynamics 365 Field Service mobile app.

Dynamics 365 Field Service mobile usability enhancements

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2022	Apr 2022

Business value

With usability enhancements in the Dynamics 365 Field Service mobile app, your frontline workers will get access to mobile-friendly experiences that will bring important information to the forefront, making it easier to edit information on mobile and tablet touch screens and reducing the number of taps needed to perform common tasks. These enhancements help reduce the time frontline workers need to spend in the app, and let them focus on the task at hand, whether it's fixing an asset or addressing customer concerns.

Feature details

The following usability enhancements will be available as part of this feature:

- Customizable quick actions from the booking calendar control provide handy shortcuts for users, such as navigating to customer location or changing booking status.
- Layout optimizations for tablets.
- Enhancements to lookup controls allowing simple selection from a list of items.
- Highlight important asset details within the booking form.

Finance and Operations

Overview of Dynamics 365 Finance 2022 release wave 1

Financial leaders and their organizations are continuing to adopt cloud financial systems as part of their digital transformation journey in the core part of their business, finance. Regardless of whether an organization is product-centric, service-centric, or is a diversified organization, moving users to value-added activities versus manual tasks, connecting data across systems, and having an application that supports changing business models and rapid adoption to economic changes are key to making effective decisions that drive this transformation.

To continue the success and growth of Dynamics 365 Finance, we will focus on delivering key enhancements that reflect the needs of delighting our existing customers.

- Providing a full, comprehensive subscription billing solution to organizations engaging in recurring subscription revenue opportunities, including handling complex pricing, consumption, and milestone billing, managing large volume customer contracts, and automating the complexity around the financial impact of recurring revenue.
- Enabling power finance users to have analytical insights into their financial and operating data using the preferred tool of choice, Excel or Power BI, by providing a financial analytical data model that is denormalized, reliable, scalable, and extensible.
- Automate the reading and recognition of vendor invoices by providing OCR capabilities to complete the full end-to-end automation of accounts payable. By creating a continuous, intelligent automation solution with Azure Form Recognizer, AI Builder, and Power Platform, Dynamics 365 Finance will create out-of-the-box vendor invoice models and a framework for continuous learning for invoice exceptions in an easily deployed, intuitive user experience.

To run operations globally, businesses must meet complex, country-specific globalization requirements in the areas of tax compliance and adoption of local business practices. Currently, Microsoft offers globalization capabilities for Dynamics 365 Finance, Supply Chain Management, Project Operations, and Commerce that include low-code globalization services and out-of-the-box global content for 44 countries and regions, extended by ISV solutions.

In 2022 release wave 1, we continue to extend and enhance our globalization capabilities:

- We will release Globalization Studio. Globalization Studio enhances the low-code tax compliance and globalization capabilities and makes the globalization services and multi-country content available for any first- and third-party app and extended with prebuilt ISV connectors.
- Globalization services in Globalization Studio, such as Tax Calculation and Electronic Invoicing, continue to be extended and enhanced.

- We will also release a public preview of Tax Audit and Reporting Service as part of Globalization Studio. It will enhance and scale the existing tax audit and reporting content and capabilities of Electronic Reporting to the enterprise level. This service is an evolution of Electronic Reporting into a low-code microservice and leveraging capabilities of Azure Data Lake Storage and Azure Synapse Analytics.
- We continue to enhance the Configurable Business Documents and Electronic Reporting offerings.
- We will integrate the Russian fixed assets module with the Asset Management lifecycle and Asset Leasing.

What's new and planned for Dynamics 365 Finance

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Core financials

This release for Finance is focused on bringing additional enhancements to core financial capabilities.

Feature	Enabled for	Public preview	General availability
New vendor invoice management experience	Users by admins, makers, or analysts	May 2022	-
Vendor invoice OCR – advanced configurations for OCR service	Admins, makers, marketers, or analysts, automatically	Jul 2022	-
Vendor invoice OCR – deployment wizard for vendor invoice OCR Integration	Users by admins, makers, or analysts	Jul 2022	-

Feature	Enabled for	Public preview	General availability
Vendor invoice OCR – vendor invoice OCR hub	Admins, makers, marketers, or analysts, automatically	Jul 2022	-
Vendor invoice OCR – business rules in staging area	Admins, makers, marketers, or analysts, automatically	Aug 2022	-
Enhancements around ledger settlements	Users by admins, makers, or analysts	-	Apr 2022
New button added to view settlement voucher	Users, automatically	-	Apr 2022
Post in batch for bill of exchange related journals	Users, automatically	-	Apr 2022
Reverse reconciled advanced bank reconciliation	Users by admins, makers, or analysts	-	Apr 2022
Validate vendor bank account before submitting vendor payment journal to workflow	Users by admins, makers, or analysts	-	Apr 2022
Allow positive asset depreciation	Users by admins, makers, or analysts	Feb 2022	Apr 2022
New vendor invoice data entity for OCR integration	Users by admins, makers, or analysts	Feb 2022	Apr 2022
Subscription billing – recurring contract billing	Users by admins, makers, or analysts	Feb 2022	Apr 2022
Subscription billing – revenue allocation	Users by admins, makers, or analysts	Feb 2022	Apr 2022
Subscription billing – revenue and expense deferrals	Users by admins, makers, or analysts	Feb 2022	Apr 2022
Financial tags	Users by admins, makers, or analysts	-	Jul 2022

Feature	Enabled for	Public preview	General availability
General ledger year-end enhancements – specify balance sheet dimensions and year end close micro-service	Users by admins, makers, or analysts	-	Jul 2022
Ledger settlement automation	Users by admins, makers, or analysts	-	Aug 2022

Globalization

We enhanced the Tax Calculation and Electronic Invoicing services and released a public preview of the Tax Audit and Reporting service. These low-code services and multi-country content are available for any first- and third-party app and extended with the prebuilt ISV connectors in Globalization Studio.

Feature	Enabled for	Public preview	General availability
Tax Audit and Reporting Service	Users by admins, makers, or analysts	Sep 2022	-
Russian Fixed Assets – integration with Asset Management lifecycle	Users by admins, makers, or analysts	-	Apr 2022
Tax Calculation service – inheriting origin tax information for reversal transactions	Users, automatically	-	Apr 2022
Electronic Reporting – ORDER BY function in queries	Admins, makers, marketers, or analysts, automatically	Feb 2022	Apr 2022
Configurable Business Documents – Business Document management workspace integration with Global Repo	Users, automatically	Feb 2022	Apr 2022
Russian Fixed Assets – integration with Asset Leasing	Users by admins, makers, or analysts	-	Jul 2022
Tax Calculation service – accepting multiple documents in one API call	Users by admins, makers, or analysts	Apr 2022	Sep 2022
Globalization Studio	Users by admins, makers, or analysts	Jun 2022	Sep 2022

Description of **Enabled for** column values:

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- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

Core financials

Overview

This release in core Dynamics 365 Finance is focused on bringing additional enhancements to core financial functionality, including automation around end-to-end business processes, enhanced experiences around year-end close, analytical reporting using data in the data lake, and comprehensive subscription billing capabilities that set organizations that are embracing the subscription economy up for success.

New vendor invoice management experience

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2022	-

Business value

This feature should significantly reduce the need to enter and process vendor invoices manually. This change largely improves the usability and efficiency of the vendor invoice process.

Feature details

This new experience will provide a central place where vendor invoices will be created, displayed, edited, deleted, and posted. The new feature will merge existing vendor invoice applications into a single, comprehensive application. At the same time, the feature redefines the user interface to eliminate redundant menus and confusing actions.

Vendor invoice OCR – advanced configurations for OCR service

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2022	-

Business value

With configuration settings, optical character recognition (OCR) data processing will be flexible enough to fulfill multiple business needs that customers have.

Feature details

This feature provides a list of configuration settings that include:

- Define mandatory invoice data fields - defines the minimal data required when creating vendor invoices. Microsoft provides a default setting, but you can tailor it to your organization's needs by adding or removing fields.
- Define confidence score of invoice recognition - defines the quality standard for invoice data to be recognized by AI builder. When the OCR process is finished, the system sends structured invoice data and the corresponding confidence score for each field on the invoice. You can configure the confidence scores to indicate differences in the severity of the detected errors.
- Define mandatory review needed before invoice creation - determines whether a manual review is needed for each recognized invoice.

Vendor invoice OCR – deployment wizard for vendor invoice OCR Integration

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	-

Business value

This feature provides customers with an out-of-the-box optical character recognition (OCR) solution for vendor invoice processing that reduces the labor required for data entry and helps reduce errors that can occur when tasks are completed manually.

Feature details

To complete the end-to-end solution for vendor invoicing, an out-of-the-box solution is necessary for reading vendor invoices. This feature provides a step-by-step guide that lets users deploy the solution easily.

Vendor invoice OCR – vendor invoice OCR hub

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2022	-

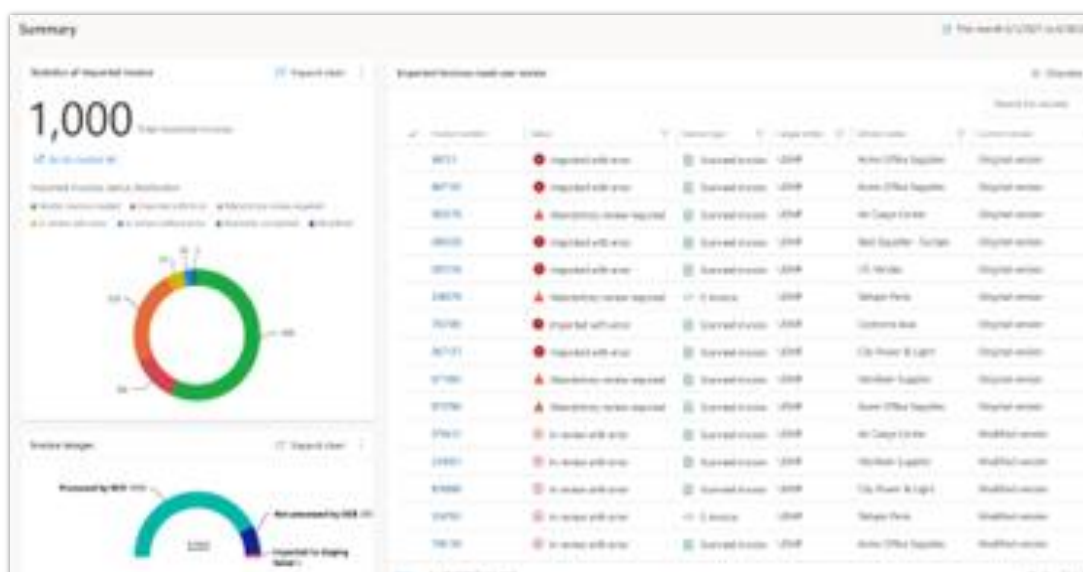
Business value

This feature provides customers with a central place to track and process vendor invoice data that was entered through optical character recognition. Most invoice data will be processed automatically. This feature will save accounts payable clerks significant effort while reducing the risk of errors that can arise when completing tasks manually.

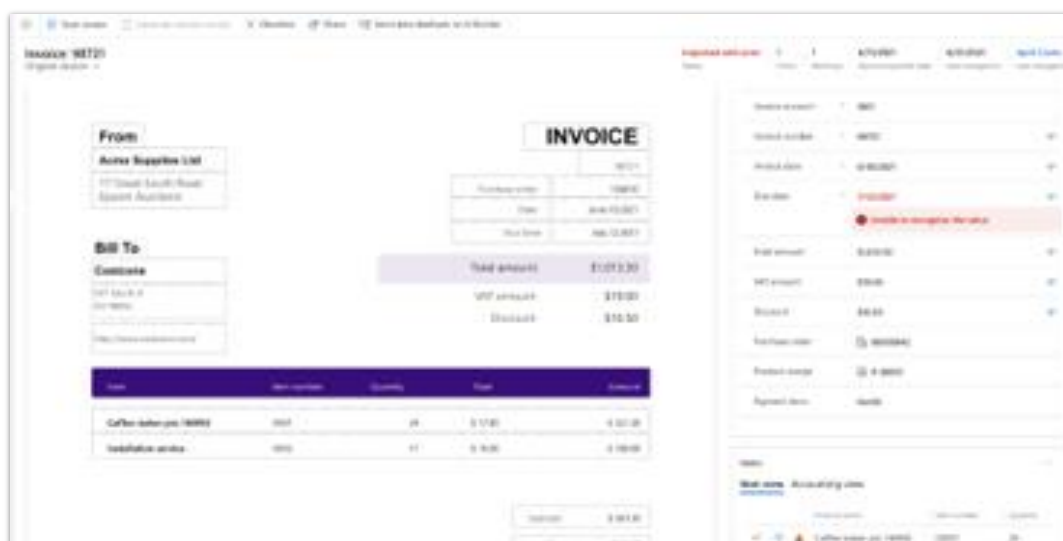
Feature details

The feature provides a central place to let recognized invoice data be validated and pre-processed before being converted to a vendor invoice in Dynamics 365 Finance.

The staging area will accept any accuracy level of recognized data from the AI builder—without regard to whether the invoice data is complete. The data can be enriched and validated automatically according to rules or even machine learning during the import process. It's also possible to review and edit invoices manually from the user interface.



Vendor invoice OCR cockpit.



Vendor invoice staging area.

Vendor invoice OCR – business rules in staging area

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2022	-

Business value

This feature gives users more flexibility than they've had previously for validating invoices according to rules that they define and that are optimal for their organizations.

Feature details

When the system recognizes invoice data that was imported using optical character recognition, there's not always enough data to create vendor invoices in Dynamics 365 Finance. Some information must be derived and validated, such as the legal entity, vendor account, among other things. The derivation and validation can differ significantly from one customer to another. This feature provides a framework that lets each customer define rules that are specific to their organization's needs.

Enhancements around ledger settlements

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2022

Business value

Reports and inquiries will use the settlement date, which provides an accurate picture of what is unsettled as of the reporting date. In addition, the year-end close and ledger settlement processes will be tightly integrated to ensure that only unsettled transactions are considered during the year-end close, providing correct beginning balances per transaction currency. This ensures that settled foreign currency transactions aren't included in the foreign currency revaluation process in the next fiscal year. Details for unsettled ledger transactions can also be maintained during the year-end close process, making it easier to settle the ledger in the next fiscal year.

Feature details

This feature includes the following enhancements:

- Year-end close and ledger settlement process:
 - The year-end close will only include unsettled transactions in the beginning balances. In addition, an organization can choose to keep transaction details for unsettled transactions for the main accounts identified for ledger settlement. Keeping transaction details allows for easier settlement of beginning balance transactions to transactions posted into the next fiscal year. For more information, see [Ledger settlements](#)
 - Settlement can only be performed within a fiscal year to ensure consistency between the beginning balances and unsettled transactions.
 - Settlement can only be performed for transactions posted to the same main account.
- Reporting and inquiries:
 - The **Unsettled transactions** report will use the settlement date to determine which transactions are settled as of the **To date**.
 - The **Transactions for...** page, when opened from the **Trial balance** list page, will use the settlement date to determine which transactions to display when choosing the option **Show unsettled transactions only**.

New button added to view settlement voucher

Enabled for	Public preview	General availability
Users, automatically	-	Apr 2022

Business value

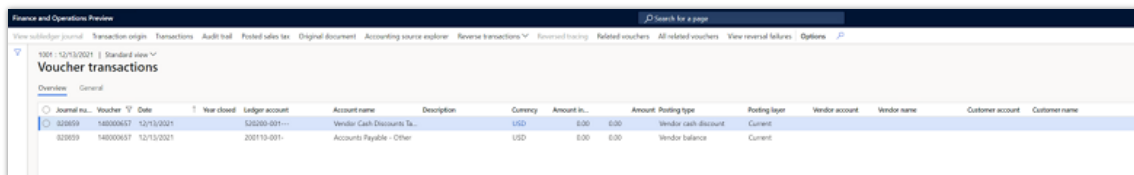
The ability to view all the transactions in a settlement voucher with a single click can significantly increase efficiency when you're viewing or working with settlement history for vendors and/or customers.

Feature details

A new button, named **Settlement voucher**, has been added to the **Vendor settlement history** and **Customer settlement history** pages. You can use the button to view all transactions in a settlement voucher in one step. This feature is available by default and can save time when performing reconciliations when you try to view all the transactions in one settlement voucher.



Settlement voucher.



Voucher transactions.

Post in batch for bill of exchange related journals

Enabled for	Public preview	General availability
Users, automatically	-	Apr 2022

Business value

This feature lets you run the journal posting process in the background for all bill of exchange journals, which in turn lets you continue working on other tasks in the system at the same time.

Feature details

All bill of exchange journals will now include a new button, called **Post in batch**. The journals that have the new button added include:

- Draw bill of exchange.
- Remittance.
- Settle bill of exchange.
- Protest bill of exchange.
- Redraw bill of exchange.

You can click **Post in batch** to start batch posting for each of these journals.

Save Post **Post in batch** Validate Payment proposal Generate payments Functions Inquiries Print Options

00000081: EMMEAR

Draw bill of exchange

Standard view

Overview General Bill of exchange History

+ New Delete Settle transactions Financial dimensions Sales tax Payment status Voucher View marked transactions

Date	Voucher	Company	Account	Account name	Description	Debit	Credit	Currency	Method of payment	Payment specificati...	Payment status	Due date
11/15/2021	BOED000...	frs	FR_SI_0001	Atypical Bike Com...			666.00	EUR	BOE		Sent	11/30/2021
11/15/2021	BOED000...	frs	FR_SI_0001	Atypical Bike Com...			888.00	EUR	BOE		Sent	11/30/2021

Draw bill of exchange.

Save Post **Post in batch** Validate Payment proposal Generate remittance Functions Inquiries Print Options

00000083: REMISEBQUE

Remittance

Standard view

Overview General Bill of exchange Payment fee History

+ New Delete Settle transactions Financial dimensions Sales tax Payment status Voucher View marked transactions

Date	Voucher	Company	Account	Account name	Description	Debit	Credit	Currency	Method of payment	Payment specificati...	Payment status	Due date
11/15/2021	REMT000...	frs	FR_SI_0001	Atypical Bike Com...			666.00	EUR	BOE		Sent	11/30/2021
11/15/2021	REMT000...	frs	FR_SI_0001	Atypical Bike Com...			888.00	EUR	BOE		Sent	11/30/2021

Remittance

Save Post **Post in batch** Validate Payment proposal Generate payments Functions Inquiries Print Options

00000084: PAIEMENTEAR

Settle bill of exchange

Standard view

Overview General Bill of exchange Payment fee History

+ New Delete Settle transactions Financial dimensions Sales tax Voucher View marked transactions

Date	Voucher	Company	Account	Account name	Description	Debit	Credit	Currency	Offset account type	Offset account	Method of payment	Payment specificati...	Due date
11/15/2021	BOES000...	frs	FR_SI_0001	Atypical Bike Com...			666.00	EUR	Bank	FRSI OPER	BOE		11/30/2021
11/15/2021	BOES000...	frs	FR_SI_0001	Atypical Bike Com...			888.00	EUR	Bank	FRSI OPER	BOE		11/30/2021

Settle bill of exchange.

Save Post **Post in batch** Validate Generate payments Functions Inquiries Print Options

00000085: LITIGESAR

Protest bill of exchange

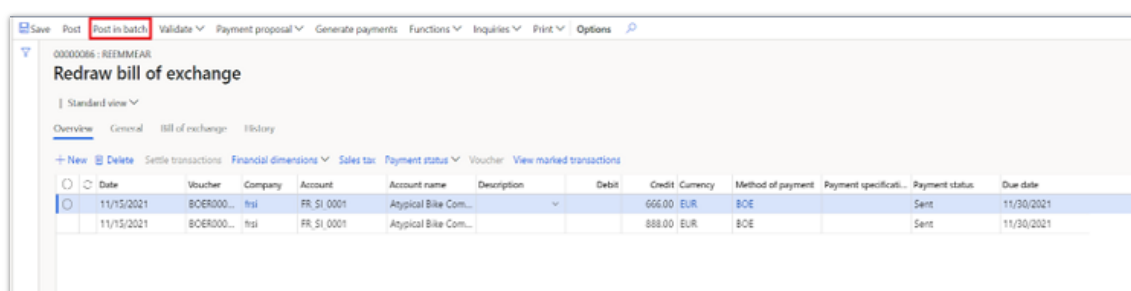
Standard view

Overview General Bill of exchange Payment fee History

+ New Delete Select settled bills of exchange Financial dimensions Sales tax Voucher View marked transactions

Date	Voucher	Company	Account	Account name	Description	Debit	Credit	Currency	Offset account type	Offset account	Method of payment	Payment specificati...	Due date
11/15/2021	BOED000...	frs	FR_SI_0001	Atypical Bike Com...		666.00		EUR	Bank	FRSI OPER	BOE		11/30/2021
11/15/2021	BOED000...	frs	FR_SI_0001	Atypical Bike Com...		888.00		EUR	Bank	FRSI OPER	BOE		11/30/2021

Protest bill of exchange.



Redraw bill of exchange.

Reverse reconciled advanced bank reconciliation

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2022

Business value

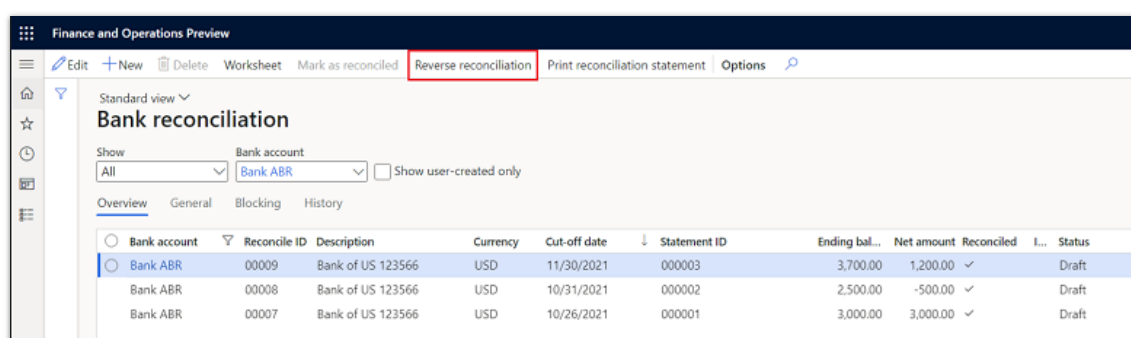
This feature lets you reverse reconciled advanced bank reconciliation in a single step.

Feature details

When bank reconciliations are reconciled without new transactions or correction amounts, this feature enables the reverse reconciliation button on the **Bank reconciliation** and **Bank reconciliation worksheet** pages to reverse reconciliations.

If a reconciliation, for example, reconciliation A, has following reconciliations, you must reverse and delete the following reconciliations before you can reverse reconciliation A.

Advanced bank reconciliations can't be reversed if new transactions or correction amounts exist in the reconciliation.



Reverse reconciliation.

Operation has been cancelled.

You should reverse bank reconciliation 00009 firstly.

Standard view

Bank reconciliation

Show: Bank account: ☐ Show user-created only

Overview General Blocking History

Bank account	Reconcile ID	Description	Currency	Cut-off date	Statement ID	Ending bal...	Net amount	Reconciled	L...	Status
Bank ABR	00009	Bank of US 123566	USD	11/30/2021	000003	3,700.00	1,200.00	✓		Draft
Bank ABR	00008	Bank of US 123566	USD	10/31/2021	000002	2,500.00	-500.00	✓		Draft
Bank ABR	00007	Bank of US 123566	USD	10/26/2021	000001	3,000.00	3,000.00	✓		Draft

Reverse previous bank reconciliations.

Operation has been cancelled.

The unreconciled bank reconciliation 00009 should be deleted firstly.

Standard view

Bank reconciliation

Show: Bank account: ☐ Show user-created only

Overview General Blocking History

Bank account	Reconcile ID	Description	Currency	Cut-off date	Statement ID	Ending bal...	Net amount	Reconciled	L...	Status
Bank ABR	00009	Bank of US 123566	USD	11/30/2021	000003	3,700.00	1,200.00			Draft
Bank ABR	00008	Bank of US 123566	USD	10/31/2021	000002	2,500.00	-500.00	✓		Draft
Bank ABR	00007	Bank of US 123566	USD	10/26/2021	000001	3,000.00	3,000.00	✓		Draft

Remove unreconciled bank reconciliations.

Operation has been cancelled.

Bank reconciliation cannot be reversed due to existing new transactions.

Bank reconciliation worksheet

00009: Cut-off date: 10/30/2021 Bank: Bank of US 123566 Currency: USD

Bank statement transactions

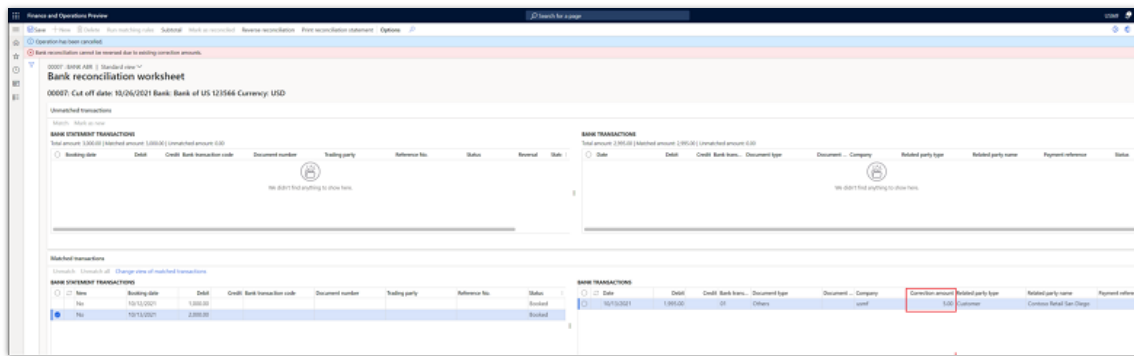
Bank transactions

Matched transactions

Bank statement transactions

Bank transactions

Bank reconciliation with new transactions.



Bank reconciliation and corrections.

Validate vendor bank account before submitting vendor payment journal to workflow

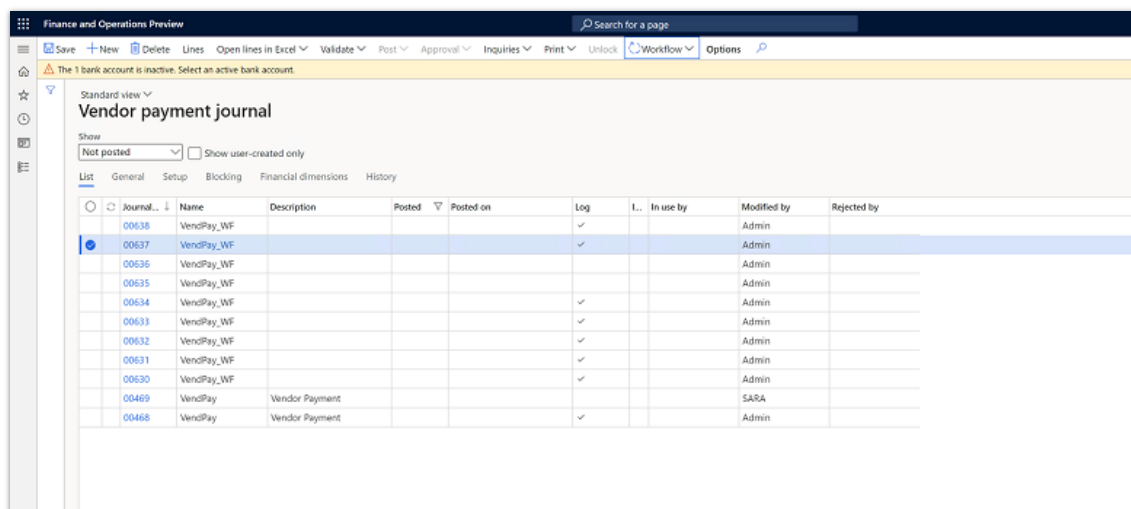
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2022

Business value

This feature saves time and frustration among your staff by letting you validate a vendor bank account before submitting a payment journal for that vendor to workflow. When there's an issue with a bank account that's used in a payment journal that has been submitted to workflow, the issue will stop the workflow process when the issue is encountered. When that happens, a member of your accounts payable staff must correct the issue and then resubmit the payment journal to workflow. Finding and fixing potential errors in advance can save time and help prevent the frustration that can arise.

Feature details

In earlier versions, you could submit a vendor payment journal to the workflow process even if the information for the vendor's bank account was incorrect. This feature lets you identify issues with the vendor's bank account before submitting the payment journal to workflow, thereby letting you correct the issue before it surfaces as an error during the workflow process.



Validate vendor bank account before submitting to workflow.

Allow positive asset depreciation

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business value

Allowing positive depreciation in a depreciation proposal lets your organization account for governmental funds that record the fund as an asset with negative value then depreciate that asset with positive depreciation.

Feature details

When you let the system calculate positive depreciation, the system will consider the negative book value of the asset and calculate positive depreciation (as a debit entry). The **Allow net book value higher than acquisition price** and **Allow negative net book value** options will be available after the **Allow positive depreciation** feature is enabled in the **Feature management** workspace.

New vendor invoice data entity for OCR integration

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business value

Customers are increasingly using an optical character recognition (OCR) solution to import invoices into Dynamics 365 Finance and Operations system. However, existing data entities

for vendor invoice importing have limitations that include incomplete functionalities, data inconsistency, and poor performance. The new data entity aims at solving major issues and making it easier to consume invoice data.

Feature details

To ensure data consistency, the new invoice data entity will create vendor invoices as a whole instead of using different data entities to create pieces of information one by one, such as headers, lines, taxes, charges, and so on.

If possible, invoices will be processed automatically during the import phase. That reduces the manual tasks that must be completed by accounts payable clerks to processing invoices with errors or exceptions. New parameters will be created for the new data entity to support process automation when invoices are imported.

Subscription billing – recurring contract billing

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business value

Organizations often employ complex pricing and billing practices that can be difficult to manage. This feature allows greater control over billing per item and contract, lets you automate and evergreen renewals, enables flexible pricing models, and improves insight into recurring billing.

Flexible billing lets you consolidate invoices, which saves you time and lets you provide your customers with a complete and accurate invoice if there are multiple billing schedules.

Organizations typically use a variety of methods to invoice their customers. Being able to invoice based on consumption, meter readings, or usage lets your organization use Dynamics 365 Finance to support your specific business processes. Pricing can be adjusted based on the quantity to be invoiced.

Feature details

Recurring billing and price management allows greater control with management of pricing and billing parameters at the line-item level. Contracts can be set up to have automated and evergreen renewals. The Monthly recurring revenue report provides insight into recurring billing, which can help you forecast more accurately.

You can consolidate invoices by the customer if there are multiple billing schedules. You can also consolidate multiple billing schedule lines into a single billing line.

Flexible pricing is critical to invoicing customers. Invoicing through subscription billing can be based on consumption, meter readings, or usage. For example, consumption can be entered manually or entered through entity import. Meter readings can be entered and used

as the beginning reading for the next period. Invoices can be created based on usage with price tiers or pricing adjustments based on quantity to be invoiced.

Subscription billing – revenue allocation

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business value

This feature assists with revenue compliance by letting you easily allocate revenue to items within contracts that have multiple performance obligations.

Feature details

By assigning default and standalone selling prices and methods to items, you can calculate the standalone selling price as a percentage of related items. You can allocate revenue based on these standalone prices to maintain compliance with accounting standards.

Subscription billing – revenue and expense deferrals

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business value

Advanced revenue recognition lets you manage revenue in compliance with ASC 606 and IFRS 15 accounting standards. This feature will enable revenue recognition on document types beyond sales orders allowing greater control of revenue.

Managing deferrals at the line-item level puts you in control of the revenue recognition process. Having an automatic process helps reduce mistakes that can creep in through manual processes and saves time.

Feature details

Advanced revenue recognition lets organizations eliminate manual processes or external systems by allowing users to manage revenue in one system. Real-time reporting provides insights into critical information, such as monthly recurring revenue.

Once an item is set up as deferrable, the deferral schedule is automatically created when items are added. Templates can be predefined to create different types of deferral schedules, such as monthly, quarterly, or schedules that are based on specified dates. One process allows all current deferral schedules to be recognized quickly.

Financial tags

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jul 2022

Business value

Financial tags let organizations track user-defined fields on accounting entries posted to the general ledger, eliminating the need to create financial dimensions that contain values that are not reusable. Additional financial dimensions increase the size of an organization's chart of accounts, causing a negative impact on system performance during processes such as the year-end close. The financial tag values can be used for reporting purposes or ledger settlement. For example, you can create a financial tag to track payment references used for ledger settlements, making it easier to match transactions.

Feature details

An organization can define up to 15 financial tags, which will be stored on accounting entries posted to the general ledger. The financial tag names can be defined by the user, giving clarity to data entry clerks about the data expected in each field. Financial tag values are not validated or entered by default. They can be entered manually on transactions such as financial journals or imported through transactional entities.

General ledger year-end enhancements – specify balance sheet dimensions and year-end close micro-service

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jul 2022

Business value

This feature comprises a number of enhancements that improve performance during the year-end close process.

Feature details

The enhancements to the year-end close process include the following:

- Allows you to specify balance sheet financial dimensions in detail when you close a year. This functionality now parallels the capability that's available for profit and loss accounts.
- Improves overall performance so that the year-end-close process runs more efficiently.

The following enhancements were added in the July 2021 release:

- Moves the setup of the year-end closing templates to a new setup page. The existing year-end close page will change in a way that's similar to the general ledger foreign

currency revaluation, where a list will indicate each of the times the year-end close has been run or reversed. An accounting manager can initiate the year-end close from the new page.

- Lets accounting managers reverse a year-end close by selecting the most recent fiscal year and selecting the **Reverse year-end close** button. The reversal will delete the accounting entries for the previous year-end close but won't rerun the year-end close automatically.
- Requires voucher numbers when closing a year, where this was optional (based on a parameter setting in general ledger) in previous versions.
- Maintains the history and audit trail of previously closed years by company and year.

Ledger settlement automation

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Aug 2022

Business value

This feature saves time and labor costs by using the system to automatically match debit and credit transactions in the general ledger and mark them as settled. Your accounting staff no longer has to mark and settle the related transactions manually, allowing them to focus their activities on the areas that have the highest value for your organization.

Feature details

The ledger settlement process will be enhanced to reduce the number of manual steps through an automated settlement process. The ledger settlement automation process will run as a background process, based on rules that you specify. You can define the transaction selection criteria and create matching rules that are based on transaction attributes, such as financial tags and amounts. Additionally, you can define the frequency of the automated settlement, such as daily or monthly. Historical automation process information can be maintained.

Globalization

Overview

In 2022 release wave 1, we will continue to extend and enhance our globalization capabilities.

We'll ship Globalization Studio, which is globalization as a service. It enhances the low-code tax compliance and globalization capabilities and makes the globalization services and multi-country content available for any first-party and third-party application and extended with

prebuilt ISV connectors. Globalization services in Globalization Studio continue to be extended and enhanced. This includes:

- **Tax Calculation:** Enable multiple document tax calculations in one API call to increase the performance of tax calculation processing for customers with a high volume of invoices in certain industries. A connector with one of the US tax rate providers will be included.
- **Electronic Invoicing:** Provide a connector with one of the global e-invoicing service providers to deliver last-mile business-to-government integrations for some countries, extend global coverage by enabling e-invoicing solutions for non-Microsoft localized countries, and provide access to e-invoicing exchange frameworks.
- **Tax Audit and Reporting Service (preview)** will enhance and scale the existing tax audit and reporting content and capabilities of electronic reporting to the enterprise level. This service is an evolution of electronic reporting into a low-code microservice and leveraging capabilities of Azure Data Lake and Azure Synapse Analytics.

We continue to enhance the configurable business documents and electronic reporting offerings.

Additionally, we will integrate the Russian fixed assets module with the Asset Management lifecycle and Asset leasing.

Tax audit and reporting service

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2022	-

Business value

The service allows you to scale the existing tax audit and reporting content and capabilities of Electronic reporting to the enterprise level. It leverages Microsoft Azure Data Lake, Azure Synapse Analytics, and other Azure technologies to enhance tax analysis and reporting and enable intelligent tax audit scenarios. The service also provides a low-code experience to build reports on top of the common tax audit and reporting data model, leveraging Electronic reporting capabilities integrated as a microservice to Azure Data Lake and Azure Synapse Analytics.

Feature details

Leveraging our tax audit and reporting experience in 44 countries/regions with several hundred tax data submission formats, audit files, and reports, we have built a common tax audit and reporting data model hosted in an Azure Synapse workspace. While the model will be accessible by using Power BI and Microsoft Excel, we are providing a configurable Electronic reporting microservice and several configurable tax, audit, and other regulatory report templates for multiple countries/regions. These templates are currently available in

Dynamics 365 Finance as part of Electronic reporting and will also run in the Tax audit and Reporting service. The microservice provides a low-code experience to build and extend tax audit and regulatory reports on top of this common tax audit and reporting data model.

This first release of the service provides enterprise-level tax validation, audit, analysis, reporting capabilities, and enables enterprise-level scalability. Capabilities include:

- Ingestion of tax audit reporting data in Finance into Azure Data Lake.
- Transformation of the data into the tax declaration and Tax audit data models accessible by using Power BI, Excel, and Electronic reporting.
- Low-code Electronic reporting capabilities as a microservice integrated with Azure Data Lake and Azure Synapse Analytics.
- Reusing the existing Electronic reporting formats for Tax audit and Tax declarations in the service. This applies to both formats created by Microsoft as well as by partners and customers. There will be a limited scope of Microsoft formats available in this preview.

Russian Fixed Assets – integration with Asset Management lifecycle

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2022

Business value

This integration provides users of the Russian Fixed assets module with all the benefits of the Asset Management lifecycle. Benefits include:

- Improved machine effectiveness with preventive maintenance capabilities that reduce asset failure and extend equipment life expectancy.
- Condition-based maintenance, which reduces asset lifecycle costs.
- Improved visibility into production performance, which helps customers to plan ahead.
- Insight into downtime, with intelligent analytics that helps users make informed data-driven decisions.
- Automated management of maintenance workflows to limit risks.
- Efficient spare parts management that ensures a complete overview of item consumption on assets, thereby optimizing the maintenance process.
- Reduced production costs using enhanced visibility of assets across sites and departments.
- Visibility into real-time asset financial information.
- Advanced cost control on assets, locations, faults, work hours, and work orders.
- Reduction in maintenance overtime, labor, and contractor costs.

Feature details

This functionality enhances the **acquire to retire** asset lifecycle and end-to-end process flows with the **Russian Fixed assets** module. By integrating the **Asset Management** and **Fixed assets** modules, you can link Russian fixed assets with maintenance assets. Fixed assets users can then create a maintenance asset from a new or existing fixed asset, and Asset Management users can associate a maintenance asset with an existing fixed asset.

Tax Calculation service – inheriting origin tax information for reversal transactions

Enabled for	Public preview	General availability
Users, automatically	-	Apr 2022

Business value

This feature provides users with the option to inherit tax information, such as tax codes, rates, and amounts from the original transaction, or recalculate tax based on the latest tax setup. This feature can help users improve reconciliation accuracy in some scenarios.

Feature details

With this feature, reversal transactions can inherit tax information from the original document. Users can also trigger a recalculation to update the tax information on a reversal transaction.

This feature supports the following transactions:

- Sales order - Return order.
- Sales order - Credit note.
- Transfer order - Cancellation.

This feature applies to the Tax calculation service and the Core tax engine.

Electronic reporting – order by function in queries

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	Apr 2022

Business value

This feature significantly improves the performance of many electronic reporting configurations that are executed on large volumes of data that require some specific order sorting.

Feature details

Electronic reporting users can choose **querymode** to execute the electronic reporting **OrderBy** function. Selecting this function improves the performance for many electronic reporting configurations that are executed on large volumes of data that require specific order sorting.

Configurable business documents – business document management workspace integration with global repo

Enabled for	Public preview	General availability
Users, automatically	Feb 2022	Apr 2022

Business value

Business users can download new business document templates or new versions of existing business document templates from one workspace.

Feature details

This feature provides users assigned to a specific role with new business document templates. These templates are stored on a new tab in the **Business document management** workspace.

When you select to import the business document template, the system will open a tab with a list of templates applicable to your assigned user role. Only the list of templates for your assigned role is shown. The system doesn't download all the templates.

After you select the documents and select **Create template**, the selected templates are imported from the global repository, and your templates are created in the **Business document management** workspace.

Russian Fixed assets – integration with Asset leasing

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jul 2022

Business value

Customers using the Russian Fixed assets module may feel more confident that they are following the proper accounting standards and reducing the risk of spending extensive time doing offline calculations. Asset leasing is an advanced capability for managing, tracking, and automating financial transactions for leased assets in Microsoft Dynamics 365 Finance. Asset leasing complies with International accounting standards (IFRS 16) and US GAAP standards (ASC 842). Asset leasing captures and processes information about the leases and helps

generate journal entries throughout the lifecycle of the lease, from initial recognition and monthly journal entries to impairment and termination of the lease.

Feature details

This functionality integrates **Asset leasing** with the **Russian Fixed assets** module to enable the following functions:

- Automates the complex lease calculation of a lease's present value and its subsequent processes such as future lease payments, amortization of lease liability, and the right-of-use asset depreciation and expenses schedules.
- Helps automatically classify the lease as either operating or finance or as a short-term or low-value lease. The lease classification tests include Transfer of ownership, Purchase option, Lease term, Present value, and Unique asset.
- Centralizes the management of lease information. This information can include important dates, like the commencement and expiration dates, and the lease's transaction currency, payment amounts, and payment frequency.
- Helps generate accounting entries for the initial recognition and subsequent measurement of the lease liability and right-of-use asset.
- Reduces time for the complex calculation of lease modification and automatic adjustment transactions.
- Provides posting to different layers to accommodate different reporting purposes, such as tax reports that are available in Dynamics 365 Finance.
- Complies with the accounting standards to represent leases in balance sheets using the **Balance sheet impact calculator**.
- Provides audit controls over the integrity of the lease data to ensure that the posted transactions match the calculated amounts of the present value, future payments, and liability amortization.
- Provides tools to import from or export to Microsoft Excel for all lease data.
- Includes features that help prepare asset leasing reports, particularly the preparation of disclosures and notes.
- Integrates with your company chart of accounts, currencies, fixed assets, vendors, journals, data management, and number sequences.

Tax Calculation service – accepting multiple documents in one API call

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2022	Sep 2022

Business value

This feature enables multiple document tax calculations in one API call to increase the performance of the tax calculation processing for customers with a high volume of invoices in certain industries.

Feature details

The Tax calculation service can accept multiple taxable documents in one API call to improve the performance of the batch importing scenario.

The new API reduces network latency compared to a single taxable document API call by combining documents in one payload.

Free text invoice will be the first transaction type to integrate with this new mode. We will roll out this mode to other transaction types based on market needs.

Globalization Studio

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2022	Sep 2022

Business value

Globalization Studio is our low-code tax compliance and globalization platform with out-of-the-box multi-country content that provides tax compliance and globalization as a service. Globalization Studio enhances our low-code tax compliance and globalization capabilities and makes our low-code globalization services and multi-country content available to integrate with any first- and third-party app and extended with prebuilt ISV connectors.

Feature details

Globalization Studio is our low-code tax compliance and globalization platform with out-of-the-box multi-country content that provides tax compliance and globalization as a service.

Globalization Studio is an evolution of our low-code Regulatory Configuration Service (RCS) and provides the following enhanced capabilities:

- Low-code designer for globalization content, including tax rules, e-invoice formats, regulatory tax audit files and report templates, Office 365 templates for business documents, and payment formats.
- Globalization content lifecycle management.
- Out-of-the-box tax compliance and globalization content for 44 countries/regions and extending to more. This low-code multi-country content can be used as-is or easily extended in Globalization Studio by non-developers of customers or partners to meet specific requirements of more countries/regions, states/cities, or industries/verticals.

- Configuration and setup for Tax Calculation and Electronic Invoicing microservices and any future globalization microservices.

Additionally, Globalization Studio provides globalization as a service to any first and third-party app and extends with prebuilt ISV connectors. As an integration hub for globalization services, the Globalization Studio provides the following types of out-of-the-box connectors:

- Connectors to Microsoft globalization services using Microsoft Power Platform and Dataverse to enable sharing globalization capabilities and content with any first and third-party applications. In the first release, we will ship:
- A Tax Calculation service connector.
- An Electronic Invoicing Service connector.
- Connectors to ISV tax compliance and globalization solutions extending out-of-the-box tax compliance and globalization content and capabilities. In the first release, we will ship:
- An ISV solution connector that's embedded in the Tax Calculation microservice for US sales tax and use tax rates. You can turn on the connector to get an ISV solution without any customized integration effort.
- An ISV solution connector that's embedded in the Electronic Invoicing microservice. This connector delivers "last mile" business-to-government integrations for some countries, extends global coverage by enabling e-invoicing solutions for non-Microsoft localized countries, and provides access to E-Invoicing Exchange Frameworks to route electronic invoices created by using the Globalization Studio.

The Globalization Studio is the only tool to provide all of the low-code configuration and setup experience for any new globalization services, including the Tax Audit and Reporting Service that will be shipped in Public Preview in 2022 Wave 1 Release.

Overview of Dynamics 365 Supply Chain Management 2022 release wave 1

Dynamics 365 Supply Chain Management provides the end-to-end capabilities that manufacturers, distributors, and retailers require to meet their supply chain needs. Functionality ranges from product information management, planning, inventory, sales, and procurement to complex manufacturing, warehouse, and transportation management.

Increasing resiliency continues to be a priority for organizations as they emerge from the current crisis and reset strategies to anticipate and minimize disruptions. The investments in this release will help organizations balance cost and investments in creating a resilient and agile supply chain to ensure business continuity.

New features and improvements introduced during 2022 release wave 1 will help businesses to:

- **Enhance operational resilience.** The enhanced warehouse workload for cloud and edge scale units adds support for more warehouse processes, including those for packing stations, manufacturing operations, and material handling systems, thereby helping businesses scale mission-critical operations.
- **Implement agile production planning.** A significantly expanded manufacturing industry footprint enables businesses to use Planning Optimization for production planning and take advantage of the shortened planning cycles to increase manufacturing agility.
- **Optimize inventory and service levels.** Native Demand Driven Material Requirements Planning (DDMRP) support in Planning Optimization helps businesses reduce inventory levels while improving customer service.
- **Increase fulfillment capability.** New inventory allocation and available-to-promise (ATP) capabilities in the Inventory Visibility add-in helps businesses increase order fulfillment rates by pre-allocating available inventory for key channels and accounts, and by providing visibility into future stock levels.
- **Simplify multinational operations.** Global Inventory Accounting helps businesses comply with local and global accounting standards. It provides the ability to account inventory in multiple representations by applying the appropriate valuation method and accounting currency per instance.

What's new and planned for Dynamics 365 Supply Chain Management

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Inventory and logistics

New inventory and logistics features help organizations gain visibility, resiliency, and efficiency in their supply chain.

Feature	Enabled for	Public preview	General availability
Unified pricing service	Users, automatically	Sep 2022	-
Available-to-promise for the Inventory Visibility Add-in	Users by admins, makers, or analysts	Mar 2022	Apr 2022
Inventory allocation for the Inventory Visibility Add-in	Users by admins, makers, or analysts	Mar 2022	Apr 2022
Inventory Visibility support for advanced warehouse management	Users by admins, makers, or analysts	Mar 2022	Apr 2022
Global Inventory Accounting Add-in for Dynamics 365 Supply Chain Management	Users by admins, makers, or analysts	✓ Jun 18, 2021	Apr 2022
Landed cost integration with third-party freight forwarders	Users by admins, makers, or analysts	Apr 2022	Jun 2022
Enhanced warehouse execution workloads on scale units	Users by admins, makers, or analysts	May 2022	Jul 2022

Manufacturing

This release focuses on building resilience into key manufacturing processes and on enabling process industry customers to execute mission-critical manufacturing processes without interruption and at scale.

Feature	Enabled for	Public preview	General availability
Material consumption and reservations in the production floor execution interface	Users by admins, makers, or analysts	Jan 2022	Apr 2022
Register material consumption on scale units	Users by admins, makers, or analysts	Feb 2022	Apr 2022
Catch weight items for the production floor execution interface	Users by admins, makers, or analysts	May 2022	Jul 2022

Planning

Planning Optimization enhancements in this release wave deliver a significantly expanded manufacturing industry footprint and add exciting new Demand Driven Material Requirements Planning (DDMRP) capabilities.

Feature	Enabled for	Public preview	General availability
Planning Optimization suggestions to optimize existing supply	Users by admins, makers, or analysts	Feb 2022	Apr 2022
Planning Optimization centralized calendar maintenance	Users by admins, makers, or analysts	Mar 2022	Apr 2022
Planning Optimization support for subcontracting	Users by admins, makers, or analysts	Apr 2022	Jun 2022
Planning Optimization support for shelf life	Users by admins, makers, or analysts	Apr 2022	Jun 2022
Planning Optimization support for resource scheduling with finite capacity	Users by admins, makers, or analysts	Jun 2022	Sep 2022
Demand Driven Material Requirements Planning (DDMRP)	Users by admins, makers, or analysts	Jul 2022	Sep 2022
Make-to-order supply automation	Users by admins, makers, or analysts	Jul 2022	Sep 2022
Planning Optimization for select manufactured items	Users by admins, makers, or analysts	Jul 2022	Sep 2022

Feature	Enabled for	Public preview	General availability
Planning Optimization support for capable-to-promise (CTP)	Users by admins, makers, or analysts	Jul 2022	Sep 2022

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

Inventory and logistics

Overview

In this release of Dynamics 365 Supply Chain Management, we have added several new inventory and logistics features that can help organizations gain visibility, resiliency, and efficiency in their supply chain.

- New **Global Inventory Accounting** capabilities in this release wave include support for the accounting conservatism principle, recalculation of inventory after source documents are changed, and new reporting with Power BI. Businesses can also get started quickly by using the new step-by-step setup wizard.
- The **Unified pricing service** now enables businesses to apply pricing and discount rule conditions and set scalable price attributes. Business can benefit from complex pricing rules and integrate with third-party systems to retrieve calculated prices.
- The **Inventory Visibility service** empowers businesses with near real-time visibility into their inventories. This release now enables businesses to validate fulfillment dates with an ATP check, allocate stock in advance for the most profitable sales channels, and ensure accurate calculations of warehouse-enabled items.
- **Warehouse execution workloads** now provide expanded out-of-the-box capabilities for running scale units as part of a distributed hybrid topology. In this release wave, warehouse execution workloads now provide expanded support for inbound transfer

orders, sorting for packing stations and inventory, integration with warehouse material handling automation, and additional warehouse features for manufacturing processes.

- **Paperless inbound receiving** enables businesses to receive inventory using the Warehouse Management mobile app. The app now supports advanced queries so workers can quickly find the right suppliers, purchase orders, and purchase lines to register against when receiving goods.

Unified pricing service

Enabled for	Public preview	General availability
Users, automatically	Sep 2022	-

Business value

Many modern companies are building strategic supply chain resilience by forging strong long-term relationships with their key customers. One of the primary methods to accomplish this is to develop and manage better pricing and promotion strategies. For those companies, pricing structure complexity and price calculation performance are two of the main challenges.

The unified pricing service now provides tools for companies using "attribute-based pricing" strategies. Price managers can identify the price-differentiating attributes that apply for products, customers, or orders and use those price attributes to build scalable pricing and trade-promotion rules in a simplified manner. By leveraging the unified pricing engine, sales managers can now view the calculated pricing and discount details in real time. Third-party systems can also retrieve real-time pricing by calling pricing service APIs.

Feature details

The unified pricing service is a centrally located pricing engine that supports both B2B and B2C scenarios. It makes calculations using complex pricing rules based on selected attributes. You can group pricing-critical attributes for customers and orders in the header price-attribute group, and group pricing-critical attributes for products in the line price-attribute group. By creating flexible combinations of header and line price-attribute groups, you can create pricing models that consider the conditions of customers, product categories, and attributes. Final prices are calculated using detailed pricing models that you define.

- Calculations made by the pricing service start from a fallback base price, which is calculated based on the terms defined in the vendor price list. The service also lets you define margin-components price adjustments, which apply percentage or value calculations based on the base price or trade-agreement price. The base price, trade-agreement price, and margin-components price adjustments are all components of your final sales-order price.
- The pricing service can calculate and determine applicable discounts based on concurrency modes using best price, compound rules, or price-attribute group priority.

You can also set up mix-and-match discounts that support bonus-buy and complex assortment-buy promotion scenarios.

- The service lets you inspect pricing details at the order level. You can view the pricing details in the price component code and calculation sequence to confirm that the pricing calculation has been done correctly.
- The pricing service comes with an easy-to-use RESTful API, which enables the front-end omnichannel order management system to retrieve the calculated price by calling the service.

Available-to-promise for the Inventory Visibility Add-in

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2022	Apr 2022

Business value

Available-to-promise (ATP) functionality for the Inventory Visibility Add-in can greatly increase your order fulfillment capability. It provides visibility into future stock levels and can query the next available date for orders. This reduces the risks of losing sales opportunities and overstocking on inventory (which can have cost impact). Most importantly, it provides insights into foreseen potential stock disruptions and the opportunity to act against it.

Feature details

Recalculate inventory based on a specified date and period

Retailers and manufacturers can check inventory for a specified day or ask for the next available dates for products, which is especially useful to support online customer queries and bulk orders. ATP functionality lets you select a recalculation date or period when querying inventory on hand. It also lets you check availability when reserving or allocating products. Each time you select a recalculation date and submit a query, the system performs an instance check and recalculates the latest inventory changes. The latest inventory information for the selected date or period (including transaction statuses (physical measures) and calculated measures) will be returned as the result of the query.

View future seven-day availability with rolling calculations

The system supports up to seven days of rolling calculations and updates of inventory data.

Inventory allocation for the Inventory Visibility Add-in

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2022	Apr 2022

Business value

Businesses constantly experience fluctuating inventory levels, especially when running a sales promotion or experiencing supply shortages. Inventory allocation lets you pre-allocate available inventory to make sure you can fulfill orders for key channels or accounts. It helps you meet service level agreements (SLAs) and fulfill commitments to important customers. With global visibility over your inventory allocations, you can align your multichannel inventory control strategy across legal entities.

Feature details

Inventory allocation allows you to set aside dedicated inventory to make sure you can fulfill your most profitable channels or customers. Without inventory allocation, inventory is most typically fulfilled using a simple *first come, first served* principle. Inventory Visibility gives you more control by allowing you to build virtual inventory pools that are created based on allocation rules and allocation objects. Allocation objects are dimensions you can use to subgroup available inventory within a physical inventory location.

You can use virtual inventory pools for preallocating (ringfencing) a portion of inventory for your most profitable channels or customers. Front-end systems can submit queries to Inventory Visibility and can make soft reservations that respect the allocation objects dimensions. Inventory Visibility then finds the applicable allocation rule and responds with the available allocated inventory.

With the inventory allocation feature, you can:

- Set up inventory allocation receiver objects, which can be based on channels, locations, customer groups or customized dimension. You can also create a hierarchical structure of allocation receivers.
- Restrict the actual consumption to allocated quantities. You can opt in for a hard check where if the allocated quantities are all consumed, new demand requests posted by the same allocation receiver object will be rejected.
- Set up a fallback shared inventory pool. Inventory in the common pool is allocated for all channels and customers based on a *first come, first served* principle. If a dedicated virtual pool is out of stock, you can use the common pool to fulfill an order.

[View future seven-day availability with rolling calculations](#)

The system supports up to seven days of rolling calculations and updates of inventory data.

Inventory Visibility support for advanced warehouse management

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2022	Apr 2022

Business value

Businesses using advanced warehouse management (WHS) are now able to leverage the Inventory Visibility service to make near real-time inventory queries of all warehouse items. With this enhancement, the Inventory Visibility service calculates WHS-enabled items correctly, regardless of which hierarchical level the items are stored in. You can query, reserve, and allocate WHS-enabled items just as non-WHS items

Feature details

The Inventory Visibility Add-in now fully supports WHS-enabled items and can correctly reserve items at the warehouse, location, and license plate level.

In the previous release, on-hand inventory of WHS-enabled items wasn't always calculated correctly after being reserved by Inventory Visibility. For example, if you had an item stored at Location A under Warehouse 1, and then you reserved one unit at that location, Inventory Visibility would erroneously deduct two units from the total quantity because it didn't recognize the full warehouse hierarchy. With this enhancement, inventory of reserved WHS-enabled items will be calculated just as accurately as for non-WHS items.

[View future seven-day availability with rolling calculations](#)

The system supports up to seven days of rolling calculations and updates of inventory data.

Global Inventory Accounting Add-in for Dynamics 365 Supply Chain Management

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Jun 18, 2021	Apr 2022

Business value

International organizations are under increasing pressure from authorities to comply with local and global accounting standards. The valuation of inventory plays a significant role in securing compliance. The Global Inventory Accounting Add-in for Dynamics 365 Supply Chain Management provides the ability to account inventory in multiple representations by applying the appropriate valuation method (standard cost, average, or specific identification) and the selected accounting currency per instance. Global Inventory Accounting enables organizations to report inventory statements and subledger accounting values (also known as the inventory balance and the cost of goods sold) in what is often referred to as dual valuation or dual currency.

Feature details

Organizations, especially those with international operations, often prefer to account for inventory by standard cost as part of their management accounting setup. However, local governments, tax authorities, and the International Financial Reporting Standards

Foundation (IFRS) typically don't recognize standard cost as an accounting principle and often require average or specific identification. In addition, organizations often want to account inventory using a local currency and the functional currency.

Collectively, these requirements must be addressed in a comprehensive solution that supports the ability to perform inventory accounting in multiple costing ledgers, where each ledger can be configured with a specific set of accounting policies.

With this new functionality, organizations can define as many costing ledgers as required. Inventory accounting in dual currencies and in dual valuations are both supported.

Inventory accounting is performed in individual ledgers. Several costing ledgers can be created for each legal entity in an organization as needed, thereby ensuring that multiple inventory representations can be obtained. All documents (such as purchase orders, sales orders, transfer orders, and so on) posted in a legal entity will be accounted in all the costing ledgers associated with that legal entity.

A costing ledger is defined by:

- Calendar
- Currency
- Exchange rate table
- Convention

A convention is a collection of inventory accounting policies that can be associated to one or more ledgers. This provides the ability to share a common convention in the organization.

The Global Inventory Accounting Add-in supports multiple inventory accounting policies. For each policy, a single rule can be selected, and it applies to all products. Supported cost object policy options:

- Product
- Product – Site
- Product – Site – Warehouse

Supported input measurement basis policy options:

- Normal historical
- Standard

Supported cost flow assumption policy options:

- Average
- Specific identification (batch)
- Cost element policy

Supported recording interval:

- Perpetual

This solution provides a detailed audit trail, which ensures that you can track inventory accounting events and measurements all the way back to the original document posted in Supply Chain Management.

The solution leverages Power BI to provide insights and analytics. The shared asset library of Microsoft Dynamics 365 Lifecycle Services provides a specially designed Power BI template that you can download and embed into Supply Chain Management.

