Microsoft

Microsoft Dynamics 365

2021 RELEASE WAVE 2 PLAN

Features releasing from October 2021 through March 2022

Contents

Dynamics 365 and industry clouds: 2021 release wave 2 plan

The Dynamics 365 and industry clouds release plan for the 2021 release wave 2 describes new features releasing from **October 2021** through **March 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 2021 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

2021 release wave 2 overview

The 2021 release wave 2 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, and Nonprofit.

Marketing

Dynamics 365 Marketing focuses on capabilities to create personalized journeys to engage with your customers across all touchpoints, in the moments that matter. It takes personalization to the next level, and helps you find inspiration with AI-based content ideas so you can deliver superior experiences to win more customers and earn their loyalty.

Sales

Dynamics 365 Sales focuses on realizing exciting new functionality as well as enhancements to the Microsoft Teams calling experience, LinkedIn integration enhancements for easy access to Sales Navigator, forecasting updates, and guided selling improvements with sales accelerator and launching deal manager that helps to manage your pipeline more effectively.

Service

Dynamics 365 Customer Service delivers rich knowledge-authoring enhancements with AI-suggested keywords and brief descriptions for knowledge articles. It also offers enhancements to agent experience and productivity to handle omnichannel support and investing in routing diagnostics for supervisors, machine learning-based rules for classification such as sentiment analysis, and effort estimation and improved historical analytics.

Dynamics 365 Field Service introduces a new customer portal that includes self-scheduling and appointment-management capabilities for providing better service and customer communication. In addition, a new work order is released with enhancements to provide better unified views and work order summary to increase productivity.

Finance and Operations

Dynamics 365 Finance is investing in data insights as part of general availability of Finance Insights, which is the intelligent cash flow offering that empowers users with out-of-the-box machine learning for financial operations. Through automation and modernizing the services that our customers use daily, this release wave brings enhanced usability and performance around fixed assets, year-end close, and financial dimensions. Globalization offering with additional localizations and the general availability of our Tax Calculation service are added to this release.

Dynamics 365 Supply Chain Management enables resilient supply chain with investments in key areas such as resource planning, manufacturing, asset management, planning and inventory management. New manufacturing execution scenarios are included to allow integration between Dynamics 365 Supply Chain Management, common manufacturing execution solutions (MES), and shop floor automation systems for our customers to be able to easily adopt and integrate new business models.

Dynamics 365 Supply Chain Insights connects data sources from a variety of apps to enable interactive analytics that enables you to gain valuable insights across your end-to-end supply chain. This includes the ability to connect to other organizations, share data, leverage out-of-the-box connectors, deep supply chain analytics, and advanced and AI-driven analytics.

Dynamics 365 Project Operations connects sales, resourcing, project management, and finance teams all in one application to win more deals, accelerate delivery, empower employees, and maximize profitability by delivering rich capabilities and enhancements to task scheduling and managing subcontracts with vendors.

Finance and Operations cross-app capabilities brings in Microsoft Power Platform governance features to enable new capabilities such as environment provisioning, authorization and authentication, run-time events, and developer tools. New capabilities in this release include providing enhanced data exchange experiences between Finance and Operations apps, Microsoft Dataverse, and Customer Engagement apps in Dynamics 365.

Human Resources

Dynamics 365 Human Resources provides enhancements to Benefits management capabilities that offer a simplified user experience. Our continued journey to bring capabilities that enable employee workflow includes managing their leave requests using the Teams app and providing organizations the ability to view analytics on leave balances that helps meet company policies.

Commerce

Dynamics 365 Commerce includes key investments for this wave in customer segmentation and using site builder with specific page layouts and content, integrating with Microsoft Clarity, creating a customer-specific catalog that provides a limited view to only see and order products that are configured for their organization and enhancements to the reordering experience and admin privileges.

Fraud Protection

Dynamics 365 Fraud Protection is expanding its experiences to offer deeper observability of fraud, enable merchants to try Fraud Protection directly from the web and enable payment service providers (PSPs) to integrate with Fraud Prevention to offer their merchants the capability to observe and combat fraud.

SMB

Dynamics 365 Business Central focuses on the application enhancements that expand the integration with Microsoft 365, adds country and regional expansions in 10 more markets, and adds capabilities that simplify tenant administration.

Connected Spaces

Dynamics 365 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 analytics 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.

Guides

Dynamics 365 Guides helps authors to easily create guides without 3D or programming skills by leveraging the HoloLens app and PC app and providing an updated user experience leveraging HoloLens instinctual interactions.

Remote Assist

Dynamics 365 Remote Assist, as part of this release, will cascade Microsoft Teams meeting policies for Remote Assist users to simply configuration.

Customer Insights

Audience insights adds capabilities to eliminate data silos and build a unified customer profile to provide intelligent insights and action for their B2C and B2B customers. In the B2B area, in addition to churn predictions for individual customer records, audience insights will predict the likelihood of churn for accounts in the same straightforward guided experience.

Data ingestion enhancements in Customer Insights include additional Power Query connectors and improvements to the data ingestion process.