See also

[Global Inventory Accounting home page](#) (docs)

Landed cost integration with third-party freight forwarders

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2022	Jun 2022

Business value

Third-party logistics providers (3PLs) can now submit voyage information, container status, apportionment methods for cost types, vendor invoice costs, and other information directly to the landed cost module. This saves time and improves accuracy by ensuring that this information doesn't have to be keyed in manually at companies using landed cost to manage their inbound processes.

Feature details

This feature provides an integration template that enables the landed cost module to integrate with third-party logistics providers (3PLs). It adds 12 new data entities that cover the following scenarios:

- **Create voyage and containers.** This is made possible by the following entities:
 - ITMTableEntity
 - ITMContainersEntity
 - ITMFolioTableEntity
 - ITMLineEntity
- **Set the default apportionment method for each cost type code.** This is made possible by the following entities:
 - ITMCostTransVoyageEntity
 - ITMCostTransShippingContainerEntity
 - ITMCostTransFolioEntity
 - ITMCostTransPurchaseOrderEntity

- ITMCostTransItemEntity
- ITMCostTransTransferLineEntity
- **Track status updates.** This is made possible by the following entity:
 - ITMContainerActivityEntity
- **Create voyage cost line records for the actual invoiced amount and link to the vendor invoice, voyage cost transaction, and voyage invoicing.** This is made possible by the following entity:
 - ITMLedgerJournalCostLinesEntity

Enhanced warehouse execution workloads on scale units

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2022	Jul 2022

Business value

With warehouse execution workloads running on a scale unit, companies can increase the resilience of their mission-critical warehouse processes.

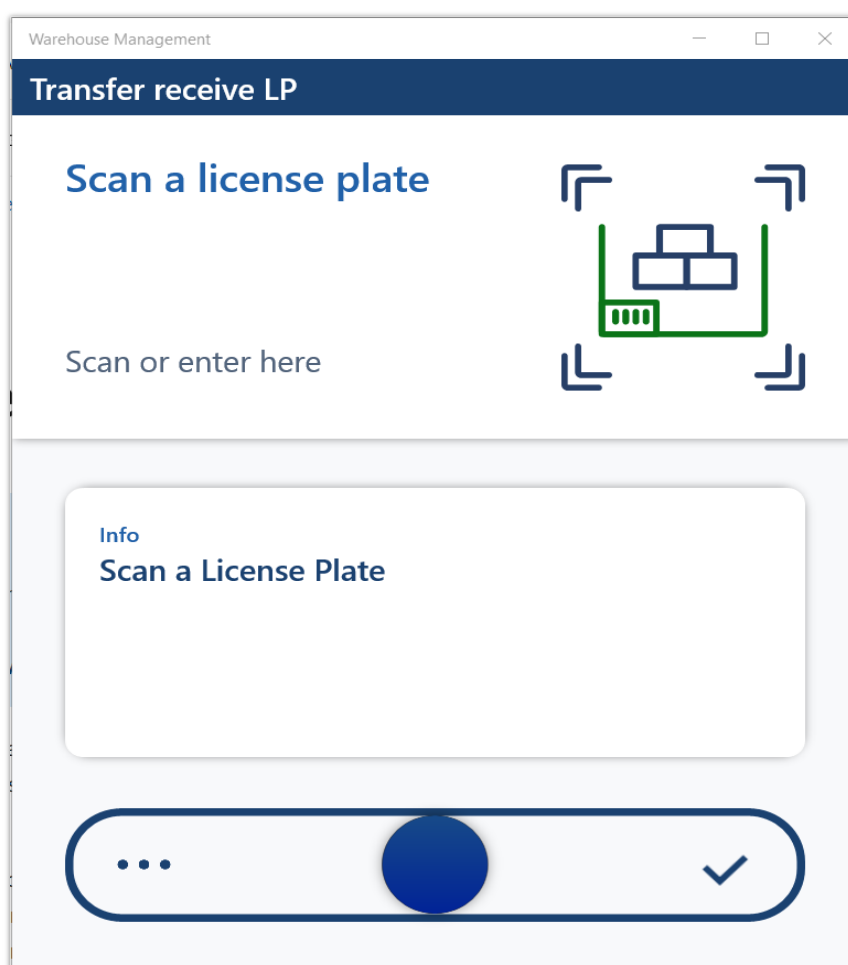
Warehouse execution workloads now provide expanded out-of-the-box capabilities for scale units running as part of a distributed hybrid topology. This set of additional features add support for a wide range of new scenarios, thereby enabling more of our customers to operate using a resilient, scalable, hybrid environment.

Feature details

Enhanced warehouse execution workloads on scale units add support with the following new capabilities, which further improve the ability of these workloads to fulfill organizations' growing requirements:

- Selected inbound warehouse management operations.
- Outbound warehouse management operations for packing stations and sorting.
- Integration with material handling automation systems.
- Warehouse management processes for manufacturing operations.

For more information about the benefits of using scale units, see [Scale units in a distributed hybrid topology](#).



Transfer order license plate receiving.

Manufacturing

Overview

Businesses seeking to digitally transform and empower their production floor workforce, and increase the resilience of their operations, require manufacturing execution processes that operate without interruption and that integrate data from both automated and manual processes. The capabilities added in this release wave are focused on completing the modernization of core manufacturing execution operations for improved usability and resilience.

- Add process manufacturing support across the production floor execution user experience.
- Enhance integration between manufacturing and warehouse process running on scale units to enable autonomous end-to-end execution of production processes, from raw materials picking through finished goods put-away.

- Support continuous manufacturing and warehouse operations even when external connectivity is lost.

Material consumption and reservations in the production floor execution interface

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2022	Apr 2022

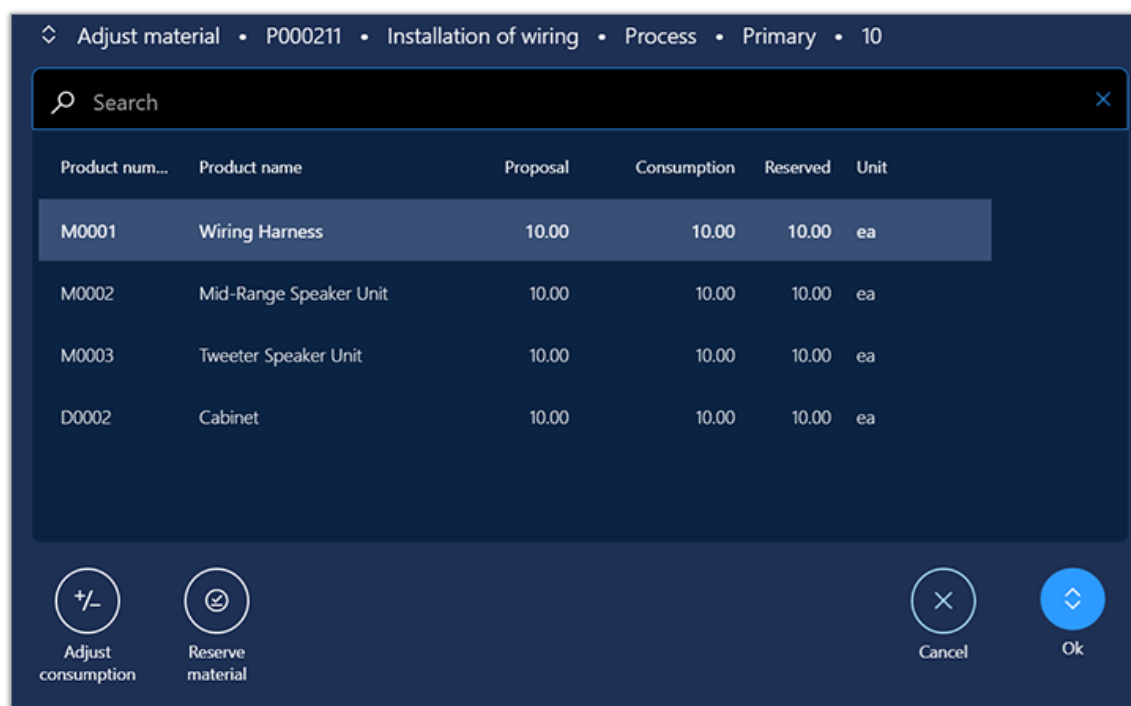
Business value

Manufacturers can now take advantage of the new, modern user experience when working with production and batch orders where there are variations in actual material consumption compared to planned consumption. Workers can also manage reservations of inventory batches and serial numbers. This ensures accuracy of inventory levels and cost and will meet requirements for material traceability.

Feature details

Workers can use the production floor execution interface to register material consumption, batch numbers, and serial numbers.

Some manufacturers, especially those within the process industries, need to explicitly register the amount of material consumed for each batch or production order. For example, workers might use a scale to weigh the amount of material consumed as they work. To ensure full material traceability, these organizations also need to register which batch numbers were consumed when producing each product.



Adjust material • P000211 • Installation of wiring • Process • Primary • 10

Search

Product num...	Product name	Proposal	Consumption	Reserved	Unit
M0001	Wiring Harness	10.00	10.00	10.00	ea
M0002	Mid-Range Speaker Unit	10.00	10.00	10.00	ea
M0003	Tweeter Speaker Unit	10.00	10.00	10.00	ea
D0002	Cabinet	10.00	10.00	10.00	ea

Adjust consumption Reserve material Cancel Ok

Material consumption and reservations in the production floor execution interface.

Important dates

These dates represent the current targets for this feature as it progresses toward becoming mandatory for all customers. The dates are subject to change.

Feature stage	Version	Date
Public preview	10.0.26	March 2022
Generally available	10.0.26	April 2022
On by default	10.0.33	February 2023
Mandatory	10.0.37	September 2023

Register material consumption on scale units

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business value

Manufacturers using a distributed hybrid architecture can now register material consumption at sites being served by a cloud or edge scale unit, which enables workers to operate without interruption, even if the connection to the hub is lost.

Feature details

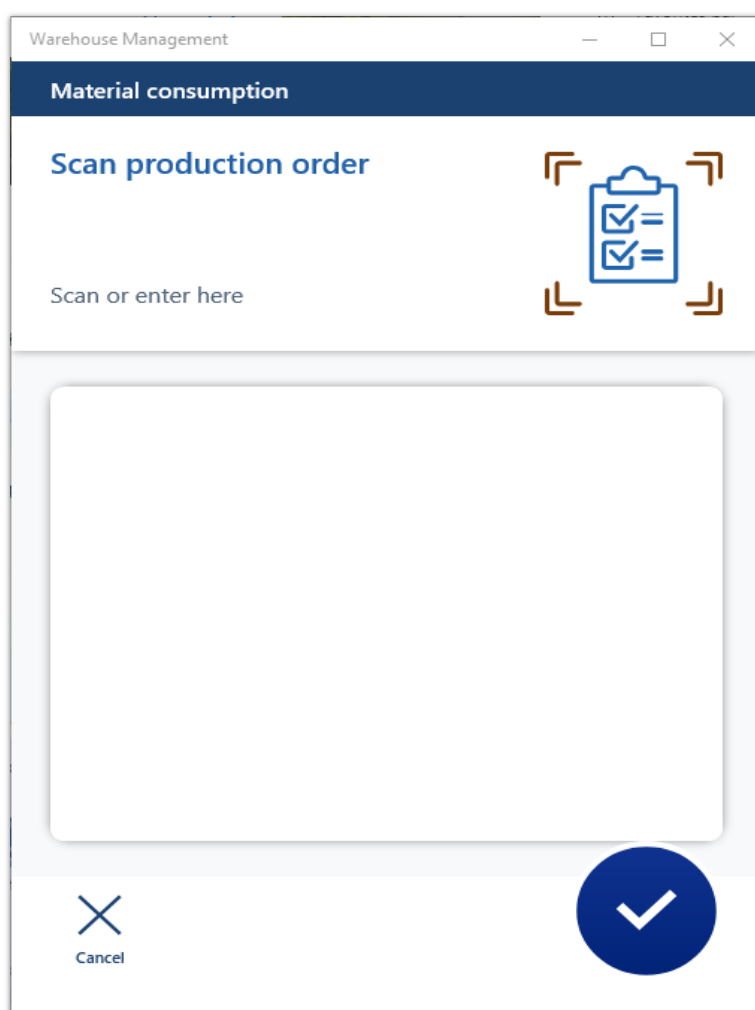
[Use the Warehouse Management mobile app to register material consumption for production and batch orders when running on a scale unit](#)

Some manufacturers, especially those within process industries, must explicitly register the amount of material consumed for each batch or production order. For example, a scale could be used to weigh material to determine the amount that goes into a production process. To ensure full material traceability, these organizations also need to register which batch numbers are consumed by the production processes.

Workers can now use the *Register material consumption* flow on the Warehouse Management mobile app to register quantities of material consumed for a production or batch order and to register the batch and serial numbers for those materials as needed.

When registering material consumption, inventory records on the scale unit are updated without requiring a round trip to the hub. This ensures that inventory information for the material always stays current and available to other production orders or processes. This capability also ensures these processes can run without interruption even if the connection between the hub and scale unit is lost.

An open API for registering material consumption is also provided. This is beneficial for organizations that want to integrate with a third-party manufacturing execution system (MES) that records the weight and tracking dimensions of consumed materials.



Warehouse app used for registration of material consumption for production and batch orders.

[Learn more about the benefits of scale units](#)

For more information about the benefits of using scale units, see [Cloud and edge scale units for manufacturing and warehouse management workloads](#).

Important dates

These dates represent the current targets for this feature as it progresses toward becoming mandatory for all customers. The dates are subject to change.

Feature stage	Version	Date
Public preview	10.0.26	March 2022
Generally available	10.0.26	April 2022
On by default	10.0.33	February 2023

Feature stage	Version	Date
Mandatory	10.0.37	September 2023

Catch weight items for the production floor execution interface

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2022	Jul 2022

Business value

With the addition of catch weight support for the production floor execution interface, manufacturers can take advantage of the new, modern user experience when working with products where the weight varies for each item, as is often the case for food manufacturers.

Feature details

[Register material consumption, batch numbers, and serial numbers for catch weight items](#)

Workers can now use the production floor execution interface to instantly register material consumption for catch weight items. They can also explicitly register the weight of each piece of consumed material (such as a block of cheese or a steak).

[Report on co-products and by-products for catch weight items](#)

Workers can use the production floor execution interface to report on formula items, co-products, and by-products that are enabled for catch weight.

[Important dates](#)

These dates represent the current targets for this feature as it progresses toward becoming mandatory for all customers. The dates are subject to change.

Feature stage	Version	Date
Public preview	10.0.28	May 2022
Generally available	10.0.28	July 2022
On by default	10.0.33	February 2023
Mandatory	10.0.37	September 2023

Planning

Overview

Planning Optimization is a game changer that enables businesses to increase their agility and enables them to respond to volatile business environments. Near real-time tactical planning, with runtimes in minutes instead of hours, lets businesses update their tactical plans several times a day. This reduces replenishment time, reduces inventory levels, and increases resilience in response to disruptive changes in supply and demand.

For manufacturing customers, this release wave delivers a significantly expanded industry footprint for Planning Optimization, which provides the following benefits:

- Order takers have order-promising information right at their fingertips, even for complex, custom, make-to-order products. End-to-end, finite-capacity planning respects internal factory constraints and helps to manage external subcontractors.
- Manufacturers and retailers having products with limited shelf life can optimize their supply planning.

Customers looking to implement demand-driven planning practices to reduce inventory levels and improve customer service will also benefit from the addition of full Demand Driven Material Requirements Planning (DDMRP) support, as defined by the Demand Driven Institute. This builds on the priority-based planning capabilities introduced in the previous release wave.

Planning Optimization suggestions to optimize existing supply

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business value

Get help optimizing existing supply orders by receiving system-generated suggestions created based on requirement changes.

Feature details

Action messages with suggestions to optimize existing supply are created when the system detects existing supply orders that can be optimized due to recent requirement changes. This is critical to ensure that the planned supply matches the current requirements. For example, if a significant customer order is canceled, you will be notified that the related supply is no longer needed and, if possible, you should try to cancel it. Action messages can also suggest that you modify the date or quantity on existing supply orders in response to recent requirement changes.

A flexible setup allows you to control the action messages generated by Planning Optimization. You can apply the suggested change directly from an action message.

These enhancements add to the capabilities of Planning Optimization. Planning Optimization facilitates high performance planning without slowing down the rest of the system.

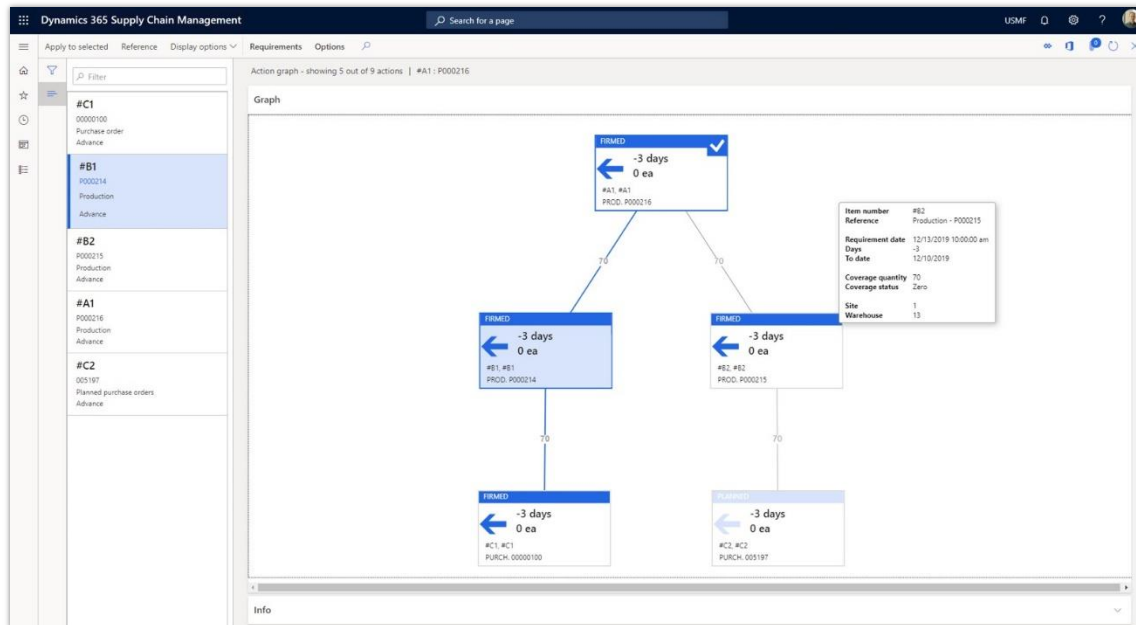
Planning Optimization benefits

With Planning Optimization, companies can benefit from:

- Significantly improved performance and scalability with in-memory processing.
- Minimized system impact on other processes made possible by running master planning as a separate service.
- Near real-time insights into requirement changes, achieved by running master planning several times daily during office hours.

Learn more about Planning Optimization

For more information about the Planning Optimization migration process and answers to frequently asked questions, see [Migration to Planning Optimization for master planning](#).



Action messages shown in the Action graph.

Planning Optimization centralized calendar maintenance

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2022	Apr 2022

Business value

Minimize time spent to update calendars by using base calendars that enable centralized updates to cascade into multiple individual calendars.

Feature details

Base calendars establish a hierarchical structure in which a single centralized calendar update is automatically distributed to all individual calendars that use that calendar as a base. Planning Optimization support for base calendars provides great flexibility in terms of creating specific calendars and assigning them to production resources.

Planning Optimization benefits

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Planning Optimization support for subcontracting

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2022	Jun 2022

Business value

Enables manufacturers to use Planning Optimization to automatically create the purchase orders needed to control and track subcontracted components for production orders.

Feature details

In production processes, work is often done by resources that are owned or administered by vendors. Typically, vendor resources are used for specific operations or to handle occasional excess demand that surpasses the capacity of a company's own resources. With subcontracting enabled, Planning Optimization automatically generates the planned purchase orders required to manage the logistics for materials or semi-finished products.

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

- Significantly improved performance and scalability with in-memory processing.
- Minimized system impact on other processes made possible by running master planning as a separate service.
- Near real-time insights into requirement changes, achieved by running master planning several times daily during office hours.

Learn more about Planning Optimization

For more information about the Planning Optimization migration process and answers to frequently asked questions, see [Migration to Planning Optimization for master planning](#).

Planning Optimization support for shelf life

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2022	Jun 2022

Business value

Companies can now use Planning Optimization to ensure that on-hand items with limited shelf life automatically get replenished if they expire prior to being used.

Feature details

Companies that have items with limited shelf life can now take advantage of Planning Optimization to automatically replenish expired goods. This enhancement enables you to consider the shelf life of perishable items during master planning, which ensures that demand is covered with goods that have the desired shelf life and that existing on-hand goods are replenished when expired.

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

- Significantly improved performance and scalability with in-memory processing.
- Minimized system impact on other processes made possible by running master planning as a separate service.
- Near real-time insights into requirement changes, achieved by running master planning several times daily during office hours.

Learn more about Planning Optimization

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Planning Optimization support for resource scheduling with finite capacity

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2022	Sep 2022

Business value

Production planners can use Planning Optimization to ensure that resources are not overbooked during master planning and that resource constraints trigger relevant delays in the supply chain.

Feature details

Planning Optimization now supports production scheduling that respects finite resource capacity. Finite scheduling enables manufacturers to detect expected future delays caused by limited resource capacity. This helps you to automatically update material requirements accordingly and, when relevant, notify impacted customers. The feature enables you to do the following while using Planning Optimization:

- Avoid overbooking resources.
- Monitor bottleneck resources in production, where it's difficult or impossible to increase capacity with short notice.
- When a selected timeslot is fully booked, postpone jobs until the next free timeslot.
- Calculate delays caused by resource constraints.
- Plan the production of lower-level components according to resource constraints. For example, react to situations where the production of a subcomponent is postponed because of capacity constraints later in the supply chain.
- Update material purchase and transfer orders to reflect delays from other parts of the production, thereby ensuring optimized material flow and minimized inventory levels.
- Selectively perform finite capacity scheduling on bottleneck resources.
- Create a setup where only defined bottleneck resources are limited by finite scheduling.
- Schedule non-bottleneck resources with infinite capacity to detect when, for example, an additional shift is needed to cover the demand.

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

- Significantly improved performance and scalability with in-memory processing.
- Minimized system impact on other processes made possible by running master planning as a separate service.

- Near real-time insights into requirement changes, achieved by running master planning several times daily during office hours.

[Learn more about Planning Optimization](#)

For more information about the Planning Optimization migration process and answers to frequently asked questions, see [Migration to Planning Optimization for master planning](#).

Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- United States
- Europe
- United Kingdom
- Australia
- Canada

Demand Driven Material Requirements Planning (DDMRP)

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

A growing number of companies want to control their supply chain based on Demand Driven Material Requirements Planning (DDMRP) principles. This typically yields inventory reductions of 30-45 percent while improving customer service. With this release, the Planning Optimization Add-in for Dynamics 365 Supply Chain Management fully supports the DDMRP principles. With native DDMRP support in Planning Optimization, customers can benefit from DDMRP supply chain optimization without the need for any external solutions.

Feature details

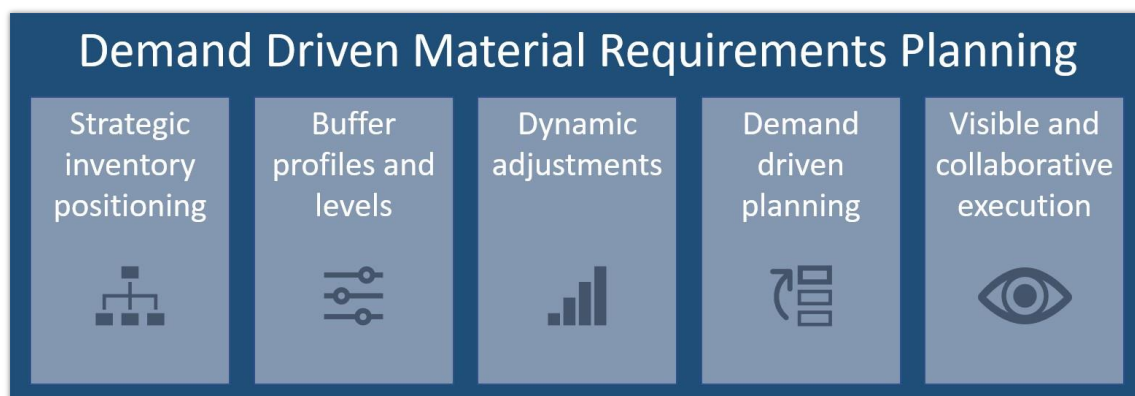
DDMRP is a formal multi-echelon planning and execution method for protecting and promoting the flow of relevant information through the establishment and management of strategically placed decoupling point stock buffers. DDMRP combines aspects of Material Requirements Planning (MRP) and Distribution Requirements Planning (DRP) with the pull and visibility emphases found in Lean and the Theory of Constraints, and the variability reduction emphasis of Six Sigma. These elements are successfully blended through key points of innovation in the DDMRP method. DDMRP is the supply-order generation and management engine of a Demand Driven Operating Model (DDOM). DDMRP can best be summarized as "position, protect, and pull."

The five sequential components of DDMRP

DDMRP has five sequential components:

- **Strategic inventory positioning:** Determines where the decoupling points are placed.
- **Buffer profiles and levels:** Determine the amount of protection at those decoupling points.
- **Dynamic adjustments:** Define how the level of protection flexes up or down based on operating parameters, market changes, or planned or known future events.
- **Demand-driven planning:** The process by which supply orders (purchase orders, manufacturing orders, and stock transfer orders) are generated.
- **Visible and collaborative execution:** The process by which a DDMRP system manages open supply orders.

The first three components essentially define the initial and evolving configuration of a DDMRP model. The final two elements define the day-to-day operation of the method. DDMRP is typically the start of an organization's transformation to a demand-driven adaptive enterprise.



The five steps of DDMRP.

Main components of the DDMRP offering for Planning Optimization

The DDMRP offering for Planning Optimization includes the following main components:

- **Inventory positioning:** Enable companies to calculate and identify the decoupled lead time (DLT) for purchased, distributed, and manufactured items.
- **Buffer profiles:** Group items into independently managed families with variable settings for zone impact. Calculate DDMRP buffers and zone values using a combination of buffer profile attributes and the individual part traits of usage, lead time, and order minimum.
- **Dynamic buffer adjustments:** Dynamically altering buffers for planned or anticipated events. Maintained as minimum, re-order point, and maximum.

- **Demand-driven planning:**
 - Perform the DDMRP net flow equation, including qualifying sales order demand (due today, past due, and qualified spikes).
 - Display net flow status (color, percentage, and quantity) for easy prioritization and supply order generation.
 - All elements of the net flow equation are visible on the planner workbench.
- **Highly visible and collaborative execution:** Display alerts based on buffer status for on-hand position.

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

- Significantly improved performance and scalability with in-memory processing.
- Minimized system impact on other processes made possible by running master planning as a separate service.
- Near real-time insights into requirement changes, achieved by running master planning several times daily during office hours.

Learn more about Planning Optimization

For more information about the Planning Optimization migration process and answers to frequently asked questions, see [Migration to Planning Optimization for master planning](#).

Make-to-order supply automation

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

Automate and streamline order taking and the related supply process for make-to-order (MTO) scenarios. You can benefit from improved capable-to-promise (CTP) accuracy with plan-specific delay tolerance, keep supply available for last-minute orders, and populate external order information during intercompany trade.

Feature details

Make-to-order supply automation enables you to do the following:

- View the resource capacity load for a user-defined period, thereby enabling long-term evaluation of the capacity load.
- Improve CTP accuracy by controlling the delay tolerance (negative days) for each master plan.

- Keep products available for last-minute orders and optimize usage of existing supply. This is achieved by using the latest possible supply to a demand, instead of using the first possible supply.
- Keep component assignment flexible for production orders after firming, which enables the system to optimize for last-minute demand changes. In other words, limit marking to one level.
- Control fulfillment policy for each sales order with defaulting from the customer setup.
- Enhance intercompany information flow. Purchase orders are updated to include fields for mode of delivery, delivery terms, and external item number. This ensures that detailed demand information can flow to the supplying company.

Planning Optimization for select manufactured items

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

Improve planner efficiency at manufacturing companies by automatically applying filters to include all required supply and demand in a multilevel production structure.

Feature details

When demand changes for a produced item, it's important to update all impacted items. This feature enables planners to run filtered master planning for selected produced items, which avoids the need to run without a filter to include related items. Automatic filtering ensures that Planning Optimization has all the information required to calculate the correct result, which must include all products that have any relation to products in the entire bill of materials (BOM) structure of the planned order. Dependent child items are automatically detected and included during master planning with Planning Optimization. For example, if a single bolt from the BOM structure of product A is also used to produce product B, then all products in the BOM structures of products A and B will be included in the filter.

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

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- Minimized system impact on other processes made possible by running master planning as a separate service.
- Near real-time insights into requirement changes, achieved by running master planning several times daily during office hours.

[Learn more about Planning Optimization](#)

For more information about the Planning Optimization migration process and answers to frequently asked questions, see [Migration to Planning Optimization for master planning](#).

Planning Optimization support for capable-to-promise (CTP)

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

Capable-to-promise (CTP) support in Planning Optimization enables manufacturers to provide their customers with reliable order-promising dates directly from the sales order.

Feature details

Manufacturers and companies with make-to-order product portfolios can use CTP dates in Planning Optimization to promise orders based on the latest master planning run. CTP calculations from master planning can be viewed from sales orders and consider material and capacity constraints related to each order. With CTP, Planning Optimization can create the planned supply needed to fulfill the related demand, and orders can automatically be firmed as desired.

[Planning Optimization benefits](#)

With Planning Optimization, companies can benefit from:

- Significantly improved performance and scalability with in-memory processing.
- Minimized system impact on other processes made possible by running master planning as a separate service.
- Near real-time insights into requirement changes, achieved by running master planning several times daily during office hours.

[Learn more about Planning Optimization](#)

For more information about the Planning Optimization migration process and answers to frequently asked questions, see [Migration to Planning Optimization for master planning](#).

Available ship and receipt dates

Mode of delivery: 10 Site: 1 Warehouse: 13 Delivery date control: CTP Lead time: 5 Working days: No Transport days: 3

MY TIME: 07:59 AM ORDER ENTRY DEADLINE: 07:59 AM CURRENT: 12/1/2021 08:09:53 AM TIME ZONE: (GMT) Coordinated Universal...

SHIPPING LOCATION TIME: 11:59 PM CURRENT: 12/1/2021 12:09:53 AM TIME ZONE: (GMT-08:00) Pacific Time (US ...)

AVAILABLE SHIP AND RECEIPT DATES

Records displayed: 30

Day	Available ship date	Day	Available receipt date	Requested ship date	Confirmed ship date	Confirmation
Friday	12/3/2021	Monday	12/6/2021	12/3/2021		
Saturday	12/4/2021	Tuesday	12/7/2021			
Sunday	12/5/2021	Wednesday	12/8/2021			
Monday	12/6/2021	Thursday	12/9/2021		12/6/2021	
Tuesday	12/7/2021	Friday	12/10/2021			
Friday	12/10/2021	Monday	12/13/2021			
Saturday	12/11/2021	Tuesday	12/14/2021			

Order promising with capable-to-promise (CTP).

Overview of Dynamics 365 Intelligent Order Management 2022 release wave 1

Microsoft Dynamics 365 Intelligent Order Management provides the flexibility you need to capture orders from any order source, including e-commerce, marketplace, mobile apps, or traditional sources like electronic data interchange (EDI). Your back-office organization can fulfill those orders from their own warehouses, third-party logistics providers (3PL), stores, or drop-ship with vendors or other delivery fulfillment partners using out-of-the-box, prebuilt connectors from a growing ecosystem of Microsoft Power Platform connectors.

The 2022 release wave 1 brings an expanded set of out-of-the-box provider integrations that ship with Intelligent Order Management, enabling rapid deployment and connectivity to an ecosystem of solutions in the order capture, logistics, fulfillment, and delivery process flows. Combined with the rich ecosystem of providers, you will have the ability to achieve more advanced order orchestration using the new expanded set of features and optimizations supported in inventory orchestration, order actions, and fulfillment.

Taking advantage of our expanded order fulfillment and world class reverse logistics and exchange experience will help you to enhance customer loyalty. The 2022 release wave 1 brings a brand-new returns and exchange management service directly integrated into e-commerce solutions. This service enables you to orchestrate journeys that minimize operational costs related to getting merchandise back on shelves, and drive clear communication with your consumers.

Monitoring complex order, fulfillment, and delivery capabilities requires a system to give you the insights to take actions on the issues you need to focus on. Building on the capabilities already in the Intelligent Order Management solution, the 2022 release wave 1 brings you new insights to help monitor your system health, allowing you to quickly focus on systems that cause issues in your order process. With expanded machine learning and Microsoft Power BI dashboards, you can gain insights into the events through the order, fulfillment, and returns process and focus on metrics to help continuously optimize the process and build customer loyalty.

For official product documentation and getting started on Intelligent Order Management, go to:

- [Microsoft Dynamics 365 Intelligent Order Management website](#)
- [Microsoft Dynamics 365 Intelligent Order Management overview video](#)
- [Microsoft Dynamics 365 Intelligent Order Management documentation](#)

What's new and planned for Dynamics 365 Intelligent Order Management

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may**

change and projected functionality may not be released. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Application monitoring and troubleshooting

Administrators can use the improved monitoring and debugging experience to monitor the Intelligent Order Management system. The new experience will automatically detect performance anomalies and includes powerful analytics tools to help you diagnose issues and to understand your system health.

Feature	Enabled for	Public preview	General availability
Improved monitoring and debugging experience for admins and business users	Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business to consumer (B2C) enhancements

Key updates that will enable you to provide your customers the confidence to make purchases while knowing they will have a delightful post-purchase and self-service returns experience.

Feature	Enabled for	Public preview	General availability
Enable real-time order status communications to your e-commerce site	Users by admins, makers, or analysts	Apr 2022	To be announced

Core orchestration functionality

Intelligent Order Management will be expanding the order orchestration capabilities to handle more advanced order actions based on configurable business logic.

Feature	Enabled for	Public preview	General availability
Expanded order actions to enable advanced order capture and processing	Users by admins, makers, or analysts	Feb 2022	Apr 2022
Fulfillment optimization using reinforcement learning	Users, automatically	Feb 2022	Apr 2022
Improved integration with Inventory Visibility Add-in for Dynamics 365 Supply Chain Management	Users by admins, makers, or analysts	Feb 2022	Apr 2022

Order visibility and insights

Machine learning (ML) and Power BI-driven dashboards give customers insights to the events through the order capture, fulfillment, and returns processes.

Feature	Enabled for	Public preview	General availability
Expanded visibility and insights in the order journey	Users by admins, makers, or analysts	Feb 2022	Apr 2022

Provider integrations

Expanded ecosystem of providers delivered from Microsoft and partners.

Feature	Enabled for	Public preview	General availability
Expanded ecosystem of providers	Users by admins, makers, or analysts	Feb 2022	Apr 2022

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

Application monitoring and troubleshooting

Overview

Administrators can use the improved monitoring and debugging experience to monitor the Intelligent Order Management system. This new experience will automatically detect performance anomalies, and it includes powerful analytics tools to help you diagnose issues and to better understand your system health.

Improved monitoring and debugging experience for admins and business users

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business value

Administrators and business users can use the improved monitoring and debugging experience to monitor the Dynamics 365 Intelligent Order Management system. The new functionality can then help to diagnose and debug issues.

Feature details

Intelligent Order Management enables administrators and business users to monitor and debug the following errors:

- Errors generated by integration points, including order intake providers, order fulfillment providers, Power Automate flows, APIs, and more.
- Errors generated by business logic (execution policy) inside the orchestration flows.

Business to consumer (B2C) enhancements

Overview

Omnichannel commerce remains a top investment priority for digital commerce leaders. For this release, we are providing key updates that will provide consumers the confidence to make purchases while knowing they will have a delightful post-purchase and self-service returns experience. These new capabilities allow brands to achieve more streamlined, cost-effective processes to reliably deliver to consumers. This solution can thereby help build the brand loyalty that is critical for direct-to-consumer growth, and empower brands in a competitive playing field with closed marketplaces.

Enable real-time order status communications to your e-commerce site

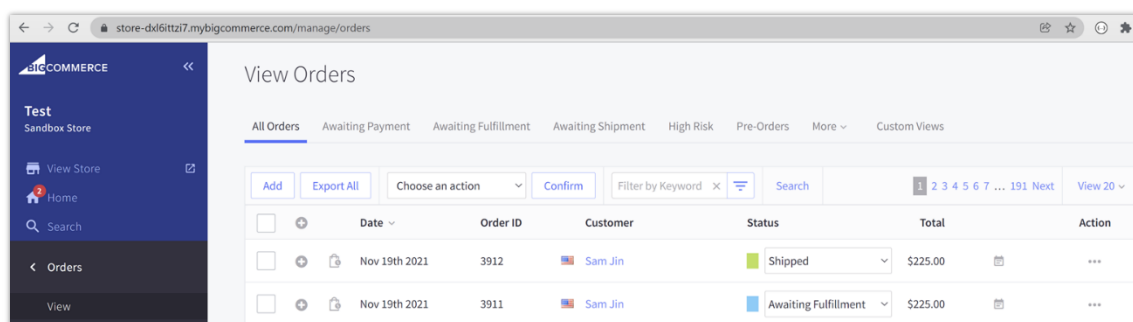
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2022	To be announced

Business value

Build trust with your consumers by providing them with real-time communications on their order and the order delivery status.

Feature details

Consumers expect close to real-time status on their purchases and order deliveries. Dynamics 365 Intelligent Order Management can help you meet consumer expectations by delivering order updates to your customers by using various communication methods. With communications relating to events including order confirmation, delayed deliveries, and order return status, you can now keep your customers up to date on their order, thereby avoiding unnecessary customer service calls and building customer loyalty.



BigCommerce status updates.

Core orchestration functionality

Overview

Small and large organizations have processes with complexity due to types of products, geographic issues, supply and fulfillment strategies, and partners. Dynamics 365 Intelligent Order Management will be expanding the order orchestration capabilities to handle more advanced order actions based on configurable business logic, allowing customers to achieve higher levels of automation in the order decisions and flexibly as needs change.

To maximize sales and improve the customer experience, businesses strive to optimally allocate the available inventory across multiple channels so that customers' expectations of fast and on-time delivery are met. Businesses can achieve optimal inventory allocation and build customer confidence by developing a single view of inventory that can be dynamically shared across order sources, fulfillment, and reverse logistics, thereby driving intelligent decisions.

Expanded order actions to enable advanced order capture and processing

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business value

Small and large organizations have processes with complexity due to types of products, geographic issues, supply and fulfillment strategies, and partners. Dynamics 365 Intelligent Order Management will be expanding the order orchestration capabilities to handle more advanced order actions based on configurable business logic, allowing customers to achieve higher levels of automation in the order decisions and flexibly as needs change.

Feature details

A new set of policies and rules will be available that will help you define advanced order actions such as splitting, grouping, and partial delivery. You will be able to use this in your order orchestration to drive different actions.

- Order grouping allows you to reduce the number of shipments and associated packaging and delivery costs by grouping multiple orders together based on your needs and criteria. For example, you can meet your supply chain sustainability commitments by reducing packaging and waste.
- You can use split orders into multiple shipments for scenarios such as needing to meet customers' delivery expectations for certain order items, or managing your delivery truck capacity.

You can also preserve product size, dimensions, and other attributes and use those attributes to get actual shipment costs and delivery data from logistics and delivery providers.

See also

[Orchestration flows](#) (docs)

Fulfillment optimization using reinforcement learning

Enabled for	Public preview	General availability
Users, automatically	Feb 2022	Apr 2022

Business value

This feature will enable businesses to create optimal fulfillment plans that are real-time, using real-time inventory, and with the consideration of past demands in order to minimize opportunity costs. The feature will provide a dashboard to capture metrics around the

fulfillment plans being created. Order managers will be able to be proactive and take action as needed.

Feature details

The PROF algorithm will create optimal fulfillment plans using reinforcement learning:

- Supports real-time fulfillment plan creation based on real-time inventory and subsequent order confirmation.
- A learning factor, λ (lambda), will keep information from previous fulfillment plans baked into it to intrinsically forecast demand and create plans accordingly.

Improved integration with Inventory Visibility Add-in for Dynamics 365 Supply Chain Management

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business value

Businesses strive to optimally allocate available inventory across multiple channels to meet customers' expectation of fast and on-time delivery, thereby improving the customer experience and maximizing sales. Dynamics 365 Intelligent Order Management will provide functionality that produces a single view of inventory that can be dynamically shared across order sources, fulfillment, and reverse logistics. The functionality will help businesses drive intelligent decisions that can help them achieve optimal inventory allocation and build customer confidence.

Feature details

Intelligent Order Management will provide tighter integration with the Inventory Visibility Add-in for Dynamics 365 Supply Chain Management. With this functionality, you can get real-time insights into your inventory across warehouses that will help you meet customer expectations for their orders. The following functionality will be enabled:

- Inventory Visibility will be updated to reflect when an order is placed or canceled.
- Orders that will have inventory arriving soon can be placed (available to promise, or ATP).
- Inventory can be allocated for specific channels. When inventory is depleted, it can be taken from a common pool.

Order visibility and insights

Overview

Monitoring complex order, fulfillment, and delivery capabilities requires a system that will provide insights so that you can take actions on the issues you need to focus on. Building on

the capabilities in the Dynamics 365 Intelligent Order Management solution, we are providing expanded capabilities to help monitor your system health. This functionality will enable you to focus on systems that cause issues in your order process. With expanded machine learning and Power BI-driven dashboards, you will gain insights into events through the order capture, fulfillment, and returns process. With the new functionality, you can focus on metrics that will help you continuously optimize your process and build customer loyalty.

Expanded visibility and insights in the order journey

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business value

Monitoring complex order, fulfillment, and delivery capabilities requires a system that will provide insights so that you can take actions on the issues you need to focus on. Building on the capabilities in the Dynamics 365 Intelligent Order Management solution, we are providing expanded capabilities to help monitor your system health. This functionality will enable you to focus on systems that cause issues in your order process. With expanded machine learning and Power BI-driven dashboards, you will gain insights into events through the order capture, fulfillment, and returns process. With the new functionality, you can focus on metrics that will help you continuously optimize your process and build customer loyalty.

Feature details

The **Order anomaly** dashboard shows multiple graphs to detect trends across different KPIs, including:

- Total sale amount, country, and product line.
- Total revenue per month, per country, and per quarter.
- Order lines contributing to highest sales and revenue.

We are also building an inventory dashboard that will capture and display values such as supply versus demand, items that need to be restocked, and the most popular items in every warehouse.

Provider integrations

Overview

The ability to connect to an ecosystem of solutions in the order capture, logistics, fulfillment, and delivery process flows gives customers the choice to work with the software and the partners that bring value to their business. Microsoft will expand the out-of-the-box providers that ship with Dynamics 365 Intelligent Order Management, enabling rapid deployment and the ability to quickly reorganize as processes and requirements change.

Expanded ecosystem of providers

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business value

The ability to connect to an ecosystem of solutions in the order capture, logistics, fulfillment, and delivery process flows gives customers flexibility to work with partners that bring the most value to their business. Dynamics 365 Intelligent Order Management will provide an expanded ecosystem of out-of-the-box providers, enabling rapid deployment and the ability to quickly reorganize as processes and requirements change.

Feature details

Listed below are the providers that Microsoft is working with.

Order intake providers:

- BigCommerce

Electronic Data Interchange (EDI) providers:

- Orderful

Delivery providers:

- ShipStation

Warehouse management providers:

Warehouse management services (WMS) providers help in the picking and packaging of orders to get them ready for shipment. When integrated with Intelligent Order Management, the WMS will be able to fetch outbound order data, process the data, and export shipping information back into Intelligent Order Management. The WMS connector will also be able to fetch the initial inventory data from Intelligent Order Management, and update it periodically as the inventory changes.

- Flexe

Enterprise resource planning (ERP) providers:

- NAV 2016

Tax service providers:

- Avalara

Overview of Dynamics 365 Project Operations 2022 release wave 1

In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams to win more deals, accelerate delivery, empower employees, and maximize profitability. The application provides the necessary visibility, collaboration, and agility across the project lifecycle to drive success for project-centric businesses. Powered by Microsoft Power Platform, customers are provided with an unmatched set of capabilities that enable everyone to analyze, act, and automate across their organization to transform their services business from the ground up. It's everything you need to run your project operations, from deal management to financials, all in one application.

For 2022 release wave 1, we will deliver functionally rich experiences in the following areas:

- Project-based vendor invoice reconciliation for Project Operations for resource and nonstocked scenarios.
- Upgrade from Dynamics 365 Project Service Automation to Dynamics 365 Project Operations Lite Deployment - Phase 2.
- Time-zone agnostic price defaulting on project actuals.
- Revision and activation of quotes.
- Per diem expenses in the modern interface experience.
- External project scheduling.

What's new and planned for Dynamics 365 Project Operations

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Feature	Enabled for	Public preview	General availability
Modern approvals	Users, automatically	✓ Oct 10, 2021	Apr 2022

Feature	Enabled for	Public preview	General availability
Per diem expenses in the modern interface experience	Users by admins, makers, or analysts	Feb 2022	May 2022
Pay-when-paid support for resource-based nonstocked scenarios	Users by admins, makers, or analysts	-	Jul 2022
Transfer all lines with posting errors to a new Project Operations integration journal	Users by admins, makers, or analysts	Mar 2022	Jul 2022
Time-zone agnostic price defaulting on Project Operations actuals	Users by admins, makers, or analysts	-	Aug 2022
External Project Operations planning	Users by admins, makers, or analysts	-	Aug 2022
Upgrade from Dynamics 365 Project Service Automation to Dynamics 365 Project Operations Lite Deployment - Phase 2	Users by admins, makers, or analysts	-	Aug 2022
Date-effective overrides in Project Operations pricing and costing	Users by admins, makers, or analysts	-	Sep 2022
Editing resource assignment contours	Users by admins, makers, or analysts	-	Sep 2022
Revision and activation of quotes	Users by admins, makers, or analysts	-	Sep 2022
Support vendor payment of expense liability in foreign currency	Users by admins, makers, or analysts	-	Sep 2022
Project-based vendor invoice reconciliation for Project Operations for resource and nonstocked scenarios	Users by admins, makers, or analysts	Aug 2022	Sep 2022

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

Modern approvals

Enabled for	Public preview	General availability
Users, automatically	✓ Oct 10, 2021	Apr 2022

Business value

Improved processing of approvals results in a faster time to revenue for the customer and an improved end-user experience when submitting entries that require approval. This feature allows for more accurate tracking of the approval status and improved reliability of posting.

Feature details

This feature improves the batch processing of approvals through the introduction of Approval sets. Approval sets group approval requests together into smaller subsets of operations. This grouping allows approvals to be processed by project in a specific order and allows for retrying and sequencing. Grouping the approval requests together improves the reliability and traceability of approval processing for large volumes of approvals.

Approval sets indicate the overall processing state of their related records. When an approval record is processed using an approval set, the record moves from **Submitted** to **Approved** and is no longer linked to the approval set. If a record fails when it is submitted for approval, the record remains in a status of **Submitted**, and the approval set is marked as **Failed**. The approval set logs the error message of the failure.

Per diem expenses in the modern interface experience

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	May 2022

Business value

The modern user experience improves the ease of use when entering per diem expenses.

Feature details

In the reimagined expense UI, submitting per diem expenses isn't supported. This is a mandatory requirement for many employers looking to provide per diems for employee travel. Companies that provide per diems to employees for travel can use the new and reimagined modern expense experiences to enter per diem expenses with this feature.

This feature includes the following capabilities:

- Scenario 1: Per diem based on the number of meals per day.
- Scenario 2: Per diem based on meal type per day.
- Scenario 3: Per diem based on meal type per trip.
- Scenario 4: Per diem limits with zero meal reduction.

Pay-when-paid support for resource-based nonstocked scenarios

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jul 2022

Business value

This feature provides the capability to hold payment to a subcontractor until the project contract customer pays for the work that's performed by the subcontractor.

Feature details

This feature includes the following capabilities:

- The project accountant can define pay-when-paid thresholds for a specific vendor, group, or all vendors and subcontractors per project.
- The accounts payable clerk can record pay-when-paid terms in the project purchase order.
- The project accountant can reconcile and audit the project cost transactions and sales transactions.
- Vendor invoices for payment can be released after the customer pays for the project invoice.

Transfer all lines with posting errors to new integration journal

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2022	Jul 2022

Business value

Project Operations transactions without business validation errors will be processed immediately. The project accountant can review transactions with errors in a dedicated journal, address the issues, and then post them.

Feature details

This feature improves the integration journal experience in Project Operations. When enabled, the system will post all the correct lines in the journal and create a new journal for all lines with errors. Users can then review the journals by going to **Project management and accounting > Journals > Project Operations integration journal**, and then filtering the journals by the value in the **Original journal** field.

Time-zone agnostic price defaulting on Project Operations actuals

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Aug 2022

Business value

This feature improves the accuracy and predictability of costing and pricing time, expense, and material usage recorded on projects.

Feature details

Time-zone agnostic price defaulting allows you to eliminate unexpected price defaulting when the time, expense, or material usage falls on the date when prices are due to change. Given that all the date fields in the tables related to price defaulting are time-zone aware, the pricing of time, material, or expense can change and yield unexpected results when the user recording the entry is either ahead or behind the UTC time zone. With this feature, time-zone agnostic date fields on price lists and the transactional tables will make price and cost defaulting more predictable and accurate, regardless of the user's time zone recording the transaction.

External Project Operations planning

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Aug 2022

Business value

This feature provides generic APIs for customers to bring their own project management tool.

Feature details

In this release wave, customers can bring their own project management tools through a generic API where task scheduling can happen in the project management tool of choice and then integrate to Project Operations, becoming available to users in a read-only manner. Resource scheduling and booking would remain in Project Operations.

Key capabilities in this feature release include:

- Generic APIs to integrate tasks, assignments, and contours.
- Connector for common project management tools such as Desktop client and Project Online.

Upgrade from Dynamics 365 Project Service Automation to Dynamics 365 Project Operations Lite Deployment - Phase 2

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Aug 2022

Business value

Providing an in-place upgrade experience, this capability set targets customers who are currently using Dynamics 365 Project Service Automation and are looking to upgrade to Dynamics 365 Project Operations.

Feature details

In the last release wave, an upgrade from Project Service Automation v3 to Project Operations was enabled for customers who don't take a dependency on the work breakdown structure (WBS) or related entities. In this release wave, we are extending the upgrade to customers with projects. This includes:

- Customers who manage projects within the current WBS limits.
- Customers who require support for larger projects.

Date-effective overrides in Project Operations pricing and costing

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Sep 2022

Business value

Better control of maintaining price lists, gaining performance, and reducing data explosion in the project lifecycle.

Feature details

During the project lifecycle, a full copy of the price list can be initiated in different scenarios, such as:

- When a project is sold and a project contract is created.
- When prices for project resources change in a given cycle.
- When custom pricing is required for a particular project quote.

Each price list can have between 10–10,000 rows across 4 to 5 different child tables. During any of the above-mentioned scenarios, making a full copy of the price list may not be required. It can also take a long time and may cause data explosion. For this feature, the concept of price overrides allows users to create targeted date-effective overrides for specific prices in a price list. These price overrides can also be scoped to a particular quote or project contract. This feature changes the following scenarios around copying price lists in Project Operations:

- The number of times a price list is copied fully is reduced or minimized using configuration parameters and dialog prompts.
- Customers are able to reduce data explosion by creating overrides for specific prices.
- The ability to use standard price lists on project contracts if there is no need to create a full custom price list.

Editing resource assignment contours

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Sep 2022

Business value

This feature provides more precision in project planning and estimation.

Feature details

With this feature enabled, customers can edit resource assignment contours within the day, week, month, or year range. This precision improves the fidelity of resource requirements and financial estimates by allowing users to accurately forecast effort over the duration of the task and for the specific resource.

Revision and activation of quotes

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Sep 2022

Business value

This feature enhances process support for deal management in project-based companies.

Feature details

Currently, Project Operations does not support activation and revision of quotes. This restricts customers from having project-based deals where similar requirements for a quote sent to the customer should be made read-only and must be versioned when the quote is revised with clear version history. With this capability, project-based quotes will support a process for versioning a quote that is sent to the customer, which will allow for revising these quotes based on customer-requested or internally triggered changes.

Support vendor payment of expense liability in foreign currency

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Sep 2022

Business value

Project Operations uses the standard defined exchange rate for currency conversions. However, because of time lags in the process from posting to actual payment, there is often a mismatch between the transaction amount and the posted amount. This feature addresses the issue with foreign currency payments related to expense transactions.

Feature details

When creating an expense report with foreign currency for an employee, the system converts the value of that foreign currency to the legal entity currency using the exchange rate taken on the day the expense report was created. After several days, when the customer tries to make a payment back to the employee or vendor, the system converts the amount to be paid using the exchange rate on that day. This results in a difference in the amount between the expense report and the amount paid. Because of this issue, the employee or vendor is

either underpaid or overpaid, requiring manual intervention to settle correctly. With this feature, we aim to address the discrepancy with foreign currency payments related to expense transactions.

Project-based vendor invoice reconciliation for Project Operations for resource and nonstocked scenarios

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Aug 2022	Sep 2022

Business value

This feature will enable the integration of project vendor invoices coming from the Finance and Operations apps. Invoices will be made available for procurement and front-office personas, such as project and account managers. These invoices can then be reconciled with time entries and other documents, such as product receipts and vendor invoices that need to be cleared for payment.

Feature details

Subcontracting or outsourcing project work to vendors, managing the vendor resource assignments, and the delivery of work is essential in every project-based organization. In the last release wave, Project Operations added end-to-end experiences for managing the contracted capacity of subcontractors on project work, allowing subcontractor time to be estimated and recorded correctly. We also added the ability to record and reconcile project vendor invoices with time, expense, and material usage on projects, allowing vendor invoices to be cleared for payment for customers using the Lite deployment (Dataverse only) of Project Operations.

In this release wave, subcontracting capabilities will be enabled for customers using Project Operations for resource and nonstocked scenarios (Project Operations Integrated with Finance and Operations app). This release will also include:

- Project manager review of project vendor invoices recorded by Accounts payable clerks in Dynamics 365 Finance.
- Project accountants' ability to record, review, and audit subcontract-related actuals in project financials.

Overview of Finance and Operations cross-app capabilities 2022 release wave 1

Finance and Operations cross-app capabilities apply to all Finance and Operations apps, including Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations.

To enable businesses everywhere to accelerate their digital transformation, we are continuously enhancing the platform and services that support Finance and Operations apps with new capabilities. As we add product enhancements at a rapid pace, we deliver frequent updates (eight per year) that help customers stay current in a consistent, predictable, and seamless manner.

The key driver for the new core capabilities is to increase productivity and return on investment. The Finance and Operations cross-app capabilities in this release wave can be divided into the following categories:

Data and process integration: This feature area includes improvements to the integration between Finance and Operations apps and Azure Data Lake Storage. The capabilities include:

- Enable customers to build rich data integrations and reports using data from both customer engagement apps and Finance and Operations apps using Azure Synapse Link for Microsoft Dataverse.
- Enable customers to optionally include large fields, such as memos and XML strings, to be exported to Azure Data Lake Storage.
- Enable customers to optionally exclude sensitive data, such as Social Security numbers, from being exported to Azure Data Lake Storage.

Power Platform requests for Finance and Operations environments: Today, customers using Finance and Operations applications have no way to purchase additional compute resources when their processing needs increase. Microsoft plans to extend the Power Platform requests to cover the compute meter on the Finance and Operations platform. Most customers using Finance and Operations applications will be entitled to a sufficient amount of base capacity along with their app licenses. Only those customers needing more compute processing will have to purchase those units. Power Platform requests will expand the scope and definition of what is already being sold as order lines.

Regression suite automation tool (RSAT): RSAT continues to be an important area for Microsoft and customers. It is a cornerstone for customers moving to the cloud in that they are able to produce automated tests that enable them to easily perform user acceptance tests of new releases and ensure a smooth experience with each upgrade. The 2022 release wave 1 features will improve the usability of RSAT and provide better integration between RSAT and Microsoft Azure DevOps.

Cross-app features: Cross-app features provide ease of use to all users of Finance and Operations apps. These capabilities improve development, administration, and user

experiences by addressing some of the key shortcomings we've heard about from our customers.

What's new and planned for Finance and Operations cross-app capabilities

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Cross-application features

Capabilities and features that apply to all Finance and Operations apps.

Feature	Enabled for	Public preview	General availability
Updates to client feature states with version 10.0.25	Users, automatically	Jan 2022	Apr 2022
Updates to saved views and personalization	Users by admins, makers, or analysts	Jan 2022	Apr 2022
Vertically scrolling workspaces	Users, automatically	Jan 2022	Apr 2022

Data and process integration

Finance and Operations data and processes are available in Microsoft Dataverse and Azure Data Lake.

Feature	Enabled for	Public preview	General availability
Specify which data is exported to Azure Data Lake	Users by admins, makers, or analysts	Apr 2022	-
One Azure Synapse experience for all Dynamics 365 data	Users by admins, makers, or analysts	Jul 2022	-

Regression suite automation tool (RSAT) improvements

Improvements for the Regression suite automation tool.

Feature	Enabled for	Public preview	General availability
Support of test case variants	Users, automatically	May 2022	May 2022
Improved integration with Azure DevOps	Users, automatically	Jun 2022	Jun 2022
Improvements to the Task recorder experience	Users, automatically	Aug 2022	Aug 2022
Improved Azure DevOps experience	Users by admins, makers, or analysts	Sep 2022	Sep 2022

Description of **Enabled for** column values:

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- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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Cross-application features

Overview

Cross-app features provide ease of use to all users of Finance and Operations apps. These capabilities improve development, administration, and user experiences by addressing some of the key shortcomings we've heard from our customers.

Updates to client feature states with version 10.0.25

Enabled for	Public preview	General availability
Users, automatically	Jan 2022	Apr 2022

Business value

This information helps customers stay current on the latest client capabilities of Finance and Operations apps.

Feature details

Mandatory features with the 10.0.25 release

- [Enable a drop-down list on multiline controls](#)
- [New HTML editor control](#)
- [Email throttling](#)
- [Internet Explorer end-of-support notifications](#)

NOTE Starting with version 10.0.25, Internet Explorer can no longer be used. See [Internet Explorer deprecation](#) for more information.

- [Open-source software update – upgrade Moment and remove jQuery](#)
- [New color picker control](#)

NOTE The timelines for transitioning the **New grid control** and **Saved views** features (and their dependent features) to mandatory have been postponed to October 2022.

Enabled-by-default features with the 10.0.25 release

These features will be turned on by default, but can still be manually disabled. These features are all targeted to become mandatory with 2022 release wave 1.