Engagement insights connects data sources from a variety of apps to enable interactive analytics over web, mobile, connected products, and customer journey touchpoints. This includes out-of-the-box analytics, customer journey analytics, and advanced and AI-driven analytics and insights such as personalization and attribution modeling. Engagement insights expands to multichannel analytics over data from other channels for richer customer analytics, downstream actions, activations, and optimizations.

Customer Voice

Dynamics 365 Customer Voice is focused on helping survey owners to act on feedback based on insights and trends and use Power Automate to define and trigger custom workflows to engage the right contacts.

Microsoft Cloud for Industry Solutions

Microsoft Cloud for Healthcare helps healthcare organizations to deliver exceptional patient care by enhancing patient experiences, coordinating patient care, and driving operational efficiency through tailored capabilities from Dynamics 365, Microsoft Power Platform, Microsoft Teams, and Azure. This update includes a unified patient profile and activity timeline for better patient insights, improved ingestion of healthcare data into Microsoft Dataverse, and expansion to more countries and regions.

Microsoft Cloud for Financial Services provides differentiating customer experiences and increases customer retention through a unified customer profile that helps relationship managers to gain 360-degree customer insights, predict customer churn, and facilitate cross and upsell. In addition, it provides transparent loan onboarding through process automation and integration with Microsoft Teams loan manager to reduce time from interest to closing.

Microsoft Cloud for Nonprofit launches two volunteering applications in this release: a volunteer management model-driven app for nonprofit staff to manage engagement opportunities and a Power Apps portal that integrates with nonprofit sites to span the volunteer recruitment efforts.

Key dates for the 2021 release wave 2

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 2021 release wave 2.

Milestone	Date	Description
Release plans available	July 14, 2021	Learn about the new capabilities coming in the 2021 release wave 2 (October 2021 – March 2022) across Dynamics 365 and industry clouds and Microsoft Power Platform.
Early access available	August 2, 2021	Test and validate new features and capabilities that will be part of 2021 release wave 2, coming in October, before they are enabled automatically for your users. You can view the Dynamics 365 2021 release wave 2 early access features now.
Release plans available in 11 additional languages	August 13, 2021	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	October 1, 2021	Production deployment for the 2021 release wave 2 begins. Regional deployments will start on October 1, 2021.

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 2021 release wave 2 plan.

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

Change history

This topic is updated when a feature's release date changes or when a feature is added or removed. You can see the full topic in the Dynamics 365 change history online.

2021 release wave 2 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning **August 2, 2021**.

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 Finance
- 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 early access 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 2021 release wave 2 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
Boost sales productivity using an intelligent worklist	Users, automatically	✔ Aug 2, 2021	✔ Oct 1, 2021
Improving seller productivity with bulk actions	Users, automatically	✔ Aug 2, 2021	✔ Nov 1, 2021

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
Modern control for subject entity	Users, automatically	✓Aug 2, 2021	✓Oct 4, 2021
Scheduling and IoT capabilities in Customer Service workspace	Users, automatically	✓Aug 2, 2021	✓Oct 4, 2021
Usability improvements for agent workspaces	Users, automatically	✓Aug 2, 2021	✓Oct 4, 2021
Usability improvements in knowledge management	Users, automatically	✓Aug 2, 2021	✓Oct 4, 2021

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 (Dynamics 365) mobile app usability enhancements	Users, automatically	✓Aug 2, 2021	✓Oct 1, 2021
Functional location and asset tree improvements	Users, automatically	✓Aug 2, 2021	✓Oct 1, 2021
Improved user experience with new schedule board enhancements	Users, automatically	✓Aug 2, 2021	Jan 2022
Modular work order pricing	Users, automatically	✓Aug 2, 2021	✓Oct 1, 2021
Work order form simplification	Users, automatically	✓Aug 2, 2021	✓Oct 1, 2021
Work order ribbon simplification	Users, automatically	✓Aug 2, 2021	✓Oct 1, 2021

Dynamics 365 Finance

For a complete list of the Dynamics 365 Finance features, see What's new and planned for Dynamics 365 Finance.

Feature	Enabled for	Early access	General availability
Configurable business documents – delegated account setup for emailing via electronic reporting destinations	Users by admins, makers, or analysts	✓Aug 1, 2021	✓Oct 1, 2021
Configurable business documents – specific destinations via printer management settings	Users by admins, makers, or analysts	✓Aug 1, 2021	✓Oct 1, 2021
Configurable business documents – support for configurable images in headers and footers	Users by admins, makers, or analysts	✓Aug 1, 2021	✓Oct 1, 2021
Electronic reporting – query reuse for performance improvements	Users by admins, makers, or analysts	✓Aug 1, 2021	✓Oct 1, 2021
Tax Calculation service	Users by admins, makers, or analysts	✓Apr 16, 2021	✓Oct 8, 2021
Tax Calculation service – enabling tax calculation parameters by tax jurisdiction	Users by admins, makers, or analysts	✓Apr 16, 2021	Jan 2022
Tax Calculation service – integration with free text invoice	Admins, makers, marketers, or analysts, automatically	✓Apr 16, 2021	✓Dec 10, 2021
Tax Calculation service – integration with general journal	Admins, makers, marketers, or analysts, automatically	✓Apr 16, 2021	Mar 2022
Tax Calculation service – sales tax group determination	Users by admins, makers, or analysts	✓Apr 16, 2021	✓Oct 8, 2021
Tax Calculation service – supporting multiple VAT IDs	Users by admins, makers, or analysts	✓Apr 16, 2021	✓Oct 8, 2021