- [Align interaction patterns for combo boxes with those of look-up controls](#)
- [Allow admins to select default document types](#)
- [Allow configuration of the publish batch size in the Excel add-in](#)
- [Visual update for wizards](#)
- [Translation support for organizational saved views](#)
- [Improved legal entity support for saved views](#)
- [Embed third-party apps – phase 2](#)

Updates to saved views and personalization

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2022	Apr 2022

Business value

Saved views allow an easy and no-code approach for customers and users to optimize their user experiences and deploy and manage those experiences at an organizational level. The enhancements to saved views and personalization described below will make saved views more applicable for more scenarios, which can lead to improved user satisfaction and productivity.

Feature details

The saved views capabilities in Finance and Operations apps will be extended in the following ways:

- Add view support on dialogs.
- Add view support on workspaces.
- Allow queries to be saved in views on more pages.

[View support for dialogs](#)

The **Saved views support for dialogs** feature adds view support for dialogs, notably the ability to save multiple dialog views and publish those views to users.

[Important dates](#)

These dates represent the current targets for this feature as it progresses toward becoming mandatory for all customers. The dates are subject to change.

Feature stage	Version	Date
Generally available	10.0.25	April 2022
On by default	10.0.29	October 2022
Mandatory	10.0.33	April 2023

[View support for workspaces](#)

The **Saved views support for workspaces** feature will add view support for workspace forms, notably the ability to save multiple workspace views and publish those views to users. With this change, when users add tiles, lists, or links to a workspace, they will also need to select the target workspace views the content should be added to.

[Important dates](#)

These dates represent the current targets for this feature as it progresses toward becoming mandatory for all customers. The dates are subject to change.

Feature stage	Version	Date
Generally available	10.0.25	April 2022
On by default	10.0.29	October 2022
Mandatory	10.0.33	April 2023

Queries on views on Task pages

The **Allow queries to be saved to views on Task Single and Task Double** pages feature allows filters and sorts to be saved to views on [Task Single](#) and [Task Double](#) pages. These are pages with older interfaces that allow you to show and edit data for a single entity and parent/child entities, respectively.

Important dates

These dates represent the current targets for this feature as it progresses toward becoming mandatory for all customers. The dates are subject to change.

Feature stage	Version	Date
Generally available	10.0.25	April 2022
On by default	10.0.29	October 2022
Mandatory	10.0.33	April 2023

Vertically scrolling workspaces

Enabled for	Public preview	General availability
Users, automatically	Jan 2022	Apr 2022

Business value

This feature offers improved usability and alignment with other Dynamics 365 products to have vertically scrolling pages.

Feature details

To date, workspaces in Finance and Operations apps have used panoramas to be horizontal in nature, which followed the Windows 8 design paradigm. Starting with the April 2022 release, workspaces will be adjusted so that sections stack vertically (instead of laying out horizontally) and are collapsible. This change will be accomplished through updates to the Workspace form patterns to optimize form metadata for a vertical page orientation.

To stay in alignment with out-of-the-box workspaces, externally created workspaces will need to update to the latest form patterns. Other minor tweaks may be desired to optimize for a vertical experience.

Data and process integration

Overview

This feature area includes improvements to the integration between Finance and Operations apps and Azure Data Lake Storage. The capabilities include:

- Enable customers to build rich data integrations and reports using data from both customer engagement apps and Finance and Operations apps using Azure Synapse Link for Microsoft Dataverse.
- Enable customers to optionally include large fields, such as memos and XML strings, to be exported to Azure Data Lake Storage.
- Enable customers to optionally exclude sensitive data, such as Social Security numbers, from being exported to Azure Data Lake Storage.

Specify which data is exported to Azure Data Lake

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2022	-

Business value

This feature enables you to have greater control over the Finance and Operations data that is exported to Azure Data Lake.

Feature details

This feature enables you to optionally include or exclude Finance and Operations data that is exported to Azure Data Lake. For example:

- You can optionally include large fields, such as memos and XML strings, to be exported to Azure Data Lake.
- You can optionally exclude sensitive data, such as Social Security numbers, from being exported to Azure Data Lake. Sensitive data may be valuable for operational purposes (and is securely stored within Finance and Operations apps). However, this data may not be required for reporting, and you may not want to make it available in the Azure Data Lake.

One Azure Synapse experience for all Dynamics 365 data

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	-

Business value

Customers can build rich data integrations and reports using data from both customer engagement apps and Finance and Operations apps. Using a single experience in Azure Synapse workspaces, customers can choose and work with data from all of their Dynamics 365 apps.

Feature details

Customers can install and configure the **Export to Azure Data Lake** add-in and then configure a data lake with their Dynamics 365 environment and apply it to both customer engagement apps and Finance and Operations apps. This enables customers to export data from both customer engagement apps and Finance and Operations apps to the data lake.

With one experience, customers can connect to an Azure Synapse workspace and work with data with any tool, including (but not limited to) T-SQL, Spark, Synapse pipelines, or Power BI. Dynamics 365 metadata (friendly names, entity shapes, and data relationships) are reflected in Synapse tools. This enables customers to build rich data integrations and reports to unlock insights hidden in the data.

Regression suite automation tool (RSAT) improvements

Overview

The Regression suite automation tool (RSAT) continues to be an important area for Microsoft and customers. It is a cornerstone for customers moving to the cloud in that they are able to produce automated tests that enable them to easily perform user acceptance tests of new releases and ensure a smooth experience with each upgrade. The 2022 release wave 1 features will improve the usability of RSAT and provide better integration between RSAT and Microsoft Azure DevOps.

Support of test case variants

Enabled for	Public preview	General availability
Users, automatically	May 2022	May 2022

Business value

Companies often need tests of multiple different variants for scenarios, where slight changes to data are all that varies among the tests. This has required creating multiple test cases with

similar steps with each variant, which results in great overhead for test maintenance. This is particularly painful when test steps need to be changed, as well.

This feature provides a cost-effective way to maintain test cases in the Regression suite automation tool (RSAT).

Feature details

This feature provides:

- Support for RSAT to run test cases multiple times. For example, a test case may be run multiple times with identical data to generate data volumes or to measure performance. RSAT will provide an option to specify the number of times a test case should be run repeatedly.
- An effective way of managing how test cases should be run with different data inputs. For example, different data inputs may include tables from the Excel parameter form to cover different variants for the test case.
- Ways to handle variation to how a test case should be run. For example, you'll be able to add conditions to both test cases and test steps to handle a branched type of execution.

Improved integration with Azure DevOps

Enabled for	Public preview	General availability
Users, automatically	Jun 2022	Jun 2022

Business value

This feature improves the usability and efficiency in working with test suites centered around the Regression suite automation tool (RSAT).

Feature details

Customers are not typically familiar with Microsoft Azure DevOps and using DevOps together with RSAT to define and run acceptance tests. Defining and running acceptance tests require time and effort to navigate DevOps. This adds to the cost of onboarding test automation with RSAT and can hold some companies back from using RSAT.

The improved RSAT and DevOps integration focuses on reducing the need for customers to interact directly with DevOps. You will be able to navigate to some of the DevOps features using RSAT. This means you can create new test suites directly in RSAT without leaving the app. The improved integration also offers seamless navigation to perform test runs in DevOps so you can easily review data.

Improvements to the Task recorder experience

Enabled for	Public preview	General availability
Users, automatically	Aug 2022	Aug 2022

Business value

Customers have provided feedback that the Task recorder can be difficult to use, and this has discouraged some companies from onboarding test automation.

This feature improves the usability of the Task recorder and adds a few additional changes that make it easier to use with the Regression suite automation tool.

Feature details

Based on customer feedback, Microsoft has improved the usability of the Task recorder. Features have been added to the Task recorder that provide support when recording, and help prevent users from making mistakes during the recording experience.

New options are added to support the validation of system controls, such as SQL Server Reporting Services and document upload. This enables new scenarios that can now be recorded that were not supported earlier, such as expense management scenarios.

Improved Azure DevOps experience

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2022	Sep 2022

Business value

Customers that use the Regression suite automation tool (RSAT) and Azure DevOps are commonly not taking advantage of the full features available in DevOps. This feature seeks to provide information and guidance to help customers obtain more value from using DevOps as part of the toolbox for driving test automation.

Feature details

This feature provides information on how to set up and configure Azure DevOps to be used with RSAT. This includes information on how to set up a pipeline for running test cases automatically. The test cases can be run automatically per scheduled times or by manually triggering them, which is an alternative to running them manually from within RSAT. This capability is assisted by a DevOps extension with common RSAT tasks that make it easy to integrate DevOps with RSAT.

This feature also includes guidance on how to build dashboards with useful charts to help visualize and analyze test results efficiently.

Human Resources

Overview of Dynamics 365 Human Resources 2022 release wave 1

Dynamics 365 Human Resources helps businesses empower and engage their workforce, provide modern benefits packages, and stay compliant. It allows HR professionals to be more strategic, providing the workforce insights they need to build better organization structures, compensation, benefits, leave and absence, compliance, employee and manager self-service, and performance management programs. Human Resources centralizes people data to build an HR ecosystem, using Microsoft Power Platform to tailor workflows, improve business intelligence, and connect with third-party best-of-breed HR solutions. Human Resources connects people and operations data to help you optimize workforce costs and take better care of employees.

For 2022 release wave 1, we are focusing on three key areas:

- **Improving business automation:** Equip HR professionals with the ability to tailor experiences and automatically complete processes when employees are joining, leaving, and moving within an organization.
- **Intelligent talent management:** Provide intelligent talent management capabilities to enable companies to ensure the right people are in the right jobs and plan for future investments.
- **Environment migration:** Deliver migration capabilities to enable moving to the merged infrastructure.

The next sections provide details about the specific features we're releasing across these areas.

What's new and planned for Dynamics 365 Human Resources

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Employee development

Employee development in Human Resources lets you define and map skills to find current employees or candidates with qualifications that directly relate to business needs.

Feature	Enabled for	Public preview	General availability
Intelligent talent management improves workforce	Admins, makers, marketers, or analysts, automatically	Aug 2022	

General

We're enhancing our user experience and providing general improvements to Dynamics 365 Human Resources that apply to multiple workspaces and pages.

Feature	Enabled for	Public preview	General availability
Migration to Finance and Operations infrastructure	Admins, makers, marketers, or analysts, automatically	Mar 2022	Jun 2022

Integrations and extensibility

A core focus for Dynamics 365 Human Resources is ensuring customers are able to extend and expand application functionality through integrations and customizations. We're making new integrations available and providing new features that streamline custom integrations through Microsoft Dataverse.

Feature	Enabled for	Public preview	General availability
Enable simplified integration with learning management system providers	Users by admins, makers, or analysts	Apr 2022	Jul 2022

Organization and personnel management

Organization management in Human Resources lets you define the groups, legal entities, operating units, and hierarchies in your organization. Personnel management allows managers and HR users to start the hiring process for a position, set up the approval process, and manage employees and positions.

Feature	Enabled for	Public preview	General availability
Improved business process automation – active employees	Admins, makers, marketers, or analysts, automatically	Aug 2022	
Improved business process automation – employees joining	Admins, makers, marketers, or analysts, automatically	Aug 2022	
Improved business process automation – employees leaving	Admins, makers, marketers, or analysts, automatically	Aug 2022	

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

Employee development

Overview

Employee development in Human Resources lets you define and map skills to find current employees or candidates with qualifications that directly relate to business needs.

Intelligent talent management improves workforce

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2022	-

Business value

Companies need to have a clear understanding of the skills required to optimize business processes and determine the workforce's ability to perform. What is also clear is that the skills needed today are not the same skills that will be needed by the organization in the future. As the business grows and reacts to the ever-changing market, businesses must have

the ability to understand what skills will be needed in their workforce to meet future demands.

Feature details

An intelligent-skills gap analysis is needed to understand the gap between the skills needed for the organization and employees to be successful and the skillset held by the organization's current workforce. By providing this intelligent talent management capability, Dynamics 365 Human Resources enables companies to ensure the right people are in the right jobs, as well as plan for the future.

- **Internal mobility:** Match job postings to employees based on skills, certifications, and experience.
- **Coaching and mentoring:** Enable managers to have meaningful career conversations based on skill insights.
- **Learning:** Provide recommendations for learning content and automatically add to goals and course assignments.
- **Recruiting:** Automatically add skills to recruiting requisitions based on job requirements.

Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

General

Overview

We're enhancing our user experience and providing general improvements to Human Resources that apply to multiple workspaces and pages.

Migration to Finance and Operations infrastructure

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2022	Jun 2022

Business value

Now that Dynamics 365 Human Resources is on the Finance and Operations infrastructure, standalone Human Resources customers and Finance and Human Resources customers need to migrate to the new infrastructure.

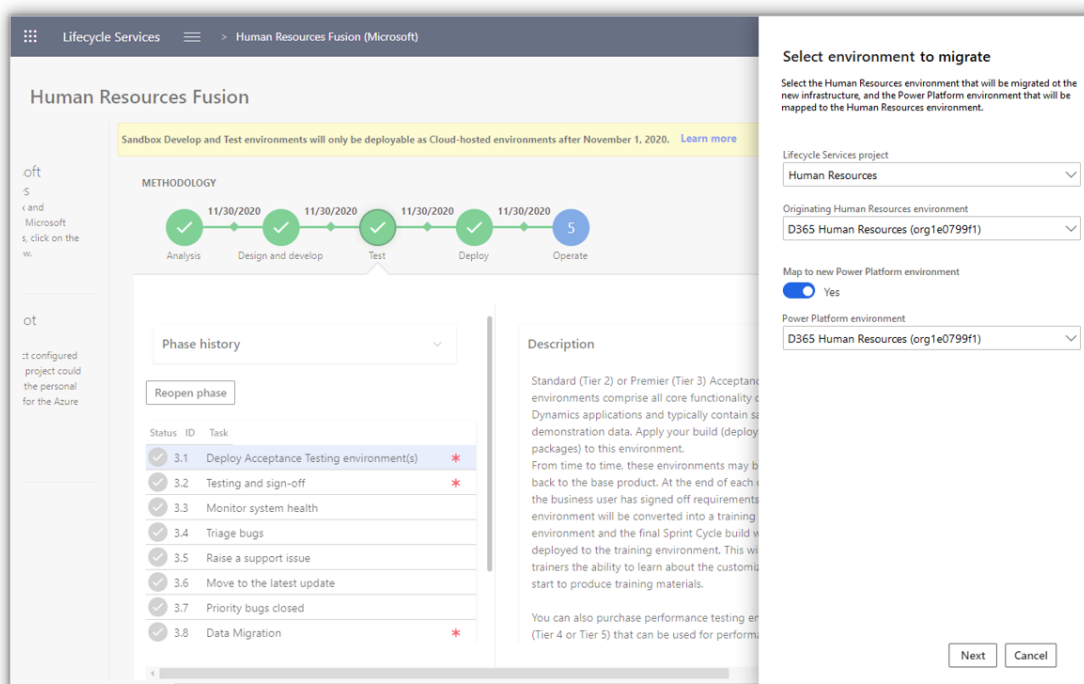
Feature details

Customers who are on the standalone Human Resources:

- Copying data and migrating Power Platform extensions to the Citizen Application Platform infrastructure.

Customers who are on Dynamics 365 Finance and using the HR module:

- Copying data and migrating Power Platform extensions to the Citizen Application Platform infrastructure.
- Creating entities where needed.
- Export from Human Resources and import into a Finance environment.



Migration options in Lifecycle Services.

Integrations and extensibility

Overview

A core focus for Dynamics 365 Human Resources is ensuring customers are able to extend and expand application functionality through integrations and customizations. We're making new integrations available and providing new features that streamline custom integrations through Microsoft Dataverse.

Enable simplified integration with learning management system providers

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2022	Jul 2022

Business value

This new capability will enhance employee and manager experience by bringing together all the training data from partner learning management systems on a single pane of glass, right next to all their other employee data.

Feature details

With the continued globalization of workforces, the ability to assign, deliver, and track employee training is becoming more of a challenge for companies than ever before. To bring the utility of existing learning management systems closer to Dynamics 365 Human Resources, we need to build integrations with partners. This will fill a gap in functionality while also creating a centralized place to view training data right next to all their other employee data.

We will create a set of scenario-specific APIs in our integration platform, based on Microsoft Dataverse, that are streamlined to enable partners to quickly create tight integrations with Human Resources. This will enable an end-to-end scenario of assigning online training to an employee for companies using a wide range of partner-learning management systems.

Organization and personnel management

Overview

Organization management in Human Resources lets you define the groups, legal entities, operating units, and hierarchies in your organization. Personnel management allows managers and HR users to start the hiring process for a position, set up the approval process, and manage employees and positions.

Improved business process automation – active employees

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2022	-

Business value

Having an efficient way to manage employees who are joining or leaving your organization is critical. Dynamics 365 Human Resources will not only save HR professionals time but will also help ensure accurate employee information and provide a more comprehensive employee experience.

Feature details

Dynamics 365 Human Resources provides HR professionals the ability to tailor experiences and automatically complete processes. This feature will enable auto-approvals for information such as skills and certifications that are entered by Human Resources.

Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Improved business process automation – employees joining

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2022	-

Business value

HR professionals are faced with challenges with managing employee information for people joining and leaving the organization. Many HR professionals struggle with not having the right information available when hiring employees and missing critical steps in the onboarding process. Too much time is spent enrolling or unenrolling employees individually from the HR programs that are offered.

Feature details

Having an efficient way to manage employees who are joining or leaving the organization is critical. Dynamics 365 Human Resources provides the ability to tailor experiences and automatically complete processes. Dynamics 365 Human Resources will not only save HR professionals time but will also help ensure accurate employee information and provide a more comprehensive employee experience.

This feature allows:

- HR to select data that's important to them to be included when hiring a new employee and set defaults.
- Automatic assignment of onboarding guides based on job or position information.
- Automatic enrollment of employees in compensation, benefit, and leave plans based on certain criteria such as department or position.

Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Improved business process automation – employees leaving

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2022	-

Business value

Having an efficient way to manage employees who are joining or leaving your organization is critical. Dynamics 365 Human Resources will not only save HR professionals time but will also help to ensure accurate employee information and provide a more comprehensive employee experience.

Feature details

This feature will enable you to:

- Automatically unenroll and process leave accruals when someone leaves (prorated).
- Automatically assign offboarding guides.
- End terms of employment when employment is terminated.

Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Commerce

Overview of Dynamics 365 Commerce 2022 release wave 1

Dynamics 365 Commerce is an end-to-end solution delivering seamless commerce across all channels. It encompasses sales, mobility, intelligence, and productivity, to help customer-facing businesses achieve more in a cloud-first, mobile-first way. The solution offers comprehensive support to operate a broad range of business processes including e-commerce, clienteling, point of sale, call center, merchandising, inventory, and channel management, while providing a unified and immersive customer experience for B2C and B2B engagements across physical and digital channels.

Organizations can drive better business outcomes with Commerce through:

- **Engaging customers across channels:** Give your customers or partners the option to purchase when, how, and where they want—on any device—by delivering a frictionless and consistent engagement across physical and digital channels.
- **Building your e-commerce presence:** Grow your business with a unified digital commerce solution that scales to meet your needs across business and consumer sales.
- **Enabling AI-driven intelligent commerce:** Delight your customers with engaging, personalized, and item-based AI-powered recommendations discovery experiences to increase repeat visits, customer retention, and loyalty.
- **Modernizing retail stores and streamlining operations:** Create personalized and friction-free retail commerce experiences through user-friendly applications powered by robust back-office operations.
- **Gaining agility and scalability through a natively headless solution:** Support traditional and emerging channels by using an agile, API-driven headless commerce engine to help adapt to current and emerging needs.

Key investments for this wave include:

- **Personalization with Customer Insights and customer journey orchestration:** Digital commerce organizations will be able to use site builder to target customer groups in Dynamics 365 Customer Insights with specific page treatments and offers.
- **Streamlined omnichannel media management:** Leverage new workflows in headquarters to manage media assets that are used across channels.
- **New B2B e-commerce business opportunities:** New capabilities such as sales agreements and on-behalf-of ordering to facilitate and grow B2B business opportunities.
- **Integrated experimentation:** Create, edit, manage, and analyze the full lifecycle of A/B experiments in site builder.
- **Enable customer service chat in e-commerce:** Use chat to connect call center agents with customers on your e-commerce site.

What's new and planned for Dynamics 365 Commerce

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

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This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Feature	Enabled for	Public preview	General availability
Direct fiscal integration from POS	Users by admins, makers, or analysts	-	Apr 2022
Enhanced fiscal connector configuration	Users by admins, makers, or analysts	-	Apr 2022
Integration with Sitecore Content Hub	Admins, makers, marketers, or analysts, automatically	✓ Nov 19, 2021	Apr 2022
Additional filter options in POS inventory operations	Users, automatically	Jan 2022	Apr 2022
Integrated experimentation in Dynamics 365 Commerce	Admins, makers, marketers, or analysts, automatically	Jan 2022	Apr 2022
Order cancellation for e-commerce	Admins, makers, marketers, or analysts, automatically	Jan 2022	Apr 2022
PayPal Cart Checkout support in e-commerce	Users by admins, makers, or analysts	Jan 2022	Apr 2022
Show or hide tax breakdown in e-commerce when prices include sales tax	Users by admins, makers, or analysts	Jan 2022	Apr 2022
Support for catalogs in e-commerce channel	Admins, makers, marketers, or analysts, automatically	Jan 2022	Apr 2022

Feature	Enabled for	Public preview	General availability
Chat in Commerce with Power Virtual Agents and Omnichannel for Customer Service	Admins, makers, marketers, or analysts, automatically	Jan 2022	Apr 2022
Payments in installments with the Dynamics 365 Payment Connector for Adyen for Brazil	Users by admins, makers, or analysts	-	Apr 2022
B2B e-commerce	Admins, makers, marketers, or analysts, automatically	Feb 2022	Apr 2022
Edit customer information asynchronously in POS and e-commerce channels	Users by admins, makers, or analysts	Feb 2022	Apr 2022
Honor site and warehouse settings on trade agreement in Commerce pricing engine	Users by admins, makers, or analysts	Feb 2022	Apr 2022
Personalization with Dynamics 365 Customer Insights	Admins, makers, marketers, or analysts, automatically	Feb 2022	Apr 2022
Apple Pay with Dynamics 365 Payment Connector for Adyen	Users by admins, makers, or analysts	Apr 2022	Jul 2022
Copy CMS content using site builder and manage it with API or Power Platform connector	Admins, makers, marketers, or analysts, automatically	Apr 2022	Jul 2022
Integrated omnichannel media asset management improvements	Admins, makers, marketers, or analysts, automatically	Apr 2022	Jul 2022
Store Commerce app for Windows	Admins, makers, marketers, or analysts, automatically	Apr 2022	Jul 2022
Google Pay with Dynamics 365 Payment Connector for Adyen	Users by admins, makers, or analysts	May 2022	Jul 2022

Description of **Enabled for** column values:

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Direct fiscal integration from POS

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2022

Business value

This Dynamics 365 Commerce feature will increase the flexibility in selecting appropriate in-store topologies in countries or regions that have fiscal registration requirements. It will be possible to integrate a point of sale (POS) with a fiscal device or service directly when no physical connection is required. This functionality, for example, enables fiscal integration for mobile devices with no shared hardware station required.

Feature details

The feature extends the [fiscal integration framework](#) by adding a capability to create fiscal connectors that will be executed in POS. This type of connector will communicate with a fiscal device or service that provides an HTTP API and will not require a dedicated physical machine in the store to be plugged in or deployed on.

The following capability is currently planned to be released after the general availability of this feature:

- A sample of the direct fiscal integration from POS for selected countries or regions. This capability is currently planned for May 2022.

Enhanced fiscal connector configuration

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2022

Business value

This new Dynamics 365 Commerce capability increases the flexibility in configuring fiscal integration in stores in countries or regions that have fiscal registration requirements. With these improvements, it will be possible to define connections settings for fiscal connectors for individual point of sale (POS) registers, as well as to disable the fiscal registration for selected POS registers.

Feature details

The feature extends the [fiscal integration framework](#) by adding the following options:

- An option to define connection settings for a fiscal connector on the individual POS register level, in addition to the hardware profile level. This will provide the ability to configure different connection settings for individual fiscal devices or service instances used by different POS registers in the store. This capability is currently planned for April 2022.
- An option to disable fiscal registration for selected POS registers in a fiscal registration-enabled store. Store associates will be able to use the registers for non-sales operations (such as inventory management operations), and to create sales that can then be completed on fiscal registration-enabled registers. This capability is currently planned for May 2022.
- The option to review the fiscal registration process state and details on the **Settings** page of POS. This capability is currently planned for May 2022.

Integration with Sitecore Content Hub

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓ Nov 19, 2021	Apr 2022

Business value

This release provides a seamless integration with the Sitecore Content Hub CMS, an industry-leading, enterprise content management solution. By providing the ability to easily configure Sitecore Content Hub for use with Site Builder, customers can easily consume images, videos, and enriched content for use in marketing and merchandising pages. This functionality enables enterprise organizations to simplify brand management, marketing, and product assets in one system for use across print, media, and digital experiences.

Feature details

A data connector will automatically push the Dynamics 365 Commerce product and category data into your Sitecore Content Hub instance allowing additional digital asset management and product enrichment options for your Commerce channels. Content and assets stored in Sitecore are simple to access through inline authoring workflows within Dynamics 365

Commerce site builder. These inline Commerce site builder workflows will allow authors to choose digital assets or HTML fragments from Sitecore in a seamless and efficient workflow.

Additional filter options in POS inventory operations

Enabled for	Public preview	General availability
Users, automatically	Jan 2022	Apr 2022

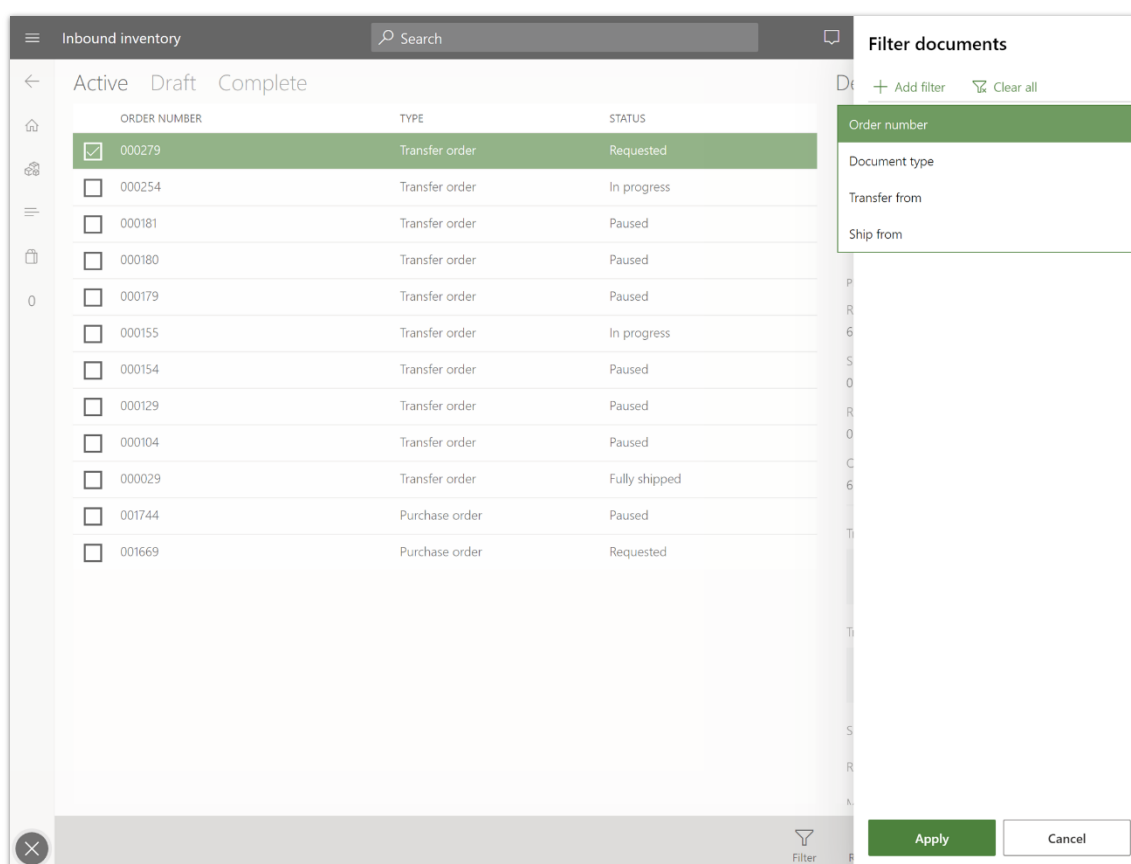
Business value

The current in-market point of sale (POS) inventory operation in Dynamics 365 Commerce only supports the **Order number** filter option in the **Inbound inventory** and **Outbound inventory** operations. Organizations who need additional filter capabilities have to build custom extensions. This feature will provide support for additional filter options that are commonly requested across POS inventory operations, thereby eliminating the need for unnecessary extensions and significantly improving the efficiency of the store inventory operation.

Feature details

With this feature, the following filter options will be supported in the POS inventory operation directly out of the box.

- **Inbound inventory**
 - List view: Order number, Type, Status, Transfer from (location)
 - Details view: Product number, Product (name), Location
- **Outbound inventory**
 - List view: Order number, Status, Transfer to (location)
 - Details view: Product number, Product (name), Location
- **Inventory adjustment**
 - List view: Journal number, Journal name, Description, Default adjustment type
 - Details view: Product number, Product (name), Location, Adjustment type
- **Inventory movement**
 - List view: Journal number, Journal name, Description
 - Details view: Product number, Product (name), From (location), To (location)
- **Stock count**
 - List view: Journal number, Journal name, Description, Status
 - Details view: Product number, Product (name), Location



Filter options in the Inbound inventory operation.

Integrated experimentation in Dynamics 365 Commerce

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jan 2022	Apr 2022

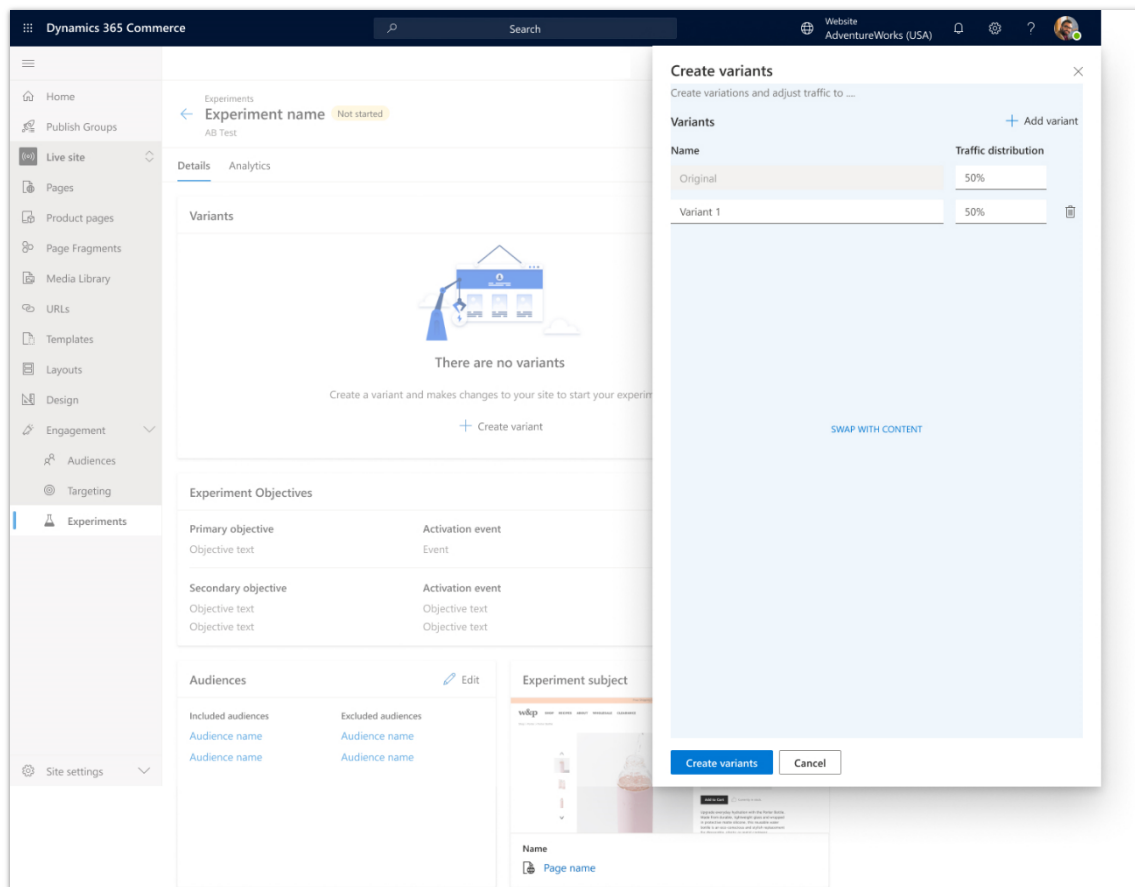
Business value

With the functionality that enables you to conduct controlled experiments such as A/B tests natively in Dynamics 365 Commerce e-commerce sites, you can validate hypotheses about the effectiveness of your B2B and B2C e-commerce pages and make decisions with data-driven confidence. You will be able to easily make updates to your e-commerce website experiences and measure the impact of these changes directly in the site builder interface, thereby driving increased customer engagement and conversion rates.

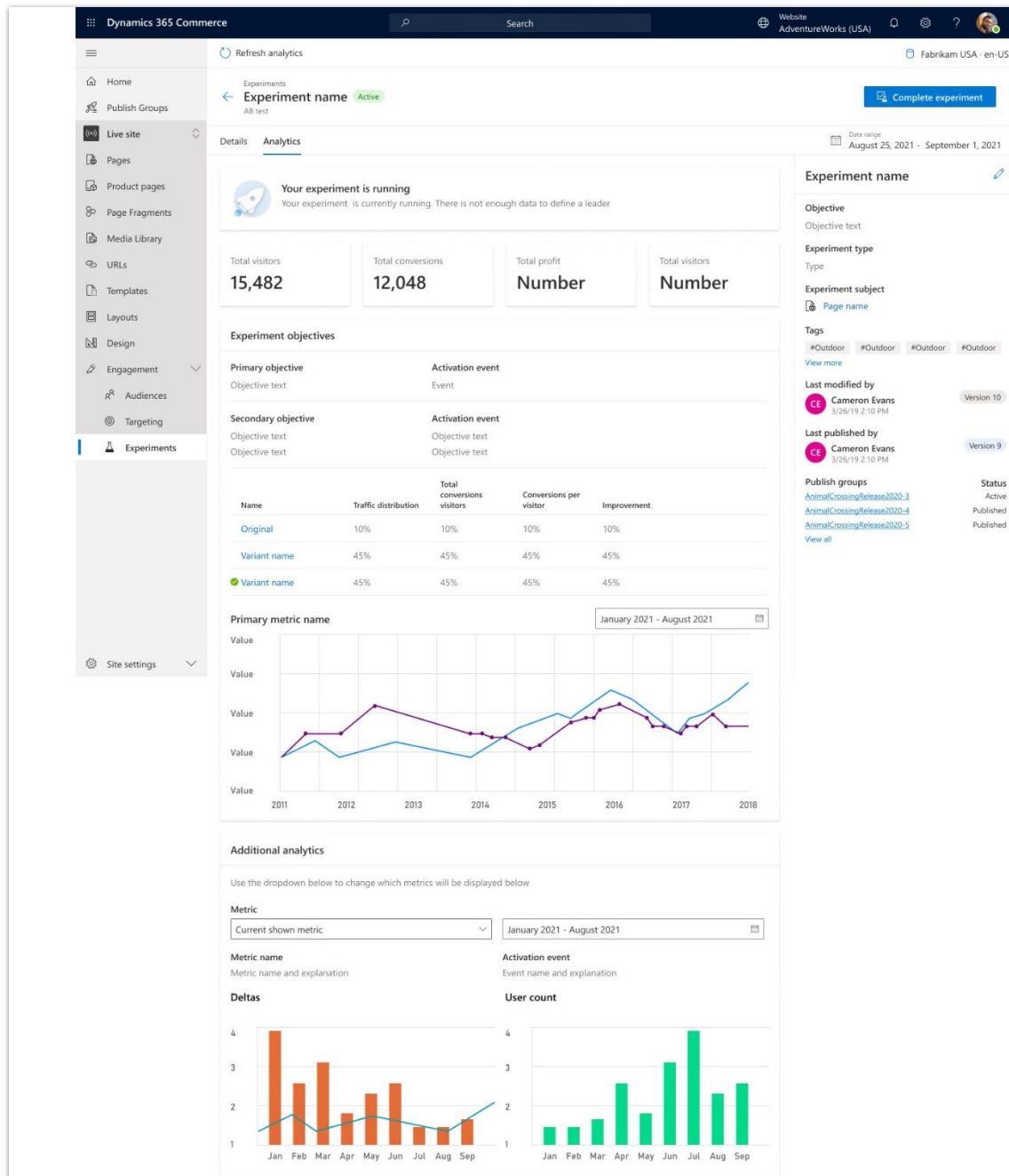
Feature details

This out-of-the-box feature enables the seamless creation of experiments and related content treatments within Dynamics 365 Commerce site builder. You will be able to create, edit, and manage the full lifecycle of an experiment natively within your site builder instance.

Additionally, event streams generated from the web storefront will support end-to-end analytics and reports defining experiment results, all also available within site builder.



Create A/B/n experiments and content variations in site builder.



View experiment analytics in site builder.

Order cancellation for e-commerce

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jan 2022	Apr 2022

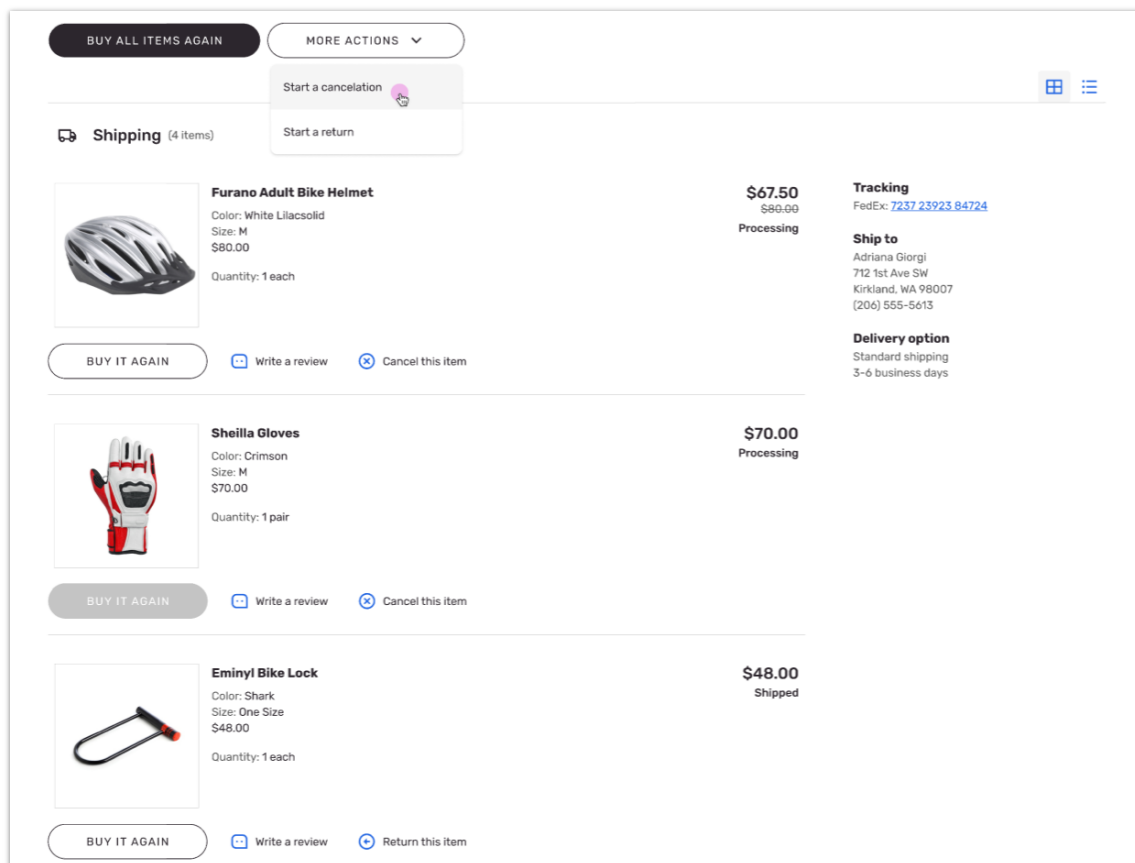
Business value

Customers on an e-commerce site may request cancellation of their orders for a variety of reasons. Providing an intuitive and smooth order cancellation experience contributes to better customer satisfaction. Additionally, organizations expect systematic processing of cancellation requests initiated from the e-commerce channel, including automatic refund, customer communication, and necessary auditing.

Feature details

This Dynamics 365 Commerce feature enables an end-to-end experience for consumers on an e-commerce site for initiating a request to cancel an entire order or individual order lines that are not yet fulfilled.

- The order history and order details modules will be enhanced to support the order cancellation function.
- Organizations will be able to configure cancellation reason codes in Commerce HQ, and e-commerce users will be able to associate cancellation reasons with entire orders or specific order lines during the cancellation flow.
- Organizations will be able to view and manually process e-commerce order cancellation requests in Commerce HQ.
- Refunds will be issued automatically to consumers after cancellation.
- Confirmation emails will be sent to consumers after the cancellation request is submitted and processed.
- The cancellation function works for both B2C and B2B e-commerce sites. For B2B, the organization admins will be able to cancel company-wide orders on behalf of other users.



Order cancellation from e-commerce order details page.

PayPal Cart Checkout support in e-commerce

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2022	Apr 2022

Business value

Dynamics 365 Commerce will add support for PayPal Cart Checkout (formerly PayPal Express) to enable a faster e-commerce checkout experience. PayPal Cart Checkout allows a user who signs in to PayPal for a payment to use their address information that is stored in PayPal on the e-commerce site, thereby reducing the data entry required for a customer to check out. As users return from the PayPal payment window, the checkout form will be populated with their chosen user information and will be ready for the user to confirm the purchase. Streamlining a user's experience from cart to order completion will reduce friction for online purchase flows.

Feature details

This feature will add the following capabilities for your e-commerce experience:

- An **Express** section in the checkout page to allow users to check out using PayPal Cart Checkout.
- A dedicated module for PayPal Cart Checkout.
- Auto-population of shipping address, billing address, and email address when returning from PayPal Cart Checkout to the e-commerce checkout page.
- Auto-selection of the first delivery method against the cart to streamline the checkout flow.
- The ability to include the **PayPal Cart Checkout** button in the cart page.

Show or hide tax breakdown in e-commerce when prices include sales tax

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2022	Apr 2022

Business value

Businesses in some legal entities may include sales tax in their prices. In that scenario, businesses can either show the tax breakdown by extracting the tax portion from prices and charges, or hide the tax breakdown. This feature allows businesses to organize the order summary in the e-commerce channel to meet business requirements that apply to prices including sale tax.

Feature details

This feature provides the following capabilities:

- Businesses can display tax information explicitly in the order summary on cart, checkout, confirmation, and order details pages in the e-commerce channel.
- Businesses can hide tax information in the order summary on cart, checkout, confirmation, and order details pages in the e-commerce channel. Prices and charges in the order summary will be displayed inclusive of taxes.

Prices include taxes - Hide taxes breakup	Prices include taxes - Show taxes breakup.
Order summary Subtotal \$130.00 Shipping \$15.00 <hr/> AMOUNT DUE \$145.00	Order summary Subtotal 122.07 Shipping \$14.08 Tax \$8.85 <hr/> AMOUNT DUE \$145.00

Show or hide tax breakdown in prices include sales tax scenario on e-commerce channel.

Support for catalogs in e-commerce channel

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jan 2022	Apr 2022

Business value

You can now define partner-specific product catalogs for your B2B business partners. This allows you to offer a subset of products that may include special pricing on a partner-by-partner basis.

Feature details

In a B2B e-commerce business model, business partner organizations may contract to purchase a subset of the products from the retailer's catalog. Typically, special pricing is negotiated for these product subsets. Accordingly, buyers within business partner organizations want to see and buy from only these contracted product subsets from the B2B e-commerce website. This can now be achieved by defining one or more business partner-specific catalogs with products and prices as negotiated with the business partner. When signed in to the site, business partner users will only see the products and prices as defined in the catalog associated with their organization.

The following capabilities are planned as part of this feature:

- Associate a default catalog to the e-commerce website.
- Associate one or multiple catalogs to the customer hierarchies associated with a business partner organization and set a default catalog.
- Associate a default catalog to the customers in the customer hierarchy.
- Render the e-commerce site with products as per the catalog associated with the customer that's signed in.

- Provide capability for a customer to change the default catalog to another valid catalog on the e-commerce site.

Chat in Commerce with Power Virtual Agents and Omnichannel for Customer Service

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jan 2022	Apr 2022

Business value

A first-class customer support experience is key to providing a personalized and delightful commerce experience for consumers. Multiple commerce touchpoints exist today, such as physical stores, online channels, and social channels, and consumers expect personalized support experience in all of them.

This feature helps you to increase cart conversions to sales, increase personalized engagement with consumers, and enhance customer service with integration of a human agent and self-service Power Virtual Agents chatbots. Improvements to the agent experience include access to real-time customer profile, order, and purchasing data.

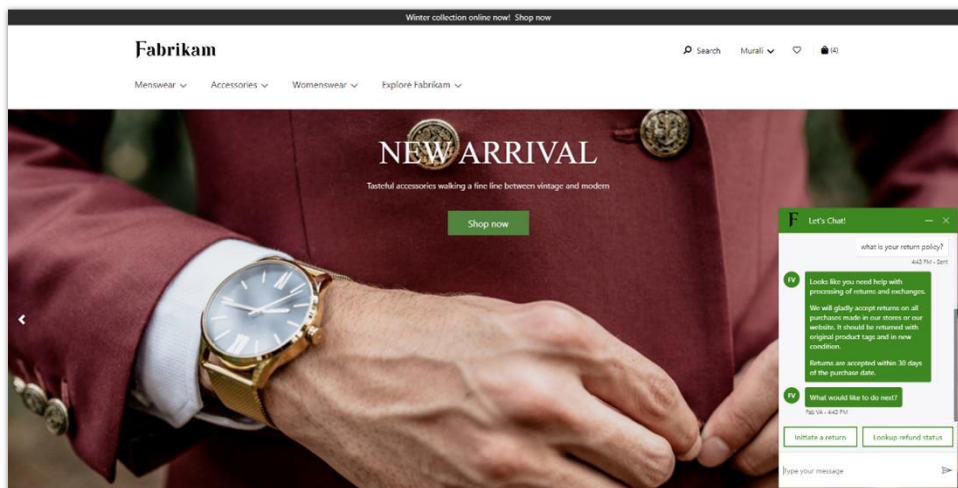
Feature details

Customer service functionality is now a part of Dynamics 365 Commerce. This functionality leverages the capabilities in Dynamics 365 Omnichannel for Customer Service and Power Virtual Agents.

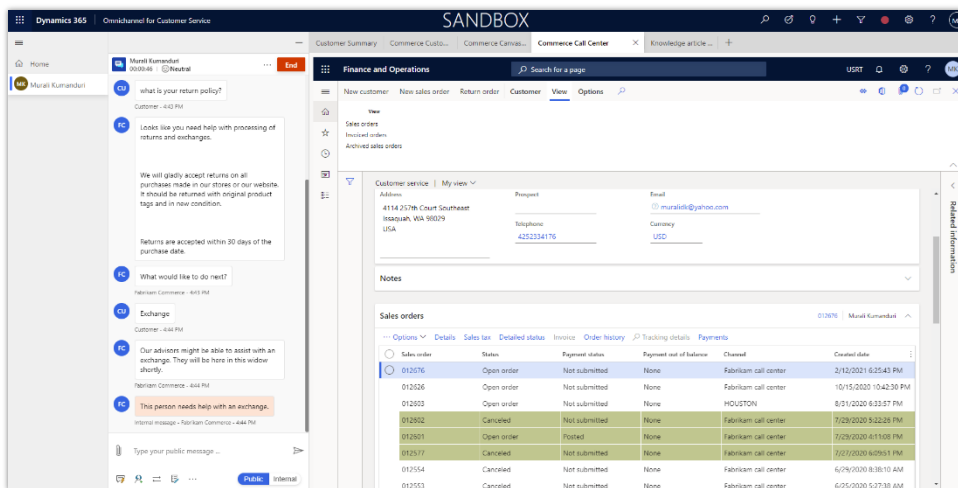
Site administrators will be able to configure a chat widget on their e-commerce site with proactive notification capability based on different criteria. The chat can be invoked proactively based on different triggers like time spent on the site, number of visits to a page, cart value, or number of items in the cart. Customer context is passed to Power Virtual Agents, Omnichannel for Customer Service for chatbot, and the live agent, in order to be able to act on behalf of the customer.

Customer service agents will be enabled to better serve customers by using a unified view of profile and transaction data across the Dynamics 365 apps in the Omnichannel for Customer Service support channel. Agents will act on data from the service channel.

The Power Virtual Agents starter content pack will be made available to enable retailers to jumpstart deployment and make modifications to meet their business needs. Topics in the content pack will showcase how Power Automate connects to Commerce HQ and Commerce Server APIs to act on behalf of the customer via Power Virtual Agents.



Example of chat module in Dynamics 365 Commerce e-commerce.



Chat session between customer service agent and customer.

Payments in installments with the Dynamics 365 Payment Connector for Adyen for Brazil

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2022

Business value

This feature extends the out-of-the-box Dynamics 365 Payment Connector for Adyen to support paying in installments for Brazil. This payment option is popular in Brazil because shoppers can receive goods or services immediately but have the option to spread the cost over multiple months.

Feature details

The [Dynamics 365 Payment Connector for Adyen](#) is an out-of-the-box payment connector that supports various payment instruments globally. This feature leverages the connector's built-in [credit card installments](#) capability and extends the payment connector to support paying in installments in stores that are located in Brazil.

While paying by card, a retail customer can make a choice to pay in installments. A cashier can then select the **Installments** payment preference type and specify the number of payments that is requested by the customer. The payment preference information is passed to Adyen with other credit card payment data. Further installment processing is handled by Adyen and the customer's bank. The purchase amount is split into the specified number of equal monthly payments. These payments are charged to the customer's credit card every 30 days until their purchase is paid in full.

B2B e-commerce

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	Apr 2022

Business value

With the launch of B2B e-commerce in April 2021, Dynamics 365 Commerce provides a unique and differentiating solution to the market by supporting both B2B and B2C e-commerce scenarios in one offering, while providing integrated and end-to-end retail scenarios with horizontal ERP capabilities. These capabilities extend beyond retail and commerce by appealing to organizations such as manufacturing, dealership, consumer packaged goods (CPG), and other industry segments.

This release will augment the existing B2B e-commerce offering with additional ordering capabilities for account managers and business buyers, support for additional pricing and merchandising scenarios, and more.

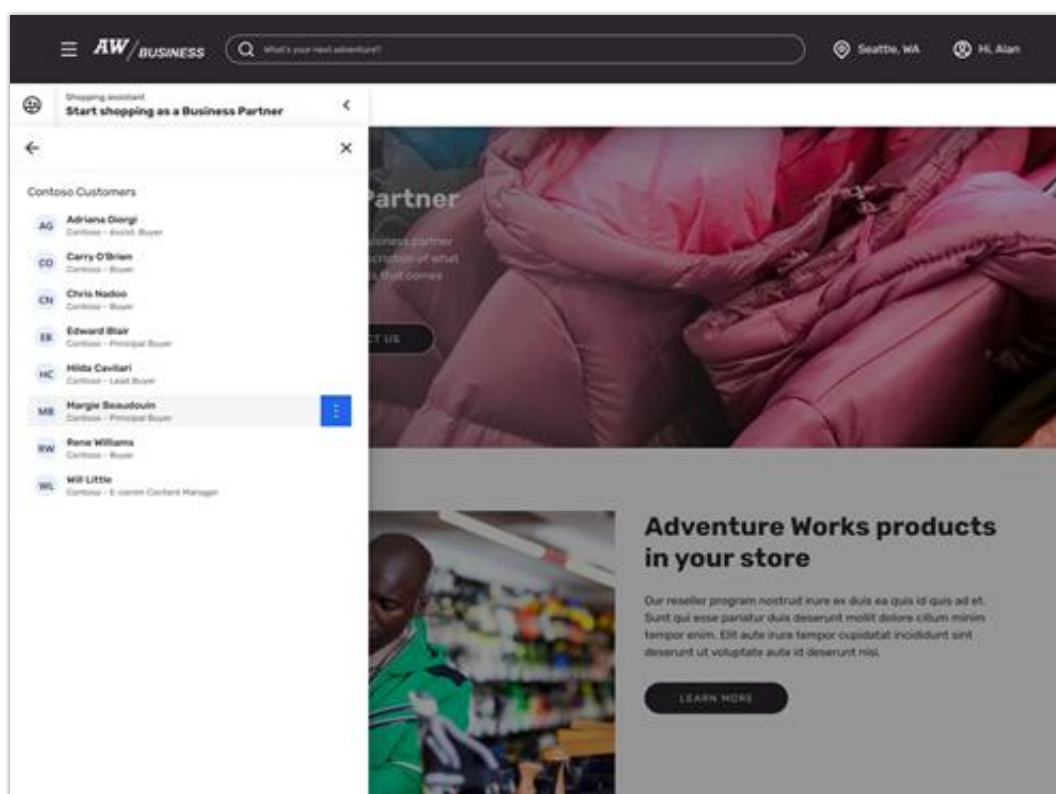
Feature details

The following B2B e-commerce capabilities are planned for this release:

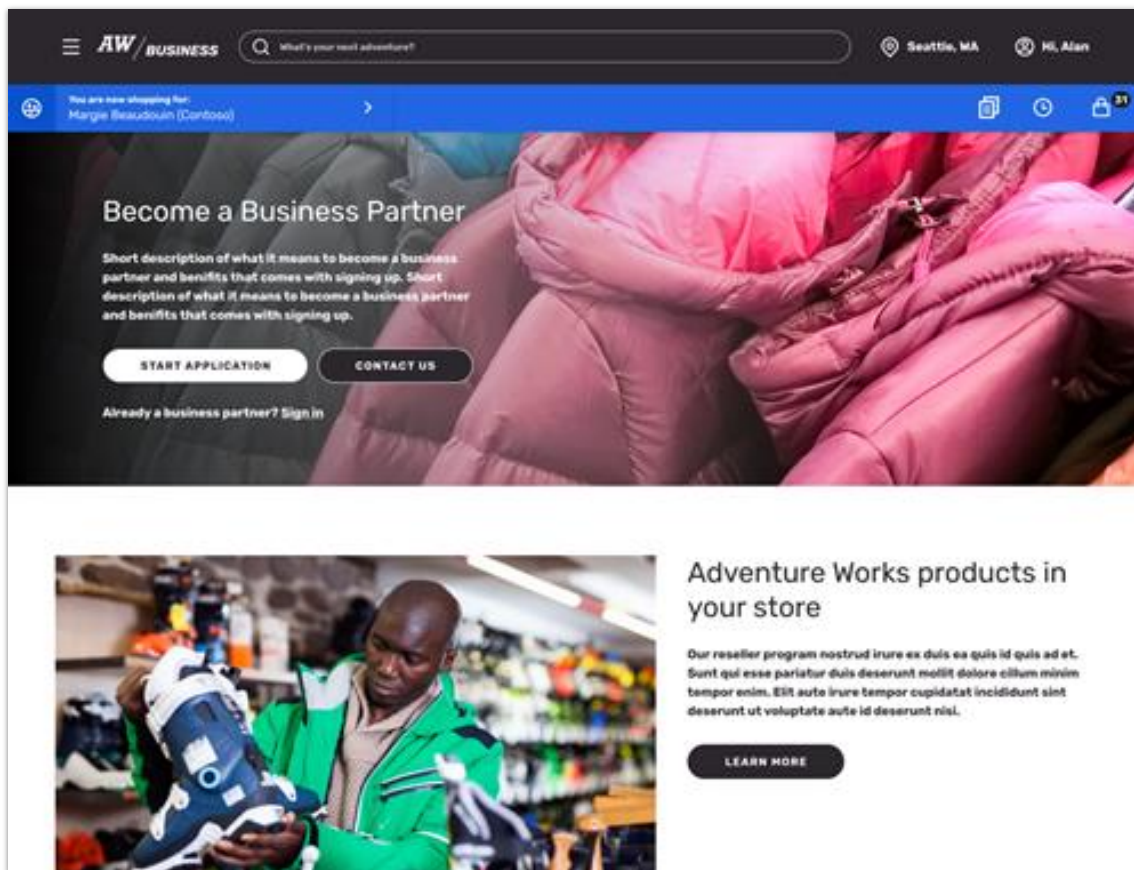
- **“On behalf of” ordering:** This capability will enable an account manager to sign in to the B2B e-commerce website in the context of a user for an account that they are managing. They will be able to view the same product, price, promotion, and discount experience as the user. Account managers can also place orders on behalf of the user. This capability enables scenarios where account managers receive orders offline and must enter those orders into the system on behalf of another user.
- **Sales agreement and contract-based pricing:** B2B trade relationships are often driven based on contracted pricing for products, with volume and quantity-based qualifying criteria baked in. This capability will allow you to define these contracts in the system

using sales agreements, and the contracted prices will be applied in the B2B ordering experience on the website.

- **“Request for Quote” process:** Business partners often need to request special pricing or terms through a quote for a given purchase, even when prices and terms are predefined between the parties. This can be true for ad hoc bulk purchases or for purchases of products that are highly configurable. This capability will allow business partners to “Request for a Quote” for a given set of products through the B2B e-commerce website. The request can then be managed by the account manager through Commerce HQ or Dynamics 365 Sales. The response can be viewed, collaborated on, and approved or rejected by the business partner user on the B2B website.
- **Uploading cart lines with Excel:** It is common for business purchase orders to contain thousands of order lines. Manually entering these orders through an e-commerce site is not efficient for a business buyer. New functionality in Commerce will allow a business buyer to upload products to the cart using Excel, allowing for the quick creation of large orders.
- **Sharing order templates between users:** Order templates provide a business user a way to quickly enter repeatable orders on a B2B e-commerce website. Extending the current capability and allowing these templates to be shared among business users, and between account managers and business users will greatly improve the ordering experience within the B2B e-commerce solution.



Start shopping as a business partner.



Become a business partner.

Edit customer information asynchronously in POS and e-commerce channels

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business value

High availability and high performance are default expectations for e-commerce sites today. To help meet these expectations, Dynamics 365 Commerce e-commerce sites will no longer need to rely on real-time communication with Commerce HQ when you edit customer information. The ability to edit customer information asynchronously for async and non-async customers is a way to reduce real-time calls to Commerce HQ.

Feature details

This feature adds the following capability for editing customer information asynchronously:

- Ability to edit customer information asynchronously, regardless of whether the customer was created synchronously or asynchronously.

Honor site and warehouse settings on trade agreement in Commerce pricing engine

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2022	Apr 2022

Business value

Today, site and warehouse storage dimensions on a trade agreement definition are not fully honored by the in-market Dynamics 365 Commerce pricing engine. For example, if a site is specified and a warehouse is not specified on a trade agreement, the Commerce pricing engine will ignore the site and apply the trade agreement to all sites. This has caused inconsistent behavior between Dynamics 365 Supply Chain Management and Commerce for pricing calculations.

Feature details

This feature enhances the Commerce pricing engine so that it will honor site and warehouse settings on a trade agreement price or trade agreement discount when determining the matching trade agreement for price calculation. With this feature enabled, a trade agreement can be applied to a sales order line only when the fulfillment location set on the line matches the specified site and warehouse on the trade agreement.

Personalization with Dynamics 365 Customer Insights

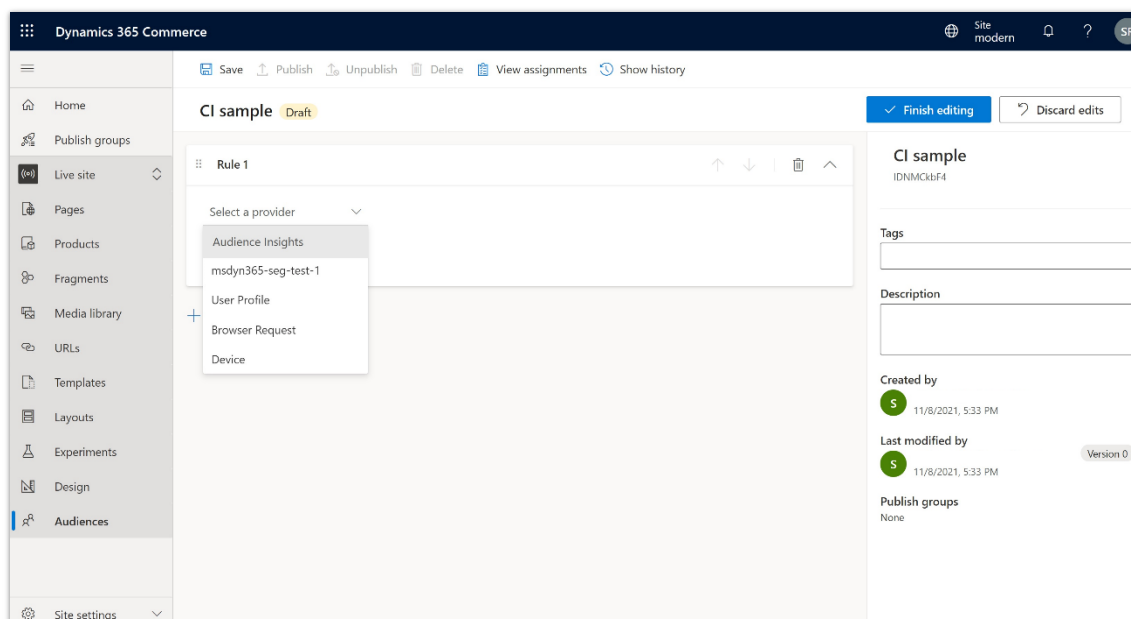
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	Apr 2022

Business value

Dynamics 365 Commerce will enable you to target customer groups in Dynamics 365 Customer Insights with different content and offers based on customers' behaviors and demographics. This functionality will enable you to personalize page content, pricing, promotions, and discounts for these target groups and audiences to help drive increased user engagement and satisfaction.

Feature details

This feature enables you to target segments or groups of your customers based on transactional, observational, and behavioral data from [audience insights for Dynamics 365 Customer Insights](#). You will be able to consume these segments through an intuitive interface in site builder and generate audience groupings to provide personalized experiences, such as varied layouts and composition of marketing and merchandizing pages, unique pricing, offers, discount codes, promotions, and loyalty opportunities across the digital commerce channel.



Connect to audience insights in Dynamics 365 Commerce site builder.

Apple Pay with Dynamics 365 Payment Connector for Adyen

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2022	Jul 2022

Business value

Dynamics 365 Commerce will support Apple Pay through the Dynamics 365 Payment Connector for Adyen for point of sale (POS) and e-commerce checkout scenarios. Commerce will support online 1-click checkout scenarios for systems supporting Apple Pay checkout. This functionality will save consumers time during checkout on supported iOS devices, and enable order review, updates, payment, and express checkout directly using Apple Pay with Adyen. The Apple Pay payment method will be available in the **Express Checkout** section in the Commerce checkout page.

Feature details

This feature will add the following capabilities:

- Support for Apple Pay on POS using the Dynamics 365 Payment Connector for Adyen.
- Support for providing the **Apple Pay** payment method in the **Express Checkout** section for e-commerce checkouts.
- Apple Pay population of shipping address, billing address, email address, and delivery options for 1-click checkout scenarios in e-commerce.
- The ability to include an **Apple Pay** button in the cart page.

Copy CMS content using site builder and manage it with API or Power Platform connector

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	Jul 2022

Business value

Dynamics 365 Commerce users will be able to leverage the content management services (CMS) API or the out-of-the-box Power Platform connector to automate content operations. This functionality will help to greatly minimize the manual work required during an e-commerce site deployment. It can also be used for integrations and automation when a site is in production. This type of automation reduces deployment and operational costs, minimizes errors from manual entry of data, and improves process efficiency.

Feature details

The CMS API provides you with programmatic access to asset management operations in Commerce such as create, read, update, and delete (CRUD) operations for a site, release group, page, fragment, and other assets. The API allows the automation of content operations during deployment to minimize the manual work required (for example, migrating existing assets into the digital asset management library, or performing other bulk operations.) You can also use the CMS API for automation and integrations on your live systems (for example, ongoing synchronization of digital assets between systems, or automated localization.)

The Power Platform connector provided in Commerce allows you to connect Commerce and a variety of apps and other services through Power Platform.

Commerce will provide a user interface (UI) in site builder that will enable you to copy objects as self-serve operations within or across environments, including site, release group, page, fragment, or other assets. This functionality will allow you to copy site content from your production environment to lower environments for development, testing,

troubleshooting, and training purposes, thereby removing the risk of disruptions in the production environment.

Integrated omnichannel media asset management improvements

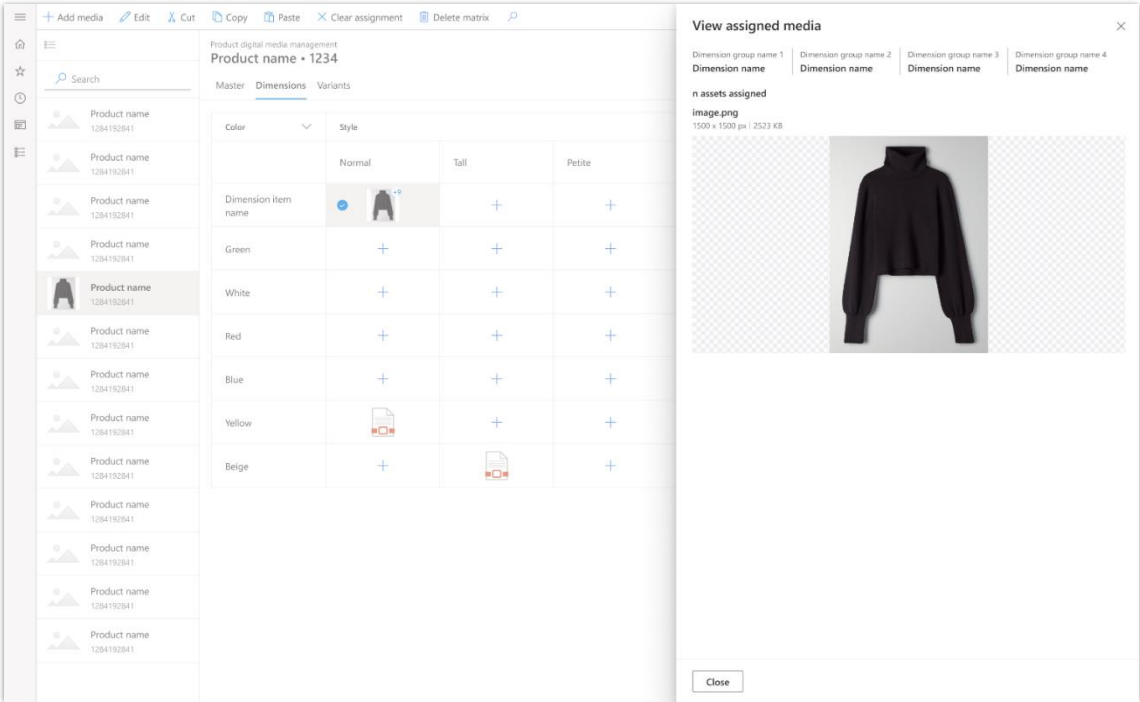
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	Jul 2022

Business value

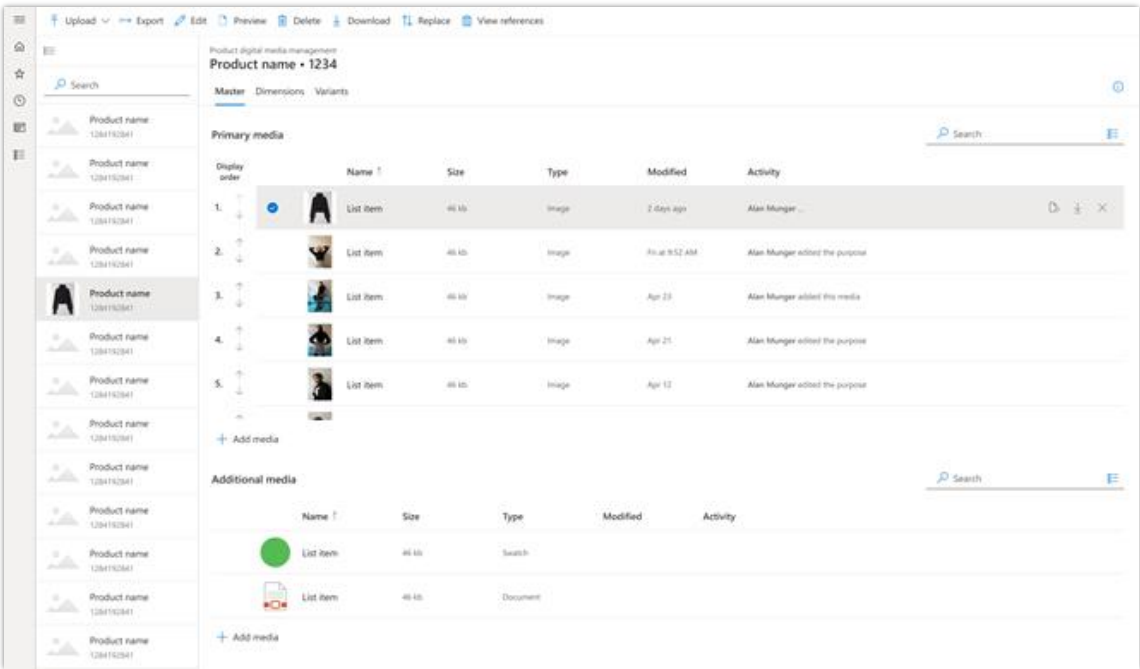
Dynamics 365 Commerce is simplifying media asset management for common merchandising tasks by enabling native media management features shared between Commerce HQ and site builder. This capability will streamline media asset management workflows by placing native workflows directly where merchandising occurs in Commerce HQ. This will reduce complexity for both integrators and merchandisers by providing an omnichannel media management option that works right out of the box. This capability builds on the support for image association with a product by enabling the association of videos, PDFs, and other file formats.

Feature details

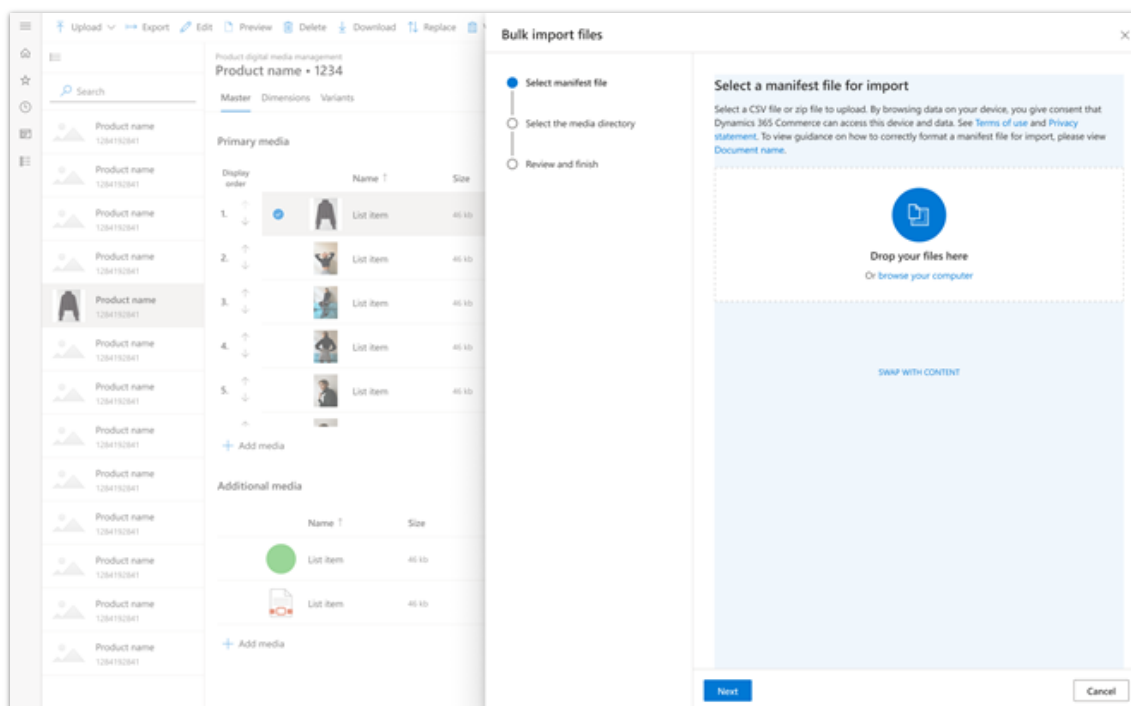
This feature addresses the need for integrated omnichannel media asset management within Commerce merchandising workflows. This functionality includes native media asset workflows to upload, choose, define metadata, and manage media assets such as product images directly within the omnichannel product merchandising workflow. The improvements work seamlessly with point of sale (POS) and e-commerce channels, and solve many product merchandising workflow issues that are difficult for detached media management implementation architectures. The improvements also solve media type issues by enabling video, PDF, Word, Excel, and other types of documents to be associated with a product.



Assign media by dimension.



Simplified product media management.



New bulk import workflows.

Store Commerce app for Windows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	Jul 2022

Business value

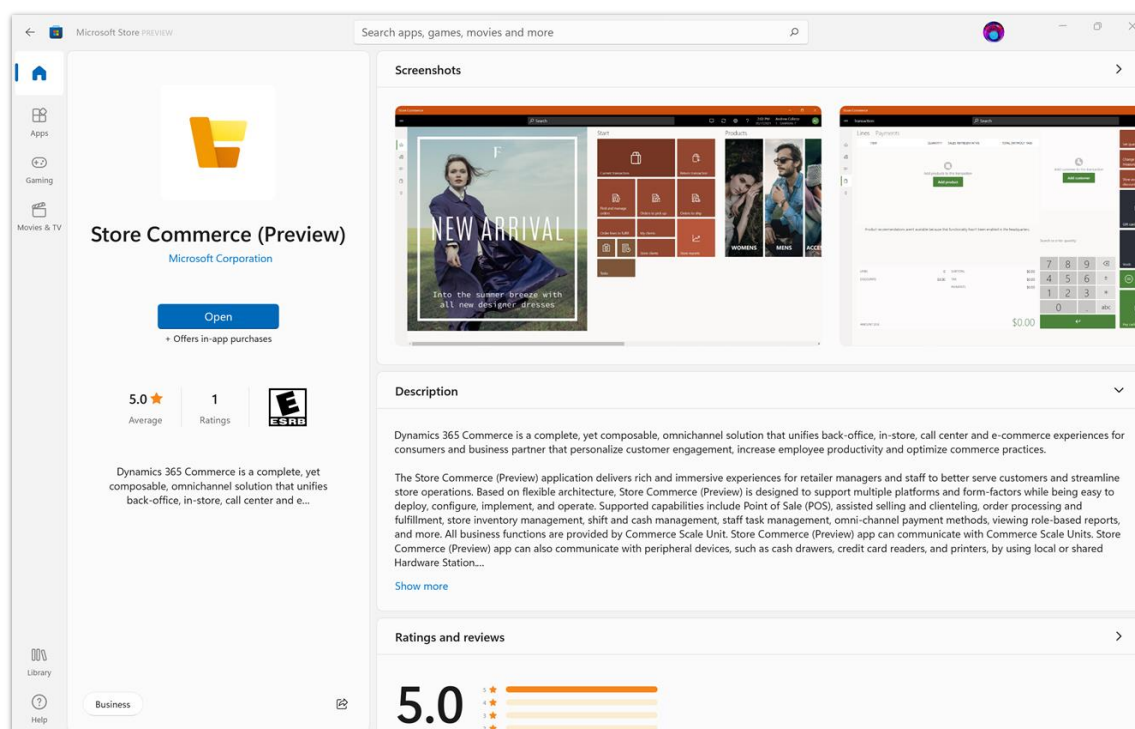
The Store Commerce app in Dynamics 365 Commerce is the next generation of the Dynamics 365 Commerce point of sale (POS) app, and represents Microsoft's continuing commitment to provide the best POS experience for our customers. The Store Commerce app will be available through the Microsoft Store for easy download and deployment. A downloadable installer will support offline deployment, and multiple update and servicing models will be supported. The app is both forward and backward compatible with your Commerce Scale Unit (CSU), and you can reuse your existing extensions and customizations in it. Rendering performance is improved through use of the Chromium rendering engine.

Feature details

Store Commerce is a shell app for Windows that renders the Cloud Point of Sale (CPOS) app. Although CPOS can run in a web browser, Store Commerce runs as a native Windows app like the Modern Point of Sale (MPOS). This allows Store Commerce to support a dedicated hardware station for direct integration with a payment terminal, printer, cash drawer, and other peripherals. You don't have to set up a shared hardware station to use hardware devices.

To render the user interface (UI), Store Commerce uses the Chromium engine instead of the Universal Windows Platform (UWP) app rendering framework used by MPOS. The Chromium engine has better rendering performance than the native JavaScript UWP app in Windows.

The Store Commerce app in Dynamics 365 Commerce provides all the rich commerce functionality that first-line workers such as cashiers, sales associates, inventory associates, stock clerks, and store managers expect from MPOS and CPOS. These workers can perform commerce-related operations such as cash-and-carry transactions, cash/shift management, customer engagement, assisted selling, clienteling, endless aisle, order processing/fulfillment, inventory management, and reporting.



Store Commerce application.

Google Pay with Dynamics 365 Payment Connector for Adyen

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2022	Jul 2022

Business value

Dynamics 365 Commerce will support Google Pay through the Dynamics 365 Payment Connector for Adyen for point of sale (POS) and e-commerce checkout scenarios. Commerce will support online 1-click checkout scenarios for systems supporting Google Pay checkout. This functionality will enable information stored in Google Pay to populate billing address, shipping address, and email address, thereby saving consumers time during checkout on

supported devices. The Google Pay payment method will be available in the **Express Checkout** section in the Commerce checkout page.

Feature details

This feature will add the following capabilities:

- Support for Google Pay on POS using the Dynamics 365 Payment Connector for Adyen.
- Support for providing the **Google Pay** payment method in the **Express Checkout** section for e-commerce checkouts.
- Google Pay population of shipping address, billing address, and email address for 1-click checkout scenarios in e-commerce.
- The ability to include a **Google Pay** button in the cart page.

Fraud Protection

Overview of Dynamics 365 Fraud Protection 2022 release wave 1

Microsoft Dynamics 365 Fraud Protection brings together account protection, payment protection, and loss prevention, providing a 360-degree view of the fraud landscape to partners and businesses to help them discover and combat fraud efficiently and effectively.

We are investing in six areas in this release to amplify our partners' and businesses' ability to fight fraud:

- Enhancing the ability of fraud solution providers to operate and manage their many customers' fraud at scale.
- Enabling search capabilities to enhance the analytics and policy setting for fraud managers.
- Adding natively integrated case management for purchase protection.
- Providing provisioning of Fraud Protection in Canada.
- Protecting businesses' native mobile applications against fraud.
- Protecting businesses' Power App Portal products more easily against fraud.

What's new and planned for Dynamics 365 Fraud Protection

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Feature	Enabled for	Public preview	General availability
Canadian provisioning of Dynamics 365 Fraud Protection	Users, automatically	Apr 2022	Jun 2022
Enhance ability of fraud solution providers to manage fraud at scale	Users, automatically	Apr 2022	Jun 2022

Feature	Enabled for	Public preview	General availability
Natively integrated case management for purchase protection	Users, automatically	Apr 2022	Jun 2022
Protect native mobile applications against fraud	Users, automatically	Apr 2022	Jun 2022
Protect Power Apps portals products against fraud	Users, automatically	Apr 2022	Jun 2022
Search functionality for fraud managers	Users, automatically	Apr 2022	Jun 2022

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

Canadian provisioning of Dynamics 365 Fraud Protection

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	Jun 2022

Business value

Businesses can choose to have Dynamics 365 Fraud Protection provisioned within Canada if they have specific data residency needs or latency requirements that would call for it.

Feature details

With this new feature, businesses will be able to choose to provision Fraud Protection within Canada, the United States, or Europe. Businesses with data residency needs specific to

Canada or with tight latency needs will be able to choose a region within Canada to provision to.

Enhance ability of fraud solution providers to manage fraud at scale

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	Jun 2022

Business value

Payment service providers (PSPs), cloud service providers, system integrators, and other fraud solution providers who manage fraud on behalf of other businesses can use Dynamics 365 Fraud Protection to operate and manage their customers at scale, more effectively and efficiently.

Feature details

Fraud solution providers (such as PSPs) who offer fraud management services to run and operate on behalf of many businesses will be able to:

- More effectively manage fraud across many businesses, where each business has multiple tenants and multiple verticals.
- Use aggregated fraud analytics to observe what is happening across all of their customer businesses.
- Benefit from enhanced policy creation and management across all of their customers.

Natively integrated case management for purchase protection

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	Jun 2022

Business value

Dynamics 365 Fraud Protection will include a natively integrated case management experience. With this new functionality, fraud managers will experience a seamless end-to-end fraud operations workflow for purchase protection.

Feature details

Fraud Protection will have a case management experience for purchase protection built into the product.

Fraud Protection previously offered an optional plug-in for manual review that product owners could choose to use to build, host, and connect to their Fraud Protection instance. With this new feature, case management for purchase protection will be integrated natively

into Fraud Protection. Using the Fraud Protection rules experience, fraud managers can identify purchase transactions that require further review and add them to the manual review queue. They can then take the appropriate action on these transactions from within Fraud Protection.

Protect native mobile applications against fraud

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	Jun 2022

Business value

With this new feature, businesses will be able to protect their native mobile applications in addition to their mobile browser-based applications using Dynamics 365 Fraud Protection.

Feature details

This new feature will enable businesses to integrate Fraud Protection into their iOS and Android ecosystems to protect against fraud.

Fraud managers will be able to protect their native mobile applications, in addition to their mobile browser-based applications. Mobile protection will be available for both purchase protection and account protection.

Protect Power Apps portals products against fraud

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	Jun 2022

Business value

Businesses that build products with Microsoft Power Apps portals will be able to easily protect their products by using Dynamics 365 Fraud Protection. That way, their apps and websites will be better protected from fraud.

Feature details

Fraud Protection will provide a certified purchase protection Power Apps portals connector and a certified account protection Power Apps portals connector that will enable businesses to easily integrate their products that were built using Power Apps portals with Fraud Protection. With this feature, businesses can better protect their customers from fraud.

Search functionality for fraud managers

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	Jun 2022

Business value

Fraud managers can run operations in Dynamics 365 Fraud Protection more effectively by using newly added search capabilities.

Feature details

Fraud Protection is introducing a new search capability that can help fraud managers run fraud operations more efficiently. Complementary to the existing fraud analytics in purchase protection and account protection, the new search feature extends a fraud manager's ability to find information. Fraud managers can find transaction events with historical and relationship context included and discover clusters of unusual behavior and previously unknown interconnections across transaction events.

SMB

Overview of Dynamics 365 Business Central 2022 release wave 1

Dynamics 365 Business Central is a comprehensive business application solution that is designed and optimized for small and midsize organizations. In 2022 release wave 1, you will see further investments centering on helping users get to productive usage faster, whether they are new or existing customers of ours, by providing in-app improvements to help them get started. We expand out on the capabilities of the Help pane and make it the go-to resource for helping both new and existing users. We continue our geographic expansion, and we will improve performance and usability by focusing on easier navigation in menus. To help users be productive, we enhance our reporting capabilities with Excel layouts.

Seamless service: No matter the industry type of a small or midsize business (SMB), business users expect a dependable service and platform that they can run their business on.

Administration: In 2022 release wave 1, Business Central delivers a set of features that are designed to simplify and improve the way our partners administer tenants, and the way administrators manage licensing and permissions.

Application: The finance and supply chain capabilities in Business Central are improved with several optimizations and enhancement of the capabilities so that users can execute business processes more productively.

Better with Microsoft 365: In 2022 release wave 1, we improve the efficiency of collaborative business processes in Microsoft Teams, and we harden the Excel and Outlook add-ins.

Country and regional: In 2022 release wave 1, Business Central is generally available in more countries and regions.

Onboarding: In 2022 release wave 1, customers can get to productive usage faster using the new modern Help pane.

Development tools: As we have moved entirely to Visual Studio Code, we continue to invest in areas that enhance productivity for developers. Additionally, we introduce GitHub Go for partners to set up CI/CD for their apps without any prior knowledge about pipelines, Docker, or PowerShell.

Power Platform: We improve our Power Automate capabilities, making it much easier to set up workflows for the specific needs of an organization.

What's new and planned for Dynamics 365 Business Central

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Application

In 2022 release wave 1, we deliver updates based on the most popular requests for improvement. We'll invest in better reporting and several improvements to the supply chain area.

Feature	Enabled for	Public preview	General availability
Blocking deletion of G/L accounts	Users, automatically	✓ Jan 4, 2022	Apr 2022
Allow the sell-to and bill-to customers to be different for jobs	Users, automatically	Mar 2022	Apr 2022
Bank reconciliation	Users, automatically	Mar 2022	Apr 2022
Change default company bank account on sales and service documents	Users, automatically	Mar 2022	Apr 2022
Check documents and journals in background	Users, automatically	Mar 2022	Apr 2022
Consolidate customer and vendor balances	Users, automatically	Mar 2022	Apr 2022
Fixed Quantity in product bills of materials	Users, automatically	Mar 2022	Apr 2022
Improved and extensible Adjust Exchange Rates batch job	Users, automatically	Mar 2022	Apr 2022

Feature	Enabled for	Public preview	General availability
Map to Dataverse option sets such as payment terms, freight terms, and shipping agents without code	Users by admins, makers, or analysts	Mar 2022	Apr 2022
More control over deferrals posting	Users, automatically	Mar 2022	Apr 2022
New UI for entering demand forecasts to add support for variant code and other improvements	Users, automatically	Mar 2022	Apr 2022
Payment reconciliation journal	Users, automatically	Mar 2022	Apr 2022
Report selection for projects	Users, automatically	Mar 2022	Apr 2022
Set default dimensions on locations	Users, automatically	Mar 2022	Apr 2022
Shopify connector	Users, automatically	Mar 2022	Apr 2022
Standardizing the bank reconciliation process in North American versions	Users, automatically	Mar 2022	Apr 2022
Support inventory pick and warehouse pick operations for jobs	Users, automatically	Mar 2022	Apr 2022
Synchronize sales quotes and orders in both directions between Business Central and Dynamics 365 Sales	Users by admins, makers, or analysts	Mar 2022	Apr 2022
Use different G/L accounts for payables and receivables transactions	Users, automatically	Mar 2022	Apr 2022

Better with Microsoft 365

In 2022 release wave 1, we invest in a stronger reporting story, including better integration with Excel. We also improve the support for collaborative business processes in Teams so you can bring Business Central pages into a Teams channel.

Feature	Enabled for	Public preview	General availability
Improvements to the Teams integration and Details page	Users, automatically	Mar 2022	Apr 2022

Feature	Enabled for	Public preview	General availability
Outlook add-in – add attachments from emails directly to Business Central documents	Users, automatically	Mar 2022	Apr 2022

Development

We continue to invest in a rich spectrum of extensibility tooling capabilities for developers, including making the AL language even stronger, providing developers with a great experience.

Feature	Enabled for	Public preview	General availability
Auto-deploy dependent projects in workspace	Admins, makers, marketers, or analysts, automatically	Feb 2022	Apr 2022
In-client performance profiler	Users, automatically	Feb 2022	Apr 2022
Demo tool and demo data for manufacturing scenarios	Users, automatically	Mar 2022	Apr 2022
AL-Go for GitHub: Modern DevOps for partners	Admins, makers, marketers, or analysts, automatically	Apr 2022	Apr 2022
Telemetry – company name as a custom dimension in AL LogMessage	Users, automatically	Apr 2022	Apr 2022
Users can export report datasets to XML	Users, automatically	Apr 2022	Apr 2022

Governance and administration

Dynamics 365 2022 release wave 1 delivers a set of admin and governance capabilities to help admins and IT pros set up, secure, manage, govern, and monitor customer environments.

Feature	Enabled for	Public preview	General availability
Customer-managed encryption key for encrypting customer data at-rest	Admins, makers, marketers, or analysts, automatically	-	Apr 2022
Customers can consent to Microsoft Support accessing their data through a Lockbox consent flow	Admins, makers, marketers, or analysts, automatically	-	Apr 2022
Allow security administrator to define default permission set assignments when user is signing up	Admins, makers, marketers, or analysts, automatically	Feb 2022	Apr 2022
Updating only licensed users from Microsoft 365 runs faster and more efficiently	Admins, makers, marketers, or analysts, automatically	Mar 2022	Apr 2022
Permission set handling enhancements	Admins, makers, marketers, or analysts, automatically	May 2022	Jun 2022

Microsoft Power Platform

In 2022 release wave 1, we improve the integration with Microsoft Dataverse and Microsoft Power Platform.

Feature	Enabled for	Public preview	General availability
Dataverse data change events	Admins, makers, marketers, or analysts, automatically	Apr 2022	-
Improvements to the Power Automate and Power Apps connector	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022

Modern clients

In 2022 release wave 1, we make improvements to our extensive portfolio of clients with the focus on better usability, accessibility, performance, and stability.

Feature	Enabled for	Public preview	General availability
Introduce copy link option in the Share menu	Users, automatically	Mar 2022	Apr 2022
The new PWA app replaces the Windows desktop app (UWP)	Users, automatically	Mar 2022	Apr 2022
Usability improvements to the web client	Users, automatically	Mar 2022	Apr 2022

Onboarding

Onboarding is a key focus in every release wave. The aim is to make the onboarding of new customers faster, but also the onboarding of new users.

Feature	Enabled for	Public preview	General availability
Context-aware links in the Help pane from Microsoft and partners	Users, automatically	Mar 2022	Apr 2022
Guided tour that helps users find settings and personalization tools	Users, automatically	Mar 2022	Apr 2022
Support for rich text in teaching tips and tours	Users, automatically	Mar 2022	Apr 2022
Tour of the Role Explorer and how to filter it	Users, automatically	Mar 2022	Apr 2022

Reporting

Reporting is top-of-mind for many business users, both as a way to get insight into new growth opportunities but also as a way to share data as a foundation for business planning discussions.

Feature	Enabled for	Public preview	General availability
New capabilities for financial reporting with account schedules	Users, automatically	Mar 2022	Apr 2022
Use Excel to design layouts for reports	Users, automatically	Apr 2022	Apr 2022

Service and platform

No matter the industry type of a small or medium-sized business (SMB), business users expect a dependable service and platform that they can run their business on.

Feature	Enabled for	Public preview	General availability
Performance – partners can get database insights through virtual tables and in-client pages	Users, automatically	Apr 2022	Apr 2022
Telemetry – error dialogs are logged to telemetry	Users, automatically	Apr 2022	Apr 2022
Telemetry – support engineers can now see user IDs in telemetry	Users, automatically	Apr 2022	Apr 2022
Telemetry – the action of enabling detailed telemetry is logged to telemetry	Users, automatically	Apr 2022	Apr 2022
Telemetry – when a database deadlock occurs, this is logged to telemetry	Users, automatically	Apr 2022	Apr 2022

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

Application

Overview

In 2022 release wave 1, we deliver updates based on the most popular requests for improvement. We'll invest in better reporting, improve the control of deferral postings, improve the Dimensions capabilities by allowing default dimensions on locations, and we'll deliver several improvements to the supply chain area.

Blocking deletion of G/L accounts

Enabled for	Public preview	General availability
Users, automatically	✓ Jan 4, 2022	Apr 2022

Business value

Maintenance of the chart of accounts takes place only a few times, once it's been set up for an organization, but it does occur. To help avoid accidental deletion of general ledger (G/L) accounts, this release wave adds an extra check.

Feature details

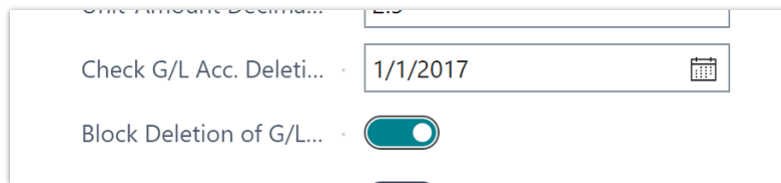
To delete G/L accounts, you must first balance the account to zero. Then, you must close the fiscal year for any entries. The **Check G/L Acc. Deletion After** field is checked to see if there are ledger entries in the account after this date, in which case it's likely not to be deleted. The user can still proceed to delete if they need to.

In this release wave, we introduce an extra safeguard against accidental deletion of G/L accounts even in the scenarios where the criteria are met.

A new field, **Block Deletion of G/L Accounts**, is added to the **General Ledger Setup** page. The field acts as an extra validation when a user tries to delete an account where there are ledger entries after the date that is specified in the **Check G/L Acc. Deletion After** field.

When the **Block Deletion of G/L Accounts** field is set to *Yes*, you cannot delete G/L accounts that have ledger entries after the date in the **Check G/L Acc. Deletion After** field. In order to delete such an account, a user with access to the **General Ledger Setup** page must first set this field to *No*. Then the account can be deleted.

We recommend setting the **Block Deletion of G/L Accounts** field to *Yes*. We also recommend that you always have a date set in the **Check G/L Acc. Deletion After** field, such as the time you're required to store your finance data.



New field in General Ledger: Block Deletion of G/L Accounts.

Tell us what you think

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Thank you for your idea

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See also

[Understanding the General Ledger and the Chart of Accounts](#) (docs)

Allow the sell-to and bill-to customers to be different for jobs

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

We've added support for projects where the party that is receiving a service is different from the party that is paying the bill. When a project manager creates a job, they can specify the customer who will benefit from the project, and this customer can be different from the company that will pay for the project. Additionally, the project manager can specify the place where the work will happen by selecting from a list of ship-to addresses for the customer, add information about external references to simplify communication about the project, and overwrite the standard financial terms of the specific project.

Feature details

We've added **Sell-to** and **Ship-to** field groups to the **Jobs** page. Existing jobs will be updated automatically, and these new fields will inherit values from the respective fields in the **Bill-to** group that was already available.

Additionally, the **Your Reference**, **External Document No.**, **Payment Terms Code**, and **Payment Method Code** fields are added to jobs and will be respected when you create invoices.

Changes in the Job table and the Job Card page

Element	Table 167 Job	Upgrade	Page 88 Job Card
Sell-to			
Sell-to Customer No.	added to table	From Bill-to Customer No.	Added to General tab
Sell-to Customer Name	added to table	From Bill-to Customer Name	Added to General tab
Sell-to Customer Name 2	added to table	From Bill-to Customer Name 2	-
Sell-to Address	added to table	From Bill-to Address	Added to General tab
Sell-to Address 2	added to table	From Bill-to Address 2	Added to General tab
Sell-to City	added to table	From Bill-to City	Added to General tab
Sell-to Contact	added to table	From Bill-to Contact	Added to General tab
Sell-to Post Code	added to table	From Bill-to Post Code	Added to General tab
Sell-to County	added to table	From Bill-to County	Added to General tab
Sell-to Country/Region Code	added to table	From Bill-to Country/Region Code	Added to General tab
Sell-to Phone No.	added to table	From Bill-to Phone No.	-
Sell-to E-Mail	added to table	From Bill-to E-Mail	n/a
Sell-to Contact No.	added to table	From Bill-to Contact No.	Added to General tab
SellToContact."Phone No."	n/a	n/a	Added to General tab
SellToContact."Mobile Phone No."	n/a	n/a	Added to General tab
SellToContact."E-Mail"	n/a	n/a	Added to General tab

Element	Table 167 Job	Upgrade	Page 88 Job Card
Bill-to			
Bill-to Customer No.	already in table	kept current value	Moved to new Invoice and Shipping tab
Bill-to Customer Name	already in table	kept current value	Moved to new Invoice and Shipping tab
Bill-to Customer Name 2	already in table	kept current value	-
Bill-to Address	already in table	kept current value	Moved to new Invoice and Shipping tab
Bill-to Address 2	already in table	kept current value	Moved to new Invoice and Shipping tab
Bill-to City	already in table	kept current value	Moved to new Invoice and Shipping tab
Bill-to Contact	already in table	kept current value	Moved to new Invoice and Shipping tab
Bill-to Post Code	already in table	kept current value	Moved to new Invoice and Shipping tab
Bill-to County	already in table	kept current value	Moved to new Invoice and Shipping tab
Bill-to Country/Region Code	already in table	kept current value	Moved to new Invoice and Shipping tab
Bill-to Contact No.	already in table	kept current value	Moved to new Invoice and Shipping tab
BillToContact."Phone No."	n/a	n/a	Moved to new Invoice and Shipping tab
BillToContact."Mobile Phone No."	n/a	n/a	Moved to new Invoice and Shipping tab
BillToContact."E-Mail"	n/a	n/a	Moved to new Invoice and Shipping tab

Element	Table 167 Job	Upgrade	Page 88 Job Card
Ship-to			
Ship-to Code	added to table	<i>blank</i>	Added to new Invoice and Shipping tab
Ship-to Name	added to table	From Bill-to Customer Name	Added to new Invoice and Shipping tab
Ship-to Name 2	added to table	From Bill-to Customer Name 2	-
Ship-to Address	added to table	From Bill-to Address	Added to new Invoice and Shipping tab
Ship-to Address 2	added to table	From Bill-to Address 2	Added to new Invoice and Shipping tab
Ship-to City	added to table	From Bill-to City	Added to new Invoice and Shipping tab
Ship-to Contact	added to table	From Bill-to Contact	Added to new Invoice and Shipping tab
Ship-to Post Code	added to table	From Bill-to Post Code	Added to new Invoice and Shipping tab
Ship-to County	added to table	From Bill-to County	Added to new Invoice and Shipping tab
Ship-to Country/Region Code	added to table	From Bill-to Country/Region Code	Added to new Invoice and Shipping tab
Other			
External Document No.	added to table	<i>blank</i>	Added to General tab
Your Reference	added to table	<i>blank</i>	Added to General tab
Payment Method Code	added to table	<i>blank</i>	Added to new Invoice and Shipping tab
Payment Terms Code	added to table	<i>blank</i>	Added to new Invoice and Shipping tab

Sequence ↑	Report ID	Report Caption
→ 1	1016	Job Quote

Jobs card with new fields.

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Thank you for your idea

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Bank reconciliation

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Bank reconciliation is a critical accounting task for most businesses because it helps make sure that everything is registered, and that the cash positions are correct. The report for the posted bank reconciliations (bank account statements) has now been improved to allow for more efficient validation and auditing.

Feature details

The **Bank Account Statement** report on the posted bank reconciliations has been modified so it now shows a more detailed snapshot of the bank information as of the time when the bank reconciliation was posted. G/L Balance, Outstanding Payments, and Checks fields have been added, making it easier to validate and audit.

Find the Bank Statement Report in the **Bank Statements** list (posted bank reconciliations list).

Change default company bank account on sales and service documents

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Companies today use multiple bank accounts at different banks, which reduces the costs of handling financial transactions, limits currency risks, and so on. Also, more and more companies use electronic sales invoices that need to include the bank account that the company expects to get paid. Being able to change the bank account on sales and service documents adds flexibility to directing customer payments.

Feature details

You can now set default bank accounts for companies, and for individual currencies, by choosing **Default Bank Account** from the list of company bank accounts on the **Company Information** and **Currencies** pages.

When someone creates a sales document, the default bank account is automatically assigned. Users who have the appropriate permissions can change the default bank account by choosing a different account in the **Bank Account** field. Bank account details, such as bank account branch, bank account number, or IBAN, are shown as read-only. When sales or service documents are posted, the selected bank account is copied to the documents, but can be changed by choosing the **Update Document** action (by users with appropriate permissions). Printed documents also contain details about the selected bank account.

Additionally, partners can extend bank account selection and defaulting logic on sales documents to fit the needs of specific industries and customers.

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Check documents and journals in background

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

To help users with visual indications of issues in documents and journals, we've introduced validations that can help prevent issues with posting before they happen. Early, unobtrusive visual indications that there is a problem can help improve user productivity and save time.

Feature details

If you enable this feature on the **Feature Management** page, Business Central will validate documents and journals while you're working on them. When the validation is enabled, the **Check** FactBox displays next to the document or journal lines and shows issues in the current document or journal line or the whole journal batch. Validation happens when you load a document or journal batch, and when you choose another document or journal line. The Issues total tile in the FactBox shows the total number of issues that Business Central found, and choosing it will open an overview of the issues.

NOTE You must have the **Feature: Check documents and journals in background** feature enabled in the [Feature Management](#) page to use this capability.

Tell us what you think

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Consolidate customer and vendor balances

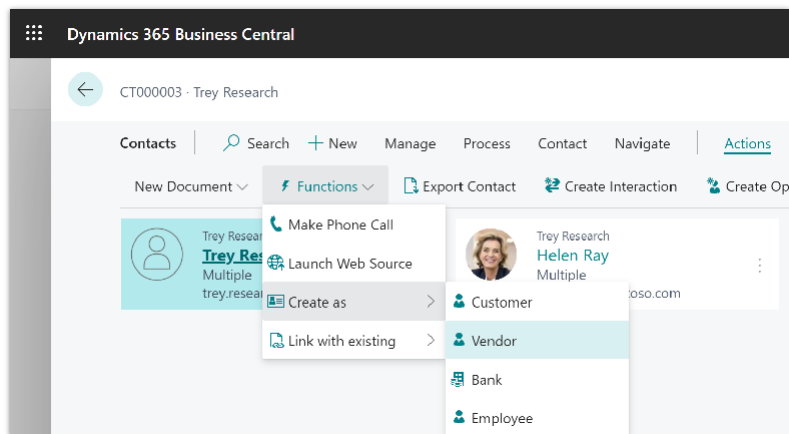
Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

A company that you do business with might be both a customer and a vendor. When that's the case, you can avoid making unnecessary payments or receipts and save on transaction fees by consolidating the customer and vendor balances.

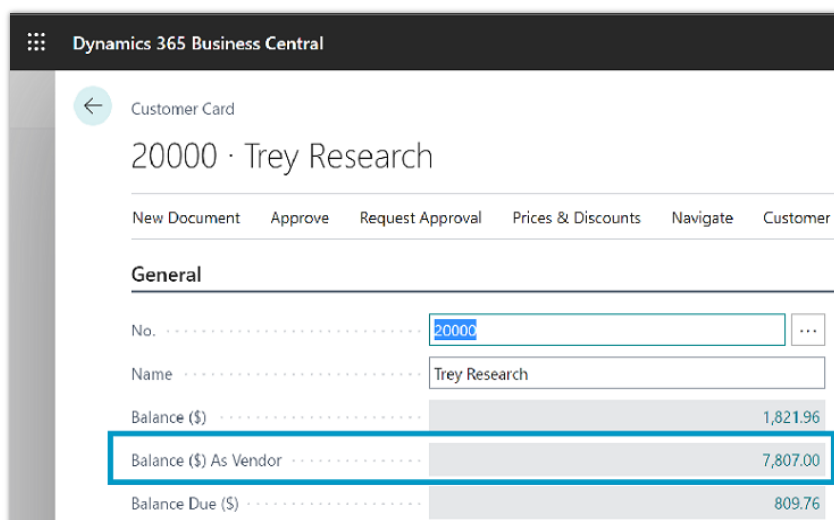
Feature details

You can turn a contact company into a customer or vendor by using the **Create as Customer** or **Create as Vendor** actions on the **Contact Card** page.



Shows Create as, Vendor functions to create a vendor from contact.

On the **Customer Card** page, you can view the **Balance as Vendor**, and on the **Vendor Card** page you can view the **Balance as Customer** for companies that were created or linked to the same contact company.



Shows Balance As Vendor field when customer is created as a vendor.

On the **Payment Journal** page, you can use the **Net Customer/Vendor Balances** action to net the customer and vendor balances for the company.

Posting Date	Document Date	Document Type	Document No.	Account No.	Account Type	Account No.	Account	Description
→ 4/11/2022	4/11/2022	Payment	G04001		Vendor	*		

Shows Net Customer/Vendor Balances action on Payment Journal page.

The **Net Customer/Vendor Balances** action creates payment journal lines that net balances for a customer and vendor that are linked.

Posting Date	Document Date	Document No.	Account Type	Account No.	Description	Amount	Bal. Account Type	App. (Yes...)	Applies to Doc. Type	Applies to Doc. No.	Applies to Doc. Date
4/12/2021	4/12/2021	G04002	Vendor	V00010	Net customer/vendor balances G04002 04/12/21	1,821.96	G/L Account		Invoice	108209	5/12/2021
4/12/2021	4/12/2021	G04002	Customer	20000	Net customer/vendor balances G04002 04/12/21	-809.76	G/L Account		Invoice	PS-INV103169	2/13/2021
→ 4/12/2021	4/12/2021	G04002	Customer	20000	Net customer/vendor balances G04002 04/12/21	-1,012.20	G/L Account		Invoice	PS-INV103195	4/13/2021

Shows payment journal lines that the Net Customer/Vendor Balances action creates.

Tell us what you think

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Thank you for your idea

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Fixed Quantity in product bills of materials

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

You can ensure that the consumption of a component is the same, regardless of the scrap or output quantities.

Feature details

You can select the **Fixed Quantity** option in the **Calculation Formula** field on production BOM lines, planning components, and production order components to ensure that the consumption of a component is the same.

You can choose from the following values in the **Calculation Formula** field:

- **Blank:** The quantity is not calculated.
- **Length:** Quantity = Length * Quantity per
- **Length * Width:** Quantity = Length * Width * Quantity per
- **Length * Width * Depth:** Quantity = Length * Width * Height * Quantity per
- **Weight:** Quantity = Weight * Quantity per
- **Fixed Quantity** = Quantity Per

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Thank you for your idea

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Improved and extensible Adjust Exchange Rates batch job

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

When companies operate in multiple countries or regions, it's important that they can do business and run financial reports in more than one currency. Because exchange rates often change, businesses must periodically update the rates in Business Central. This feature update gives accountants additional control over how they adjust exchange rates. At the same time, it allows partners to extend and customize an exchange rate adjustment to meet the needs of specific industries or markets.

Feature details

You can now preview the effect that an exchange rate adjustment will have on posting before you actually post by choosing **Preview** on the **Adjust Exchange Rates** report request page. You can select whether you want a detailed (per entry) or summarized (per currency) posting to general ledger by choosing **Summarize Entries** on the **Adjust Exchange Rates**

report. You can also pick how Adjust Exchange Rates will handle dimensions for unrealized gains and losses postings by choosing one of the following options in the **Transfer Dimension Values** field:

- **Source Entry:** G/L entries for unrealized gains and losses will have dimensions values transferred from the entry being adjusted.
- **By G/L Account:** G/L entries for unrealized gains and losses will have dimensions values transferred from the unrealized gains and losses G/L account's dimension settings source entry.
- **No Transfer:** G/L entries for unrealized gains and losses won't have dimensions values.

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Thank you for your idea

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Map to Dataverse option sets such as payment terms, freight terms, and shipping agents without code

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2022	Apr 2022

Business value

Payment terms, shipment methods, and shipping agents can change along with the environments in which businesses operate. To react quickly to changing business conditions, businesses must be able to quickly and cost effectively change their payment, shipping, or freight policies across their business systems.

Feature details

You can manually map payment terms, freight terms, shipping methods, and shipping agents between Business Central and Microsoft Dataverse.

If you enable the **Feature Update: Map to option sets in Dataverse without code** feature in [Feature Management](#) in Business Central, you will no longer need to do code customizations to synchronize payment terms, shipment methods, and freight terms. The feature update will add integration table mappings for payment terms (PAYMENT TERMS), shipment methods(SHIPMENT METHOD), and shipping agents (SHIPPING AGENT).

Because payment terms, shipment methods, and shipping agents are handled as standard integration table mappings, you can view which payment terms, shipment methods, and shipping agents are coupled using the **Coupled in Dataverse** column.

You can synchronize payment terms, shipment methods, and shipping agents data by using the **Synchronize** action, couple or delete unit groups by choosing the **Coupling**, **Set up coupling** or **Delete coupling** actions, or do a match-based coupling by choosing the **Match-Based Coupling** action.

Name	Table	Table From	Direction	Integration Table	Integration Field	Integration Field Type	Integration Table Filter
CONTACT	Contact	VERSION(1) SORTING(Field1) W...	Bidirectional	Dataverse Contact	Contact	GUID	VERSION(1) SORTING(Field1) W...
CURRENCY	Currency	VERSION(1) SORTING(Field1) W...	Unidirectional	Dataverse Transactioncurrency	Transaction Currency	GUID	VERSION(1) SORTING(Field1) W...
CUSTOMER	Customer	VERSION(1) SORTING(Field1) W...	Bidirectional	Dataverse Account	Account	GUID	VERSION(1) SORTING(Field1) W...
PAYMENT TERMS	Payment Terms	VERSION(1) SORTING(Field1) W...	From Integr...	Dataverse Account	Payment Terms	Option	VERSION(1) SORTING(Field1) W...
SHIPMENT METHOD	Shipment Method	VERSION(1) SORTING(Field1) W...	From Integr...	Dataverse Account	Address 1: Freight Terms	Option	VERSION(1) SORTING(Field1) W...
SHIPPING AGENT	Shipping Agent	VERSION(1) SORTING(Field1) W...	From Integr...	Dataverse Account	Address 1: Shipping Method	Option	VERSION(1) SORTING(Field1) W...
VENDOR	Vendor	VERSION(1) SORTING(Field1) W...	Bidirectional	Dataverse Account	Account	GUID	VERSION(1) SORTING(Field1) W...

Shows integration table mappings for payment terms, shipment methods, and shipping agents.

Code	Due Date Calculation	Discount Date Calculation	Discount %	Calc. Post Date	Description	Coupled in Dataverse
10 DAYS	10D		0		Net 10 days	
14 DAYS	14D		0		Net 14 days	
15 DAYS	15D		0		Net 15 days	
1M/30D	1M	30D	2		1 Month/2% 8 days	
2 DAYS	2D		0		Net 2 days	
2% 10 NET			0			
21 DAYS	21D		0		Net 21 days	
30 DAYS	30D		0		Net 30 days	
60 DAYS	60D		0		Net 60 days	
7 DAYS	7D		0		Net 7 days	
CM	CM		0		Current Month	
COD	OD		0		Cash on delivery	
NET 30			0			
NET 45			0			
NET 60			0			

Shows Coupled to Dataverse column on Payment Terms page.

Code	Due Date Calculation	Discount Date Calculation	Discount %	Calc. Post Date	Description	No. Data...
10 DAYS	10D		0		Net 10 days	
14 DAYS	14D		0		Net 14 days	
15 DAYS	15D		0		Net 15 days	
1M/30D	1M	30D	2		1 Month/2% 8 days	
2 DAYS	2D		0		Net 2 days	
2% 10 NET			0			
21 DAYS	21D		0		Net 21 days	
30 DAYS	30D		0		Net 30 days	
60 DAYS	60D		0		Net 60 days	
7 DAYS	7D		0		Net 7 days	
CM	CM		0		Current Month	
COD	OD		0		Cash on delivery	
NET 30			0			
NET 45			0			
NET 60			0			

Shows Dataverse action group on Payment Terms page.

NOTE You need to have the **Feature Update: Map to option sets in Dataverse without code** feature enabled in the [Feature Management](#) page to use this capability.

Tell us what you think

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More control over deferrals posting

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

People use deferrals to recognize a revenue or an expense during a period that is different from the one in which the transaction was actually posted. Most accounting controls are focused on the current accounting period. The deferrals functionality lets you automatically defer revenues and expenses over a specified schedule and multiple accounting periods, giving accountants more control over when people post deferrals.

Feature details

You can define periods during which you allow people to post deferrals for specific users on the **G/L Setup** page, and for users on the **User Setup** page by entering dates in the **Allow Deferral Posting From** and **Allow Deferral Posting To** fields. This lets people post deferral entries in a future period, even though the Allow Posting From/To fields block other entries.

For deferral templates, you now have an option to specify **Beginning of Next Calendar Year** as the starting date.

Deferral Schedule

Deferral %

100

Calc. Method

Straight-Line

Start Date

Beginning of Next Period

Posting Date
Beginning of Period
End of Period
Beginning of Next Period
Beginning of Next Calendar Year

New option for Start Date: Beginning of Next Calendar Year.

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New UI for entering demand forecasts to add support for variant code and other improvements

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Accurate demand forecasting gives businesses valuable insight into their position in the market, which helps decision makers shape their strategies for pricing, business growth, and market potential. The ability to include the right level of detail on item variants in demand forecasts unlocks planning capabilities and reduces lead times for companies that don't have an inflow of sales orders and manage many nearly identical items.

Feature details

Item variants are a great way to keep your list of items under control, especially if you have a large number of items that are almost identical and vary only in color, for example. Rather than setting up each variant as a separate item, you can set up one item and then specify the various colors as variants of the item.

You can already register the anticipated demand not only with respect to locations and dates, but with item variants as well in the **Demand Forecast Entries** page directly or use the **Edit in Excel** action for bulk editing.

With 2022 release wave 1, you can define the right level of details in the **Forecast by Location** and **Forecast by Variant** fields in the **Demand Forecast Overview** page. Notice that filters by date, locations, items, as well as forecast type are stored in the **Demand Forecast Name** table. So you can easily stop and continue your work later.

Existing customers must activate the new experience in the **Feature Management** page: *Feature Update: Enable a new user experience for creating demand forecasts.* For new customers of Business Central, this experience is enabled by default.

Dynamics 365 Business Central

Demand Forecast Overview

NEW UI

Previous Set Previous Column Next Column Next Set More options

General Show less

Demand Forecast Name: NEW UI

Description:

View by: Month

View as: Net Change

Forecast Type: Sales Item

Item Filter:

Forecast by Locations: ☒

Location Filter:

Forecast by Variants: ☒

Variant Filter:

Date Filter: 04/01/21..06/30/21

Demand Forecast Matrix

No.	Description	Variant Code	Location Code	Apr 2021	May 2021
1936-S	BERLIN Guest Chair	BLUE	MAIN		
1936-S	BERLIN Guest Chair	BLUE	WEST		
1936-S	BERLIN Guest Chair	GREEN	EAST		
1936-S	BERLIN Guest Chair	GREEN	MAIN		
1936-S	BERLIN Guest Chair	GREEN	WEST		
1936-S	BERLIN Guest Chair	RED	EAST		
1936-S	BERLIN Guest Chair	RED	MAIN		
1936-S	BERLIN Guest Chair	RED	WEST		
1936-S	BERLIN Guest Chair	YELLOW	EAST		

Demand Forecast Overview page with enabled location and variant.

Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Payment reconciliation journal

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Bank and payment reconciliations are key processes for all businesses because they provide an overview of whether the cash flow is accurate, and that all transactions have been accounted for. In this release we've made it even more efficient to use payment reconciliation journals.

Feature details

The **Payment Reconciliation Journal** has been improved with the following capabilities:

- View fields for debits and credits on the footer of journals.
- Use separate number series.
- Preview before posting.
- Use the payment reference on the auto-application rule.
- Identify the bank ledger entries that are already posted.
- Reverse the G/L register posted through the payment reconciliation journal.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Report selection for projects

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

The Report Selections for Jobs page lets users specify which report object will be used to print job quotes if you use the Jobs module to manage your projects.

Feature details

Use the in-product Search to open the new **Report Selection - Job** page. The default configuration will use report 1016 **Job Quote**, but you can change this default behavior. You can also add reports to the **Report Selection - Job** page if you want to print more than one report per document type, for example.

In this version, you can only specify **Job Queue** as the value for the **Usage** field.

For more information, see [Report Selection](#)

Report Selection - Job.

Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Set default dimensions on locations

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Dimensions are values that categorize entries so you can track and analyze them on documents, such as sales orders. For example, dimensions can indicate the department or project an entry came from. That can help people avoid making a mistake and having to enter dimension manually on the transaction level if all goods are coming out of a single location and department.

Feature details

You can now set default dimensions for a location on the **Location Card** page by choosing **Location**, and then **Dimensions**. The location's default dimensions are copied to journals and documents when you specify the location on a line, but you can delete or change the

dimension on the line if needed. You can require that people specify dimensions for specific locations before they can post an entry. You can also include location dimension values in **Default Dimension Priorities** and **Dimension Combinations** for combinations of priority and dimension rules.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Shopify connector

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Dynamics 365 Business Central is teaming up with Shopify to help our customers create a better shopping experience. Shopify provides merchants with an easy-to-use e-commerce solution, and Dynamics 365 Business Central offers comprehensive business management across finance, sales, service, and operations teams in a single application. Seamless connection between the two systems will synchronize order, stock, and customer information to ensure that merchants can fulfill orders faster and better serve their customers. The joint effort furthers the commitment of Dynamics 365 Business Central to connect data to help businesses adapt faster, work smarter, and perform better.

Feature details

Adapt faster

Connecting Dynamics 365 Business Central with Shopify will help merchants all over the world implement more agile online business processes, while keeping people focused on selling. With connected data across your online stores and business operations, you can rapidly respond to consumer demands to adjust product pricing and merchandising. With support for multitier pricing structures and multiple currencies, companies, and entities, Business Central will support multiple Shopify store scenarios with ease.

Work smarter

Eliminating manual processes will not only improve accuracy, but also keep people focused on taking care of customers. By connecting Shopify and Business Central, you will improve visibility into stock, pricing, existing customers and order history, order status, billing, and

payments. Better visibility means faster customer inquiry responses, timely returns and refunds, and more accurate order processing.

Perform better

Enhanced operational efficiency not only saves you time and reduces costs but can also translate into better results and faster decision-making. You'll have the confidence to expand your online presence while minimizing overhead with automatic synchronization between systems for price changes, product updates, and customers. At the end of accounting periods, Business Central will help merchants handle their financial reporting and tax reporting as required by local legislation.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Standardizing the bank reconciliation process in North American versions

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Bank reconciliation in North American versions is now done through the standard Bank Reconciliation page, which has been improved to support the same tasks as the Bank Rec. Worksheet did in those versions. The Bank Rec. Worksheet page that was specific to North American versions will be removed in April 2023.

Feature details

Bank reconciliation in the North American (NA) versions for the United States, Canada, and Mexico can be done either through the standard Bank Reconciliation page or with the Bank Rec. Worksheet page, which was missing some of the newer features that the Bank Reconciliation page offers. To standardize the bank reconciliation process, we have modified the Bank Reconciliation page, added a feature for deposits that is the same as we provide for the NA version today, and added capabilities to allow users to reconcile deposits.

In addition, header and footer fields help ensure that users have the same overview of outstanding checks and payments as they had in the NA versions. The Bank Statement Report (posted bank reconciliations) is improved to show more detailed information on the G/L balance and outstanding checks and payments than the current NA version of the Test reports. The standard version of the Test report is improved accordingly.

In the standard side-by-side bank reconciliation, all users can import bank statements (.csv files), use automatic matching, post and reconcile deposits, and get a better overview of

related data during bank reconciliation through on-page information such as a test report as well as a more audit-friendly report for posted bank reconciliations.

In April 2023, users must use the Bank Reconciliation page for bank reconciliations. The Bank Rec. Worksheet will no longer be available.

Users who have performed bank reconciliations using the Bank Rec. Worksheet page will still be able to review their posted bank reconciliations and print reports for them.

By default, the Bank Reconciliation page is turned on. To turn on the Bank Rec. Worksheet page and use it instead, you can open the **General Ledger Setup** page and turn on the **Bank Recon. With Auto. Match** toggle.

The following pages and reports are marked as Obsolete in this release:

- PAG 10120 Bank Rec. Worksheet
- REP 10407 Bank Rec. Test Report
- REP 10406 Bank Rec. Process Lines

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Support inventory pick and warehouse pick operations for jobs

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Enable internal warehouse activities for jobs to ensure an effective flow through the warehouse and to organize and maintain company inventories.

Feature details

The warehouse activity of picking items before they are consumed is performed in different ways, depending on how warehouse management features are configured. The complexity can rank from no warehouse features, through basic warehouse configurations for order-by-order handling in one or more activities, to advanced configurations where all warehouse activities must be performed in a directed workflow.

If you decide to organize and record your picking activity with warehouse documents, you choose the **Require Pick** field on the **Location Card** page. This field specifies whether you must perform pick activities in the warehouse at this location.

NOTE Although the setting is called **Require Pick**, you can still post consumption directly from the job journal line at the location. If your location is set up to require pick processing

but not shipment processing, you use the **Inventory Pick** page to organize and print the picking information, and enter and post the result of the pick, which in turn posts the consumption of the items.

If your location is set up to require both pick and shipment processing, meaning that you have chosen both the **Require Pick** and **Require Shipment** fields on the **Location Card** page, you use the **Warehouse Pick** page to handle the pick. The warehouse pick functions similarly to the inventory pick, except that instead of posting the picking information you register the pick. This registration process does not post the consumption, but merely makes the items available for post. As a warehouse manager, you can use a pick worksheet to organize pick information before creating the individual warehouse pick instructions.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Synchronize sales quotes and orders in both directions between Business Central and Dynamics 365 Sales

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2022	Apr 2022

Business value

Keep your sellers informed about possible shipment delays, inventory shortages, or other changes to the sales quotes and orders that you synchronize between Business Central and Dynamics 365 Sales.

Feature details

You can now synchronize sales quotes and orders between Business Central and Dynamics 365 Sales in both directions. For example, if a customer changes their mind about the product or quantity they ordered in Dynamics 365 Sales, such changes can be automatically processed in Business Central by archiving the sales document and creating new one. The same is true for changes in Business Central—for example, when prices, tax amounts, or expected shipment dates change, the changes are automatically synchronized to Dynamics 365 Sales. That helps keep your sellers up to date with the latest changes and the status of quotes and orders.

The **Integration Table Mappings** page contains new mappings for sales quote and order header and lines. When setting up the initial connection for Dynamics 365 Sales, active

quotes and orders can be synched between Business Central and Dynamics 365 Sales using **Full Synchronization** or **Match-based coupling**.

NOTE This feature and existing sales order integrations are mutually exclusive. You can use one or the other, but not both.

NOTE You must have the **Feature Update: Bidirectional Synchronization of Sales Order and Quotes** feature enabled in the [Feature Management](#) page to use this capability.

Tell us what you think

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Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Use different G/L accounts for payables and receivables transactions

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Sometimes businesses want to post payable and receivable transactions to a different G/L account than the one that is specified on the customer or vendor posting group—for example, in a case where a transaction is for a bad debt. Controllers can define policies for posting these non-standard transactions, and accountants can change them during posting.

Feature details

You can enable alterations of default customer or vendor posting groups by choosing **Allow Alteration of Posting Group** on the **Sales and Receivable Setup** and **Service Mgt. Setup** pages for customer posting group changes, and the **Purchases and Payables Setup** page for vendor posting group changes.

On the **Customer Posting Groups** or **Vendor Posting Groups** pages, you can specify the posting groups to allow as substitutes by choosing **Substitutions**. Substitute posting groups can replace the default customer or vendor posting group specified for a customer or vendor.

After you set this up, you can pick among allowed substitute posting groups and change customer or vendor posting group when posting sales or purchase documents and journals. Changed, non-default, customer or vendor posting groups are copied to posted documents and journals, and payable or receivable G/L entries are posted to the G/L accounts specified for the substitutes.

When applying, for example, an invoice and payment that are posted to with different customer or vendor posting groups (different G/L accounts), Business Central transfers amounts between the G/L accounts to balance them.

A **Suggest Vendor Payments** report can now also be run using Vendor Posting Group as criteria for suggesting payments.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Better with Microsoft 365

Overview

In 2022 release wave 1, we invest in a stronger reporting story through better integration with Excel where we'll use the Excel layout capabilities. We also further improve the support for collaborative business processes in Teams so you can bring Business Central pages into a Teams channel. Finally, we also enrich the information from Business Central that we present in Teams.

Improvements to the Teams integration and Details page

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

The Business Central app for Teams and the ability to view details of the shared content directly from Teams remains a crucial point of collaboration. We add more capabilities and strengthen the link between these two apps so that business decision makers can act fast and collaborate with other stakeholders without leaving Microsoft Teams.

Feature details

When a link or record from Business Central is shared to Microsoft Teams, either through the **Share** feature that we introduced in 2021 release wave 2 or by copying the link from the browser tab, it renders an actionable mini-card that displays the most crucial information about the data that you shared. In this release wave, we add more capabilities to this adaptive card:

- The card opens the **Details** view on a larger page that gives you more screen real estate. It also gives you access to more insights and details about the entry. You can open the FactBox pane on the side, see details in focus mode, or view more columns of information at the same time.
- From the **Details** page, you can open the full Business Central experience in the browser. With the addition of this capability, we'll remove the equivalent option from the main mini-card.
- The card can be pinned as a new tab in Microsoft Teams.

In addition to these improvements, you can also directly pin a new tab to a Teams channel or chat by choosing the **New tab** action in Teams, and then choosing the Business Central icon. This way, you can add a new tab with rich Business Central content.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Outlook add-in – add attachments from emails directly to Business Central documents

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Working with Business Central add-in for Outlook allows salespeople and decision makers to take direct action while communicating with customers. With this new change, we're allowing any attachments sent by the customer via email to be added to Business Central records, and this way simplify the workflows and shorten the learning curve.

Feature details

This feature provides you with an option to take all or selected attachments sent by the external customer via email and directly add them to Business Central records (as attached documents for contacts, customers, and so on).

In Outlook, the add-in will display a list of the attachments to the email and allows the attachments to be moved to Business Central.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Development

Overview

We continue to invest in a rich spectrum of extensibility tooling capabilities for developers, including making the AL language even stronger, providing developers with a great experience.

Auto-deploy dependent projects in workspace

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	Apr 2022

Business value

When working with AL workspaces and projects in Visual Studio Code, it is common to open the workspace and deploy a given project. Currently, however, if the NST server doesn't have all the extensions that the project depends on, these must be manually traversed and installed, as dependency publishing only works if there is a baseline to calculate from. To optimize the experience, and remove unnecessary manual work, deployment will now automatically deploy required projects in the workspace.

Feature details

To optimize the experience and remove unnecessary manual work, deploying an AL project in a Visual Studio Code workspace will traverse the project dependency graph in the workspace and install any required projects if these are not already deployed to the NST server. Note that this will only handle project and app references covered by the workspace. If the deployed AL project has dependencies to apps not included in the workspace, these will still have to be present or manually deployed in advance.

In-client performance profiler

Enabled for	Public preview	General availability
Users, automatically	Feb 2022	Apr 2022

Business value

In 2022 release wave 1, we add new capabilities to the AL performance profiler. In this release wave, we are going to empower functional developers/consultants, as well as customer administrators and power users to capture a user flow from within the web client, and view high-level information about time spent in the web client. This way, people can investigate which involved extensions consume the most time, including top-consuming method calls, for example.

Feature details

In 2021 release wave 2, we added the AL performance profiler to the Visual Studio Code AL experience. The performance profiler has empowered pro developers to investigate performance as part of developing new functionality, as well as help troubleshoot performance issues in AL code in customer environments, even in production.

In 2022 release wave 1, we are going to take this even further. Having this tool will make it easy for consultants and customer administrators to seamlessly perform initial performance investigations without involving pro developers, to be able to pinpoint performance issues and file support cases to the most likely owners of the app, be that a per-tenant extension, an AppSource app, or the Dynamics 365 Business Central core app. It will also be possible to share the resulting capture, making it faster for a pro developer to do further analysis without having to perform a repro of the issue locally.

The in-client performance profiler will be a new app page that can be reached on its own or from the **Help & Support** page. It will contain actions to start and stop the capture of a user flow. You will be able to see the performance results of a capture, including time spent per involved extension, top method calls, and other metrics. You'll also be able to download the capture so that you can share it with technical support or a pro developer. Note that the rules of GDPR apply to this. The page can be opened in another browser window side-by-side with the user experience that you want to profile so that you can make sure the capture is as concise as possible and only contains the relevant steps. In this release wave, it will only be possible to capture the current session for the user who starts the profiler.

Demo tool and demo data for manufacturing scenarios

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

To help partners demonstrate the premium capabilities of Business Central, we are making the demo tool and demo data available for manufacturing scenarios.

Feature details

The demo tool and demo data set will be available for scenarios in manufacturing as an extension that you can install on any environment. Presales specialists can run the tool on top of Cronus or My Company and get the setup and demo data they'll need when they demonstrate various scenarios in the manufacturing space. Both the demo tool and the demo data set are available on product media as source code.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

AL-Go for GitHub – modern DevOps for partners

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	Apr 2022

Business value

By making continuous integration and continuous delivery (CI/CD) virtually free in terms of investment, more partners adopt this practice, which leads to a higher quality in apps for Business Central.

Feature details

When you create a new GitHub repository, you can base it on either the [PTE](#) or the [AppSource App](#) template repository. Both types of repos give you a fully functional GitHub repository for AL projects, in which you can create your new app or add your existing app.

- Create a new app by using the **Create a new app** or the **Create a new test app** workflow.
- Add an existing app by simply uploading the .app file to the **Add existing app or test app** workflow.
- Apps added are automatically included in the **CI/CD** workflow.
- Test execution and reporting is automatically handled for all test apps, and every successful build produces artifacts that are stored on the build for 90 days, which is the GitHub default period.
- Create an actual release by using the **Create Release** workflow.

- Every successful release is stored indefinitely, and the source for this release is available indefinitely as well.

A customer environment can be linked to the GitHub repository for continuous or manual deployment setup.

The **Update AL-Go System Files** workflow ensures that repositories always use the latest version of the workflows and actions and never get stale.

You can create local **Docker-based** and online **SaaS** development environments with all apps prepublished and ready for Rapid Application Development.

Read about the supported scenarios at [AL-Go for GitHub](#) and try it today.

Telemetry – company name as a custom dimension in AL LogMessage

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	Apr 2022

Business value

Partners can get more detailed insights into the telemetry that is emitted from AL LogMessage methods.

Feature details

The Business Central server will now emit the following additional custom dimension with every call to [AL LogMessage methods](#).

- Company name

This new dimension will make troubleshooting and analytics much better for telemetry that is emitted from AL, both for telemetry emitted from the base application or system modules, and also for telemetry emitted from per-tenant extensions and app source apps.

Users can export report datasets to XML

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	Apr 2022

Business value

Users and developers can get report datasets in XML that they can then use to either archive the data for compliance or integration scenarios, or to troubleshoot the reports during development.

Feature details

Similar to the **Export dataset to Excel (no layout)** capability that was added in 2021 release wave 1, business users and developers can now get report datasets in XML directly from the request page.

The **Export dataset to XML** feature will show up the same place in the request page and will also require the same privileges.

Governance and administration

Overview

Business Central 2022 release wave 1 delivers a set of admin and governance capabilities to help admins and IT pros set up, secure, manage, govern, and monitor customer environments. Areas of investments include improving the error messages to include additional details and support information.

Customer-managed encryption key for encrypting customer data at-rest

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2022

Business value

This capability will allow customers to meet their data and privacy policy according to the standard privacy guidelines.

Feature details

Customers can use their own encryption key from their own Azure Key Vault to encrypt their Business Central environment database at-rest.

The encryption key is used to encrypt data at-rest for all customer Business Central environments.

Customers can consent to Microsoft Support accessing their data through a Lockbox consent flow

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2022

Business value

Customers can fulfill their data privacy requirements and get Microsoft support in a way that ensures their explicit consent.

Feature details

With 2022 release wave 1, customers can consent to Microsoft Support staff accessing their data through a Lockbox consent flow.

Allow security administrator to define default permission set assignments when user is signing up

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	Apr 2022

Business value

We've given Business Central security administrators improved control over who has access to what. The administrators can specify which permission sets or user groups are relevant for different product licenses and plans. Then, when someone signs up, they are automatically granted the permissions that the administrator specified for their license or plan.

Feature details

Business Central security administrators can define which permission sets or user groups are assigned by default to a user when they sign up. Specifying which permission sets or user groups are relevant for a license or plan helps the administrator ensure that the user has the right access from the start.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Updating only licensed users from Microsoft 365 runs faster and more efficiently

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2022	Apr 2022

Business value

Updating users from Microsoft 365 runs faster and more efficiently with this update.

Feature details

In large organizations with many users, Azure Active Directory often includes a large number of user accounts. With this update, only users who have a valid Business Central license will be queried and updated when the admin runs the **Update users from Microsoft 365** process. As a result, the process runs faster.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Permission set handling enhancements

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2022	Jun 2022

Business value

Improve the administrator's capabilities to add support for creating, customizing, and managing permission sets to control user access to capabilities in Business Central.

Feature details

The new permission system capabilities in Business Central that became generally available in 2021 release wave 1 allow developers to establish a hierarchy of permission sets, include sets inside other permission sets, and extend permission sets. In 2022 release wave 1, admin users can leverage the permission sets and group them based on a tenant's needs, visualize which permission sets are included in a given set, include others, and finetune them as needed.

We also deliver a new capability to subtract permissions with a permission set scope in this release wave. This capability lets the admin specify that an object cannot be accessed, unless access is not granted by another permission set.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

See also

[Entitlements and Permission Sets Overview](#) (docs)

Microsoft Power Platform

Overview

In 2022 release wave 1, we improve the integration with Microsoft Dataverse and Microsoft Power Platform to enable users to be more productive and self-sufficient by making it easier to use Power Apps, Power Automate, and Power BI with Business Central. For example, we make it simple and intuitive to trigger a Power Automate flow from a specific Business Central page. In another example, this update makes it possible to add more Power BI dashboards to a user's Home page for a faster way to get to the critical business insights.

Dataverse data change events

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	-

Business value

Business Central virtual tables will emit data change events, just as the native tables do. This enables Power Automate triggers to execute when data changes for the virtual table.

Feature details

With the Business Central virtual tables solution for Dataverse, the Business Central API is exposed as tables in Dataverse. This way, makers can build apps with Power Apps that leverage the virtual tables as if they were native Dataverse tables.

Improvements to the Power Automate and Power Apps connector

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022

Business value

Being able to use Business Central and Power Platform with great confidence is essential these days. Users are empowered to enhance and integrate Business Central using no-code/low-code tools such as Power Automate or Power Apps.

Feature details

In this release wave, we add new capabilities to the Power Automate and Power Apps connector, so you can start using Business Central with Power Automate and Power Apps with greater confidence. The following list shows the specific enhancements to the connector:

- Support for finding data, filtering, and sorting
- Support for adding related records (data from both header and lines of documents)
- Improved reliability
- Potential removal of the *Preview* label

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Modern clients

Overview

In 2022 release wave 1, we make improvements to our extensive portfolio of clients with the focus on better usability, accessibility, performance, and stability.

Introduce copy link option in the Share menu

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Being able to access, save, or share the link to the current page without the need to go to the browser address bar helps sharing data and working across different devices.

Feature details

In this release wave, we add a new capability to the Business Central web client. The **Share menu** is updated so you can copy a link to the current page directly to the clipboard without the need to copy-paste from the browser's address bar. This can be helpful when you use the installable app or within Teams, since neither experience where the access to the browser's address bar is limited.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

The new PWA app replaces the Windows desktop app (UWP)

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Having access to Business Central as an app installed on your device is preferred by many users. In 2021 release wave 2, it became possible to install Business Central as an app from the browser window. With this release wave, we make this app easily discoverable in the Microsoft Store.

Feature details

The PWA-based desktop app is in the Microsoft Store and can be installed for both Business Central online and on-premises solutions. This app replaces the legacy UWP app that was

based on older technology. At the same time, the old UWP app will be kept and maintained only for supported on-premises deployments.

For more information, see <https://aka.ms/bcpwa>

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Usability improvements to the web client

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

With a growing and diverse workforce that is learning how to use the web client, and not least use the browser to complete business tasks quickly and reliably, we must continue to optimize the client for improved usability.

Feature details

In 2022 release wave 1, we introduce several additional enhancements to the usability of the web client:

- When you navigate to related entities using the *Peek* feature for entities where the card or document page is not present, the *Peek* feature offers a new **Open full list** option so that you can go to the relevant list.
- Improved behavior of lookups on dynamic fields, such as the **Description** field on sales documents, lets you choose an item but also enter a custom description.
- When a FastTab expands, the page scrolls up so the next FastTab caption is visible.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Onboarding

Overview

Onboarding is a key focus in every release wave. The aim is to make the onboarding of new customers faster, but also the onboarding of new users. In the most recent release waves, we have removed some of the friction in the onboarding of new customers by empowering partners to deliver uniform onboarding experiences at scale. This way, our partners can deliver more valuable services to their customers. Partners can use a combination of in-

product artifacts, such as the Get Started checklist, teaching tips, configuration packages, and assisted setups.

In 2022 release wave 1, onboarding to Dynamics 365 Business Central will be even easier because we will focus on people-centric experiences. Business Central becomes able to provide easy access to context-specific content. This way, we flatten the learning curve and unblock individual users in performing their business processes. Users will also be guided to understand how they can personalize Business Central to their needs.

The access to the context-specific content will be powered by a new and modern Help pane similar to that of other Microsoft offerings. The context-specific content that users get access to through the Help pane will include Microsoft-hosted content and partner-hosted content so that the Help pane is the go-to place to get unblocked.

Additionally, teaching tips will be able to include clickable links so that page- and control-level teaching tips can refer to documentation or other in-app pages.

Context-aware links in the Help pane from Microsoft and partners

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Users can self-educate and self-unblock in their journey with Business Central. This is especially relevant in the onboarding phase when customers historically relied on our partners and their consultants for training.

Feature details

In 2022 release wave 1, Dynamics 365 Business Central will be able to serve context-aware links to guidance and learning to help flatten the learning curve and unblock the individual user in performing business processes. The context-aware content will be powered by a new and modern Help pane, similar to the experience in other Microsoft offerings. Also, partners can configure their content to be available to the Help pane. This way, the Help pane becomes the go-to place to get unblocked.

We aim to make the Help pane able to surface links to conceptual Microsoft documentation, Microsoft Learn content, and partner-hosted documentation, provided that the partner content is built and stored according to our guidelines.

In this release wave, support for partner-hosted content is driven by [the existing AL-supported engine for context-sensitive help](#). In a later release wave, we plan to provide tools and guidance for partners to connect their content to the Help pane through a search index in the same way as we connect our docs to the Help pane.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Guided tour that helps users find settings and personalization tools

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Personalization is a powerful capability in Business Central. By being shown the options for personalization in a tour of the Role Center, the user is more likely to discover this capability early on so they can get productive with Business Central as fast as possible and decrease their onboarding time.

Feature details

Today, some roles can take a tour of their Home page, the Role Center, as the first task in their Get Started checklist. This tour will now be expanded with more steps to highlight where to find settings and options for personalization in the **Settings** menu. This is important, especially in non-evaluation companies where users want to dive into settings or change their role to a more relevant one.

Tell us what you think

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Support for rich text in teaching tips and tours

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

Lower the entry bar by helping users understand how to use and be successful with a complex and comprehensive business solution.

Feature details

In 2021 release wave 1, Dynamics 365 Business Central got the capability of showing in-product teaching tips to help and guide the user to understand concepts, pages, and controls. In 2022 release wave 1, we expand the capability to allow Microsoft and partners to mark up rich text in the teaching tips to provide even clearer descriptions. You can also add a

link to other in-app entities from a teaching tip, which supports users in finding and understanding business process flows more easily.

Tell us what you think

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Tour of the Role Explorer and how to filter it

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

By choosing the best match role, users can be more productive with Business Central. In Business Central, users can get an overview of the functionality by navigating to the Role Explorer.

Feature details

Dynamics 365 2022 release wave 1 adds a Role Center tour that nudges users to navigate the Role Explorer. When they go there, they'll be offered a mini-tour that explains how the Role Explorer is structured and how they can filter the view to see, for example, **Reporting & Analysis** or **Administration**. Once they understand the filtering mechanism, it's easier for users to see the breadth of reporting options or get a view of all setup-related pages.

Tell us what you think

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Reporting

Overview

Reporting is top-of-mind for many business users, both as a way to get insight into new growth opportunities but also as a way to share data as a foundation for business planning discussions. We will deliver a better experience with Excel layouts. We'll also provide improvements to the account schedules capability. Finally, we will improve our Power BI analytics story by enabling more Power BI dashboards to be shown on the Home page of business users.

New capabilities for financial reporting with account schedules

Enabled for	Public preview	General availability
Users, automatically	Mar 2022	Apr 2022

Business value

The presentation of financial reports is an important part of how people consume them. Reports must provide business insights in a way that enables people to easily recognize the report and quickly identify the important data. In Business Central, account schedules are the main tool for creating user-defined financial reports. This release provides new capabilities for account schedules that make it easier for people to produce reports in the layout they desire.

Feature details

Financial reports can be generated using new capabilities for account schedules:

- You can print the Account Schedules report a landscape format.
- You can control how the number zero is printed (as "0", "-", or (blank)). When skipping zero-lines you can now keep Headers, Begin-totals, and End-Total in order to keep the schedules structure legible.
- When you define account schedules, you can use G/L account categories as the Totalling filter for columns, and define whether to hide columns that don't contain content.
- The Account Schedules Overview now supports 15 columns to support viewing budgets for 12 months + a total.
- You can export and import account schedules to or from files, which makes it easier to reuse them between companies.
- Headings (Begin-totals) are now kept when printing to keep the structure of the account schedule. You can also choose to print lines marked as Show=No, which makes validating the account schedules easier to do when you're designing them.

Row No.	Description	TOTAL	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
P0001	Income													
P0002	Income, Services													
P0003	Income, Product Sales	483,040.20	35,529.70	41,274.90	51,360.60	57,528.00	45,622.10	49,019.00	36,290.50	43,123.60	33,907.30	36,226.00	33,374.00	20,022.50
P0004	Income, Jobs													
P0005	Sales Discounts	-4,577.06	-339.51	-368.08	-486.59	-529.22	-458.61	-444.85	-368.72	-402.55	-313.37	-326.69	-296.27	-227.30
P0006	Sales Returns & Allowances													
P0007	Income, Interest													
P0008	Job Sales Contra													
P0009	Total Income	478,463.14	35,190.19	40,906.82	50,874.01	56,998.78	45,163.29	48,574.05	35,889.78	42,721.05	33,593.93	35,899.31	33,077.73	19,795.20
P0010														
P0011	Cost of Goods Sold													
P0012	Labor													
P0013	Materials	376,690.30	27,707.60	32,186.82	40,054.40	44,861.90	35,735.30	38,325.00	28,270.30	33,628.70	26,129.40	26,251.20	26,024.90	15,614.10
P0014	Discounts Granted													
P0015	Job Cost													
P0016	Total Cost of Goods Sold	376,690.30	27,707.60	32,186.82	40,054.40	44,861.90	35,735.30	38,325.00	28,270.30	33,628.70	26,129.40	26,251.20	26,024.90	15,614.10
P0017														
P0018	Gross Profit	101,772.84	7,482.59	8,720.02	10,809.61	12,136.88	9,427.99	10,249.05	7,619.48	9,092.35	7,464.53	7,648.11	7,052.83	4,181.10
P0019														

Example of an account schedule with 13 columns presented in the overview matrix.

Row No.	Description	Totaling Type	Totaling	Row T
→ 1000	Assets	Account Category	Assets	Net Cl

The new *Totaling Type* option *Account Categories* in account schedules.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

Thank you for your idea

Thank you for submitting [this idea](#). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Use Excel to design layouts for reports

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	Apr 2022

Business value

Users can now use Excel to create and edit layouts for reports.

Feature details

Excel layouts work the same way as Word and RDLC layouts in that they can be edited and saved back again into Business Central.

With Excel layouts for Business Central reports, users can now create and edit report layouts simply by using the full palette of capabilities in Excel such as sliders, diagrams, charts, and pivot tables.

To create an Excel layout from scratch, open the report request page, and then run the report with the option *Excel document (data only)*. The report generates an Excel file with sample data and the fields that are available in the report definition. Then you add your layout to additional tabs in the Excel file. To test the layout, simply import it as a custom layout in Business Central. After the system has validated that the layout is valid for use, you can now go to the request page and run the report with your new layout.

Service and platform

Overview

No matter the industry type of a small or medium-sized business (SMB), business users expect a dependable service and platform that they can run their business on. In every release wave, we improve performance. In this release wave, we provide more insight by enabling an in-product performance advisor and in-client performance profiler. We also continue the effort of improving the client's rendering time and the performance of data entry.

Performance – partners can get database insights through virtual tables and in-client pages

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	Apr 2022

Business value

Developers and administrators can get insights into database performance.

Feature details

The database for a Business Central environment makes performance counters and information about SQL queries available through Dynamic Management Views (DMVs). It requires direct database access to be able to obtain this information, and for Business Central online environments, this is not possible due to security restrictions. With this capability, the Business Central platform will make data from a subset of these DMVs available as virtual tables, so that the data can be accessed from AL code. We will also add pages on top of the tables to make it easy to get the data without having to write code.

Telemetry – error dialogs are logged to telemetry

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	Apr 2022

Business value

When a user gets an error dialog, it is logged to telemetry. Partners can get insights into which errors users get in their setup and help users get unblocked.

Feature details

If an error message is shown to the user, the Business Central server will log calls to the ERROR method to partner telemetry.

Using telemetry, partners can get insights into which AL code paths trigger error situations for users.

Partners or tenant administrators can also set up alerts in Azure Monitor to get notified if many users experience errors.

Telemetry – support engineers can now see user IDs in telemetry

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	Apr 2022

Business value

A support engineer can now easily find data in telemetry for a given user. This makes troubleshooting much easier.

Feature details

The Business Central platform will emit a pseudo user ID to telemetry. This will allow a troubleshooter to identify which data in telemetry corresponds to a given user.

The pseudo user ID is a new field on the **User Card**. To support good privacy practices, it is possible to rotate the pseudo user ID to remove the link from a user to the entries in telemetry.

Telemetry – the action of enabling detailed telemetry is logged to telemetry

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	Apr 2022

Business value

Partners can get easier troubleshooting for a session that has enabled detailed telemetry.

Feature details

When a user enables detailed telemetry from the Help and Support page, the action is also logged to telemetry. A follow-up event is logged when the session leaves detailed logging.

This will make troubleshooting much easier for a support employee because it will be easy to identify the session that had detailed logging enabled.

Telemetry – when a database deadlock occurs, this is logged to telemetry

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	Apr 2022

Business value

Partners can get insights into database deadlocks in an environment and help users be unblocked.

Feature details

If a database deadlock occurs, the Business Central server will log an event to partner telemetry.

Using telemetry, partners can get insights into which AL code paths trigger database deadlock situations for users.

Partners or tenant administrators can also set up alerts in Azure Monitor to get notified if many users experience these types of errors.

Connected Spaces

Overview of Dynamics 365 Connected Spaces 2022 release wave 1

Dynamics 365 Connected Spaces is a turnkey software as a service (SaaS) solution that gathers and analyzes observational signals and line-of-business data to create insights and automate actions. Connected Spaces brings together computer vision and AI to help transform the operational experience. By using data from video cameras, Connected Spaces delivers real-time actionable recommendations that can make operations more efficient, improve customer experiences, and bridge the physical and digital divide by offering benefits that are traditionally available only in online spaces.

Dynamics 365 Connected Spaces enables you to:

- **React to environmental triggers:** Ensure that customer needs are met effectively and quickly by equipping managers and employees with actionable alerts triggered by activity. Access to automated, sensor-driven reporting is standardized and available for immediate action.
- **Understand and optimize your space:** Take advantage of real-time and historical dashboards that inform you on the status of your space and the change that occurs within it. Optimize staffing and merchandising decisions using AI-driven insights around the activity in the space on any given day and time. Reports are accessible to employees, managers, and even stakeholders outside of the immediate environment, such as a regional manager.
- **Empower long-term decision making:** Predict the ideal future behaviors as your environment status changes over time. Get stronger insights with each passing day.

Connected Spaces achieves this by using the following hybrid approach:

- **Intelligent edge:** A managed on-premises gateway that converts camera streams into observational data sent to the cloud.
- **Intelligent cloud:** A multitenant SaaS solution that correlates observational signals from the edge to provide insights and trigger actions.
- **Prebuilt AI models:** Out-of-the-box AI models tailored for the retail industry that apply computer vision and AI to a physical space.

We'll provide more information on upcoming features soon.

Guides

Overview of Dynamics 365 Guides 2022 release wave 1

Dynamics 365 Guides empowers employees with the critical information and on-the-job guidance that they need to achieve greater operational efficiency. Easy-to-author guides provide step-by-step holographic instructions for employees to standardize processes, reduce errors to increase yield, upgrade skills, and ensure compliance while keeping employees safe. Remotely connect with experts and bring critical information into view to help troubleshoot, audit, or support dangerous and delicate procedures.

- **Improve employee productivity with advanced guidance:** Accelerate learning, standardize processes, and reduce errors to increase yield with step-by-step holographic instructions and hands-on training that show employees how to use tools and stay safe on the job.
- **Solve problems in real time with expertise and ease:** Seamlessly collaborate, share knowledge, and problem solve with a remote expert and bring critical data into view while in the flow of work.
- **Adapt at the speed of change:** Author guides for training or day-to-day processes and quickly disseminate information across your organization, with no programming or 3D skills necessary.
- **Maximize operational efficiency with data-driven insights:** Incorporate guides into workflows to gain visibility and insight into performance data to maximize operational efficiency over time across your organization.

Dynamics 365 Guides addresses the needs of three key personas: content authors, operators, and managers/analysts.

- Authors can easily create guides without 3D or programming skills by using a simple PC app and a HoloLens app.
- Operators use guides on HoloLens in training and on the job to get guidance while they work in a heads-up, hands-free style.
- Trainers and managers can analyze usage data to optimize their workflows.

What's new and planned for Dynamics 365 Guides

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Feature	Enabled for	Public preview	General availability
Support for mobile devices	Admins, makers, marketers, or analysts, automatically	Jul 2022	-
Grant guide access to third parties	Admins, makers, marketers, or analysts, automatically	-	Apr 2022

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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Support for mobile devices

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2022	-

Business value

Customers have use cases that would benefit from deploying Dynamics 365 Guides to mobile devices. Being able to review guide content on mobile will make Dynamics 365 Guides more versatile, enabling customers to address more scenarios for more people in their organizations.

Feature details

Customers will be able to review their content (instruction text, pictures, videos, and 3D models) directly on their mobile devices. On a mobile device, content will look a lot like it does in the PC app. Mobile device content cannot be anchored to the real world.

Grant guide access to third parties

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2022

Business value

This feature will enable admins to grant content access to partners or customers. This way, content never leaves the customer's environment and access is strictly controlled. This simplifies workflows as duplication or migration of content isn't needed.

Feature details

Customers willing to grant access to content in their own Microsoft Dataverse environment to third parties will be able to do so. For example, partners will be able to create content directly in their customers' environments.

Remote Assist

Overview of Dynamics 365 Remote Assist 2022 release wave 1

Microsoft Dynamics 365 Remote Assist is a mixed-reality application that empowers technicians to solve problems faster the first time. Whether in a heads-up, hands-free environment on Microsoft HoloLens, or using an iOS or Android device, technicians can collaborate with remote experts to troubleshoot issues in context. This modernizes field-service operations so technicians can make the most of their time.

Dynamics 365 Remote Assist is used in the following scenarios:

- **Service and repairs:** Enable companies to service assets faster by doing the right remote collaboration fast and capturing the right fix to perform further analysis.
- **Surveys and walkthroughs:** Perform tasks such as inspections, quality assurance, project reviews, and other field service and operations activities by capturing asset information with augmented reality.
- **Knowledge and service insights:** Empower your technicians to capture the right information and make it available for your broader organization. Use repair data from your technician operations to improve your business processes.

What's new and planned for Dynamics 365 Remote Assist

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

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This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Feature	Enabled for	Public preview	General availability
Enable a customer or vendor to join a one-time call	Admins, makers, marketers, or analysts, automatically	-	Apr 2022

Feature	Enabled for	Public preview	General availability
Support for screen sharing in the mobile app	Users, automatically	-	Apr 2022
New Restricted mode prevents HoloLens 2 users from making private calls, accessing files and assets, and signing out of the app	Users, automatically	Dec 2021	Apr 2022

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
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Enable a customer or vendor to join a one-time call

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2022

Business value

Customers want an easy way to remotely assist B2B vendors and customers or B2C customers through a mixed-reality video call. For example, a customer might want to remotely assist a vendor field engineer to resolve an issue or remotely assist a customer trying to repair an asset. Previously, only vendors and customers with a Dynamics 365 Remote Assist license in the correct tenant could use Dynamics 365 Remote Assist. Now, vendors and customers without a Dynamics 365 Remote Assist license can join a one-time call using Dynamics 365 Remote Assist mobile. This simplifies the deployment process required for customers to provide support through a Dynamics 365 Remote Assist call.

Feature details

The one-time-call feature, which had previously been released as a preview feature, will now be available for general availability (GA).

This feature includes the following capabilities:

- A customer support agent or field expert can create a one-time-call link.
- A vendor or customer can use the one-time-call link to download the Dynamics 365 Remote Assist mobile app and join the call.
- All call participants can view and create mixed-reality annotations.

See also

[Vendors and customers use full Dynamics 365 Remote Assist capabilities](#) (docs)

Support for screen sharing in the mobile app

Enabled for	Public preview	General availability
Users, automatically	-	Apr 2022

Business value

The ability for mobile users to share their mobile device screen will enable them to collaborate on a document that's been shared with them and opened locally on their mobile device. This enhanced collaboration with remote experts can speed up problem resolution.

Feature details

Sharing a mobile device screen is particularly useful when a document has been sent to a technician and is opened locally on their device. The technician and remote expert can then collaborate by sharing the same view of the document.

New Restricted mode prevents HoloLens 2 users from making private calls, accessing files and assets, and signing out of the app

Enabled for	Public preview	General availability
Users, automatically	Dec 2021	Apr 2022

Business value

Customers who provide HoloLens 2 devices running Dynamics 365 Remote Assist as part of their customer support for field-service scenarios need to be able to restrict users from calling anyone other than their designated support agent. They also need to be able to

restrict users from accessing company files and assets and from signing out of a specific user account that has an active Dynamics 365 Remote Assist license.

At the same time, customers want their Dynamics 365 Remote Assist users on HoloLens to be able to receive notifications to join meetings (and then join meetings) set up by their designated support agent.

Feature details

Admins will be able to use the new Restricted mode in Dynamics 365 Remote Assist to prevent HoloLens 2 users from making private calls, accessing files and assets, and signing out of the app. Admins will use a combination of policies and software to set up Restricted mode on Dynamics 365 Remote Assist.

To	Admins will
Restrict calling	Use a Microsoft Teams policy to restrict the ability for Dynamics 365 Remote Assist users to make private calls. The Teams policy will not restrict the ability for the Dynamics 365 Remote Assist user to join a meeting or receive meeting notifications set up by their designated support agent.
Restrict access to files	Use the Microsoft 365 admin center to restrict access to OneDrive, SharePoint, and Office for the Web.
Restrict access to assets	Use a modified Dynamics 365 security role. Users with this restricted role will not be able to see assets in the Dynamics 365 Remote Assist model-driven app, and will not be able to access assets through the Assets tab on HoloLens 2.
Keep users from signing in to a different account	Set up Kiosk mode for the HoloLens so the Dynamics 365 Remote Assist user can't sign out of the app.

Restricted mode is not available for the Dynamics 365 Remote Assist mobile app. Mobile app users, who typically bring their own device, can [join a Dynamics 365 Remote Assist call on an ad-hoc, one-time basis without having a Dynamics 365 Remote Assist license or a Teams license](#).

Customer Insights

Overview of Dynamics 365 Customer Insights 2022 release wave 1

Dynamics 365 Customer Insights is an industry-leading customer data platform that enables organizations to understand the data about their customers and drive personalization for them. Customer Insights empowers organizations to consolidate, enrich, understand, and harness their B2C and B2B customer data for intelligent insights and actions.

With Customer Insights, organizations can unify customer profiles from disparate data sources, harmonize the customer consent from each of those sources, and create powerful AI-driven predictions, segments, and measures. This information can be activated across Microsoft and external systems. Leveraging integrations with Dynamics 365, Microsoft Power Platform, Azure Synapse Analytics, and Microsoft Dataverse, Customer Insights lowers the cost, configuration complexity, and time to value for organizations.

We are making several investments to enhance Customer Insights capabilities as a part of 2022 release wave 1:

- New templates and libraries of industry standard metrics to get started faster.
- Accelerate B2B sales and increase return on marketing spend through intent data, account-based insights, and lead matching.
- Extended semantic types for activities and entities.
- New automated transaction churn out-of-the-box model.
- Near real-time consent data harmonized from third-party consent management services.
- Enrich your customer data safely with clean rooms.

What's new and planned for Dynamics 365 Customer Insights

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Activities

Activity enhancements include improvements such as additional semantic types and intelligent semantic mapping.

Feature	Enabled for	Public preview	General availability
Expand semantic type support for activities and entities	Users by admins, makers, or analysts	Sep 2022	

B2B

Get more actionable insights for both organizations and individuals by creating them side by side.

Feature	Enabled for	Public preview	General availability
Accelerate sales through intent data and account prospecting	Admins, makers, marketers, or analysts, automatically	Sep 2022	
Provide templates and libraries of industry standard metrics	Users, automatically	Sep 2022	

Consent management

Expanding the coverage of consent enablement features that enable the harmonization of consent data across multiple consent data sources.

Feature	Enabled for	Public preview	General availability
Import consent data almost in real time	Users by admins, makers, or analysts	Sep 2022	

Enrichment

Use data from sources like Microsoft and other partners to enrich your customer data. Enriched data usually has added value due to the additional details that are available.

Feature	Enabled for	Public preview	General availability
Enrich your customer data safely with safe data collaboration	Users by admins, makers, or analysts	Sep 2022	

Intelligence

Use AI-based models to predict customer behavior and leverage machine learning models.

Feature	Enabled for	Public preview	General availability
Provide automated transaction churn out-of-the-box model	Users by admins, makers, or analysts	Sep 2022	

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
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Activities

Overview

Your data sources can include entities with transactional and activity data. Identify these entities and select the combined activities you want to view on the customer timeline for a chronological view.

Expand semantic type support for activities and entities

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2022	-

Business value

Capture meaningful attributes from your data by mapping it to predefined activity and entity schemas. You can use this data in prediction models, segments, and measures.

Feature details

Map your data to more semantic types for activities and entities. It helps you enable insights, such as out-of-the-box prediction models, segments, and measure templates. By mapping data to schemas of semantic types, you can configure models, segments, and measures with attributes defined in the semantic type schemas they use.

B2B

Overview

Work with business accounts and their related contacts in Customer Insights. In addition to individual consumers, you can leverage the features of Customer Insights for business accounts. Several feature areas support B2B scenarios if your environment is configured for B2B.

Accelerate sales through intent data and account prospecting

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Business value

Focus your activities on the right B2B account.

Feature details

This feature builds on partnerships with third-party data providers to purchase intent data and tailor your messaging to your audience at the right time. It provides a mechanism to match contacts with accounts if a relationship doesn't already exist. Through probabilistic matching, anonymous profile matching, and B2C and B2B data matching, the feature helps to provide proper account context and insights for better decision-making.

Provide templates and libraries of industry standard metrics

Enabled for	Public preview	General availability
Users, automatically	Sep 2022	-

Business value

Use templates and libraries of industry-specific standard metrics to get business value right away.

Feature details

This feature introduces a set of identified industry-specific standard metrics that are readily available in Customer Insights. No prior knowledge is required to use the templates. We identify the metrics based on close collaboration and input from sources in the industries and additional market research.

Consent management

Overview

We expand the footprint of consent enablement features across more areas within Customer Insights. This enables customers to integrate and harmonize consent data from multiple consent systems and data sources. For example, we introduce close to real-time data import, extend the data sources coverage, and the regional footprint.

Import consent data almost in real time

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2022	-

Business value

This feature enables you to integrate your consent management platform with Dynamics 365 Customer Insights.

Feature details

Consent management adds support for the integration of consent data almost in real time. It helps to ensure that consent permissions and preferences of your customers are honored during real-time personalization scenarios in Customer Insights, Microsoft's customer data platform.

Enrichment

Overview

Enriched data usually has added value due to the additional details that are available.

Data enrichment capabilities in Customer Insights for this release include:

- Additional first-party enrichments and increased coverage.
- New third-party enrichment providers.

Enrich your customer data safely with safe data collaboration

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2022	-

Business value

Protect your customer data by sharing it with your enrichment data provider in a privacy safe-and-secure way.

Feature details

Leverage our safe data collaboration capability to share and enrich your customer data. Safe data collaboration puts you in control of your data with privacy-enabled workflows to join and enrich your data with other datasets.

Intelligence

Overview

Dynamics 365 Customer Insights comes with various options that leverage AI and machine learning to predict data. Start with predicting data through predefined models, often referred to as out-of-the-box models. Alternatively, use Azure Machine Learning and custom model for even greater flexibility. Let the system generate predictions based on unified profiles and other data ingested to Customer Insights to get a better understanding of customer patterns.

Provide automated transaction churn out-of-the-box model

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2022	-

Business value

You receive proactive, automated business insights through the transaction churn AI model.

Feature details

You can get immediate value from Dynamics 365 Customer Insights after you have imported your data. Receive automated business insights through an out-of-the-box transaction churn AI model, with no manual configuration requirement. This feature shows a model result preview for your review and the option to change the parameters.

Supply Chain Insights

Overview of Dynamics 365 Supply Chain Insights 2022 release wave 1

Our vision is to help businesses build the supply chain of the future that is resilient, efficient, and sustainable. Dynamics 365 Supply Chain Insights will be capable of sensing, predicting, and mitigating disruptions before they occur without sacrificing efficiency or sustainability.

Organizations with complex supply chains such as manufacturers and retailers will be able to create a digital representation of their physical supply chain and achieve end-to-end real-time visibility. They will break down data silos inside their organization as well as across the broader ecosystem. They will be able to take advantage of AI to analyze the huge amounts of data that are surfaced and get recommendations that are predictive as well as prescriptive. Finally, they will be able to collaborate within and across company boundaries, and take actions to simultaneously improve resilience, achieve efficiency, and drive sustainability by closing the loop around supply chain execution systems.

To help businesses achieve this vision, we are bringing to market a software as a service (SaaS) product that enables them to:

- Get end-to-end holistic visibility into in-house manufacturing processes, assets, multiple tiers of suppliers and customers, service providers, distributors, 3PLs, and external factors such as natural catastrophes, the financial health of partners, and geopolitical and weather events.
- Consume AI-powered analytics that assess and surface insights and risks in a timely manner and recommend the next best actions for supply chain managers, sustainability officers, and business leaders.
- Do deep collaboration across internal and external stakeholders to take decisions and implement actions needed to effectively manage risks and optimize for resiliency, sustainability, and efficiency.

What's new and planned for Dynamics 365 Supply Chain Insights

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Feature	Enabled for	Public preview	General availability
What-if analysis	Admins, makers, marketers, or analysts, automatically	Nov 2021	Apr 2022
Use AI-driven surveys in Dynamics 365 Supply Chain Insights	Admins, makers, marketers, or analysts, automatically	Nov 2021	Apr 2022
Embedded Supply Chain Management experiences	Admins, makers, marketers, or analysts, automatically	Nov 2021	Apr 2022
Smart case manager	Admins, makers, marketers, or analysts, automatically	Nov 2021	Apr 2022

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
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What-if analysis

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Nov 2021	Apr 2022

Business value

Users can identify vulnerabilities in their supply chain and create alternate supply chain scenarios to ensure that they continuously meet the needs of the business.

Feature details

Users will be able to leverage the digital twin to understand vulnerabilities and begin to input variable data regarding nodes in their supply chain. They will be able to better understand capability constraints and create digital twin replicas with alternate suppliers. This functionality also includes an overall supply chain health score.

Use AI-driven surveys in Dynamics 365 Supply Chain Insights

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Nov 2021	Apr 2022

Business value

Participants will get direct feedback from one or many suppliers regarding a potential disruption and the potential impact to the supply chain.

Feature details

Companies using Dynamics 365 Supply Chain Insights will be able to create survey templates and enable AI to assess, survey, and understand the potential impact of a tier 1 participant.

Embedded Supply Chain Management experiences

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Nov 2021	Apr 2022

Business value

This feature will significantly enhance the effectiveness of Dynamics 365 Supply Chain Management users. Supply chain risks can be found by using data from suppliers and purchase orders (POs). With this information, supply managers can adapt POs and create orders based on risk assessments from Dynamics 365 Supply Chain Insights.

Feature details

A supply manager can natively view the supply chain map, digital twin, and other risk signals inside Supply Chain Management without having to leave their Supply Chain Management instance. This functionality will significantly enhance the effectiveness of Supply Chain Management users by leveraging the data from suppliers and POs to find supply chain risks. Supply managers can therefore be more agile by adapting POs and creating orders based on risk assessments from Supply Chain Insights.

Smart case manager

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Nov 2021	Apr 2022

Business value

Users can get recommendations on the next best actions that align with best practices to avoid loss of revenue and delayed materials. All actions and resolutions will be encapsulated in a case, including the details of the disruptive event.

Feature details

From many areas within Dynamics 365 Supply Chain Insights, including Teams, analytics, digital twin, and more, a user will be able to capture the information from Supply Chain Insights into a case. The case can then recommend what is the next best action while also pulling in the relevant stakeholders to encapsulate the final agreement on how to manage the disruption.

Customer Voice

Overview of Dynamics 365 Customer Voice 2022 release wave 1

Dynamics 365 Customer Voice is an easy-to-use, scalable, feedback management solution empowering organizations to collect, analyze, and track real-time feedback. With Dynamics 365 Customer Voice, organizations can easily personalize customer engagement with real-time surveys and analyze unified views of the customer so that you can close the loop in the moments that matter. We've seen great momentum and gathered insightful feedback with the current product and are in the early planning phases of future investment areas. There are no new specific features for this release, but the product architecture will continue to evolve with general support and stability fixes.

Microsoft Cloud for Industry

Overview of Microsoft Cloud for Healthcare 2022 release wave 1

Microsoft Cloud for Healthcare provides capabilities to manage health data at scale and makes it easier for healthcare organizations to improve the patient experience, coordinate care, and drive operational efficiency.

By bringing together capabilities from Microsoft Dynamics 365, Microsoft 365, and Microsoft Azure, Microsoft Cloud for Healthcare expedites a healthcare organization's ability to roll out solutions. Patients, providers, and care coordinators can perform daily duties in a modern yet familiar user interface.

What's new and planned for Microsoft Cloud for Healthcare

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

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Empower health team collaboration

Provider solutions by Dynamics 365 and Power Platform enable healthcare providers to coordinate safe and effective care.

Feature	Enabled for	Public preview	General availability
Care team collaboration	Users, automatically	Apr 2022	-
Guided tours for Care management	Users, automatically	Feb 2022	Apr 2022
Usability improvements for Care management	Users, automatically	Feb 2022	Apr 2022

Enhance patient engagement

Improve patient experiences with their providers.

Feature	Enabled for	Public preview	General availability
Patient view updates	Users, automatically	Dec 2021	Apr 2022

Expand healthcare solutions to payor and pharma verticals

Enabling pharma and payor customers to start participating in Microsoft Cloud for Healthcare.

Feature	Enabled for	Public preview	General availability
Decentralized clinical trials data model support	Users, automatically	Apr 2022	-
Payor data model support	Users by admins, makers, or analysts	Apr 2022	-

Improve clinical and operational insights

Healthcare provider solution connects data from across systems to improve patient care and operational efficiencies through data interoperability

Feature	Enabled for	Public preview	General availability
Enhanced data model	Users, automatically	Feb 2022	Apr 2022

Description of **Enabled for** column values:

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Empower health team collaboration

Overview

As part of Microsoft Cloud for Healthcare, Dynamics 365 and Microsoft Power Platform support the following healthcare solutions for healthcare providers:

- **Care management:** Coordinate care plans and care teams standalone and in Microsoft Teams (powered by Power Apps).
- **Home health:** Schedule and coordinate home visits (powered by Dynamics 365 Field Service).

The 2022 release wave 1 is focused on enhancing the care management solution and improving the coordination between care team members.

Care team collaboration

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	-

Business value

Care team members will be able to collaborate more seamlessly.

Feature details

Care team members will be able collaborate in context of patient information by using embedded Teams capabilities. This enables faster alignment on care goals and care plans, helping the provider give better care to their patients.

Guided tours for Care management

Enabled for	Public preview	General availability
Users, automatically	Feb 2022	Apr 2022

Business value

Users can quickly onboard and understand the highlights of the Care management app in Microsoft Cloud for Healthcare. They're easy, in-app guides that describe frequently used features and scenarios.

Feature details

Users of the Care management app in Microsoft Cloud for Healthcare will land on a **Getting started** page with in-app tours and video tours of different features in the app.

Users have the option to interact with the solution in the background as they're guided through the product.

Users control when to move to the next step or tour, or they can choose to skip tours.

Usability improvements for Care management

Enabled for	Public preview	General availability
Users, automatically	Feb 2022	Apr 2022

Business value

Customers, users, and partners get an upgraded landing page in Care management, along with improved widgets within the solutions.

Feature details

We're making the landing page of Care management more actionable for care coordinators and care managers.

We've identified commonly used controls within the solution, and will tailor them specifically for healthcare user needs and scenarios.

Enhance patient engagement

Overview

Enables data to flow securely through every point of care to improve patient experiences with their providers.

Patient view updates

Enabled for	Public preview	General availability
Users, automatically	Dec 2021	Apr 2022

Business value

Partners and customers will be able to use the patient view in their own solutions to find patient data for their users.

Feature details

The patient view will be made available as a standalone component, which partners can use in their own solutions. In addition, the view's layout and design will be updated to include a more visual approach to medication and allergies.

Expand healthcare solutions to payor and pharma verticals

Overview

Currently most solutions in Microsoft Cloud for Healthcare focus on solutions targeted at healthcare providers. To be successful in the healthcare system end to end, payor and pharma companies need to be part of the data ecosystem.

Dynamics 365 2022 release wave 1 will start enabling select use cases to help with trial and claims management.

Decentralized clinical trials data model support

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	-

Business value

The Microsoft healthcare data model will begin supporting pharma and life sciences with an initial focus of supporting decentralized clinical trials.

Feature details

The Microsoft healthcare data model is the same foundation used by Microsoft Cloud for Healthcare model-driven apps and made available for Microsoft partners and Dataverse customers via Microsoft Cloud Solution Center.

Payor data model support

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2022	-

Business value

The Microsoft healthcare data model will begin supporting payor business processes.

Feature details

The Microsoft healthcare data model is the same foundation used by Microsoft Cloud for Healthcare model-driven apps and made available for Microsoft partners and Dataverse customers via Microsoft Cloud Solution Center.

Improve clinical and operational insights

Overview

Healthcare data models and data ingestion provide the foundation for healthcare customers to be successful on Dynamics 365 and Power Platform.

To help customers of Microsoft Cloud for Healthcare accelerate use of Dynamics 365 and Microsoft Power Platform, we provide a starter healthcare data model. The data model aligns with HL7 FHIR standards to support data interoperability with other services. In addition, we provide tools to help with data ingestion.

For 2022 release wave 1, we're extending the data model and improving the data ingestion pipeline.

Enhanced data model

Enabled for	Public preview	General availability
Users, automatically	Feb 2022	Apr 2022

Business value

Microsoft's HL7 FHIR-based healthcare data model is being updated to address healthcare provider data model feedback.

Feature details

The Microsoft healthcare data model is the same foundation used by Microsoft Cloud for Healthcare model-driven apps and made available for Microsoft partners and Dataverse customers via Microsoft Cloud Solution Center.

Overview of Microsoft Cloud for Financial Services 2022 release wave 1

Microsoft Cloud for Financial Services provides capabilities to manage financial services data at scale and makes it easier for financial services organizations to improve their customer experience, coordinate engagement, and drive operational efficiency. By bringing together capabilities from Microsoft Dynamics 365, Microsoft 365, and Microsoft Azure, Microsoft Cloud for Financial Services expedites a financial services organization's ability to achieve its digital transformation. Our commitment is to offer industry-relevant data gravity and interoperability that comes to life at the application layer in a consistent and meaningful way, while enabling high-value scenarios, seamlessly extended, and enriched by premier industry partners.

With 2022 release wave 1, we're focusing on three primary dimensions:

- **Data gravity, interoperability, and analytics:** Reduce barriers to entry by simplifying the flow of data into the Microsoft Cloud for Financial Services, while ensuring consistency across operational and analytical applications to allow financial institutions the freedom to adopt capabilities as they're ready, with little to no effort—while streamlining the flow of data across applications.
- **New high-value scenarios:** Expand the value of Unified customer profile to offer deep customer understanding across wealth management and general insurance while capturing new views on the customer. Tune purpose-built AI-powered insights to meet the unique demands of new industries, while also improving employee productivity with cutting edge document intelligence to accelerate customer onboarding. Finally, improve customer engagement by leveraging high-value services in Dynamics 365 to streamline consultation appointment scheduling and intelligent customer outreach to engage with customers on their terms.
- **Rich partner network:** Enabling our ecosystem to deeply integrate to the Microsoft Cloud for Financial Services and extend its value, helps to further accelerate the data flywheel. Aligning cloud assets and ecosystem by meeting the demands of specific verticals ensures that the Microsoft Cloud for Financial Services can support industry-relevant business outcomes.

For official product documentation and training for Microsoft Cloud for Financial Services, see:

- [Microsoft Cloud for Financial Services docs](#)
- [Microsoft Cloud for Financial Services training on Microsoft Learn](#)

What's new and planned for Microsoft Cloud for Financial Services

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may**

change and projected functionality may not be released. For more information, go to [Microsoft policy](#).

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Data orchestration

Facilitating data movement and providing analytic readiness for banks.

Feature	Enabled for	Public preview	General availability
Data movement and transformation	Users by admins, makers, or analysts	Jul 2022	Sep 2022

Financial services data models

Help banks and other financial services organizations quickly take advantage of Microsoft Cloud for Financial Services.

Feature	Enabled for	Public preview	General availability
General insurance data model	Users by admins, makers, or analysts	Jul 2022	Sep 2022
Wealth management data model	Users by admins, makers, or analysts	Jul 2022	Sep 2022

General insurance

Creating building blocks that serve the needs of insurance brokers and agents with Unified customer profile for insurance and customer intelligence driving segmentation.

Feature	Enabled for	Public preview	General availability
Customer intelligence for general insurance	Users by admins, makers, or analysts	Jul 2022	Sep 2022
Unified customer profile for general insurance	Users by admins, makers, or analysts	Jul 2022	Sep 2022

Retail banking

Strengthen customer intelligence with new enhancements to Unified customer profile, Loan tracker, and Banking customer intelligence.

Feature	Enabled for	Public preview	General availability
Banking customer engagement	Users by admins, makers, or analysts	-	Apr 2022
Customer onboarding enhancements	Users by admins, makers, or analysts	Jul 2022	Sep 2022
Document intelligence	Users by admins, makers, or analysts	Jul 2022	Sep 2022
Intelligent scheduling	Users by admins, makers, or analysts	Jul 2022	Sep 2022
Unified customer profile for retail banking enhancements	Users by admins, makers, or analysts	Jul 2022	Sep 2022

Wealth management

Building blocks that were developed in the context of retail banking to the needs of investment and financial advisers serving higher net-worth customers.

Feature	Enabled for	Public preview	General availability
Customer intelligence for wealth management	Users by admins, makers, or analysts	Jul 2022	Sep 2022
Unified customer profile for wealth management	Users by admins, makers, or analysts	Jul 2022	Sep 2022

Description of **Enabled for** column values:

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Data orchestration

Overview

As part of data orchestration enhancements in Microsoft Cloud for Financial Services, we're facilitating data movement and providing analytic readiness for banks. Customers are getting connectors to core banking systems, allowing for rapid data movement to Dataverse and into analytical layers as well as embeddable Power BI templates. This allows customers and partners to focus on application needs while Microsoft is taking on the heavy lifting of scaling and moving the data around.

Data movement and transformation

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

Data movement and transformation solutions allow banks to move their data quickly and efficiently into Microsoft Cloud for Financial Services and into the analytical layer. This decreases time-to-value for our customers in their onboarding into Microsoft Cloud for Financial Services and increases the versatility of any data onboarded to cloud services from Microsoft.

Feature details

- **Core banking connectors:** Connector to core banking system provider to acquire data on accounts, balances, and transactions moving into Dataverse and analytical layers in Azure conforming to the Retail banking data model.
- **Analytical data transformation:** Transformation templates allow you to easily perform analytics on top of data from Microsoft Cloud for Financial Services in Azure Synapse Analytics and Power BI.

Financial services data models

Overview

To help banks and other financial services organizations take advantage of Microsoft Cloud for Financial Services quickly, with their business model supported out of the box, we're

introducing extensions to Common Data Model and the Retail banking data model that are applicable across financial services.

General insurance data model

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

A dedicated General insurance data model hosted in Microsoft Dataverse captures new dimensions, such as policies, coverages, and claims linked to customers. To help insurers take advantage of the benefits of Microsoft Cloud for Financial Services quickly, with their business model supported out of the box, we're introducing extensions to Common Data Model that are customized for insurance scenarios. These changes will accelerate time to value for financial institution solutions by ensuring that data structure and measures available out of the box are consistent and relevant for insurance business processes.

Feature details

- **Policy, coverage, claims schema:** Policies, coverages and claims are critical entities that are specific to insurance distributors and underwriters. We're providing relevant tables to help property and casualty insurers take advantage of Microsoft Cloud for Financial Services, with their business model supported out of the box. The new tables in the data model will cover insurance-related items: policies, coverages, and claims.
- **Claims filing schema:** We're introducing entities to Common Data Model allowing representation of claim flows to cover the claim filing process for insurers. The new attributes in the data model will support entities for the claim filing process and will include the claim submission table and related relationships to customer and policy.

Wealth management data model

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

A dedicated Wealth management data model hosted in Microsoft Dataverse captures new dimensions, such as financial goals, and investment instruments linked to customer portfolios. To help wealth managers take advantage of the benefits of Microsoft Cloud for Financial Services quickly, with their business model supported out of the box, we're introducing extensions to Common Data Model and the Retail banking data model that are customized for wealth management scenarios. These changes will accelerate time to value

for financial institution solutions by ensuring that data structure and measures available out of the box are consistent and relevant for wealth management business processes.

Feature details

- **Financial goals schema:** Financial goals assessment and tracking are critical elements of financial advice in order to assess suitability and structure investment portfolios. We're providing the ability to track and capture financial goals values and time horizons as part of the wealth management domain of the Financial services data model.
- **Investment instruments schema:** Understanding the constituents of investment portfolios is critical for wealth managers to serve their customers. We're adding the ability to capture investment instruments (securities, funds or cash) as part of the wealth domain of the financial services data model.

General insurance

Overview

We're introducing a new set of offerings for the general insurance industry, creating building blocks that serve the needs of insurance brokers and agents with Unified customer profile for insurance and customer intelligence driving out-of-the-box segmentation.

Customer intelligence for general insurance

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

We're creating the Customer intelligence offering for general insurance to allow brokers and insurance agents to provide better and more personalized services to customers powered by configurable segmentation. Customer intelligence unifies important, relevant, and accurate customer information across multiple sources via Dynamics 365 Customer Insights.

Feature details

- **Segments for general insurance:** Segments provide grouping of customers based on common characteristics allowing insurance agents and brokers to tailor their services for customers based on their profile.
- **Measures for general insurance:** Calculated measures that enable calculation of key indicators per customers.

Unified customer profile for general insurance

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

Insurance agents seek to offer highly personal experiences to their prospects and existing customers, as way to ensure existing policies are extended, while new policies and coverages are adopted, based on a successful relationship. A 360-degree of the customer that brings forward data that is easy to consume and insightful can help drive more productive and meaningful conversations, leading to better business outcomes.

Feature details

- **Unified customer profile:** With a unified customer profile, insurance agents can gain a complete view of the customer to reach better outcomes through personalized experience, facilitate cross-sell and upsell, and increase customer retention and loyalty.
- **Customer snapshot:** Provide the insurance agent with an at-a-glance view of who the customer is, from name through personal information such as demographics, regular income, and their preferred channel of communication. The profile can be enriched with additional customer intelligence-driven information such as insurance segments to help quickly gauge relevant attributes related to the customer, such as new customer or under-insured.
- **Life events:** The life event journey offers the insurance agent a comprehensive view of the customer and his or her personal life milestones. The life events control allows the addition of new life events, as well as editing or removing existing ones, as they learn new information about the customer. This helps agents collaborate with each other, as information gained is easily shared across the team.
- **Insurance policies and coverages:** Customer policies and underlying coverages are clearly identified, including relevant terms, helping insurance agents to quickly understand the customer relationship breadth, including possible whitespace that can be used to surface opportunities to deepen the relationship.
- **Claims summary:** Understanding the number, nature, and value of claims filed by the customer, as well as their status or how they concluded, can offer great insight to the insurance agent regarding the profitability and potential loyalty of each customer.

Retail banking

Overview

We've further enhanced our offering for the retail banking industry, strengthening customer intelligence with new enhancements to Unified customer profile, Loan tracker, and Banking customer intelligence.

Banking customer engagement

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2022

Business value

Banking customer engagement personalizes every customer interaction with relevant financial information to engage with customers on their preferred channel in a meaningful way, while intelligently managing their journeys across channels, to reduce churn and time to resolution.

Feature details

The retail banking dedicated hub consolidates the most relevant information about the customer, across multiple business lines, into a unified view that offers a consistent and cohesive source of truth regarding the customer. The customer service representative (CSR) can leverage this to provide personal service, solve problems quickly, reveal important opportunities, prevent potential loss or churn, and improve customer satisfaction.

- **Banking contact center enhancements:** We're introducing enhancements to the Omnichannel for Customer Service hub based on preview customer feedback.

Customer onboarding enhancements

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

When applying for new services, whether loans, accounts or credit lines, applicants usually reach out to the bank via the official website or mobile application as a first step to explore available options and evaluate their fit. Ensuring that these applications are streamlined and immediately serviced is key to ensuring customers don't turn to another bank.

Feature details

With Customer onboarding, we seek to offer self-service tools and productivity enhancing services to help banks accelerate and automate the application process, with a focus on lending. Tools and services are easily extensible and customizable, to meet each bank's unique needs and requirements.

- **Loan tracker enhancements:** We're introducing enhancements to Loan tracker based on customer feedback.
- **Loan application sample portal enhancements:** The sample portal's main goal is to demonstrate the end-to-end loan application flow from the applicant side, serving as an example for banks. In this release, banks will be able to leverage SDK and UI components to develop and improve their existing end user experience, including improvements that streamline the gathering of financial information.

Document intelligence

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

This feature introduces intelligence to the document collection process, allowing automation of document verification via AI models and reducing manual effort by auto-populating entities directly into Microsoft Dataverse.

Feature details

We're introducing intelligence to document collection offered as part of the loan application experience. This will help to accelerate the loan verification process and improve bank employee productivity.

- **Automate document verification via AI models:** We're introducing a streamlined process to identify common documents like passports, as well as custom documents like asset and liability declarations via pre-uploaded templates.

Intelligent scheduling

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

There are many communication options with financial institutions available. However, customers often seek a human connection, getting advice directly from a human advisor,

rather than relying on digital channels. This is usually related to an inquiry regarding more complex or sensitive topics that require finding the right expert.

Feature details

Intelligent scheduling offers a simple and intuitive path to identifying the right expert, most suitable to assist with the specific interest or need, while offering relevant day and time combinations for scheduling the appointment. Customers can self-schedule or continue to use the call center for scheduling. All channels will provide a consistent and flexible experience.

- **Intelligent scheduling:** Scheduling works across Dynamics 365 and Exchange Server to ensure that appointments are tracked as part of the customer engagement experience, while also featured in the agent's personal calendar, for easy tracking.

Unified customer profile for retail banking enhancements

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

With changing customer expectations, retail banks are constantly required to enhance their customer experience and to meet the customers where they are while maintaining a personalized experience and efficient, professional service. We're enhancing Unified customer profile to allow relationship managers to gain a more thorough view of the customer to reach better outcomes through personalized experience, facilitation of cross-sell and upsell, and increase customer retention and loyalty.

Feature details

- **Unified customer profile app enhancements:** We're introducing enhancements to Unified customer profile based on customer feedback.
- **Unified timeline:** A new component that allows the agent to review all recent engagements with the customer as well as planned ones (including upcoming loan onboarding appointments linked to Banking customer engagement). The timeline helps agents see all customer interaction history across channels, personnel, and the support lifecycle. The timeline is used across Dynamics 365 applications to capture activities like notes, appointments, emails, tasks, and more, to ensure that all interactions with the customer are tracked and visible over time. Agents use the timeline to quickly catch up on all the latest activity details with the customer to provide the most personalized support experience.
- **Key customer measures:** A new component that presents measures based on customer insights within Unified customer profile. This will empower banking agents to see

calculated measures for each of their customers based on information unified within Dynamics 365 Customer Insights.

Wealth management

Overview

We're introducing a new set of offerings for the wealth management industry, adjusting building blocks that were developed in the context of retail banking to the needs of investment and financial advisers serving higher net-worth customers.

Customer intelligence for wealth management

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

We're adjusting the Customer intelligence offering for retail banking to help agents in the wealth management industry provide better and more personalized services to customers powered by out-of-the-box configurable segmentation and relevant AI models. Customer intelligence unifies important, relevant, and accurate customer information across multiple sources via Dynamics 365 Customer Insights.

Feature details

- **Segments for wealth management:** Be proactive with customers and customize services for them by segmenting them into groups that share similar values, such as share-of-wallet and engagement habits. Identify customers who are most valuable or critical to the wealth management organization to provide them exceptional care with a high-touch relationship. Customer segmentation is based on engagement and strength of relationship with the bank.
- **Wealth management custom measures:** Calculated measures that allow a wealth management agent to get an aggregate view of main indicators for the client.

Unified customer profile for wealth management

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	Sep 2022

Business value

Personal advisors seek to offer highly personal investment guidance to their customers, as a way to nurture existing relationships, while onboarding prospects, based on deep

understanding of their needs and goals. A 360-degree view of the customer that brings forward data that is easy to consume and insightful can help drive more productive and meaningful conversations, leading to deeper relationships and better business outcomes.

Feature details

- **Unified profile customer app:** With a unified customer profile, personal advisors can gain a complete view of the customer to reach better outcomes through personalized consultation, while facilitating cross-sell and upsell conversations, and increasing customer retention and loyalty.
- **Customer snapshot:** Provide the personal advisor with an at-a-glance view of who the customer is, from name through personal information such as demographics, regular income, and their preferred channel of communication.
- **Life events:** Life event journeys offer the personal advisor a comprehensive view of the customer and his or her personal life milestones.
- **Financial goals:** Financial goals assessment and tracking are critical elements of financial advice in order to assess suitability and structure investment portfolio.
- **Investments:** Building on top of financial holdings introduced as part of the banking data model, we're adding another layer of depth for the investment category in wealth management. In retail banking, we offered investment details at the portfolio level. As we add wealth management, we present the breakdown of these portfolios showing the underlying securities.

Overview of Microsoft Cloud for Nonprofit 2022 release wave 1

Microsoft Cloud for Nonprofit transforms Microsoft's industry-leading technology—productivity and collaboration tools, business applications, cloud services, and infrastructure—by connecting it to the most common nonprofit scenarios. Built for fundraisers, volunteer managers, program managers, and other roles unique to nonprofit organizations, these products address the sector's most urgent challenges including constituent and supporter engagement, award management, fundraising, volunteer management, program design and delivery, nonprofit operations, and data management.

This nonprofit-specific cloud unlocks the power of Microsoft Dynamics 365, Microsoft Power Platform, Microsoft 365, Azure, and LinkedIn, enabling organizations to realize an accelerated time to value. It is built on the Nonprofit Common Data Model, a flexible and robust framework created in partnership with nonprofit leaders and technologists to unify nonprofit data and connect technology across the organization. Common Data Model is a platform-agnostic set of nonprofit entities, attributes, and relationships for the most common nonprofit scenarios. It takes the guesswork out of relating nonprofit data across platforms and applications, helping organizations eliminate expensive data silos.

Microsoft Cloud for Nonprofit meets nonprofits where they are at today, leveraging Microsoft applications that organizations may already own, including Microsoft 365, Azure, and Dynamics 365, alongside purpose-built Microsoft Cloud for Nonprofit solutions like Fundraising and Engagement, Volunteer Management, and Volunteer Engagement.

With unified data, nonprofits work smarter by raising more revenue, effectively delivering more programs and services to communities, and more easily measuring the impact they're making. Our ambition is to make it easier, faster, and less expensive for nonprofits to adopt modern technology so they can focus on what's important—their mission.

What's new and planned for Microsoft Cloud for Nonprofit

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Deliver effective programming

Empower staff and volunteers to deliver measurable and responsive programs based on community needs.

Feature	Enabled for	Public preview	General availability
Program impact dashboard enhancements	Admins, makers, marketers, or analysts, automatically	-	May 2022

Know your donors and supporters

Increase funding and support of your mission by aligning program needs with personalized supporter engagements.

Feature	Enabled for	Public preview	General availability
Automated Azure post-deployment configuration for Fundraising and Engagement	Users, automatically	-	May 2022
New Getting started experiences	Users, automatically	-	May 2022
Payment processing enhancements	Users, automatically	-	May 2022

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

Deliver effective programming

Overview

Program and service delivery sit at the core of every nonprofit organization. These are the functions responsible for executing a nonprofit's mission, and while the strategies, methods, and activities for addressing community needs differ from organization to organization, there's one thing they all have in common. Program staff and volunteers need modern tools to manage program and service delivery efficiently and effectively. Teams must adapt to the new normal with technology that enables collaboration in the hybrid workplace. Flexibility and creativity are necessary, and teams can reduce ambiguity with better, more frequent communication. Staff must be able to engage with volunteers, program recipients, and partners at any time, from anywhere.

Program impact dashboard enhancements

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	May 2022

Business value

Nonprofit organizations need tools to help them evaluate the impact of their programs. The Program impact dashboard provides a holistic view of your programs, including revenue, budgets, donations, and impact for each program. You can monitor goals and deep dive into program metrics.

Feature details

Enhancements to the Program impact dashboard introduced in Microsoft Cloud for Nonprofit's November 1, 2021, release will benefit nonprofit program and fundraising staff by empowering these users to more easily measure overall program success, individualized program results and impact, and report back to donors on specific impacts their donations have delivered.

Know your donors and supporters

Overview

Nonprofit development operations and database administrators will benefit from faster and more secure donation processing. As we continue to invest in leveraging Microsoft platform capabilities, we have further redesigned the architecture of Fundraising and Engagement to ensure Azure is delivering real-time processing and market-leading transaction security.

Nonprofit organizations and UN agencies that leverage Dynamics 365 Marketing and Microsoft Cloud for Nonprofit will benefit from a nonprofit marketing template that will provide a guided journey to campaign segmentation and analysis.

Microsoft Cloud for Nonprofit provides:

- **Constituent management:** Attract, retain, and grow donor and supporter bases.
- **Personalized engagement:** Connect through compelling content by using the most proven channels.
- **Donation and award management:** Payment processing, fund accounting, and designation management to support fundraising efficiency for simple to complex funding types.

Automated Azure post-deployment configuration for Fundraising and Engagement

Enabled for	Public preview	General availability
Users, automatically	-	May 2022

Business value

Nonprofit database administrators and implementation partners need a simpler way to deploy Fundraising and Engagement.

Feature details

Fundraising and Engagement in Microsoft Cloud for Nonprofit is dependent on the following features and products:

- Common Data Model for Nonprofits
- Dynamics 365 Sales Enterprise
- Microsoft Power Platform
- Azure

Azure is the critical infrastructure and foundation of Fundraising and Engagement. We leverage Azure infrastructure to process donations, set up and execute recurring donation logic, and calculate data and analytics that are viewed by users in the CRM user interface. In this release, we've listened to feedback from nonprofit database administrators and implementation partners to simplify and automate the required deployment of Azure in the same environment as the required Dynamics 365 tenant.

Now, citizen database administrators with little to no Azure experience will be able to deploy Fundraising and Engagement with a few simple clicks and a guided user workflow.

New Getting started experiences

Enabled for	Public preview	General availability
Users, automatically	-	May 2022

Business value

Getting started experiences provide in-application guidance and help to nonprofit users, making it easier to adopt new systems, optimize workflows, and troubleshoot on the spot.

Feature details

Microsoft Cloud for Nonprofit is powered by Dynamics 365, Microsoft Power Platform, Azure, and Modern work and exists to help nonprofit organizations to empower scalable and transformative mission impact. The following products are part of Microsoft Cloud for Nonprofit today:

- **Fundraising and Engagement:** A constituent and donation management solution powered by Dynamics 365, Power Platform, and Azure.
- **Volunteer Management:** Equip volunteer managers with the tools they need to simplify volunteer recruiting, onboarding, retention, and reporting. Powered by Power Platform.
- **Volunteer Engagement:** Empower volunteers to discover, register for, and participate in nonprofit engagement opportunities. Help volunteers connect more easily with nonprofit volunteer coordinators and have a delightful volunteer experience. A Power Apps portal application.

We're introducing Getting started experiences for all products that make up Microsoft Cloud for Nonprofit. New and returning users who want to discover new feature and product information, leverage training materials, find out more about a workflow or a feature, or connect with other users or Microsoft staff will navigate to Getting started for the latest product information.

Payment processing enhancements

Enabled for	Public preview	General availability
Users, automatically	-	May 2022

Business value

Microsoft Cloud for Nonprofit's Fundraising and Engagement product includes donation and transaction management as one of its core value drivers.

Feature details

In this release, we have strengthened the architecture between Dynamics 365 and Azure that allow nonprofit organizations to process donations in real time on their busiest fundraising days. One-time donations, recurring donations, payment schedules, and pledges are now more secure and reliable for all nonprofits.

Overview of Microsoft Cloud for Sustainability 2022 release wave 1

Drawing on the depth and breadth of the entire Microsoft cloud, Microsoft Cloud for Sustainability is a new cloud offering that is designed to help companies take control of their environmental initiatives. Microsoft Cloud for Sustainability offers a set of comprehensive, integrated, and automated insights for organizations to accelerate each stage of their sustainability journey.

With Microsoft Cloud for Sustainability, we're creating a whole new category, going beyond capturing data to helping customers aggregate sustainability data in an actionable way. It includes software as a service (SaaS) offerings that can discover and connect to real-time data sources, accelerate data integration and reporting, provide accurate carbon accounting, measure performance against goals, and enable intelligent insights for organizations to take more effective action.

Here are examples of scenarios that demonstrate how organizations will be able to leverage Microsoft Cloud for Sustainability to achieve their goals:

- CIOs will be able to easily report on IT carbon emissions from the cloud, devices, and applications as part of their department's environmental footprint. They will then be able to connect their emissions data sources into one view for reporting.
- Companies will be able to offer their customers a sustainability scorecard to track progress against their carbon emission reduction goals, inclusive of scope 1-3 emissions (that is, emissions from a company's owned sources, emissions from purchased energy, and all other emissions).
- Customers will be able to pinpoint specific emission areas and track if they are meeting their emission reduction goals. For instance, if an HVAC system is not on track to meet its prescribed emissions reduction target, the task can be assigned to operations to make the necessary improvements to reach that target.

What's new and planned for Microsoft Cloud for Sustainability

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Record

Near real-time connections across emissions sources enable Microsoft Cloud for Sustainability to automate ingestion of operational business activities that represent the customers' entire operations and value stream emissions footprint.

Feature	Enabled for	Public preview	General availability
Dynamic calculation service	Users, automatically	✓ Oct 27, 2021	May 2022
Ecosystem of prebuilt data connectors	Users, automatically	✓ Oct 27, 2021	May 2022
Common Data Model for Microsoft Cloud for Sustainability	Users, automatically	✓ Oct 27, 2021	May 2022

Reduce

Microsoft Cloud for Sustainability will help customers better understand the actions they should take to continue to reduce emissions, improve business processes, and make lasting changes in their organization.

Feature	Enabled for	Public preview	General availability
Data-driven scorecards and goals	Users, automatically	✓ Oct 27, 2021	May 2022

Report

With a complete set of understandable data, customers can produce reports based on consumption, create an accurate baseline, and understand progress toward goals, while meeting strict regulatory and public reporting requirements.

Feature	Enabled for	Public preview	General availability
Emissions and operational-specific dashboards	Users, automatically	✓ Oct 27, 2021	May 2022
Public reporting	Users, automatically	✓ Oct 27, 2021	May 2022

Description of **Enabled for** column values:

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For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

Record

Overview

Near real-time connections across emissions sources enable Microsoft Cloud for Sustainability to automate ingestion of operational business activities that represent the customers' entire operations and value stream emissions footprint.

Dynamic calculation service

Enabled for	Public preview	General availability
Users, automatically	✓ Oct 27, 2021	May 2022

Business value

With the dynamic calculation service, you can trust that you are using industry standards, which allow any easy way to streamline point-in-time calculation activities into ongoing, reliable emissions calculations. The result is a near real-time view of emissions.

Feature details

With the dynamic calculation service, you will receive recommended calculation algorithms that are specific to source and activity, with industry standard coefficients. You can also create custom calculations based on Microsoft Power Fx, which is a low-code language that helps to generate more accurate results for specific business needs. These calculations will cover scope 1, scope 2, and part of the scope 3 categories.

Calculation models

Calculation models enable both default and customizable calculation methods to be built and used, as needed. Models can be custom-built using an intuitive user interface with Power FX capabilities.

Default models include:

- Scope 1: Fugitive emissions, mobile combustion, stationary combustion.
- Scope 2: Purchased energy, purchased cooling, purchased steam and heat.
- Scope 3: Purchased goods and services, capital goods, upstream and downstream transportation and distribution, and business travel.

Calculation profiles

Note the following information about calculation profiles:

- Connect data to calculation models.
- Can be customized based on any entity within the data model.
- Set the frequency of calculation.

Emission factors and mappings

Emission factor sets can be added to Microsoft Cloud for Sustainability via the data ingestion service. Default factor sets will be added to Microsoft Cloud for Sustainability based on standards available.

Estimation factors are differentiated within Microsoft Cloud for Sustainability, but can also be added and customized.

Factor mappings map emission factors to reference data, so calculations can be scaled by factors such as facility location, fuel type, or spend code, without increasing the number of calculation models that need to be managed.

See also

[Calculation models](#) (docs)

Ecosystem of prebuilt data connectors

Enabled for	Public preview	General availability
Users, automatically	✓ Oct 27, 2021	May 2022

Business value

Streamlined and automated data collection and mapping will enable complete and accurate data to be imported into Microsoft Cloud for Sustainability to calculate emissions. This will also create a framework to unlock mutual customers' data and help accelerate their journey to become more sustainable.

Feature details

This feature provides recommendations for data connections from a catalog of prebuilt connectors and operational data providers. The catalog includes business solutions, energy providers, cloud providers, travel tools, trading partners, systems telemetry, and Internet of Things (IoT).

The ecosystem includes provider solutions that can ingest and process data for all emission categories. Customers can connect to these solutions through the Microsoft Cloud for Sustainability product or through Microsoft AppSource or Azure Marketplace using metadata. This will eliminate manual data entry and ensure that updated and accurate data is available within Microsoft Cloud for Sustainability to provide current and accurate emissions information for our customers.

A detailed framework is available to solution providers to build connectors for Microsoft Cloud for Sustainability for a seamless deployment experience that includes listing and certification within our AppSource and Marketplace sites. Solution providers can also leverage the prototype connector that defines and documents the end-to-end flow.

See also

[Import data](#) (docs)

Common Data Model for Microsoft Cloud for Sustainability

Enabled for	Public preview	General availability
Users, automatically	✓ Oct 27, 2021	May 2022

Business value

Common Data Model for Microsoft Cloud for Sustainability provided customers with a common format for emissions activity and reference data. Emissions that are calculated and stored according to this schema can be easily used for allocation and reporting in a meaningful way, according to the Greenhouse Gas Protocol.

Common Data Model for Microsoft Cloud for Sustainability will be included in the overall Common Data Model libraries, published in an open-source fashion. The data model includes emissions for scopes 1, 2, and all categories in scope 3.

Feature details

Our data model schema will be open source and available for customers to see in the [Industry Data Workbench](#). Customers can navigate to this schema and customize it using Azure Synapse Link. Data model entities include, but are not limited to, the ones listed below.

Emission sources

- Stationary combustion
- Mobile combustion
- Industrial process
- Fugitive emissions
- Purchased energy (includes heat, steam, and cooling)

Key subentities

- Fuel type
- Vehicle type
- Contractual instrument type

Emission categories

- Purchased goods and services
- Capital goods
- Fuel and energy
- Transportation and distribution
- Waste
- Business travel
- Employee commute
- Leased assets
- Sold products
- End of life
- Franchises
- Investments

Key subentities

- Fuel type
- Vehicle type
- Contractual instrument type

Emission factors

- Factor library
- Unit
- Unit group

- Emission factor
- Estimation factor
- Estimation factor type
- Parameter
- Greenhouse gas
- Supply chain emission factor

Organization

- Org unit
- Org hierarchy
- Facility
- Facility type
- Cooling type
- Heating type
- Org profile
- Industry classification
- Division master
- Major group master

Core functionality

- Data ingestion
- Calculation
- Reporting

See also

[Emission factors](#) (docs)

Reduce

Overview

Microsoft Cloud for Sustainability will go beyond basic dashboards. Many customers have set bold public commitments and are working toward them. Microsoft Cloud for Sustainability will help customers better understand the actions they should take to continue to reduce emissions, improve business processes, and make lasting changes in their organization.

Data-driven scorecards and goals

Enabled for	Public preview	General availability
Users, automatically	✓ Oct 27, 2021	May 2022

Business value

This feature enables organizations to define, track, and meet their sustainability goals in a data-driven approach.

Feature details

Using the new goals capability embedded in Microsoft Cloud for Sustainability, customers can set and track incremental and long-term goals. Goals can be created based on current and target values that are manually entered or current values that are derived from connected data. Users can manually check in updates or have the system automatically update current values and status directly tied to their data. Scorecards and insights will help organizations stay on track and ensure they have a path to hit their targets.

See also

[Scorecards and goals](#) (docs)

Report

Overview

With a complete set of understandable data, customers can produce reports based on consumption, create an accurate baseline, and understand progress toward goals, while meeting strict regulatory and public reporting requirements.

Emissions and operational-specific dashboards

Enabled for	Public preview	General availability
Users, automatically	✓ Oct 27, 2021	May 2022

Business value

Microsoft Cloud for Sustainability provides rich visuals and insights into the emissions patterns and trends occurring across your entire organization. These will help you quickly understand trends, key influencers, and summary statistics across scope 1, scope 2, and scope 3 emissions for your organization.

Feature details

The dashboards provide a summary view of total emissions along with key summary statistics. You can personalize your view by setting filters by reporting year, accounting method, and scope.

Cards

Cards on the dashboard allow you to quickly assess the following metrics:

- Total emissions.
- Percentage of renewable energy.
- Revenue intensity score, where revenue intensity equals emissions divided by revenue.

These cards come with a comparison marker comparing each metric to the previous year.

Charts

Charts showing total emissions by scope, including by country or region, enable organizations to visualize their emissions footprint. The charts enable you to quickly identify the amount and type of renewable energy investments made over time. You can drill into emissions by organizational unit to see the largest and smallest contributors.

Widgets

Widgets are available to explore emissions data by scope, source facility, and country or region. Additionally, users can identify what key influencers contribute to increases and decreases in emissions.

See also

[Emissions overview dashboard](#) (docs)

Public reporting

Enabled for	Public preview	General availability
Users, automatically	✓ Oct 27, 2021	May 2022

Business value

This feature helps to streamline the process to meet public and regulatory requirements for reporting carbon emissions.

Feature details

The feature enables customers to streamline the preparation of quantitative data aspects of public reporting through built-in, preparatory reports. You can extract emissions and activity

data out of Microsoft Cloud for Sustainability in an Excel format, which can be used to submit data to public disclosure agencies such as [DEFRA](#), [GRI](#), and [CDP](#).

See also

[Generate a quantitative preparation report](#) (docs)

2022 release wave 1 features available for early access

This topic lists the Microsoft Power Platform features that can be enabled for testing in your environment beginning **January 31, 2022**. Features from the following apps are available as part of early access:

- Power Apps

The features from these apps update the existing user experiences. You can opt in early to enable these features in your environment. This will allow you to test these features and then adopt them across your environments. For information on how to enable these features, go to [Opt in to 2022 release wave 1 updates](#).

IMPORTANT If you are using Dynamics 365 apps, such as Sales, Service, Marketing, Finance, Supply Chain Management, Business Central, and Commerce, there are early access features that could impact your users. For Dynamics 365 early access features, go to [2022 release wave 1 features available for early access](#).

Power Apps

For a complete list of the Power Apps features, go to [What's new and planned for Power Apps](#).

Feature	Enabled for	Early access	General availability
Power Apps read-only grid control is the default grid for read-only scenarios	Users, automatically	Jan 31, 2022	Apr 2022
UI improvement for business process flows	Users, automatically	Jan 31, 2022	Apr 2022

Power Apps

Overview of Power Apps 2022 release wave 1

Microsoft Power Apps is the industry-leading low-code application development platform that underpins Dynamics 365 extensibility, Microsoft 365 customization, and standalone custom line of business applications for customers around the world. Power Apps dramatically lowers the cost, complexity, and time of software development through a range of powerful low-code development tools, a deep data platform in Microsoft Dataverse, and hundreds of connectors to common business data sources.

Power Apps is investing in several areas as part of Microsoft Power Platform 2022 release wave 1:

- **Deliver modern business apps with unparalleled productivity for all users:** Power Apps will add built-in collaboration for end users and integration with Microsoft 365 to allow teams to collaborate and act on business data, as well as key updates to modernize user experiences.
- **Activate experts across the organization with advanced low code:** Makers and developers of all skill levels will be more productive over Dataverse, multiple their productivity with fusion teams and leverage intelligence to assist development.
- **Power Apps is the safest way to digitally transform at whole-company scale:** Secure and governable enterprise apps are critical to creating trust with your users and enterprise IT teams.
- **Deliver flagship applications faster than ever:** Organizations can now build and deliver flagship apps to the entire company through Power Apps with offline and standalone apps.

For official product documentation and training for Power Apps, go to:

- [Power Apps docs](#)
- [Power Apps training on Microsoft Learn](#)

What's new and planned for Power Apps

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Deliver modern business apps with unparalleled productivity for all users

Users can take advantage of cohesive and modern experiences while collaborating with team members in Power Apps.

Feature	Enabled for	Public preview	Early access*	General availability
Power Apps grid control support for editable scenarios in model-driven apps	Users by admins, makers, or analysts	Apr 2022	-	-
Enable model-driven app redirect from Internet Explorer to Microsoft Edge	Users by admins, makers, or analysts	Jun 2022	-	
Model-driven app in-app notifications	Users by admins, makers, or analysts	-	-	Apr 2022
Easy record sharing	Users by admins, makers, or analysts	✓ Nov 4, 2021	-	Apr 2022
Appointment description supports rich text	Users by admins, makers, or analysts	Jan 2022	-	Apr 2022
Create and join Teams meetings from in-app appointments	Users by admins, makers, or analysts	Jan 2022	-	Apr 2022
New activity dropdown to show only relevant activities	Users by admins, makers, or analysts	Jan 2022	-	Apr 2022
Power Apps read-only grid control is the default grid for read-only scenarios	Users, automatically	-	Jan 2022	Apr 2022
UI improvement for business process flows	Users, automatically	-	Jan 2022	Apr 2022
Explore data through modern advanced find	Users by admins, makers, or analysts	Feb 2022	-	Apr 2022

Feature	Enabled for	Public preview	Early access*	General availability
Lobe E2E to Power Apps	Admins, makers, marketers, or analysts, automatically	Dec 2021	-	Apr 2022
Co-presence in records	Users by admins, makers, or analysts	✓ Nov 4, 2021	-	Sep 2022
Owner field has improved on-line presence indicator and contact card	Users by admins, makers, or analysts	✓ Nov 4, 2021	-	Sep 2022

Enable experts across the organization with advanced low code

Enable experts across the organization with advanced low code.

Feature	Enabled for	Public preview	Early access*	General availability
Intelligent formula repair in Power Fx	Admins, makers, marketers, or analysts, automatically	May 2022	-	
Makers can collaborate together on the same app by merging changes	Admins, makers, marketers, or analysts, automatically	Jun 2022	-	
Support for data sources with dynamic schema	Admins, makers, marketers, or analysts, automatically	Jun 2022	-	-
Quickly create tables and load data in Dataverse based on existing data	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Command designer with Power Fx	Admins, makers, marketers, or analysts, automatically	✓ Jul 29, 2021	-	Apr 2022
Build forms entirely using features available in the modern form designer	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Feature	Enabled for	Public preview	Early access*	General availability
Power Fx formulas provide richer and easier to use column calculations in Microsoft Dataverse	Admins, makers, marketers, or analysts, automatically	Oct 2021	-	May 2022
Data prefetch and cache control eliminates manual cache management	Admins, makers, marketers, or analysts, automatically	Mar 2022	-	May 2022
Power Fx named formulas to ease development and improve performance	Admins, makers, marketers, or analysts, automatically	Mar 2022	-	May 2022

Rapid delivery of flagship applications

Deliver flagship applications faster than ever.

Feature	Enabled for	Public preview	Early access*	General availability
Create standalone, native mobile apps with Power Apps	Users by admins, makers, or analysts	Feb 2022	-	Apr 2022
Power Apps application on Windows running model-driven and canvas apps with full support for offline	Users by admins, makers, or analysts	Feb 2022	-	Apr 2022

Safest way to digitally transform at whole-company scale

Power Apps is the safest way to digitally transform at whole-company scale.

Feature	Enabled for	Public preview	Early access*	General availability
Conditional access policies for individual Power Apps	Users by admins, makers, or analysts	✓ Aug 29, 2021	-	Apr 2022
Enable quarantine of non-compliant Power Apps	Users by admins, makers, or analysts	✓ Aug 29, 2021	-	Apr 2022

Feature	Enabled for	Public preview	Early access*	General availability
Solution checker enforcement improvements	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022

* You can opt in to some features as part of early access on January 31, 2022, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

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Deliver modern business apps with unparalleled productivity for all users

Overview

Users can take advantage of cohesive and modern experiences while collaborating with team members in Power Apps. Key updates include:

- **Apps built using Power Apps are now multiplayer with built-in collaboration:** Enable users to collaborate, chat, and start meetings directly within the app.
- **Act on business data in context across Microsoft 365:** See and act on Power Apps and Dynamics 365 data directly in Microsoft 365 by pasting a link.
- **Keep users on task with cohesive experiences and delightful UX:** Modern and cohesive control updates across Power Apps provides a delightful and productive experience.

Power Apps grid control support for editable scenarios in model-driven apps

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Apr 2022	-	-

Business value

This grid control allows users to be more productive by letting them edit values directly in the grid.

Feature details

Building on the previous work with the [Power Apps read-only grid control](#), the new **Power Apps grid control (preview)** for model-driven apps is available with two primary changes:

- **Infinite scrolling:** Users no longer need to page to see more records. Instead, users can continue scrolling to get to the row(s) they are interested in. Paging buttons will be available as an option for makers.
- **Inline editing within views and subgrids:** In addition to being available for read-only scenarios, this control can also be used as an editable grid. When editing is enabled by the maker, users can be more productive by making edits directly in the grid instead of having to make changes in the corresponding form.

This new control continues to align with the latest Microsoft design guidance for styling and continues to support the latest Microsoft accessibility standards.

Enable model-driven app redirect from Internet Explorer to Microsoft Edge

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Jun 2022	-	-

Business value

Administrators can improve the user experience with a faster, more reliable experience in Unified Interface by redirecting to Microsoft Edge.

Feature details

Using the Power Platform admin center, administrators can enable users who open Unified Interface within Internet Explorer to be redirected to Microsoft Edge. This is the pattern that is used by other Microsoft applications to ensure users have the best experience.

We announced deprecation in [Internet Explorer 11 support for Dynamics 365 and Microsoft Power Platform is deprecated](#) and noted in [Supported web browsers and mobile devices](#) and [Support for Microsoft Internet Explorer and Microsoft Edge Legacy](#).

The current experience for Internet Explorer users is a warning message that was announced in [Unified Interface browser support changes](#).

Model-driven app in-app notifications reach general availability

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

Users can be alerted to key items to address, which makes them more likely to be successful.

Feature details

The in-app notification feature that was announced for public preview July 2021 with [Model-driven app adds in-app notifications](#) is reaching general availability. Learn more about how makers [send in app notifications](#) and how users receive [notifications](#).

Since public preview, we've improved the scalability of in-app notifications by uptaking the non-relational data storage and adding enhanced polling based on user navigation.

Easy record sharing

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Nov 4, 2021	-	Apr 2022

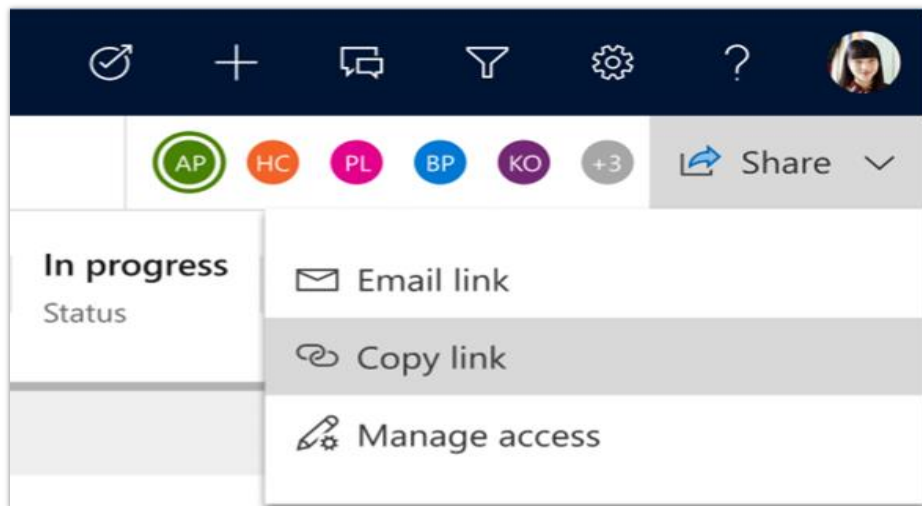
Business value

Easily share links to records with colleagues who may not have a link to the record.

Feature details

Share records as easy as Microsoft Office documents. Use the new share button to email a link or copy the link and share it with someone else. A link to the record can only be shared with users who have permissions to access the record.

This feature is currently available for the **Account**, **Case**, **Opportunity**, and **Contact** tables.



New Share menu in app.

Appointment description supports rich text

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Jan 2022	-	Apr 2022

Business value

Include rich text descriptions in your appointments, including links to online meetings.

Feature details

You can now add links, lists, and other rich text in your appointment description with the new rich text editor control. The new rich text editor is supported for all model-driven apps and is the default standard editor for appointments and email activities.

Updated appointment form.

Create and join Teams meetings from in-app appointments

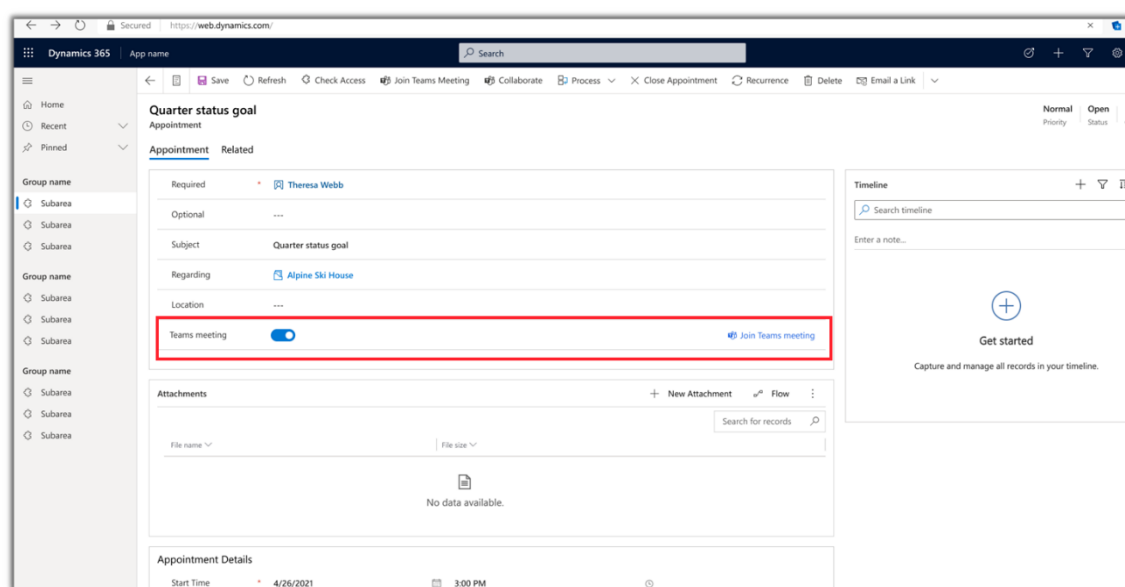
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Jan 2022	-	Apr 2022

Business value

Provide customers with unified meeting experience by allowing them to create and join Microsoft Teams meetings from their model-drive app.

Feature details

Easily add Microsoft Teams meeting from an appointment in your model-driven app. You can also join a Teams meeting with a single click from the appointment or the timeline control.



Option to join Teams meeting highlighted in appointment form.

New activity dropdown to show only relevant activities

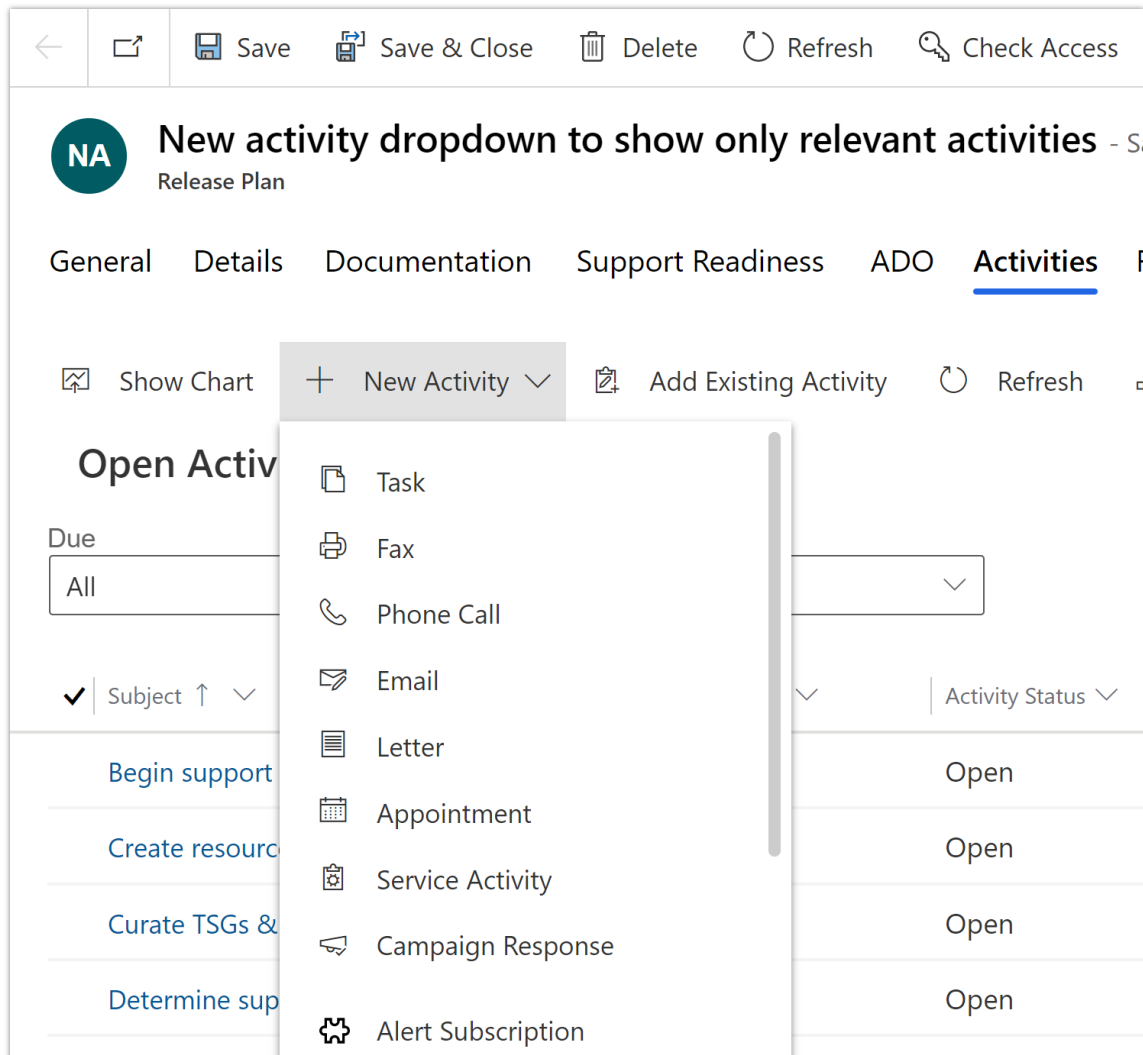
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Jan 2022	-	Apr 2022

Business value

Improve productivity by showing only relevant tables in the drop-down list.

Feature details

The **New Activity** drop-down list will only show activities that are relevant to the app. Activities that are not included in the app metadata now are hidden from the **New Activity** command.



Options shown in new activity dropdown.

Power Apps read-only grid control is the default grid for read-only scenarios

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Jan 2022	Apr 2022

Business value

The Power Apps read-only grid control includes productivity and performance enhancements, alignment with the latest in Microsoft design, and compliance with Microsoft Accessibility Standards.

Feature details

The [New Power Apps read-only grid control](#) released in 2021 release wave 2 will be the default read-only grid experience for model-driven apps in 2022 release wave 1.

This applies to grids inside view pages and sub grids in forms. When originally enabled, the jump bar row is not visible; however, this can be turned back on as needed. For more information, go to [New Power Apps read-only grid control](#)

Full Name	Email	Company Name	Business Phone
Jim Glynn (sample)	someone_j@example.com	Coho Winery (sample)	555-0109
Maria Campbell (sample)	someone_d@example.com	Fabrikam, Inc. (sample)	555-0103
Nancy Anderson (sample)	someone_c@example.com	Adventure Works (sample)	555-0102
Patrick Sands (sample)	someone_k@example.com	Alpine Ski House (sample)	555-0110
Paul Cannon (sample)	someone_h@example.com	Alpine Ski House (sample)	555-0107
Rene Valdes (sample)	someone_i@example.com	A. Datum Corporation (sample)	555-0108
Robert Lyon (sample)	someone_g@example.com	Contoso Pharmaceuticals (sample)	555-0106
Scott Konersmann (sample)	someone_f@example.com	City Power & Light (sample)	555-0105
Sidney Higa (sample)	someone_e@example.com	Blue Yonder Airlines (sample)	555-0104
Susan Burk (sample)	someone_l@example.com	A. Datum Corporation (sample)	555-0111
Susanna Stubberod (sample)	someone_b@example.com	Litware, Inc. (sample)	555-0101
Thomas Andersen (sample)	someone_m@example.com	Coho Winery (sample)	555-0112
Yvonne McKay (sample)	someone_a@example.com	Fourth Coffee (sample)	555-0100

Power Apps read-only grid control on the Contacts entity.

UI improvement for business process flows

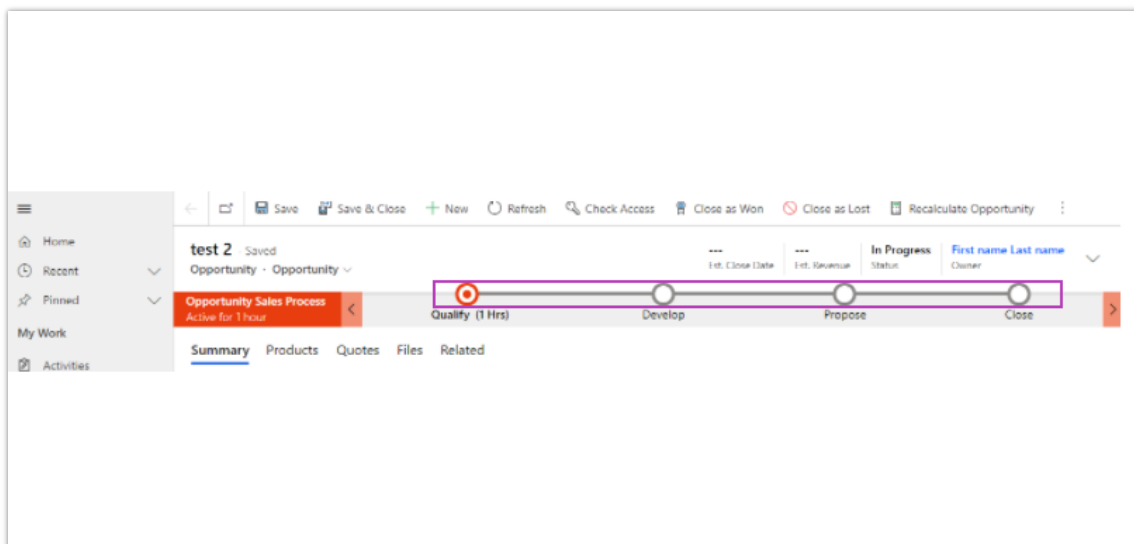
Enabled for	Public preview	Early access	General availability
Users, automatically	-	Jan 2022	Apr 2022

Business value

Changing the business process flow path-line color to a darker shade to help users easily identify and follow each stage in a business process flow.

Feature details

We're updating the color contrast in the path-line between each stage in the business process flow to a slightly darker shade. This will help users easily identify and follow each stage in a business process flow when working with data on a form in a model-drive app.



Business process flow.

Explore data through modern advanced find

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Feb 2022	-	Apr 2022

Business value

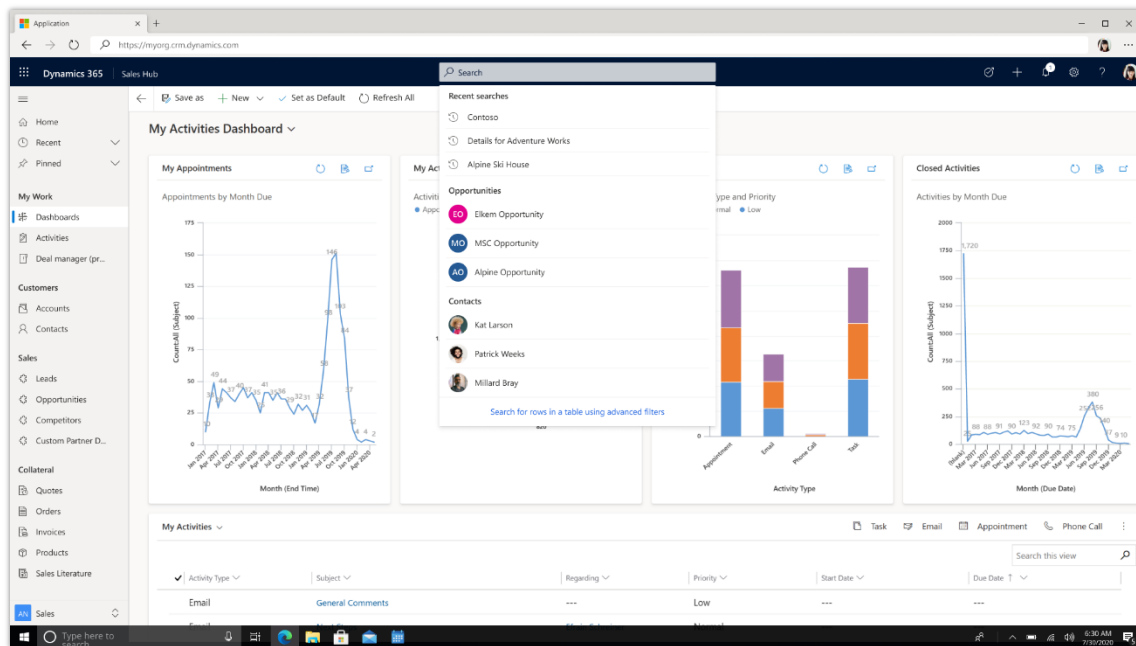
With modern advanced find, you can access any table in a model-driven app through search, and use advanced filters to explore the data easily. Be more productive with navigation by searching for a view by its name in the enhanced view selector. The new view management experience will provide you options to share views so you can collaborate with your team easily. Managing views is simpler with personalization options to build your own set of views.

Feature details

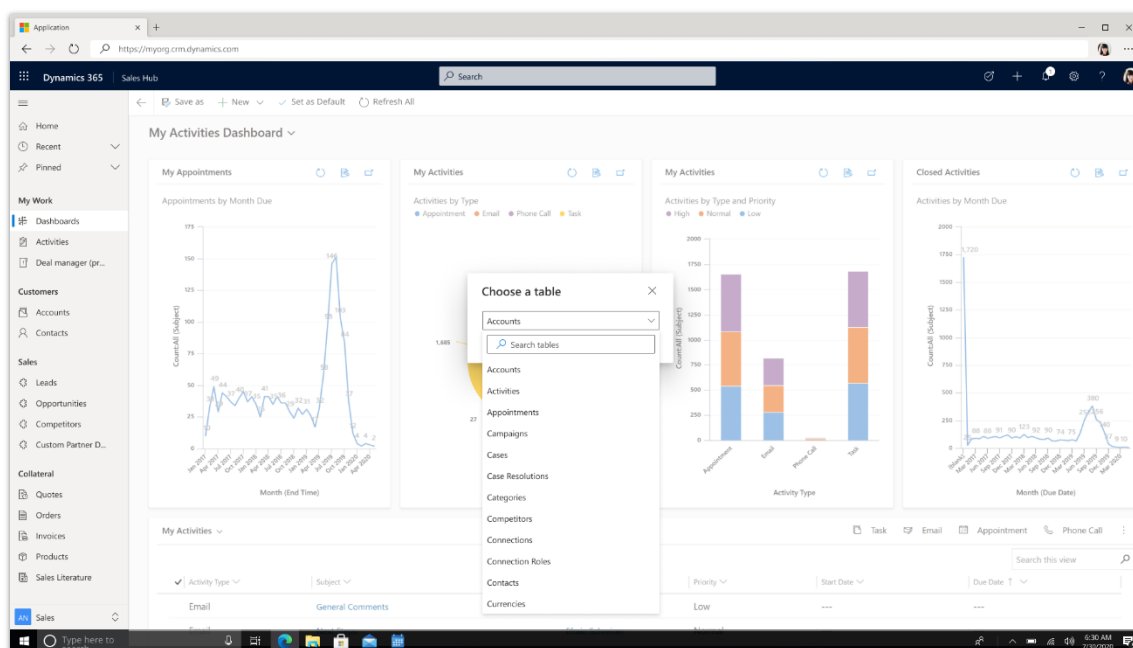
Modern advanced find provides the following benefits:

- Explore any table in a model-driven app through structured search and filters. Edit columns and filter data to construct views that help you apply the right lens on your data easily.
- Choosing the right view to access is easier with the latest enhancement to view selector having the ability for you to search for a view.
- Managing views is simpler with personalization options to build your own set of views, hide views, and order them differently. Your personalized view list travels with you across all apps and all devices, online and offline.
- Collaborate with your team by sharing views easily and managing the views shared to you.

All of the capabilities mentioned above will replace the legacy advanced find experience.



Advanced find entry point through search.



Advanced find table picker.

Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
+86-23-4444-0100	Guangzhou	Vincent Lauriant	vincent@adatum.com
555-0158	Redmond	Rene Valdes	rene@adatumfabrication.com
+27-264-1234567	Johannesburg	Adrian Dumitrascu	Adrian@adventure-works.com
+43-1-12345-0	Vienna	Cathian Cook	Cathian@alpine-skihouse.com
555-0135	Sydney	Brian LaMee	brian@blueyonderairlines.com
555-0155	Redmond	Scott Konersmann	scott@citypowerlight.com
+1-674-555-0162	Santa Cruz	Cat Francis	Cat@cohowinery.com
+99-70-01-90-90	Paris	Forrest Chand	Forrest@consolidatedmessenger.com
555-0156	Phoenix	Jim Glynn	jimglynn@contosopharma.com
+1-425-555-0120	Redmond	Robert Lyon	robertlyon@fabrikam.com
555-0150	Renton	Yvonne McKay	ymckay@fourthcoffee.com
+1-425-555-3499	Redmond	George Sullivan	george@graphicdesigninstitute.com
+64-6-333-0001	Christchurch	Patrick Steiner	psteiner@lucernepublishing.com
1-555-555-0135	Redmond	Isaac Lightner	isaac.lightner@microsoft.com
+1-098-555-4121	Port Orchard	Yvonne McKay	ymckay@proseware.com
+001-1-399-555-9000	Mississauga	Shaun Beasley	info@fineartschool.net
297-555-0192	Tokyo	Marco Tanaka	mtanaka@tailsintoy.com
+49-089-0110-0	Munich	Humberto Azevedo	info@treymresearch.net

Enhanced view selector.

Lobe E2E to Power Apps

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Dec 2021	-	Apr 2022

Business value

Enable Power Platform customers to leverage Lobe to train image classification models, upload them to AI Builder, and use them in Power Automate flows and canvas apps. We're targeting makers of canvas apps and Power Automate flows who are looking to use computer vision to improve a business process or workflow. We'll be unlocking a new machine learning problem type (image classification) with Lobe. This will allow Power Platform customers to train models locally on their desktop without using any AI Builder credits with an easy-to-use app.

Feature details

Enable Power Platform customers to leverage Lobe to train image classification models, upload them to AI Builder, and use them in Power Automate flows and canvas apps. We want to increase the consumption of AI models in apps and flows.

See also

[Overview of image classification model by Lobe preview](#) (docs)

Co-presence in records

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Nov 4, 2021	-	Sep 2022

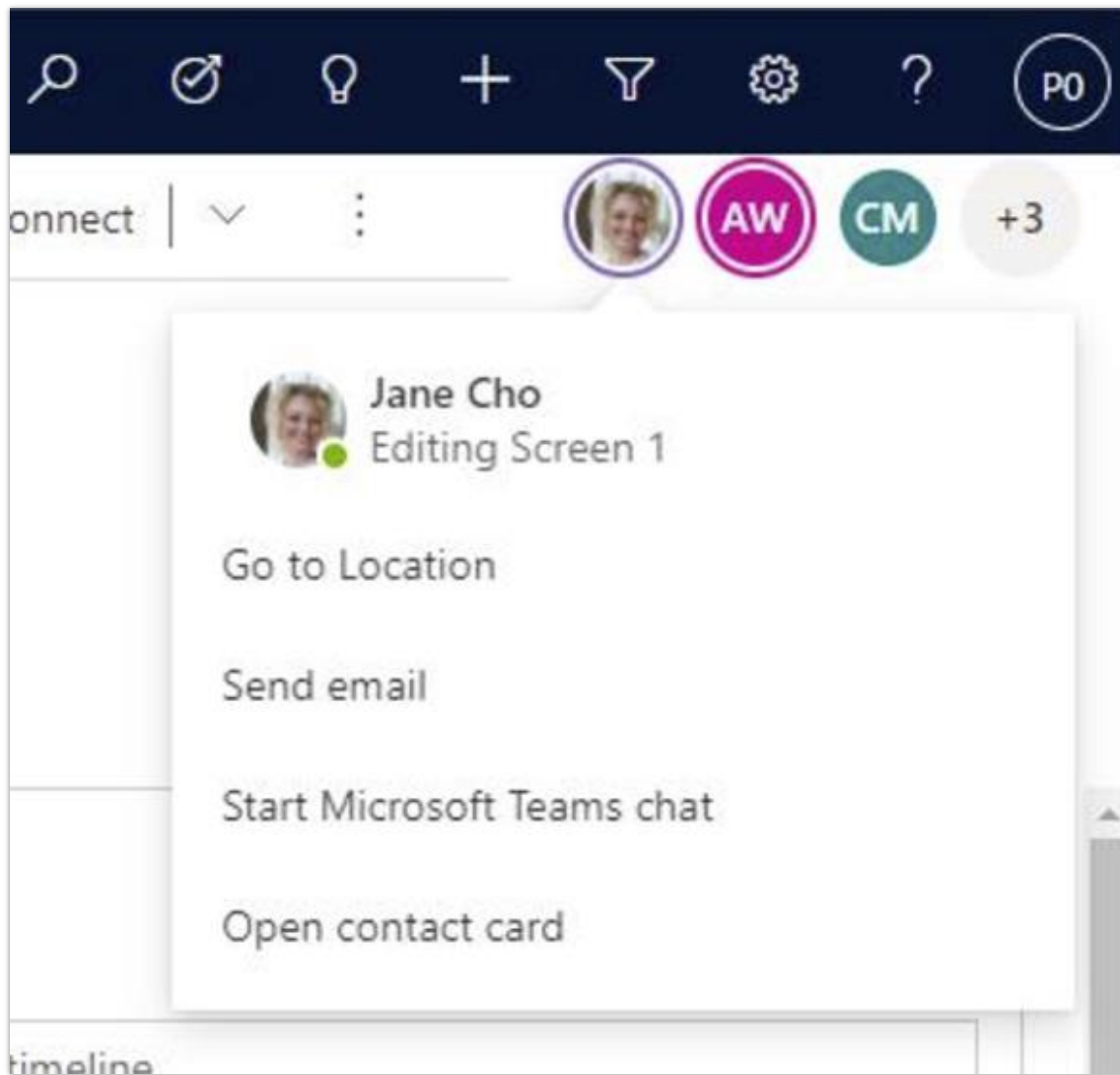
Business value

See colleagues who are currently working on a record and easily start chats with them.

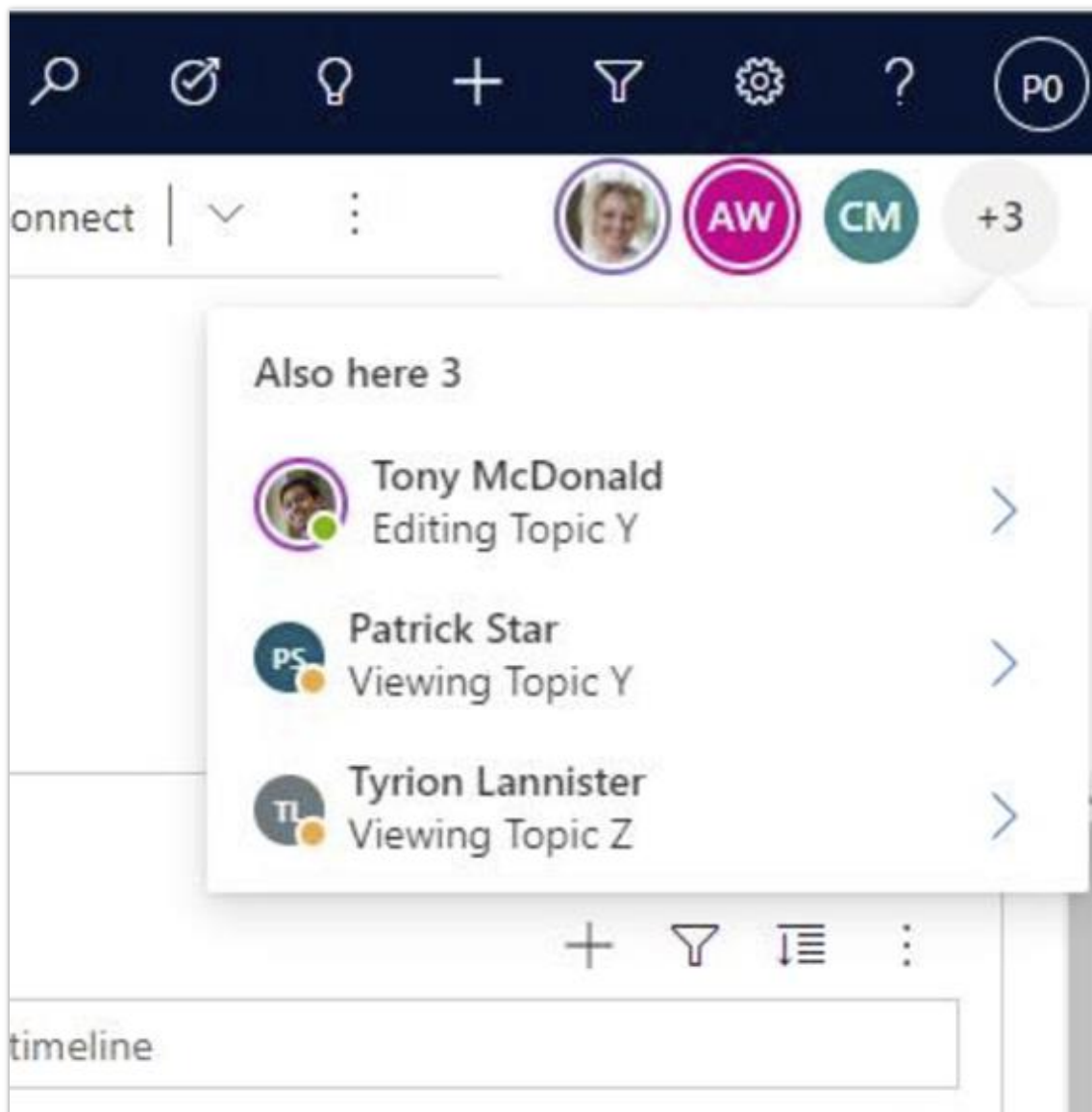
Feature details

Now you can see who's currently working on a record including their online status. You can also start a chat or send them an email and take collaboration to the next level.

This feature is currently available on the **Account**, **Case**, **Opportunity**, and **Contact** tables.



Facepile control expanded in model driven app.



Facepile overflow menu activated.

Owner field has improved on-line presence indicator and contact card

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Nov 4, 2021	-	Sep 2022

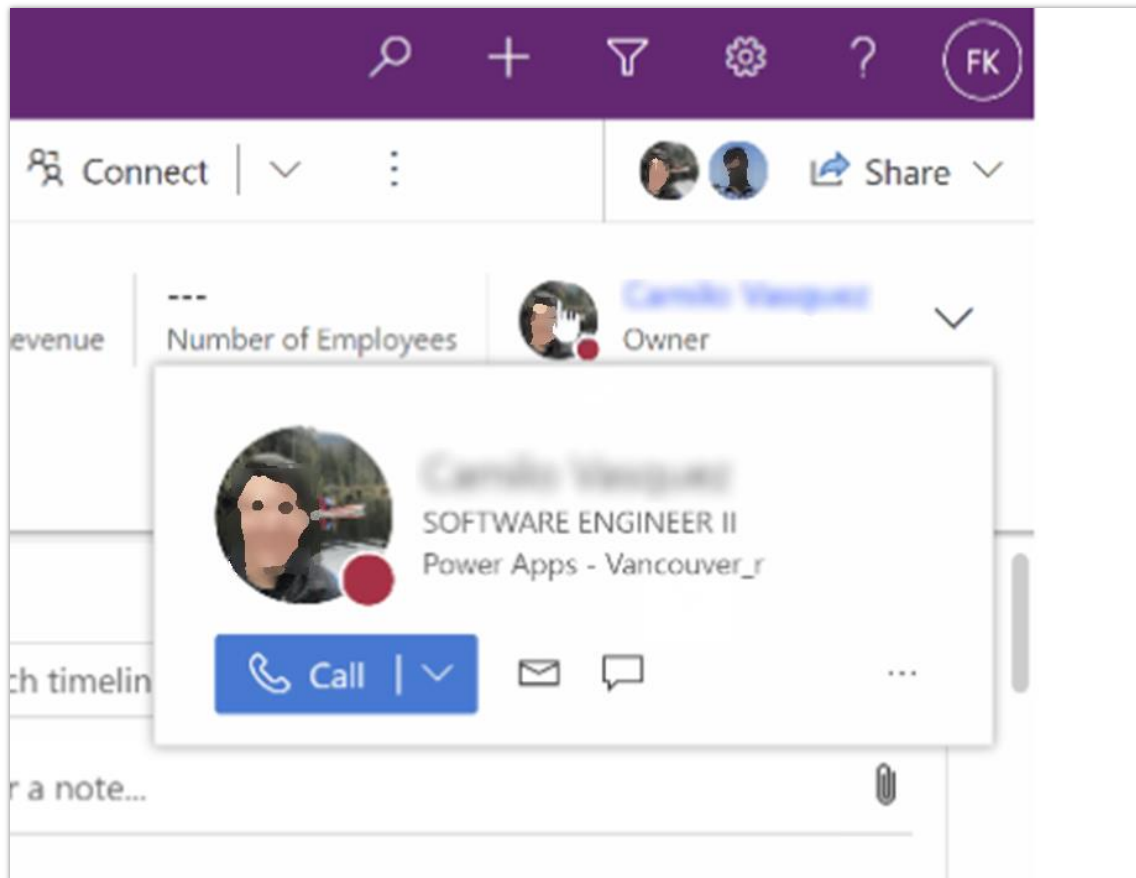
Business value

While you're working in your app, see your colleagues' online status and easily start a chat with them.

Feature details

When you're working on a record, you can see the person who owns the record and their online status. You can also select the user's photo and send them an email or start a chat.

This feature is currently available for the **Account**, **Case**, **Opportunity**, and **Contact** tables.



Persona card when clicking on the new owner field.

Enable experts across the organization with advanced low code

Overview

Makers and developers of all skill levels can be more productive with Power Apps and Dataverse, enabling fusion teams and leveraging intelligence to simplify common tasks. Key updates include:

- **It's easier than ever to get started with Dataverse:** With simplified table creation and data load, the addition of Power Fx, and new modern low-code designers to simplify building apps over Dataverse.
- **Unleash fusion teams with collaborative development:** Allow multiple makers to work on a single app at the same time, accelerating the time of development and supporting with Microsoft 365 style tools, such as commenting.

- **Infuse intelligence for makers and end users alike:** Support developers to resolve common tasks and errors with intelligence.

Intelligent formula repair in Power Fx

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	May 2022	-	-

Business value

Power Apps uses AI to save time and suggest fixes to comment mistakes and errors in formulas, allowing makers to be more productive.

Feature details

When building apps, makers often encounter errors in formulas which can be time consuming for makers of all skill levels to investigate and resolve. Intelligent formula repair will use AI to review errors in formulas and recommend corrections immediately to the maker.

Intelligent formula report is supported by Program Synthesis using Examples ([PROSE](#))—the same technology used in other Microsoft products like Excel—to help automatically suggest a fix for errors found in a formula. Instead of hours or days, makers can fix their formulas and improve business productivity within just a few seconds.

Makers can collaborate together on the same app by merging changes

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jun 2022	-	-

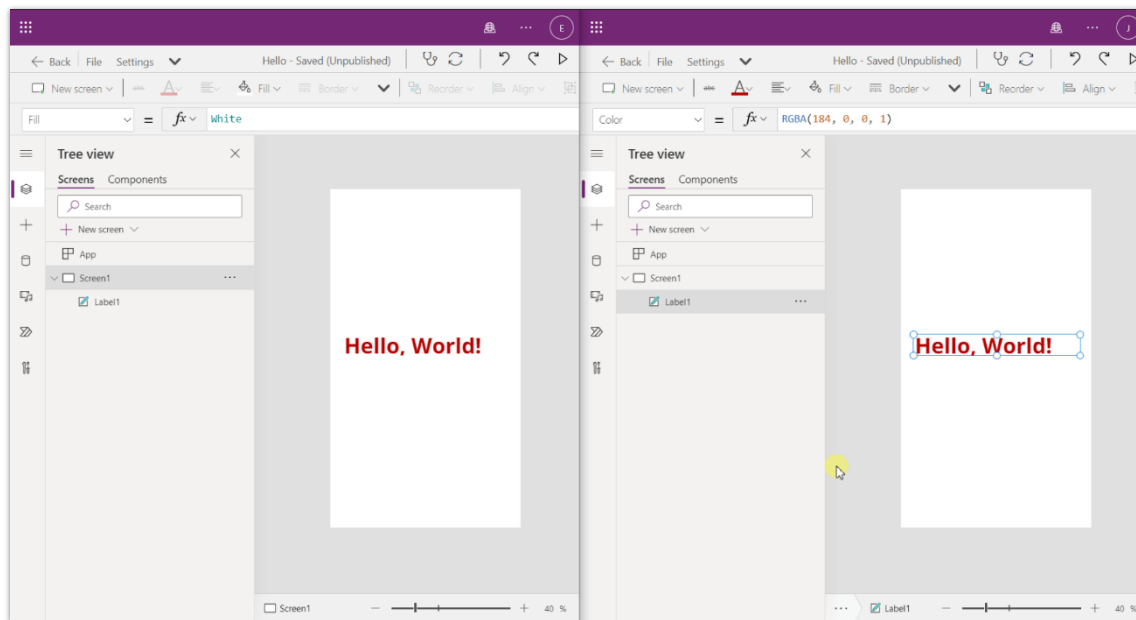
Business value

Enables multiple makers to simultaneously work on the same app and merge changes to accelerate development and track collaboration.

Feature details

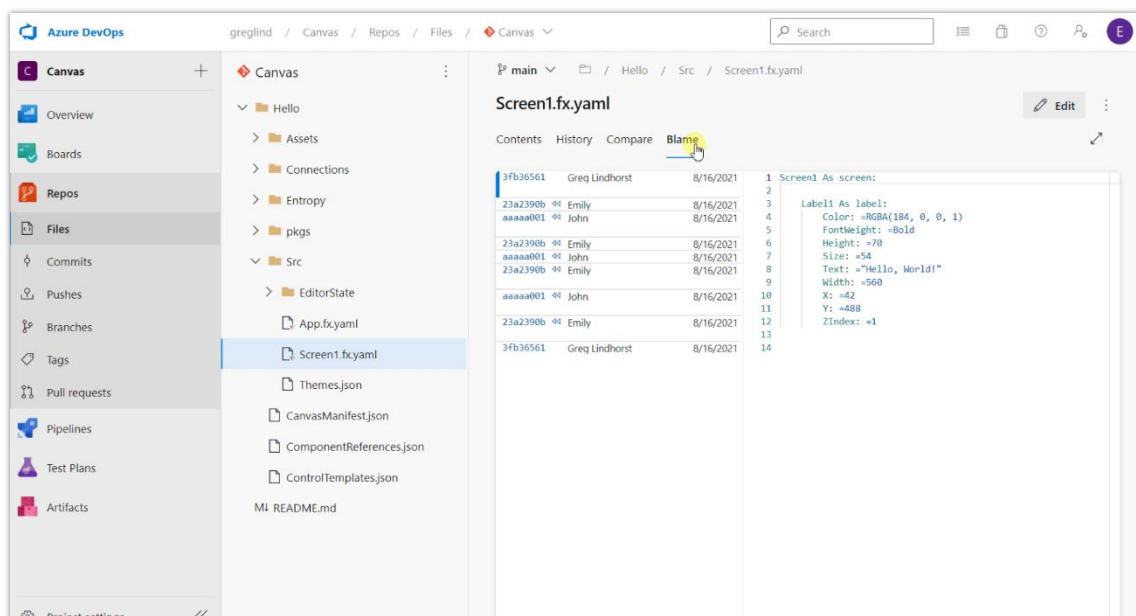
With this capability, makers will be able to work together on a single app to accelerate development, as well as track collaborating with tools such as commenting, source code and version history.

The following image shows the same canvas app open in Power Apps Studio by two different makers at the same time, something that is not possible today. Changes are merged using rich semantic information about the app and the results are stored in Azure DevOps, GitHub, or any Git provider.



Two makers are working on the same canvas app at the same time.

We can see the changes in the following image—line by line—for each maker.



Screenshot of changes each user has made line by line.

Support for data sources with dynamic schema

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jun 2022	-	-

Business value

Power Apps can access a data source's dynamic schema - flexible additional columns of data - enabling makers to create more powerful apps with more information.

Feature details

Power Apps now supports dynamic schema. Some connectors can return extra columns based on how the API is called. The dynamic schema feature gives authors the ability to access the extra columns. For instance, customers can customize Azure DevOps with additional columns beyond the ones shipped by default. Over 40% of Power Platform connectors have some form of dynamic schema (input or output) that are now accessible with this feature. Once defined, this additional type of definition is reusable. This feature will also enable us to support SQL stored procedures in the future.

Quickly create tables and load data in Dataverse based on existing data

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

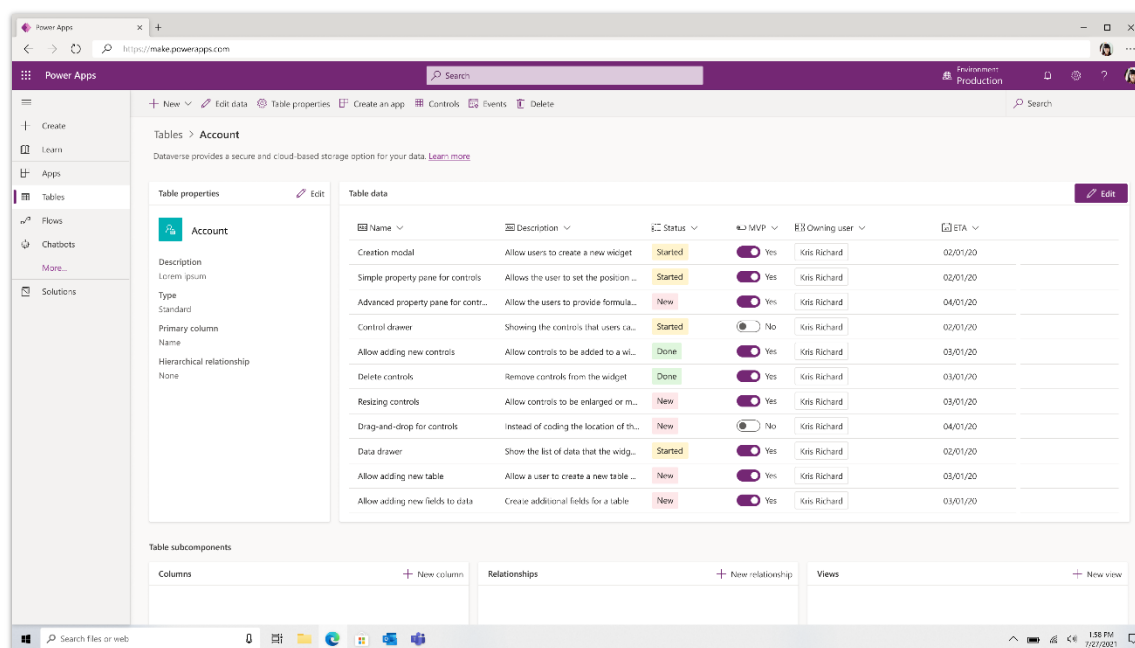
Bring table designer (currently only available in Power Apps for Teams app) to make.powerapps.com, to make creating and customizing tables more approachable for citizen developers. Enable quick create of an app over data from the table, publish and play immediately on web or using the phone app, and introduce the ability to create a new table in a simplified Power Query import of an Excel sheet.

Feature details

Tables today are configured by diving directly into the list of columns, relationships, or other subcomponents that make up Microsoft Database tables. This feature introduces a hub view for a table to provide an overview of the table subcomponents and give the maker a view of the table data. New columns can be created in-line with that table data, and (with appropriate permissions) data can also be updated.

A quick way to generate an app starting from your table will allow you to create and play the app in your browser or on your mobile device by just supplying a name for the app, giving you a good idea of how your table is used in an app before jumping into editing the app to tailor the experience.

New tables can also be created by uploading an Excel sheet containing a table. This quick create experience uses Power Query under the covers but allows a maker to skip multiple steps and get a table with the data into Dataverse quickly.



Dataverse table hub.

Command designer with Power Fx

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✓ Jul 29, 2021	-	Apr 2022

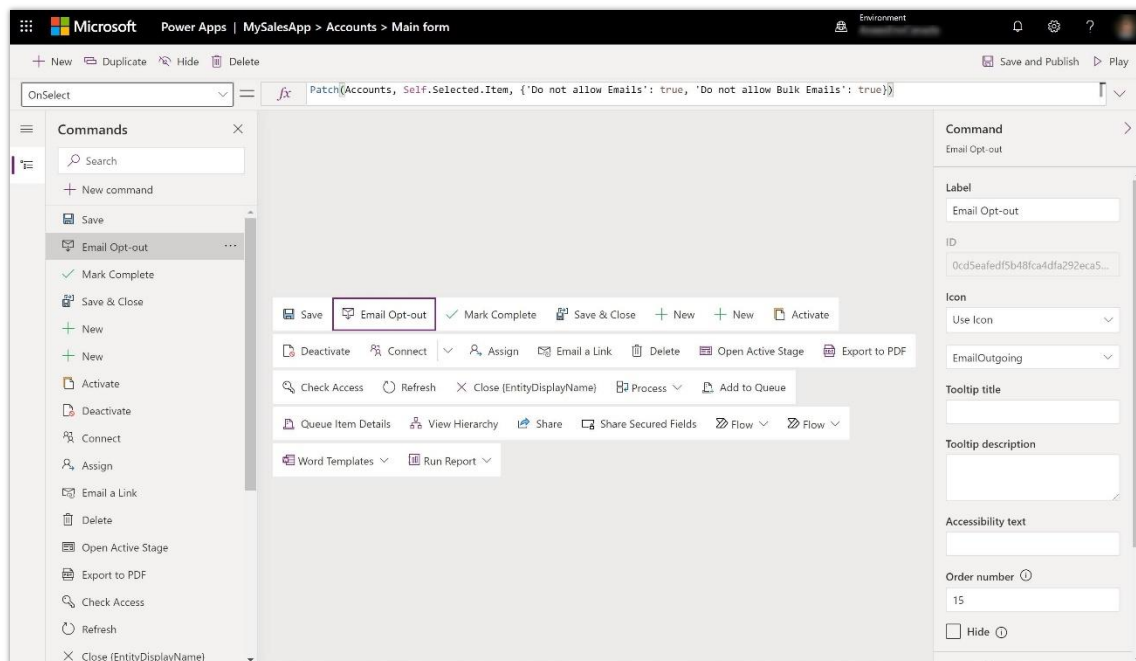
Business value

Power Apps makers can easily customize command bars and command buttons in model-driven and converged apps, including the ability to use low-code Power Fx formulas for command button visibility and actions.

Feature details

The new command designer simplifies command bar and command button customization for both low-code makers and pro-code developers:

- Use both low-code Power Fx formulas and JavaScript for command button visibility and action logic.
- Manage localization and error handling with Power Fx.
- Open a custom page as a dialog and trigger cloud flows using buttons on the custom page.
- Enhanced ALM support for the command designer enables standardized localization and presence in the solution interface.
- Better app-level control with commands applied to individual apps.
- Enhanced support for declarative programming patterns.



Command designer with Power Fx.

See also

[Using Power Fx with commands](#) (docs)

Build forms entirely using features available in the modern form designer

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

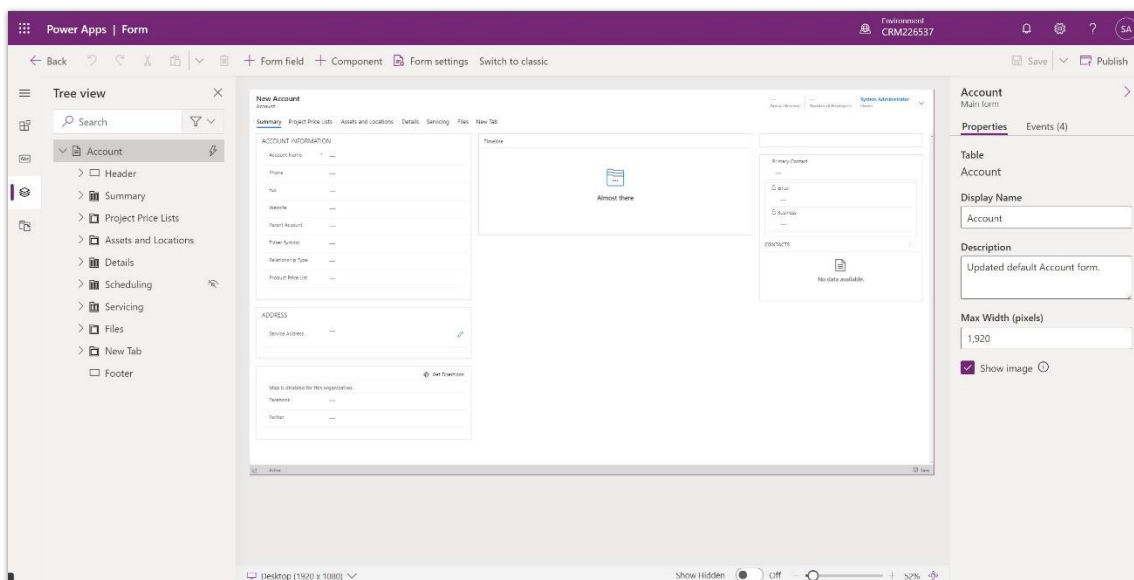
Business value

Provides an accessible modern form designer experience with full parity with classic forms. With this effort, we will soon be able to discontinue form designer with the web client.

Feature details

Makers can now build forms using the modern form designer with full parity with the classic form experience. With this update, makers will be able to customize their forms with all Power Apps component framework controls previously only available in classic, filter a lookup field based on another record through related record filtering, apply business logic to form fields through business rules, customize form elements with more formatting options, and more.

This will improve maker productivity and product accessibility, removing the need for legacy experiences. With this milestone, expect the classic form designer to soon be deprecated as makers can accomplish all the authoring tasks in the modern form designer.



Modern Form Designer Preview.

Power Fx formulas provide richer and easier to use column calculations in Microsoft Dataverse

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2021	-	May 2022

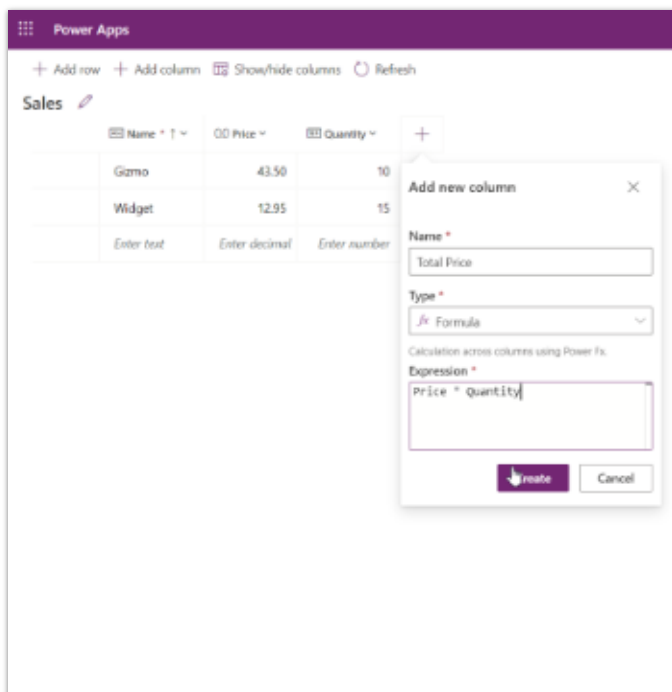
Business value

Power Fx dramatically expands what can be expressed in existing calculated columns and rollups, and adds the ability to perform calculations in real time.

Feature details

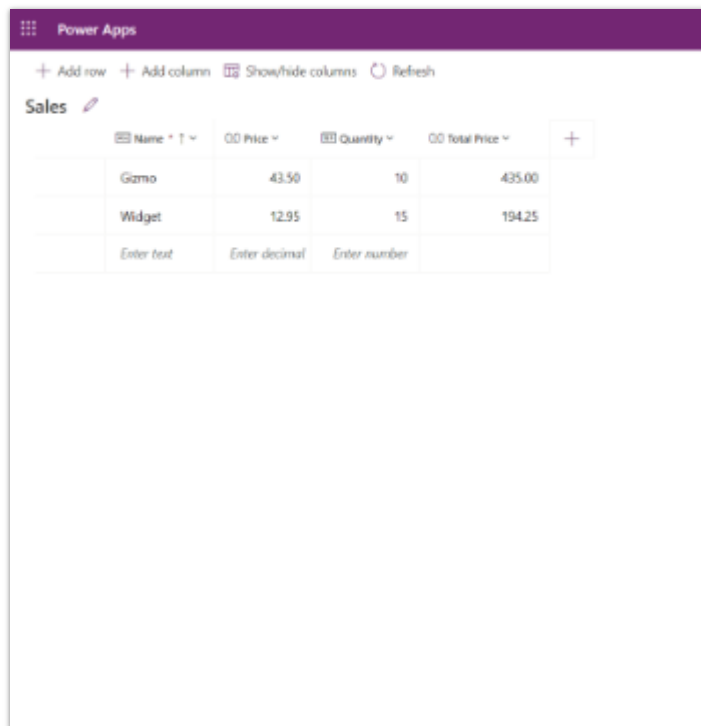
Power Fx picks up where existing Microsoft Dataverse calculated columns and rollups left off. The Power Fx formula bar has been directly integrated into the column settings, making it easy to see and edit the column's formula directly without needing to save or open another window. Power Fx adds many more functions and richer data type support than was previously available. Formula columns can also be calculated in real time, making available calculations with `Today()` and `Now()` functions for the first time.

For example, the following image shows a formula being entered for the "Total price" column with the formula of "Price * Quantity".



A formula is being entered for the column Total price.

And the result of the formula entered is available immediately.



The result of creating the formula column is immediately available.

See also

[Work with formula table columns](#) (docs)

Data prefetch and cache control eliminates manual cache management

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2022	-	May 2022

Business value

Simplify Power Apps development with easy-to-use declarative data prefetching and caching mechanisms. Not only is it easier to write, but enables the system to do a much better job with optimizing data retrievals, resulting in shorter load times and a better user experience.

Feature details

Today, many makers load data into collections when an app starts during `App.OnStart`. This allows them to retrieve the data once, before the app starts, and to cache that data for the

lifetime of the app. We've been promoting this approach for a long time to improve app performance.

This approach suffers from many problems. It's non-intuitive for citizen developers not accustomed to working with imperative logic. It requires changes to the app's formulas to replace the direct data source with a collection, locking out write back of changes, and it's limited by the non-delegation limit. It also prevents Power Apps from being able to optimize the data access patterns and improve performance of the app, especially during app load.

As a better way, data prefetching and caching will provide declarative directives that are easier to use and will work with data sources rather than sidestepping them. These directives will not change any formulas and will not change the behavior of the app. It'll only make it faster or slower, which means they can be applied and modified at any time. Analysis of app telemetry can be used to tune these directives.

Power Fx named formulas to ease development and improve performance

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2022	-	May 2022

Business value

This feature simplifies app writing as state variables do not need to be manually initialized and maintained. This capability helps apps perform better as the system is free to optimize, defer loading data and calculating values until needed.

Feature details

Today, makers must initialize global variables and collections in `App.OnStart` or `Screen.OnVisible`. Since these formulas are imperative, it limits the optimizations that Power Apps can apply to defer and rearrange work, and as a result, dramatically slow the app load time.

As an example of a better way, Microsoft Excel supports the naming of formulas with the **Name Manager**, making formulas reusable across the spreadsheet. We're going to adopt this idea for Power Fx.

Instead of the maker writing `Set(X, Last(Accounts))`, they'll write `X = Last(Accounts)` instead. It's a subtle yet powerful change. In this example, when using `Set()`, `X` is only valid after `Set()` has been called, and `X` may become invalid if `Account*` is changed without `Set()` being called again. Worse, `X` could be set in some part of the app that the maker is unaware of. Finally, the data retrieval for `Accounts` must be done each time `Set()` is called because the intent of the maker may have been to capture `X` at that moment, before it changes. And Power Fx can't optimize it.

The named formula approach results in X always being set and always being up to date with changes in **Accounts**. The named formula sets up a dependency relationship between X and Accounts, much as Excel would have between spreadsheet cells. There is only one source of truth—if you want to understand why X has the value it has, one only needs to look at the formula that defines it, nothing else can modify it. Power Fx optimizations are possible because X need not be evaluated unless it is used, and it can always be recalculated at that moment from the current state of Accounts.

Named formula can be used for simple values too. Often, `App.OnStart` will setup theme colors for the app. Instead of writing `Set(BackgroundColor, Color.Gray)`, you can now write `BackgroundColor = Color.Gray`. With the named formula, you don't need to execute `Set()`, no state variable is involved, and `BackgroundColor` is immutable and won't change. This feature eliminates a source of confusion and possible maker bugs—even for simple use cases.

Rapid delivery of flagship applications

Overview

Organizations can now build and deliver flagship apps to the entire company through Power Apps. Key updates include:

- **Accelerate line of business app dev professionals:** Simplified development and management of offline apps.
- **Deliver standalone mission critical apps to every device:** Create standalone, native mobile apps with Power Apps.

Create standalone, native mobile apps with Power Apps

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Feb 2022	-	Apr 2022

Business value

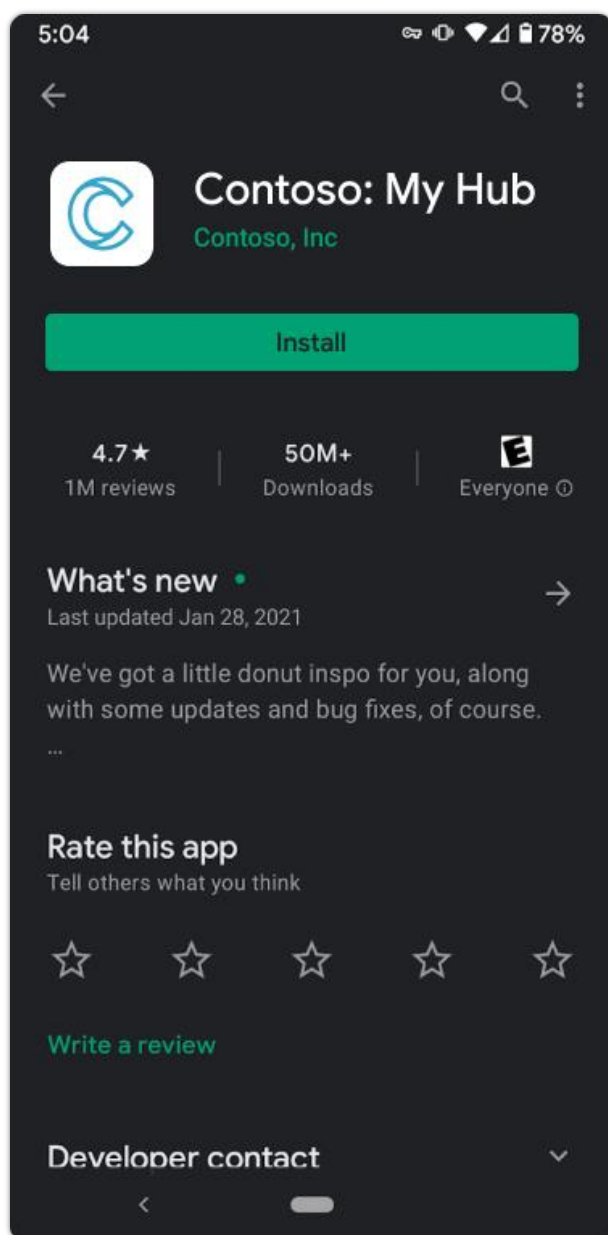
Mobile Power Apps users have historically accessed company applications through the Power Apps mobile app for iOS and Android. With this feature, makers can publish their canvas apps as standalone, native mobile apps.

- Discoverability in the app store - your app gets its own unique Apple/Google app store identity (subject to channel policies).
- Provide your own home screen icon and app name.
- Set an image to show on the custom splash screen and sign in screens.
- Launch directly into your canvas app (no app list).
- Manage your app exclusively with Microsoft Endpoint Manager (Intune) policies.

Feature details

This feature provides the following benefits:

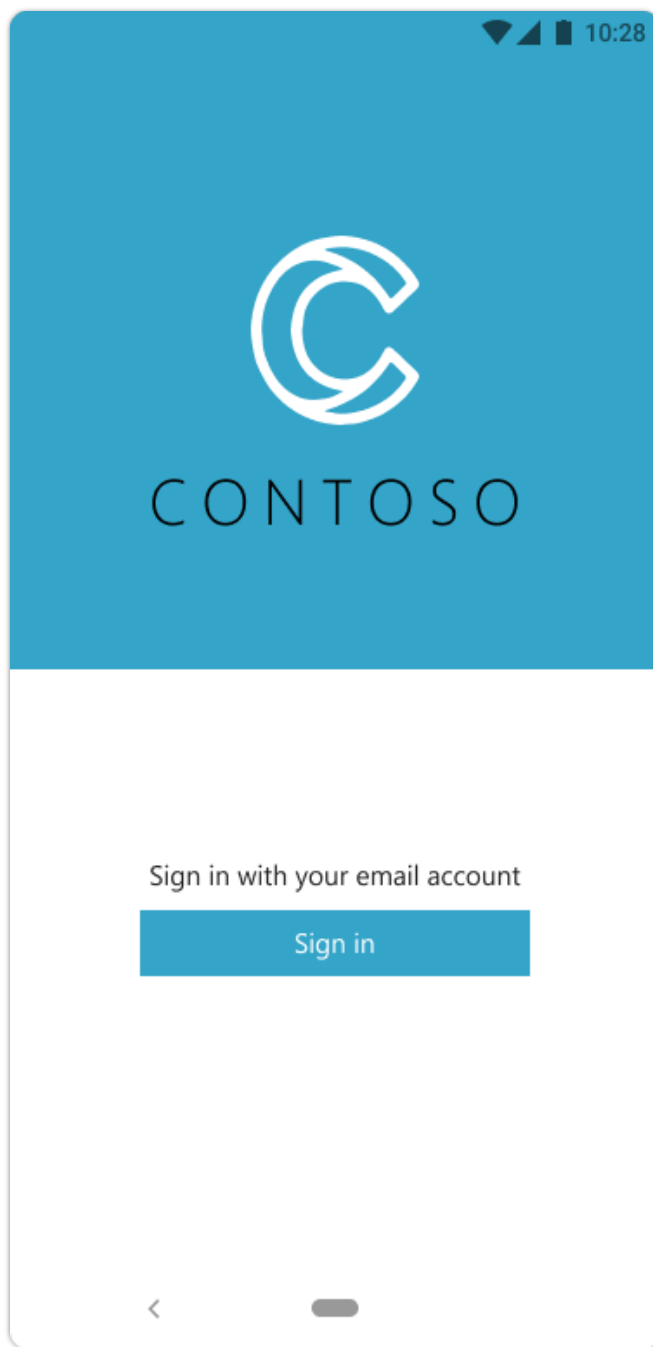
- Your app gets its own unique ID in the Apple and Google app store, making it easy to find the app.
- Provide your own home screen icon and app name.
- Set an image to show on the custom splash screen.
- Launch directly into your canvas app (no need to use app list).
- Manage your app directly with Microsoft Endpoint Manager (Microsoft Intune) policies.



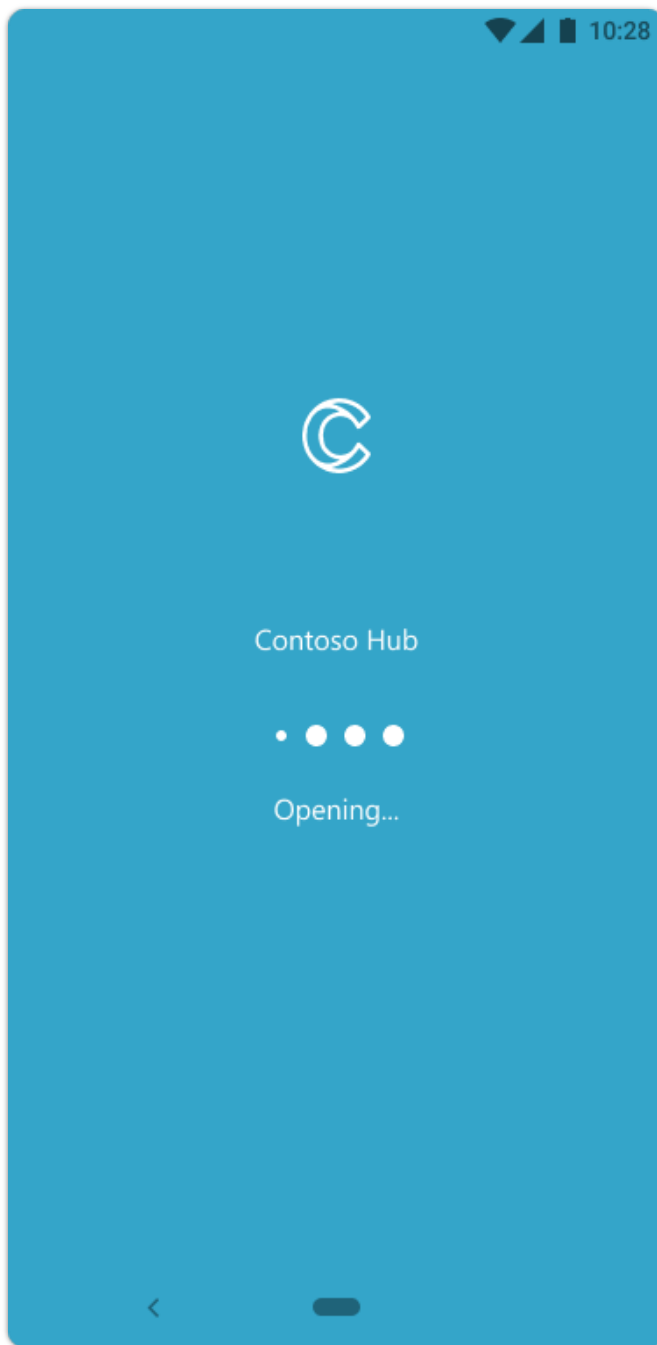
Shrink wrapped app in the Google Play Store.



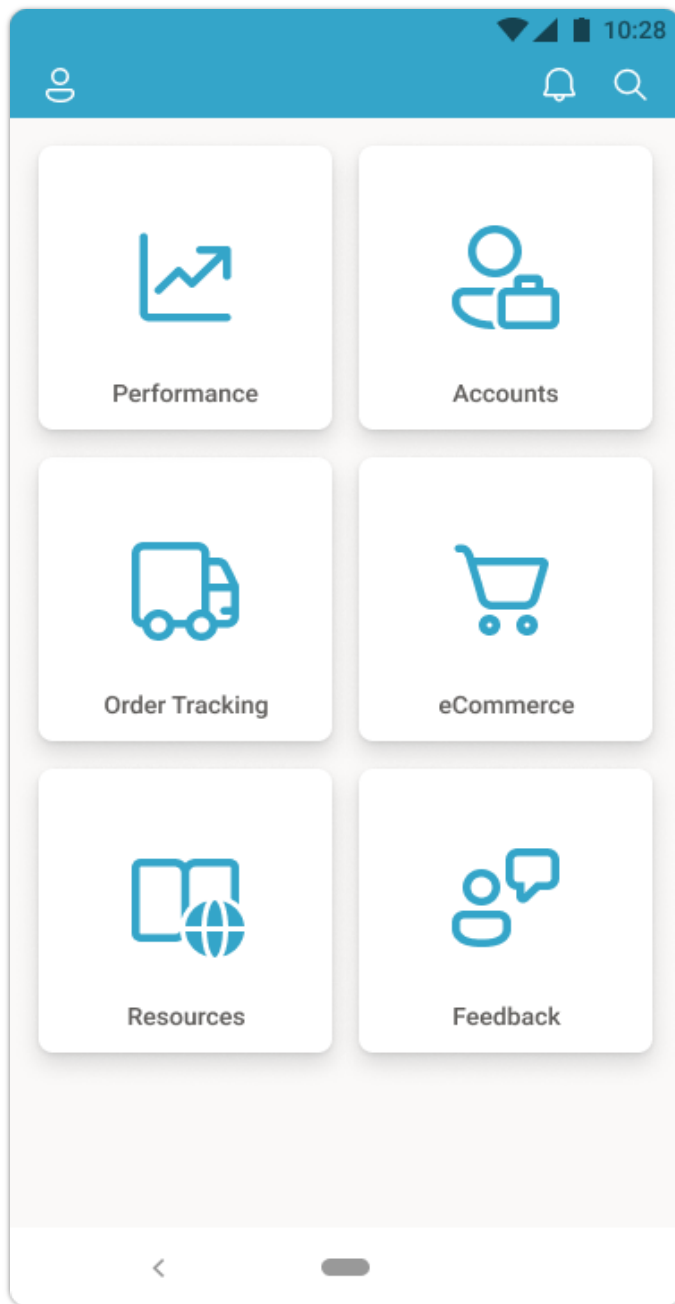
Shrink wrapped app native splash screen.



Shrink wrapped app customized sign-in screen.



Shrink wrapped (embedded) Canvas app loading screen.



Shrink wrapped app primary embedded Canvas app landing page/home screen.

Power Apps application on Windows running model-driven and canvas apps with full support for offline

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Feb 2022	-	Apr 2022

Business value

The Power Apps for Windows is a new application in parity with iOS and Android. You can run both model-driven apps and canvas apps with full support for offline mode. Users can browse from the list of apps by recently used, favorites, featured, or search for a specific app. Power Apps for Windows also supports per app and per user licensing, native connection experience for Dataverse, and offline.

Feature details

With Power Apps for Windows you can work with your business data on any device from anywhere. You can also automate tasks to help users get more work accomplished quickly. Users can also run custom apps that are shared with them.

Power Apps for Windows supports these capabilities:

- Highly secured authentication with Azure Active Directory (Azure AD) support, Intune management, and Microsoft's System Center Configuration Manager (SCCM) app distribution.
- Access to Government Community Cloud (GCC) organizations.
- Access and run both model-driven and canvas apps.
- Find your apps using search or advanced browsing.
- Leverage devices capabilities, such as camera, microphone, file picker, geolocation, and barcode scanner from your apps.
- Access your data with the latest Dataverse native APIs.

Safest way to digitally transform at whole-company scale

Overview

Secure and governable enterprise apps are critical to creating trust with your users and enterprise IT teams. New capabilities are here to help you set the right policies to enable your enterprise apps across more places. Key updates include:

- **Solution quality and enforcement:** Continuing to evolve the checkers already in place in Power Apps, these will evolve to be more comprehensive and enforce quality in production environments.

- **Security updates** : Further updates on conditional access and providing more visibility to makers on security when sharing apps.

Conditional access policies for individual Power Apps

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Aug 29, 2021	-	Apr 2022

Business value

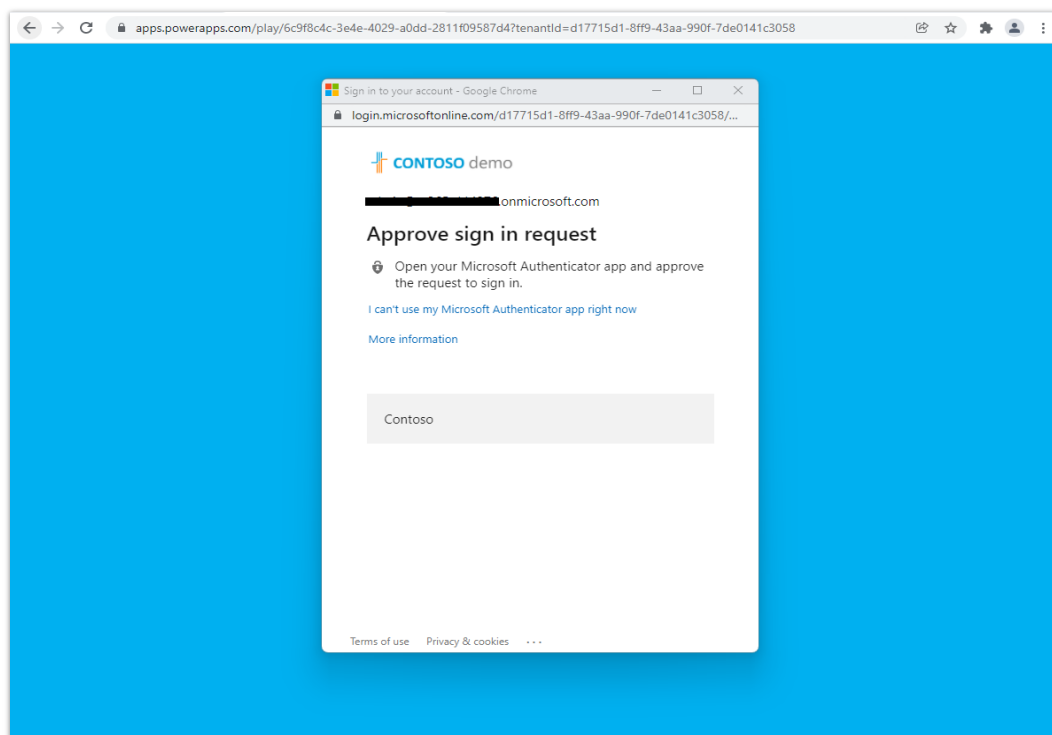
Enterprises can extend their use of Azure Active Directory Conditional Access to individual Power Apps by adding extra layers of security to apps containing sensitive data.

Feature details

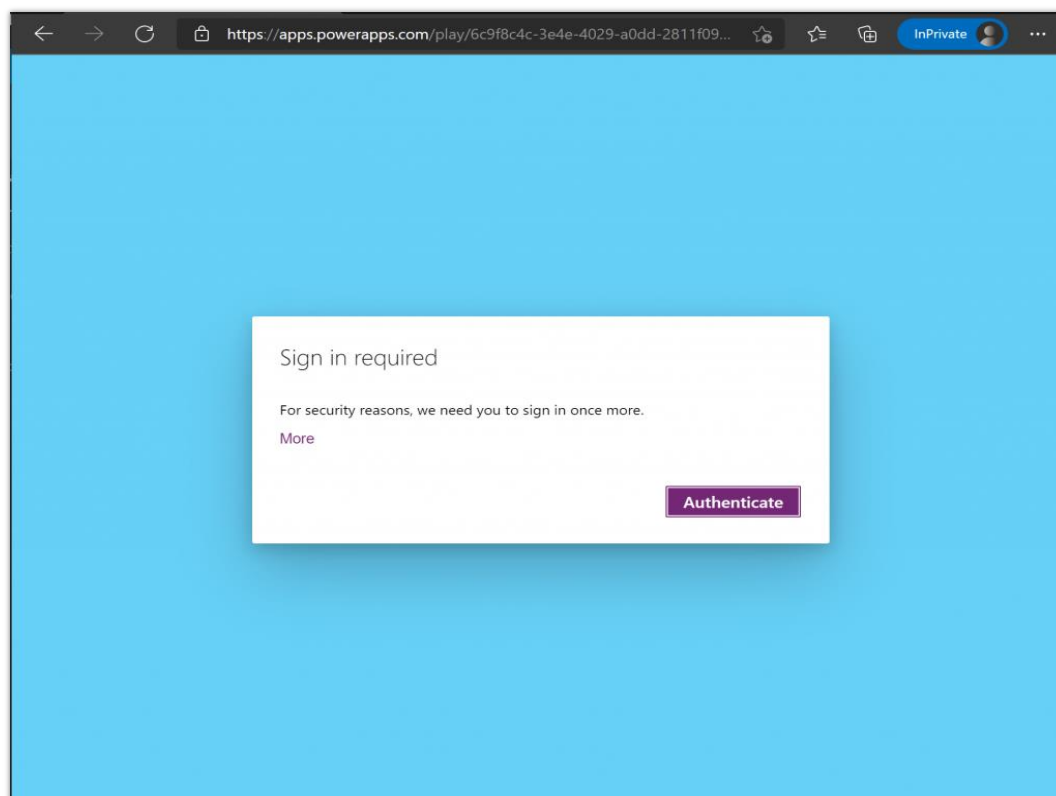
This finer granularity of Conditional Access on individual apps is available in public preview and leverages Azure AD's Conditional Access authentication context.

The granular application of Conditional Access enables many scenarios including:

- Designate specific apps to require users to perform multi-factor authentication.
- Designate specific apps to require users to be connected to their intranet to access the app.
- Designate specific apps to require users to connect from a device that is compliant with the organization's device management policies.
- Apply different Conditional Access requirements for apps available in Power Apps mobile. For example, the *Team Morale app* no longer needs to run on the intranet unlike the *Business Finance app*.
- For a given app, apply different Conditional Access policies per environment (for example, Dev, UAT, Production).



Experience when Power Apps individual app requires multi-factor authentication.



Experience when Power Apps prompts user to authenticate to satisfy Conditional Access requirement.

See also

[Manage Power Apps](#) (docs)

Enable quarantine of non-compliant Power Apps

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Aug 29, 2021	-	Apr 2022

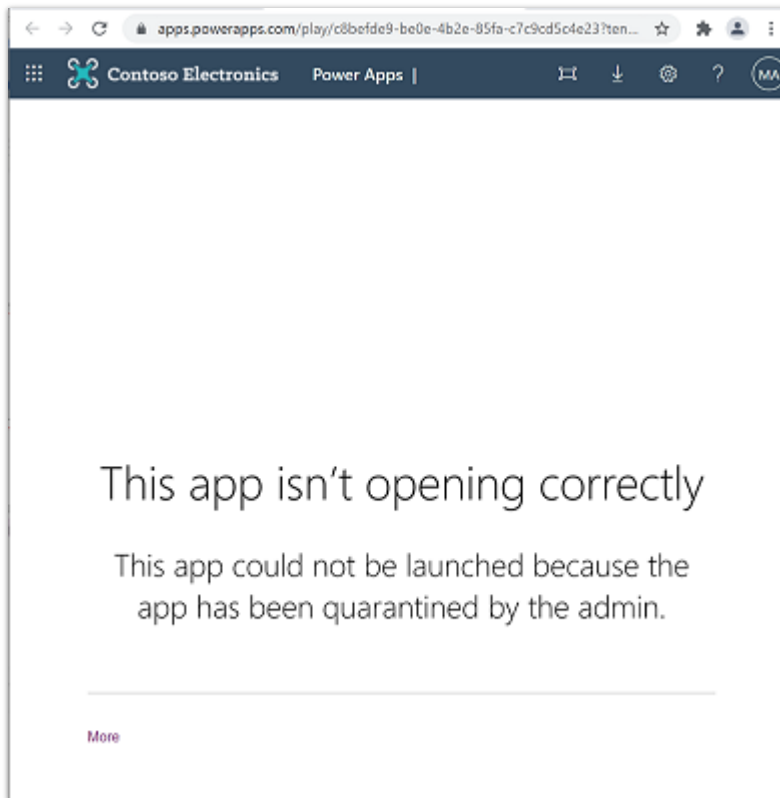
Business value

As a complement to Power Platform's data loss prevention policies, Power Apps enables admins to *quarantine* an app. This allows admins to directly limit the availability of apps that may need attention to meet an organization's compliance requirements, providing additional guardrails for low-code development.

Feature details

An app's quarantine state is managed by admins and controls whether a resource is accessible to users. The following table outlines how the quarantine state impacts experiences for admins, makers, and users.

Persona	Experience
Admin	Regardless of an app's quarantine state, an app is visible to admins in the Power Platform admin center and using PowerShell cmdlets.
Maker	Regardless of an app's quarantine state, an app is visible in https://make.powerapps.com and can be opened for editing in Power Apps Studio.
End-user	A quarantined app will present users that launch the app with a message indicating they're unable to access the app.



Power Apps experience when users attempt to launch an app that is quarantined by an admin.

See also

[Manage app quarantine state preview](#) (docs)

Solution checker enforcement improvements

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Apr 2022

Business value

Customers can identify harmful configurations and customizations in their solutions early, as part of the application lifecycle management process, to help make their apps are more reliable, secure, and performant.

Feature details

Solution checker is a great tool for makers and administrators to inspect the customizations within a solution to identify potential issues before the changes are deployed to production.

You can run the solution checker from Power Apps (make.powerapps.com) and view the results. With some effort, you can automate it to be part of the deployment process.

With this enhancement, we're making it easy for you enforce solution checker as part of the solution packaging, export, and import process. You'll be able to easily view the results and necessary information to address any issues before continuing the process.

Power Automate

Overview of Power Automate 2022 release wave 1

Microsoft Power Automate provides the tools you can use to improve your business' productivity by automating repetitive, time-consuming tasks. Power Automate provides a better way to get things done across your organization through cloud robotic process automation (RPA). It is deeply integrated with the Microsoft 365 ecosystem and the rest of Microsoft Power Platform.

Power Automate is investing in several areas as a part of Microsoft Power Platform 2022 release wave 1, including the following the following four themes:

- **Automation for everyone – exactly where you need it:** Today, the way that many people discover Power Automate is through our integrations in other products, like Windows 11, SharePoint, or Microsoft Teams. This wave, we're making it easier to get started with automation no matter what application you're using in Windows or Microsoft 365.
- **Hyperscale Cloud RPA:** From our biggest enterprise customers to our small and medium businesses, everyone is increasing the scale of their RPA deployments. We'll make it easier to roll out RPA at scale - with features to make it easier to manage your machines in Azure and the credentials of your users and accounts.
- **Automation that lets you sleep at night:** We're taking the burden of complexity and repetitive work away from you. That means, fundamentally, the service must never go down, we should deliver you consumer-quality end-to-end experiences, and ultimately, everything about our platform needs to "just work." All the features we have must be reliable and consumable, and automatable by default (adhering to the API-first approach), so that you can set it and forget it.
- **Anyone can get started:** We'll make it easier for anyone to get started with automation when they launch Power Automate for desktop or go to PowerAutomate.com for the first time. In addition to relevant first-run experiences, we'll be adding more intelligence throughout the product, making it easier to process even complex documents.

For official product documentation and training for Power Automate, go to:

- [Power Automate docs](#)
- [Power Automate training on Microsoft Learn](#)

What's new and planned for Power Automate

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Cloud flows

Use the new cloud flows features to automate tasks across hundreds of connectors.

Feature	Enabled for	Public preview	Early access*	General availability
Improved home page experience	Admins, makers, marketers, or analysts, automatically	Apr 2022	-	
Copy and paste improvements in cloud flows	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Enhanced help topics in Power Virtual Agents	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Flow ownership supported for Service Principals	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Greater control over connection reference creation and reuse during flow creation	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Handle null values in JSON	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Feature	Enabled for	Public preview	Early access*	General availability
Improved error messages across cloud flows	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
More discoverable help bot for cloud flows	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
OData editor improvements in cloud flows	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Resubmit multiple failed runs at once	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Solution cloud flows are shown in the My Flows experience	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Solution list warnings are shown when connection references are not ready for use	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Solution references will be visible when viewing solution resources	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Undo feature in cloud flow designer	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Feature	Enabled for	Public preview	Early access*	General availability
Use connections provided by run-only users with the Microsoft Dataverse connector	Admins, makers, marketers, or analysts, automatically	-	-	May 2022
Improved Power Automate mobile app for Android	Admins, makers, marketers, or analysts, automatically	-	-	Sep 2022

Desktop flows

Use the new desktop flows features to automate tasks on the web or desktop.

Feature	Enabled for	Public preview	Early access*	General availability
Use credentials from CyberArk in desktop flow connections	Admins, makers, marketers, or analysts, automatically	Jul 2022	-	
Desktop flow machines and runs - status health, analytics, and error reporting improvements	Admins, makers, marketers, or analysts, automatically	Aug 2022	-	
Set screen resolution for unattended desktop flow runs	Admins, makers, marketers, or analysts, automatically	Aug 2022	-	
SharePoint connector in Power Automate for desktop	Admins, makers, marketers, or analysts, automatically	Sep 2022	-	
Use credentials from Azure Key Vault in desktop flow connections	Admins, makers, marketers, or analysts, automatically	Sep 2022	-	

* You are able to opt in to some features as part of early access on January 31, 2022, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
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Cloud flows

Overview

Cloud flows is a core automation capability in Power Automate that allows customers to focus on what matters and automate the rest. This product area includes:

- Integration with applications like Microsoft Teams, SharePoint, OneDrive, Dynamics 365 suite of applications, and more.
- Integration with the rest of Microsoft Power Platform, including the ability to invoke workflows from an app created using Power Apps, when a data alert is triggered in Power BI or to take an action in Power Virtual Agents.
- Mobile applications that help customers be notified, perform approvals, invoke, and monitor automation execution on the go.

This functionality was first released in 2016 and has been updated on a weekly basis. In 2022 release wave 1, we're focusing on making it easier to build, deploy, and share automation as well as help organizations drive adoption with confidence through deeper governance and privacy controls.

Improved home page experience

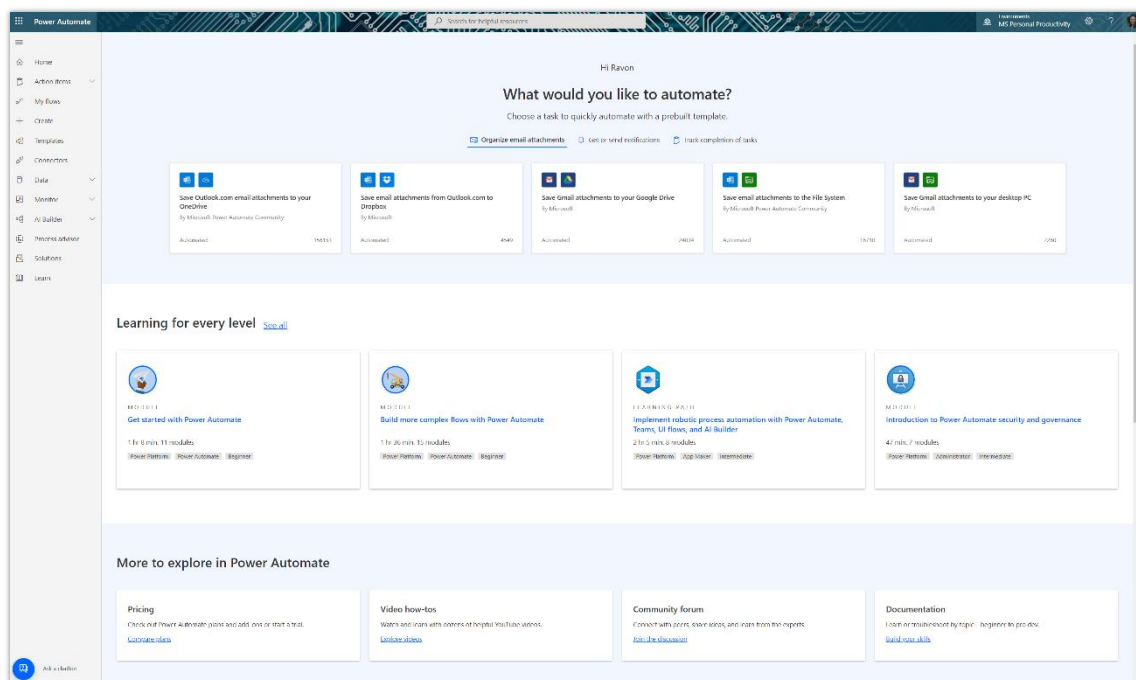
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	-	-

Business value

The new Power Automate home page will make it easier for users to learn how to build a flow and discover more about Power Automate capabilities.

Feature details

In 2022 release wave 1, we're making a number of improvements to the home page for Power Automate. This new page will make it easier to get started making a new flow. It has features and learning paths from Microsoft Learn that are targeted for both new and intermediate users. There are some resources for users to learn about pricing, interact with the community, access the documentation, and watch how-to videos. Users can stay in the know by reading blog posts written by the Power Automate team.



Screenshot of the new home page.

Copy and paste improvements in cloud flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

Customers adopting solutions for application lifecycle management (ALM) use connection references as a way to vary configuration, specifically the connection a flow user, between environments. With this feature, connection references can be copied.

Feature details

Currently, if a user tries to copy and paste an action of a cloud flow that resides within a solution, the connection reference won't be transferred. It's difficult for a user to troubleshoot and get around this. In this new feature, we'll add full support to copy and paste using the clipboard with connection references.

In addition, there are currently certain areas where actions can't be pasted, such as inside of nested switch statements. In 2022 release wave 1, these issues will be corrected.

Enhanced help topics in Power Virtual Agents

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

Power Automate includes a Power Virtual Agents-powered help bot to assist people with building flows. We'll be providing upgrades so users can get more of their questions answered through the bot.

Feature details

Many users' questions are related to how to perform automations and other documentation questions. Instead of opening support tickets or asking users to search online for the documentation, we're adding more self-help topics on Power Virtual Agents so users can easily and quickly find answers.

Flow ownership supported for Service Principals

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

This feature allows Microsoft Power Platform to work in enterprise environments where Service Principals are leveraged.

Feature details

Microsoft Dataverse application users can represent a Service Principal, but those users can't have connections shared with them so flows owned by a Service Principal cannot be enabled. This encourages the use of shared "service accounts" when flow ownership can't be on a single user.

In 2022 release wave 1, we're updating connection sharing capabilities to allow flow ownership by a user that represents a Service Principal.

Greater control over connection reference creation and reuse during flow creation

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

Connection references are an important cornerstone of the application lifecycle management (ALM) process for solution flows. This feature gives more control to cloud flow authors when creating and reusing connection references during flow creation.

Feature details

During flow creation, connection references are automatically created or reused. This can result in the use of connection references in other solutions and the creation of connection references in the wrong solution.

In 2022 release wave 1, cloud flow authors will be given greater control over connection reference creation and selection during flow creation.

Handle null values in JSON

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

Customers often use Power Automate to read in data from a variety of formats, including JSON. This feature will unblock customers who encounter null values in the JSON parsing action.

Feature details

Currently, cloud flows do not handle null values in the JSON parsing action. Instead, an exception is thrown and it is hard for users to troubleshoot, requiring a workaround in their flows to be resolved. In 2022 release wave 1, we'll add support to handle null values in the JSON parsing action.

Improved error messages across cloud flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

With improved error messages across the cloud flow experiences, users will better be able to correct errors.

Feature details

Users frequently get internal error code messages (for example, *400 Bad Request*), but they're not very actionable and are difficult to understand or troubleshoot. In 2022 release wave 1, we'll reduce instances of these errors and provide a more actionable error message wherever possible.

More discoverable help bot for cloud flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

Since it will be easier to find, more users will be able to find answers through the Power Virtual Agents-powered chat bot across all Power Automate pages.

Feature details

Currently, it's not easy enough to find the Power Virtual Agents bot. With this feature, there will be a virtual agent icon on every screen in the Power Automate designer, helping users find the answers they need quickly by chatting to a Power Virtual Agents bot.

OData editor improvements in cloud flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

This feature will provide easier filtering in actions like the SharePoint **Get Items** action that previously required OData syntax.

Feature details

We're releasing a new feature for actions in cloud flows that hides OData syntax by default. This will allow users to switch between basic and advanced mode, making it easier to filter items with less advanced knowledge (but stilling letting advanced users leverage OData if they choose). This will first be available in SharePoint Online connector's **Get Items** action.

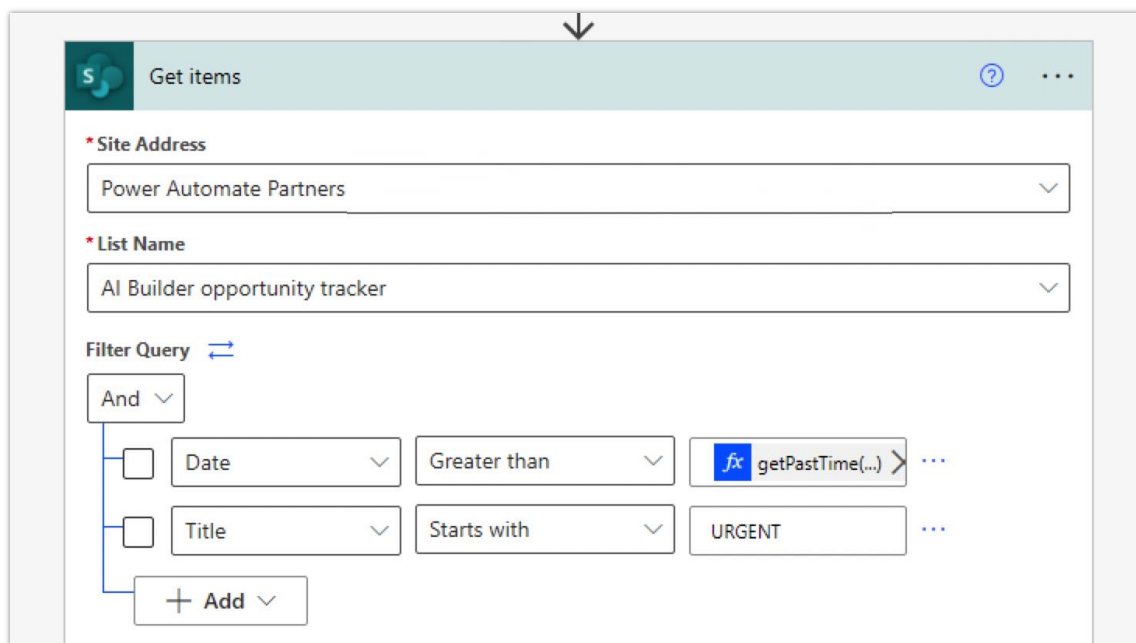


Image of the Get Items for SharePoint showing the new OData query options.

Resubmit multiple failed runs at once

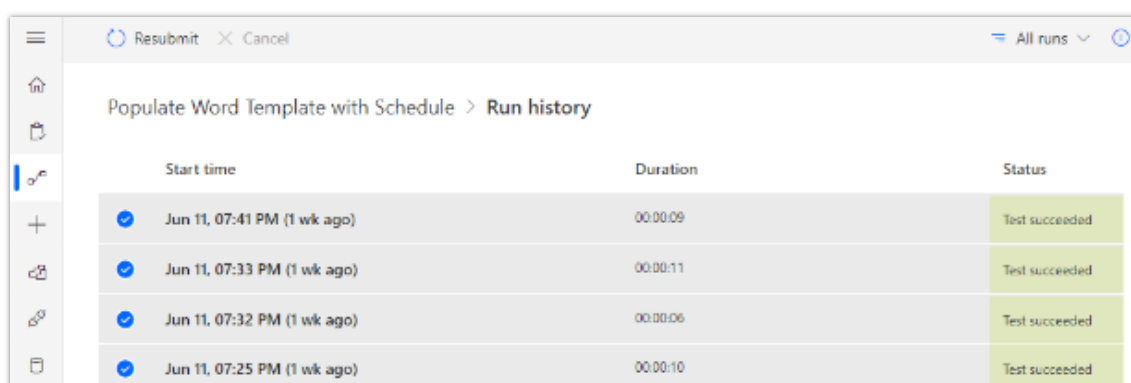
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

Improve the maker productivity by resubmitting several failed flows to rerun at the same time.

Feature details

Sometimes, you may have a flow with several failed runs. Currently, you must manually resubmit each run individually if you want to rerun them. In 2022 release wave 1, we're introducing a feature that allows you to select and resubmit multiple runs at once. This means if you have multiple failed runs, you can select all of these runs and resubmit them at the same time.



Screenshot of multiple runs selected to resubmit.

Solution cloud flows are shown in the My Flows experience

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

We're updating the My Flows experience so users will be able to find solution cloud flows more easily.

Feature details

Flows need to be in solutions to participate in the application lifecycle management (ALM) process. Solution cloud flows are currently not showing in the My Flows experience, which means that they are harder to find than non-solution cloud flows. When a non-solution cloud flow is added into a solution it "disappears" from the My Flows experience since it now must be opened through its containing solution.

In 2022 release wave 1, the My Flows experience will be updated to show users the solution cloud flows that they own.

Solution list warnings are shown when connection references are not ready for use

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

Connection references are an important cornerstone of the application lifecycle management (ALM) process for solution flows. This feature will warn users about connection references that are missing or need to be refreshed.

Feature details

When a connection reference is not ready for use, warnings are shown when a referencing flow is edited, but there's a need to have a central place to see any connection reference problems. The solution list currently shows a warning if any environment variables are missing values. This same behavior will be extended to warn about connection references that are missing connections or have connections that need to be refreshed.

Solution references will be visible when viewing solution resources

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

This feature allows users to see solution references when they're looking at solution resources, improving the ease of viewing and editing all resources in a solution.

Feature details

When you build a solution, there can be many dependencies between different types of resources. Currently, users can't easily determine the list of solutions that are referencing flows or connection references. In 2022 release wave 1, we'll make solution references visible in the flow details page and connection reference edit panel.

Undo feature in cloud flow designer

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

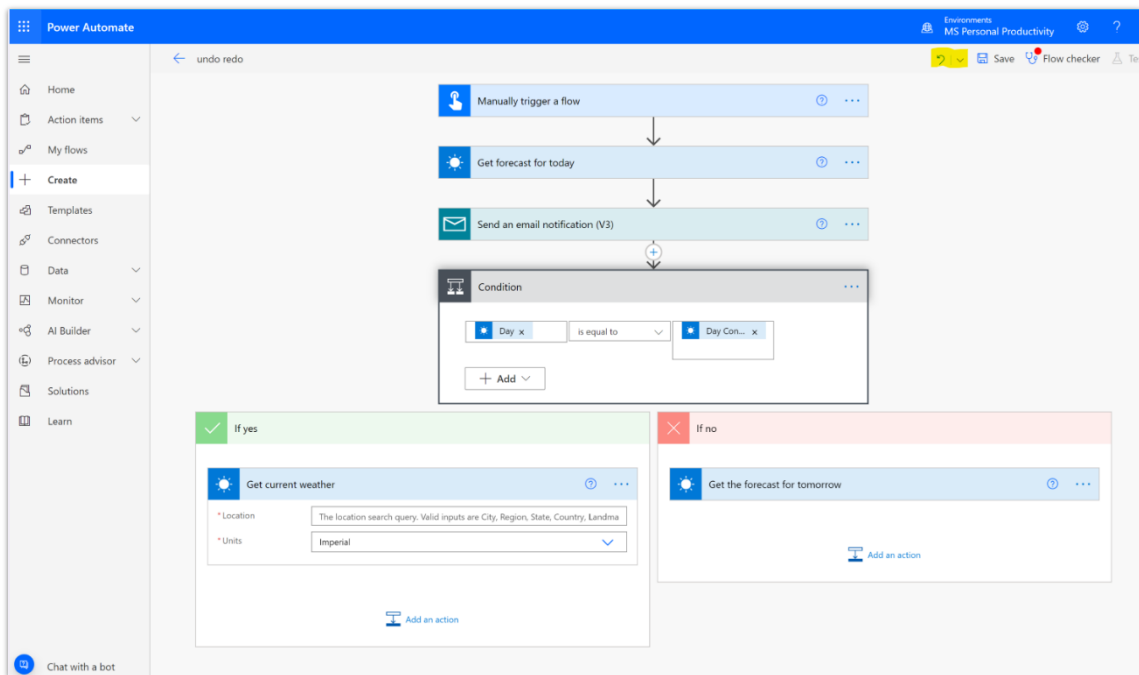
Many customers asked for an undo/redo capability. This feature will help users recover from situations where they've accidentally deleted actions and need to restore them.

Feature details

For organizations with robust source control, we recommend that they use **solutions** to manage the versions of their flows; however, sometimes makers simply want to have the undo/redo function support to revert some of their operations locally, such as adding, deleting, or editing some actions.

With this new feature, you can use the **Undo** and **Redo** buttons to easily revert some of your previous operations in cloud flow designer.

NOTE This feature uses local browser storage for design time only. It's not a server-side versioning support story.



Screenshot of the undo and redo feature in cloud flow designer.

Use connections provided by run-only users with the Microsoft Dataverse connector

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	May 2022

Business value

Users will be able to deploy flows more broadly without needing to manage shared accounts. They can now enable users to use their own connections when triggering flows with the Microsoft Dataverse connector.

Feature details

Flow makers can configure whether a stored or a user-provided connection is used for Microsoft Dataverse actions using the **Manage run-only permissions** settings for flows that are manually triggered.

Improved Power Automate mobile app for Android

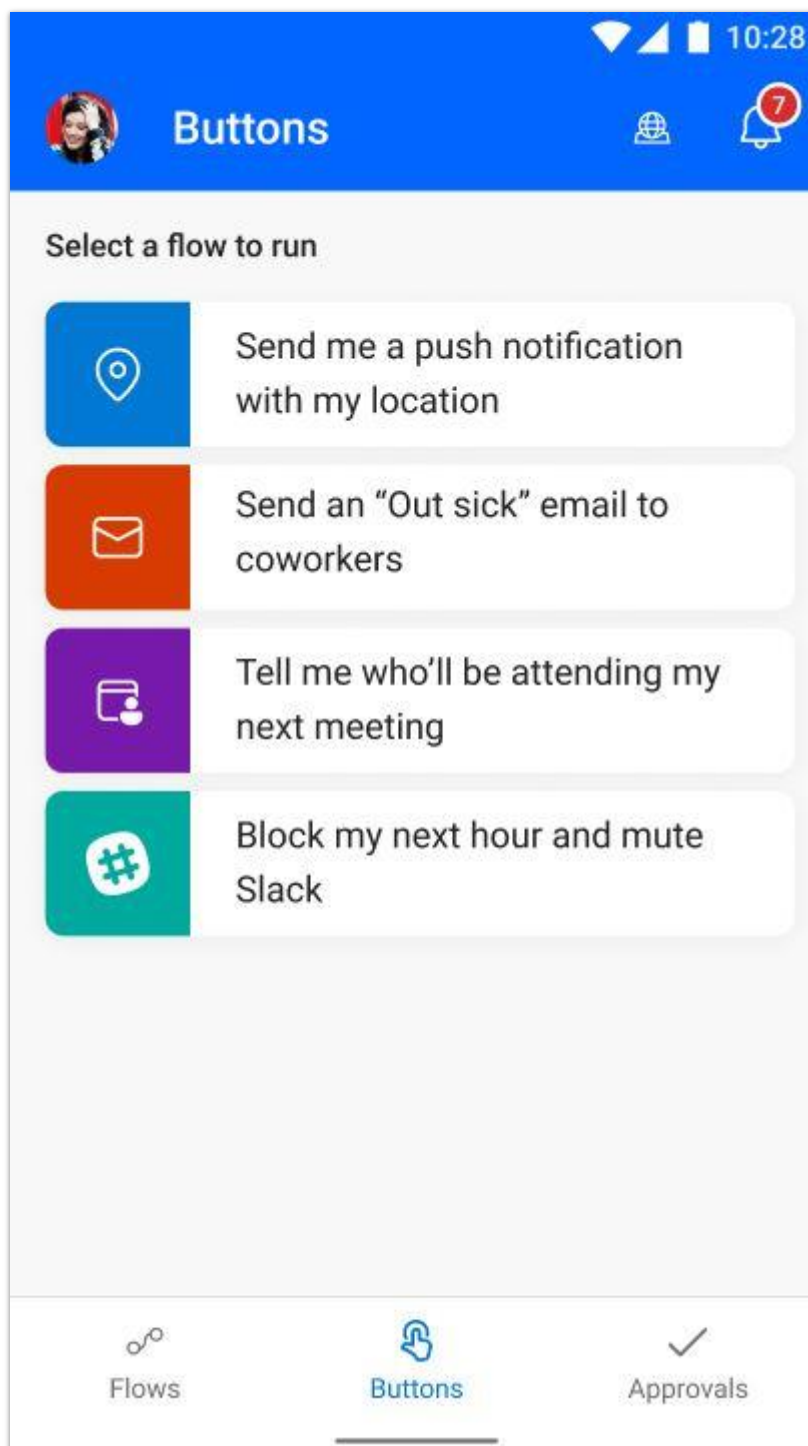
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Sep 2022

Business value

Improvements to the Power Automate mobile app for Android will provide a more usable and modern experience.

Feature details

The new version of the Power Automate mobile app for Android will provide an updated, modern experience for Power Automate users on their Android devices. Users will be able to receive notifications and trigger button flows on the go.



Screenshot of the updated Android mobile Power Automate app.

Desktop flows

Overview

The need for accessing robotic process automation (RPA) capabilities becomes more and more urgent for organizations. Indeed, they are looking to help their employees be more productive by focusing on the most important tasks and avoid spending time on repetitive, time-consuming ones, which often can be automated. Building desktop automation can be complex hence it is critical to provide simple and intuitive user experiences for people who build or run automation flows. Desktop flow makers can either be advanced RPA developers or citizen developers with less technical skills but they both need to be able to build the automations they need. In this democratization journey, Power Automate for desktop comes now with Windows 11 making RPA easily accessible for both individual users as well as organizations.

In 2022 release wave 1, we'll keep investing heavily in Power Automate for desktop to make automation even easier with improvements like welcoming in-app tutorials and out of the box ready-to-run desktop flow examples. Additionally, we'll expand the Power Automate for desktop capabilities by addressing the main UI challenges like image-based automations. All those application enhancements come with platform improvements providing better governance, monitoring, and troubleshooting capabilities to help organizations with the deployment and management of their desktop automations.

Use credentials from CyberArk in desktop flow connections

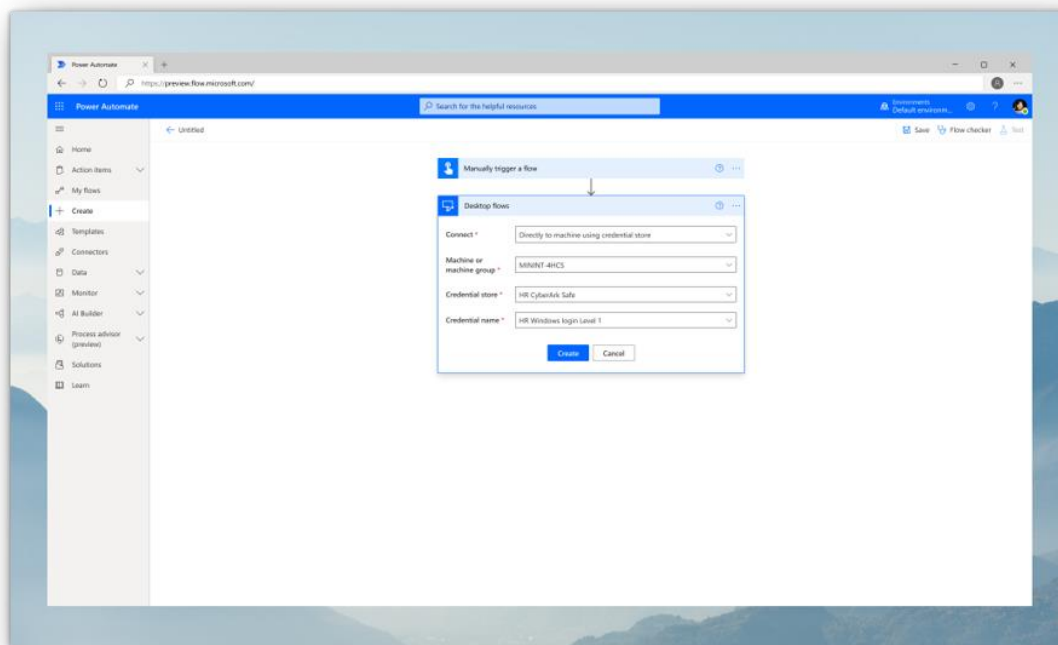
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2022	-	-

Business value

You can now leverage credentials from CyberArk to connect to Windows sessions on desktop flow machines. This feature supports rotating passwords without the need to update the connection.

Feature details

With this feature, users can now have their desktop flow automations run on Windows machines that are logged in with credentials from CyberArk. The machine will retrieve the latest credentials at runtime. This enables automations to keep running successfully even when the password is changed by the administrator.



Screenshot of username and password sourced from a CyberArk vault.

Desktop flow machines and runs - status health, analytics, and error reporting improvements

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2022	-	-

Business value

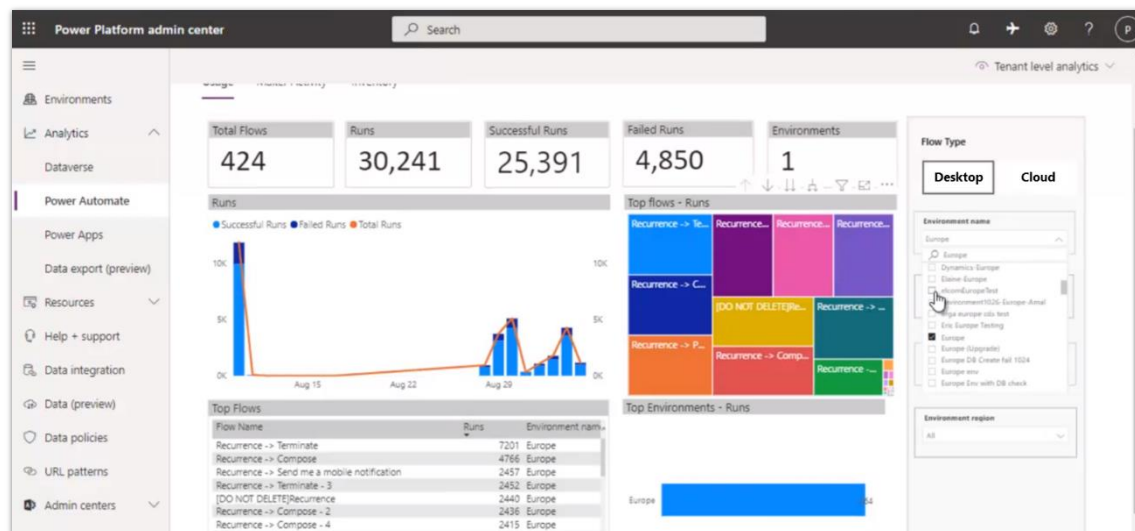
All customers need the ability to monitor and understand the health of their desktop flow setup. This includes analytics about machines configured to run them where they can quickly detect issues and be assisted in troubleshooting them as quickly as possible.

Feature details

CoE and admins have a way to monitor the health of their desktop flow machines and runs. They can get support in troubleshooting any issue surfaced with an end-to-end overview and additional capabilities.

New features will give you the ability to track/manage the health of machines and desktop flow runs end-to-end.

- The remediation pane and details run page shows up more meaningful and actionable error messages, including identifying in which step the error occurred.
- A new dashboard helps with tracking machines and flow runs health.



Screenshot of desktop flow analytics.

Set screen resolution for unattended desktop flow runs

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2022	-	-

Business value

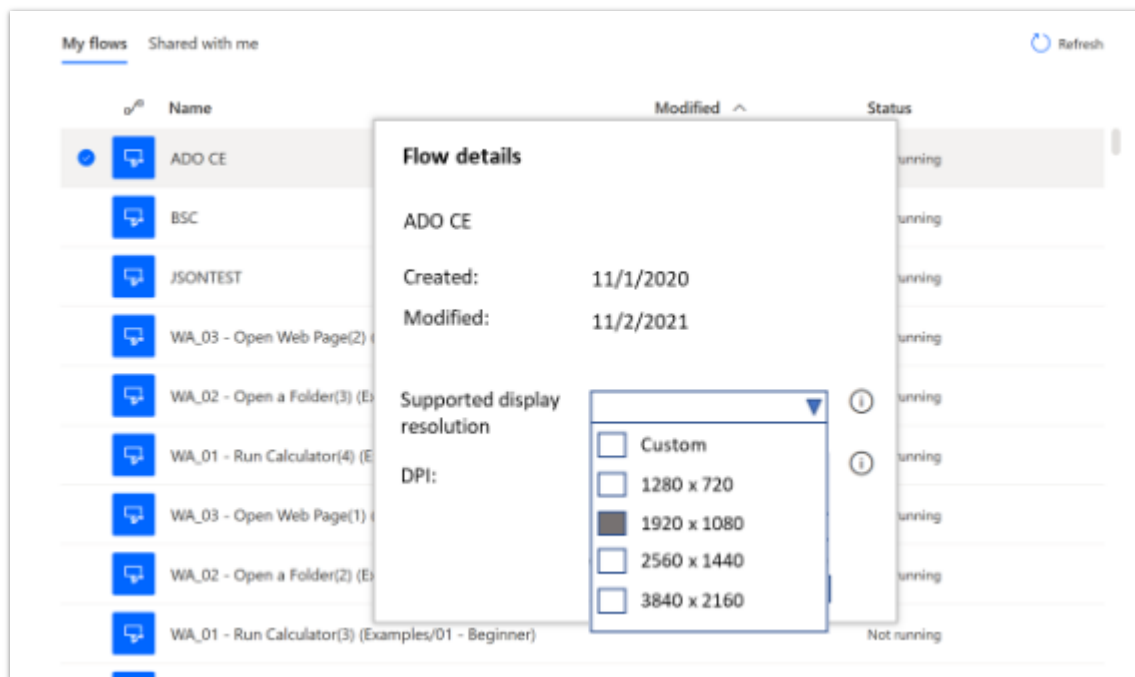
Some desktop flows can only run with a certain screen resolution. With this feature, customers can enforce a certain screen resolution to ensure their desktop flows won't fail because of a wrong screen resolution.

Feature details

Some desktop flows require a certain screen resolution to be able to run successfully. This feature allows users to define a static screen resolution to be enforced on all unattended flow runs.

From the flow details, flow makers can:

- Select between different screen resolutions
- Select between different scale settings (DPI)



Screenshot of options for desktop flows including setting resolution and DPI.

SharePoint connector in Power Automate for desktop

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-	-

Business value

The new SharePoint actions in Power Automate for desktop will increase the speed and ease of use of desktop automations.

Feature details

With the SharePoint connector in Power Automate for desktop, you can embed SharePoint cloud actions within desktop automations. Now, users can design and run desktop automations that loop over SharePoint lists and write into SAP as well as any other action from the SharePoint connector available in cloud flows.

Use credentials from Azure Key Vault in desktop flow connections

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-	-

Business value

Users can leverage credentials from Azure Key Vault to connect to Windows sessions on desktop flow machines. This feature supports rotating passwords without the need to update the connection.

Feature details

With this feature, users can have their desktop flow automations run on Windows machines logged in with credentials from Azure Key Vault. The machine will retrieve the latest credentials at runtime. This enables automations to keep running successfully even when the password is changed by the administrator.

Power Virtual Agents

Overview of Power Virtual Agents 2022 release wave 1

Power Virtual Agents enable anyone in your organization to create AI-powered bots that can chat with users about specific topics. They can answer routine questions, resolve common issues, or automate tasks that take up valuable customer or employee time.

The 2022 release wave 1 brings improvements in the authoring experience with topic suggestions from bot sessions, Power Apps Portals integration, data loss prevention options, proactive bot update messaging in Microsoft Teams, and more.

Creating a bot is typically a complex and time-intensive process, requiring long content update cycles and a team of experts. Power Virtual Agents gives anyone in your organization the ability to create powerful custom bots using an easy, code-free graphical interface, without the need for AI experts, data scientists, or teams of developers. A bot can interact with users, ask for clarifying information, and answer a customer's questions.

With deep integration with Power Automate and the Microsoft Bot Framework, authors can extend their bots to integrate with API backends, which will enable the bots to handle additional topics, limited only by the author's imagination. You can deploy bots to many channels, including websites, Microsoft Teams, and Facebook.

As users interact with a bot, the author can see which topics are performing well and which need improvement.

What's new and planned for Power Virtual Agents

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

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This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Bot configuration

Configure bots to suit the individual needs of an organization and to provide further extensibility with other services and features.

Feature	Enabled for	Public preview	General availability
Use single sign-on with Dynamics 365 Customer Service	Users by admins, makers, or analysts	Apr 2022	-

Core authoring

Use the Power Virtual Agents conversational editor to construct your dialogs with rich content, variables, and powerful entity types.

Feature	Enabled for	Public preview	General availability
Start bot conversations with proactive triggers	Users by admins, makers, or analysts	Apr 2022	-
Use connectors within Power Virtual Agents or author custom connectors	Admins, makers, marketers, or analysts, automatically	Apr 2022	-
Notify Microsoft Teams users about updates to their queries	Admins, makers, marketers, or analysts, automatically	✓ Oct 29, 2021	Apr 2022

Service and runtime

Power Virtual Agents will be available for United States Government users in the Government Community Cloud (High) environment.

Feature	Enabled for	Public preview	General availability
Create bots in Germany and United Arab Emirates datacenters	Users, automatically	-	Sep 2022

Description of **Enabled for** column values:

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- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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Bot configuration

Overview

Bots can be configured to suit the individual needs of an organization and to provide further extensibility with other services and features. This includes authentication provider support, the use of Microsoft Bot Framework skills to augment the bot's capabilities, integration with Microsoft Teams, Facebook, and other channels, and more.

Use single sign-on with Dynamics 365 Customer Service

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2022	-

Business value

Improve your customers' experiences with your chatbots by removing the need for your customers to sign in multiple times.

Feature details

When using chat authentication settings in Dynamics 365 Customer Service, Power Virtual Agents chatbots will be aware of whether the bot user is signed in, and won't ask them to sign in multiple times.

Core authoring

Overview

Creating a bot with Power Virtual Agents is easy to do with the no-code authoring canvas, and there are several ways you can manage how topics interact, how you want the conversation to flow, and what it should feel like.

It's easy to test the bot without having to fully deploy the bot whenever you make a small change. There are also lesson topics that guide you through topic authoring from simple to complex scenarios as well as default system topics. You can choose what language you want your bot to use, too. Variables and entities make your bot more capable of understanding your users, and rich content makes your bot more relatable and easier to use.

Start bot conversations with proactive triggers

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2022	-

Business value

Proactive triggers help make your bots more relevant to your customers' actual needs, reducing their frustration, and deflecting support calls.

Feature details

Today, bot interactions require an explicit trigger phrase from your customers (for example, a bot user might ask, "How many vacation days do I have left?").

In this wave, we will add the ability for your customers to proactively trigger bot conversations with their full context, based on external trigger events (such as page navigation or button clicks).

Proactive triggers let you build engaging conversations with your customers that start the conversation with relevant information. For example, the bot might say, "You have 3 days left to pick your benefits. Can I help answer any questions?".

Use connectors within Power Virtual Agents or author custom connectors

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	-

Business value

Using connectors directly in a topic means bot authors can easily call data connectors without the need to create and manage a Power Automate flow, making their workflow quicker and more efficient. Custom Connectors can also be authored with C#, providing a powerful extensibility option that lets your developers connect bots to your other services, and therefore increasing the scope of how you can help your customers.

Feature details

Bot authors can use [Microsoft Power Platform connectors](#) directly within Power Virtual Agent topics instead of having to call a Power Automate flow. This allows bot authors to easily call existing Power Platform pre-built connectors without having to create or manage a flow, and with lower latency for each call.

For scenarios where existing pre-built connectors don't exist, [Custom connectors](#) can also be authored, enabling bot authors to create connectors around REST APIs or Azure Functions. C# code can also be authored and executed within Power Platform, providing full control

over your system integration tasks and unlocking a range of extensibility scenarios previously only possible within Bot Framework and Azure.

Notify Microsoft Teams users about updates to their queries

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓ Oct 29, 2021	Apr 2022

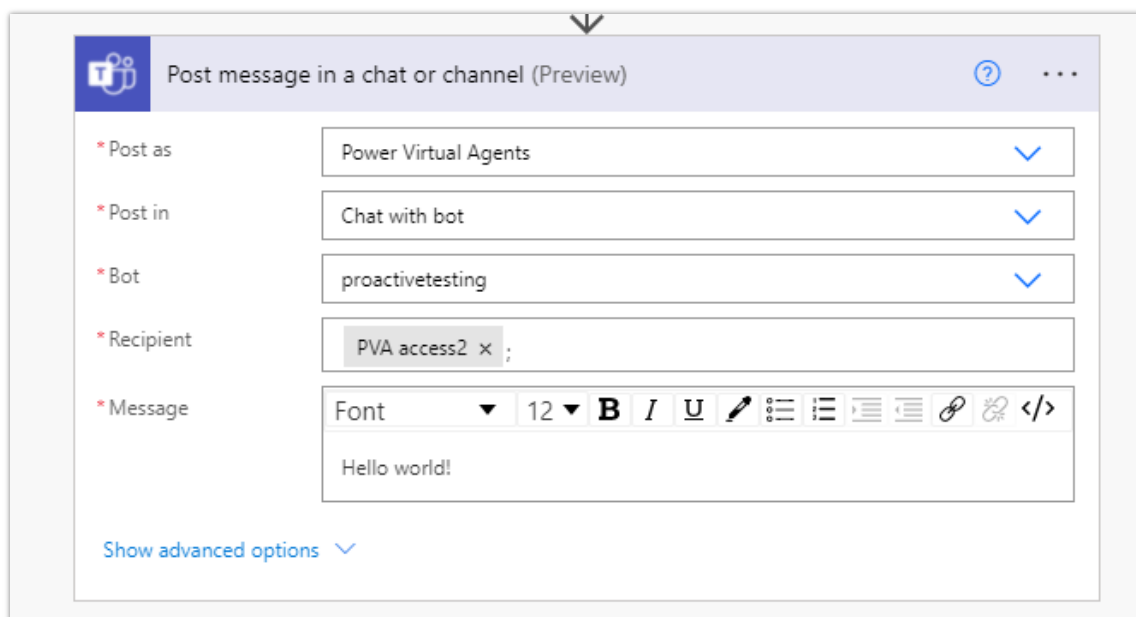
Business value

No more introvert bots. Let your bot reach users proactively. Notify them when a time-off request is approved or send reminders for daily health check-ins.

Feature details

We're adding the ability to send proactive messages from a bot to its users in a Teams chat by using a Power Automate workflow. For example, a bot user might ask the bot *Has my budget been approved?* to which the answer is *Not yet*.

Now, instead of the user having to ask the question again every day, you can create a Power Automate flow that notifies the user that the response to their question has changed, and what the new response is.



Post message action in Power Automate.

See also

[Send proactive messages and cards in Microsoft Teams](#) (docs)

Service and runtime

Overview

Power Virtual Agents continues to ensure it meets strict compliance and governance needs. Power Virtual Agents will be available for US Government customers in the Government Community Cloud (High) environment, as well as in our Germany and United Arab Emirates regions.

Power Virtual Agents will make it easier to govern your Microsoft Teams-based environments costs by offering inactivity-based environment deletion, cleaning up those environments that are in disuse, allowing your organization to focus on only active projects.

Create bots in Germany and United Arab Emirates datacenters

Enabled for	Public preview	General availability
Users, automatically	-	Sep 2022

Business value

Grow your business by creating bots in new locations that cater to that location's specific needs or scenarios.

Feature details

Power Virtual Agents can be [deployed into different Microsoft Azure datacenters \(also referred to as "regions"\)](#). You can create a bot in your tenant's location by default, or you can choose the datacenter you want to use when setting up your environment.

With this release, we're adding Germany and United Arab Emirates (UAE) to the list of datacenters that you can choose when creating an environment for your bot.

Microsoft Dataverse

Overview of Microsoft Dataverse 2022 release wave 1

Microsoft Dataverse is a low-code data platform that allows you to easily build scalable and interconnected applications, automations, and agents using common data, security, and business logic.

Deliver services with agility

Quickly add business value with an extensible data platform that uses out-of-the-box common tables, extended attributes, semantic meanings, and an open ecosystem enabled by Common Data Model.

Increase scale and efficiency

Boost productivity and reduce costs by quickly developing applications, processes, and reusable data schemes. Repeatably build, validate, and deploy your applications using GitHub and Azure DevOps.

Make your data work smarter

Get accurate insights by adding low-code AI tools to your process automation. Identify and resolve duplicated and conflicting data with a managed data platform that includes built-in business logic and rules.

Rely on the security of a trusted platform

Protect your data with a robust security management infrastructure that provides critical security and compliance capabilities—advanced encryption, rich access control, and deep integration with Azure Active Directory.

What's new and planned for Microsoft Dataverse

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [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 date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Bridge Microsoft Power Platform to Azure data

Bring Dynamics 365 data stored in Microsoft Dataverse into Azure.

Feature	Enabled for	Public preview	General availability
Export Dataverse data in Delta Lake format	Admins, makers, marketers, or analysts, automatically	May 2022	Sep 2022

Microsoft Dataverse data

Microsoft Dataverse is the default data store for Microsoft Power Platform. It provides extensive security, filtering, and search within environment bounds.

Feature	Enabled for	Public preview	General availability
Dataverse results in Microsoft Search	Users by admins, makers, or analysts	-	May 2022
Improvements to dual-write UI	Users, automatically	-	May 2022
Scan, classify, and label Dataverse data	Users by admins, makers, or analysts	Sep 2022	To be announced

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

Bridge Microsoft Power Platform to Azure data

Overview

Our customers have asked for a single, end-to-end way to work with data in Microsoft Dataverse, from running AI and machine learning and integrating with external datasets to slicing and dicing large volumes of Microsoft Dataverse data. Now, instead of using multiple tools to get the job done, you can accelerate time-to-insight with a single comprehensive solution Azure Synapse Link for Dataverse that can help you deliver on these goals end-to-end; something that is built-in and available out-of-the-box.

Azure Synapse Link for Dataverse enables Dataverse integration with Azure Synapse Analytics. With a few clicks, you can bring your Microsoft Dataverse data to Azure Synapse Analytics, visualize data in your Azure Synapse workspace, and rapidly start processing the data to discover insights using advanced analytics capabilities for serverless data lake exploration, code-free data integration, data flows for extract, transform, load (ETL) pipelines, and optimized Apache Spark for big data analytics. Seamless integration of Dataverse with Azure Synapse Analytics empowers our customers to analyze data in the lake.

Enterprise customers are now able to use the familiarity of T-SQL to analyze big data and gain insights from it, while optimizing their data transformation pipeline to leverage the deep integration of Azure Synapse with other Azure services such as Power BI Embedded, Azure Cosmos DB, and Azure Machine Learning.

Export Dataverse data in Delta Lake format

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2022	Sep 2022

Business value

This feature enables users to query and analyze Microsoft Dataverse data efficiently with Parquet.

Feature details

Delta Lake is an open source, widely used data format that is built off the Parquet data format. Parquet was designed for efficient storage and high performance, especially for large datasets. It utilizes columnar data storage as opposed to a row-based format like CSV and uses a specific compression technique for each column based on the data type. It is immutable, meaning that historical data is readily accessible, and provides flexibility with a wide variety of supported encoding types.

Delta Lake provides all the benefits of Parquet format in addition to guaranteed ACID (atomicity, consistency, isolation, and durability) transactions and time travel (data versioning). The ability to "undo" a change or go back to a previous version is one of the key

features of transactions. Delta Lake provides snapshots of data enabling you to revert to earlier versions of data for audits, rollbacks, or to reproduce experiments.

With Azure Synapse Link for Dataverse, you can now efficiently store and query your Dataverse data in Azure Synapse Analytics with the Delta Lake format. This helps citizen developers and data engineers alike to quickly query and analyze their Dataverse data, especially for large datasets.

Microsoft Dataverse data

Overview

Microsoft Dataverse is the data store for Microsoft business applications and Power Platform. Dataverse allows the storage of many types of data in customizable tables. Depending on your data needs, it's possible to store structured and unstructured data in one or many environments. Dataverse provides extensive security, filtering, and search capabilities within environment bounds. The Dataverse API and logic capabilities are used to build and maintain workflows for your application needs.

Microsoft Dataverse provides a cloud-based storage option for your data with these benefits:

- **Easy to manage:** Both the metadata and data are stored in the cloud in Dataverse logical tables.
- **Easy to secure:** Data is securely stored so that users can see it only when you grant them access. Role-based security allows you to control access to information within your organization.
- **Access your Dynamics 365 data:** Dynamics 365 applications data is stored within Dataverse, allowing you to quickly build apps that use your Dynamics 365 data and extend your apps with Power Apps, Power Automate, and more.
- **Logic and validation:** Define calculated columns, business rules, workflows, and business process flows to ensure data quality and drive business processes.
- **Productivity tools:** Seamlessly connect data with Dynamics 365, Microsoft 365, Azure, Visual Studio, Excel Power Query, and third-party services.

Dataverse results in Microsoft Search

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	May 2022

Business value

Users can see search results from Microsoft Dataverse in Microsoft 365 (Bing.com, Office.com, Sharepoint.com).

Feature details

Dynamics 365 federation with Microsoft Search provides a cohesive search experience with Dynamics 365 to intelligently help businesses search users as well as find, learn, operate, and navigate their customer and business relevant information.

Improvements to dual-write UI

Enabled for	Public preview	General availability
Users, automatically	-	May 2022

Business value

We've simplified the dual-write user interface (UI) by adding more information.

Feature details

In 2022 release wave 1, we'll address numerous dual-write UI issues. Some of these issues are:

- Improvements to mapping
- Improvements to error detection
- More detailed status information

Scan, classify, and label Dataverse data

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2022	To be announced

Business value

This feature will comply with Microsoft information protection and data governance.

Feature details

This feature onboards administrators to Azure Purview. Purview provides Microsoft Dataverse administrators the capability to perform these tasks:

- Register the data
- Scan the data
- Auto classify the data
- Add a label
- Set the data protection policy

Governance and administration

Overview of Microsoft Power Platform governance and administration 2022 release wave 1

Microsoft Power Platform offers a range of governance and administration capabilities that span Power Apps, Power Automate, Power Virtual Agents, and Microsoft Dataverse. These capabilities are designed to help administrators and IT professionals set up, secure, manage, govern, and monitor the use and adoption of Microsoft Power Platform and its components across the enterprise. In addition to the Power Platform admin center, which is the unified user experience we aim to provide for Microsoft Power Platform administrators, a unified API surface and rich tooling like PowerShell cmdlets are also available to provide fully automatable management capabilities beyond the out-of-the-box portal experience.

What's new and planned for Microsoft Power Platform governance and administration

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

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Feature	Enabled for	Public preview	General availability
Purchase Dynamics 365 and Power Platform ISV offers from AppSource	Admins, makers, marketers, or analysts, automatically	Apr 2022	Jul 2022

Description of **Enabled for** column values:

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Purchase Dynamics 365 and Power Platform ISV offers from AppSource

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	Jul 2022

Business value

Currently, customers can discover Dynamics 365 and Microsoft Power Platform ISV offers on AppSource but not purchase them. This new feature will allow customers to purchase these products from AppSource.

Feature details

This new feature allows customers to be able to purchase user-based licenses for independent software vendor (ISV) products from AppSource. The licenses they purchase will appear in the Microsoft 365 portal where they can be assigned to users.

Data integration

Overview of data integration 2022 release wave 1

Data integration is foundational for the Microsoft Data Cloud, enabling data connectivity, transformation, and integration across hundreds of critical enterprise cloud and on-premises data sources. Power Query enables users of Power BI, Excel, Power Apps, Insights Apps, and other Microsoft products and services to ingest and transform data from hundreds of sources.

In this upcoming release wave, we'll deliver improvements in our big data performance and high scale connectivity to Microsoft Dataverse, Snowflake, Databricks, BigQuery, and Redshift. You can expect several enhancements across connectors, gateway, and VNet. New capabilities will simplify data prep using the visual authoring environment and diagram view to create high-scale dataflows to Microsoft Cloud, supporting Power BI, Insights Apps, and Power Platform.

What's new and planned for data integration

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

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Dataflows

Dataflows give users a low-code self-service data preparation experience using Power Query and enables them to integrate data across Power Platform, Dynamics 365, and Azure.

Feature	Enabled for	Public preview	General availability
Connections page now lists dataflows used by connection	Users, automatically	Apr 2022	
Unified dataflows platform across Power Platform and Power BI dataflows	Admins, makers, marketers, or analysts, automatically	Sep 2022	

On-premises data gateway

On-premises data gateways are used by enterprises to access data sources and transfer petabytes of data. We're focusing on making these gateways an enterprise-grade product.

Feature	Enabled for	Public preview	General availability
Automation for adding a gateway member to a cluster	Admins, makers, marketers, or analysts, automatically	Sep 2022	-
Automation for gateway updates	Admins, makers, marketers, or analysts, automatically	Sep 2022	-
Deprecation of older versions of the on-premises data gateway	Admins, makers, marketers, or analysts, automatically	Sep 2022	

Power Query connectors

Power Query connectors provide out-of-the-box connectivity to hundreds of sources.

Feature	Enabled for	Public preview	General availability
Enhancements to the Azure Synapse Analytics connector	Admins, makers, marketers, or analysts, automatically	May 2022	
Azure Active Directory connector available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022
Certified connectors available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022
Essbase connector available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022
Hadoop Distributed File System (HDFS) connector available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Feature	Enabled for	Public preview	General availability
Informix connector available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022
OLE DB connector available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022
Support for custom connectors in Power Query Online through the on-premises data gateway	Admins, makers, marketers, or analysts, automatically	-	Sep 2022
Support for system-level proxy in the Power Query SDK	Users by admins, makers, or analysts	-	Sep 2022
Sybase connector available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022
Vertica connector available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Power Query Online

Power Query is the data connectivity and data preparation experience for users across a wide variety of Microsoft products and services.

Feature	Enabled for	Public preview	General availability
Improvements for connecting to files stored in SharePoint Online	Admins, makers, marketers, or analysts, automatically	May 2022	-
Personal query gallery	Admins, makers, marketers, or analysts, automatically	May 2022	-

VNet data gateways

Azure Virtual Network connectivity for Microsoft Power Platform using VNet data gateways.

Feature	Enabled for	Public preview	General availability
VNet connectivity for Power BI and Microsoft Power Platform dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022

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Dataflows

Overview

Dataflows provide a low-code self-service data preparation experience using Power Query, including orchestration, automation, and monitoring capabilities that enable users across Microsoft Power Platform, Dynamics 365, and Azure to integrate data for downstream use by many other users and applications.

Connections page now lists dataflows used by connection

Enabled for	Public preview	General availability
Users, automatically	Apr 2022	-

Business value

This feature provides visibility to users on where their data is used.

Feature details

The detail page of a connection now lists all the dataflows that use the connection. This provides visibility into which artifacts depend on the connector, and where the data flows. In addition, if you try to delete the connection, you're shown a warning if there are dependent dataflows.

Unified dataflows platform across Power Platform and Power BI

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Business value

Today, dataflows are featured in multiple Microsoft products with slight experience and feature variance that in the coming wave we plan to converge into a singular dataflows experience. This convergence provides users with a consistent experience for dataflows that customers can easily work across. It enables us to service and deliver continued improvements on the dataflows experiences across all products they are featured in.

Feature details

Microsoft Power Platform and Power BI dataflows will soon share a similar and unified experience that will enable an accelerated rate of new feature delivery.

In addition to improved reliability, a unified platform benefits Power BI dataflow customers in the following ways:

- The autosave dataflow draft feature automatically saves any edits to dataflows. It also lets you pause an editing session at any moment and then resume later.
- Background query validation addresses top customer feedback to allow publishing a dataflow instantaneously, without waiting for the potentially lengthy validation process to complete. If any validation errors are encountered, they're reported through the dataflow experience.
- An improved dataflow debugging experience improves ease and speed of investigating any dataflow authoring and refresh errors by offering an in-portal experience and improved human-readable, actionable error messages.
- Support for loading dataflow output to new destinations, such as Azure Synapse, Azure SQL, OneDrive, and more.
- Support for loading data in data sources behind VNets.

On-premises data gateway

Overview

The on-premises data gateway is a well-established product that's widely used by enterprises to access on-premises data sources and transfer petabytes of data weekly. Today, gateways are used either with one or a combination of services and applications, like Power BI, Power Apps, Power Automate, Azure Logic Apps, and others. Based on enterprise requests, we plan to continue to focus on making on-premises data gateways an enterprise-grade product with features like enhancements to load balancing, monitoring, and integration with additional services in the current milestone.

Automation for adding a gateway member to a cluster

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Business value

Currently, adding gateway members to existing gateway clusters is still a manual task. In 2022 release wave 1, you'll be able to automate the process of adding gateway members to existing gateway clusters.

Feature details

We released a command prompt install of a gateway, which helps automate the installation of a gateway cluster with one gateway member. Adding a gateway member to an existing cluster is still manual. With this new feature, you'll be able to automate the addition of gateway members to an existing gateway cluster.

Automation for gateway updates

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Business value

This feature saves you time and improves supportability by offering an auto-update functionality for gateways. Users will benefit from having the newest features and bug fixes that are offered with the latest release.

Feature details

We release a new version of the on-premises data gateway every month. But enterprise customers with many gateways must update their gateway manually, which causes many to

stay on older versions. This reluctance to update prevents them from benefiting from new features and bug fixes that are applied in recent releases, increasing support cases. We plan to provide an auto-update functionality for gateways to ensure all our customers are on the latest release.

Deprecation of older versions of the on-premises data gateway

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Business value

This change helps customers benefit from the new features we've released in recent versions and improves supportability.

Feature details

We plan to deprecate older versions of the on-premises gateway to improve supportability. This also helps you benefit from the new features we've released in recent versions. We'll provide ample notice to gateway admins so that they can plan for upgrades.

Power Query connectors

Overview

The ability to connect to a wide range of different data sources is one of the core features of Power Query. In 2022 release wave 1, we're continuing to invest heavily in adding new data sources and expanding the reach of the existing sources into new applications, on the desktop and online.

Enhancements to the Azure Synapse Analytics connector

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2022	-

Business value

We've made using the Azure Synapse Analytics connector in Power Query Online a simpler, friendlier experience.

Feature details

We're planning to improve the Azure Synapse Analytics connector with smart defaults based on Synapse metadata and semantics. This improvement makes it easier for you to select the data to perform downstream analytics.

Azure Active Directory connector available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

With the release of this connector in Power Query and dataflows, you can connect to and load your business data from Azure Active Directory.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you can now use the Azure Active Directory connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

Certified connectors available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

Certifying a custom connector will make it available by default in Power Query Online and dataflows in addition to Power BI Desktop.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, certified connectors will be available by default in Power Query Online and dataflows in addition to Power BI Desktop.

Essbase connector available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

With the release of this connector in Power Query and dataflows, you can connect to and load your business data from Essbase.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you can now use the Essbase connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

Hadoop Distributed File System (HDFS) connector available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

With the release of this connector in Power Query and dataflows, you can connect to and load your business data from Hadoop Distributed File Systems (HDFS).

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you can now use the HDFS connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

Informix connector available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

With the release of this connector in Power Query and dataflows, you can connect to and load your business data from Informix.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you can now use the Informix connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

OLE DB connector available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

With the release of this connector in Power Query and dataflows, you can connect to and load your business data from OLE DB.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you can now use the OLE DB connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

Support for custom connectors in Power Query Online through on-premises data gateway

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

You'll be able to use your custom connectors in Power Query Online and dataflows experiences through the use of an on-premises data gateway.

Feature details

We're adding support for custom connectors in Power Query Online and dataflows through the use of an on-premises data gateway. This lets you validate and use your custom Power Query connector in Power Query Online and dataflows before certification.

Support for system-level proxy in Power Query SDK

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Sep 2022

Business value

Connector developers can implement system-level proxy support for their connectors using the Power Query SDK. This support will enable users to use internal proxy servers to connect to their data in Power Query experiences.

Feature details

A common user need today is to be able to use an internal proxy server to connect to various connectors on our platform. This feature empowers custom and certified connector developers to implement system-level proxy support in their connectors for users to leverage.

Sybase connector available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

With the release of this connector in Power Query Online and dataflows, you can connect to and load your business data from Sybase.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you can now use the Sybase connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

Vertica connector available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

With the release of this connector in Power Query and dataflows, you can connect to and load your business data from Vertica.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you can now use the Vertica connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

Power Query Online

Overview

Power Query continues to be the primary data connectivity and data preparation experience for users across a wide variety of Microsoft products and services. For 2022 release wave 1, we'll continue to expand the scope of data sources available in Power Query and continue to add new features that provide an enhanced data preparation experience for users.

Improvements for connecting to files stored in SharePoint Online

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2022	-

Business value

This feature enables users to browser SharePoint libraries and files directly in Power Query, which will increase customer satisfaction.

Feature details

Currently, when getting data from a file stored in SharePoint, you need to go through non-trivial steps to find the correct URL to use. In 2022 release wave 1, we're simplifying that process so, you'll have a way directly in Power Query to browse your SharePoint libraries and the files in them.

Personal query gallery

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2022	-

Business value

This feature will increase satisfaction by giving users the ability to personalize their Power Query experience by allowing them to curate their own gallery.

Feature details

You'll have the ability to tailor your Power Query experience by curating your own *query* gallery so you can easily reuse queries at a later time. This gallery makes reusing queries easier than ever directly within Power Query instead of needing to copy and paste from other sources or manage.

You'll have the ability to add, edit, and remove queries from the gallery.

VNet data gateways

Overview

This feature provides the ability for enterprises who subscribe to Azure Virtual Network connectivity for their data services to use Microsoft Power Platform seamlessly.

VNet connectivity for Power BI and Microsoft Power Platform dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

This feature reduces the overhead of managing on-premises data gateways for virtual network (VNet) data sources.

Feature details

In 2022 release wave 1, we plan to make VNet connectivity for Power BI and Microsoft Power Platform dataflows to Azure data services like Azure SQL, Synapse Analytics, and others using VNet data gateways generally available.

VNet data gateways that are Microsoft managed eliminate the overhead of installing, updating, and monitoring on-premises data gateways for connecting to data sources associated to a VNet.

Got feedback?

Share your feedback on a community forum for [Dynamics 365](#) or [Power Platform](#). We'll use your feedback to make improvements. To find out about updates to these release notes, follow us on Twitter @MSFTDynamics365.