Feature	Enabled for	Early access	General availability
Tax Calculation service – supporting tax in transfer order	Users by admins, makers, or analysts	✔ Apr 16, 2021	✔ Oct 8, 2021
Tax reporting – supporting multiple tax registration numbers	Users by admins, makers, or analysts	✔ Apr 16, 2021	✔ Oct 15, 2021

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
Edge scale units to run distributed workloads at your facility	Users by admins, makers, or analysts	✔ Apr 23, 2021	✔ Nov 1, 2021
Post on-hand adjustments using codes connected to offset accounts	Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021
Sales quotation referenced data export policy	Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021
Updates to inventory and logistics feature states with version 10.0.21	Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021
Updates to manufacturing feature states with version 10.0.21	Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021
Updates to planning feature states with version 10.0.21	Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021
Updates to product information management feature states with version 10.0.21	Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021
Warehouse Management mobile app step instructions	Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021

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
Change feeds in data lakes	Users by admins, makers, or analysts	✔ Apr 30, 2021	Mar 2022
Enhanced support for full feature lifecycle in Feature management	Users, automatically	✔ Aug 2, 2021	✔ Oct 1, 2021
Improved legal entity support for saved views	Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021
New scenarios enabled with Power Platform convergence	Admins, makers, marketers, or analysts, automatically	✔ Jun 30, 2021	✔ Oct 22, 2021
Updates to client feature states with version 10.0.21	Users, automatically	✔ Aug 2, 2021	✔ Oct 1, 2021
WCAG 2.1 accessibility support for the Finance and Operations apps web client	Users, automatically	✔ Aug 2, 2021	✔ Oct 1, 2021

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
Commerce localization for Russia	Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021
Enforce custom query change tracking configurations on retail transaction tables due to performance impacts	Admins, makers, marketers, or analysts, automatically	✔ Aug 2, 2021	✔ Oct 1, 2021

Feature	Enabled for	Early access	General availability
Enhanced reordering experience in e-commerce	Users by admins, makers, or analysts	✓Aug 2, 2021	✓Oct 1, 2021
Support inventory movement between in-store locations from POS	Users by admins, makers, or analysts	✓Aug 2, 2021	✓Oct 1, 2021

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
Centralized Deployment of Office add-ins	Admins, makers, marketers, or analysts, automatically	✓Aug 1, 2021	✓Oct 1, 2021
Enhancements to the Outlook add-in	Users, automatically	✓Aug 1, 2021	✓Oct 1, 2021
Profiling AL performance with snapshot debugger	Admins, makers, marketers, or analysts, automatically	✓Aug 1, 2021	✓Oct 1, 2021
Transactional installation and sync of extensions on-premises	Admins, makers, marketers, or analysts, automatically	✓Aug 1, 2021	✓Oct 1, 2021

Marketing

Overview of Dynamics 365 Marketing 2021 release wave 2

Dynamics 365 Marketing brings together the worlds of customer experience and marketing automation, empowering businesses to orchestrate personalized journeys across all touchpoints to strengthen relationships and earn loyalty.

Our customers want to achieve more with less effort through an intuitive experience that doesn't require the assistance of technical experts to perform common tasks. With 2021 release wave 2, the product is focused on improving experiences and capabilities for creating moments-based and segment-based customer journeys that span all customer touchpoints and for taking personalization to the next level, all with less effort.

Engage your customers **in moments that matter** across **all customer touchpoints**:

- Gain more control over journey branching conditions with increased availability of attributes.
- Connect Customer Insights and your own data lake (Azure Data Lake Storage) with customer journey orchestration.
- Send SMS messages using Twilio and TeleSign integration.
- Visualize customer journey interactions on the Customer Insights activity timeline.

Personalize engagement for **each customer**:

- Personalize your emails to include lists of related data.
- Create segments for leads and custom entities with a new, easier-to-use segmentation builder.
- Call Power Automate flows from customer journeys for advanced customization.

Make faster and **better decisions**, leveraging the **power of analytics and AI**:

- Create email content easily and efficiently with AI-based content ideas.
- Use natural language to create targeted segments.

What's new and planned for Dynamics 365 Marketing

This topic lists features that are planned to release from October 2021 through March 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.

Analytics and AI

Make faster and better decisions leveraging the power of analytics and AI.

Feature	Enabled for	Public preview	Early access*	General availability
Use AI-powered ideas to automatically generate content for emails	Admins, makers, marketers, or analysts, automatically	✔Oct 1, 2021	-	-
Use natural language to create targeted segments	Admins, makers, marketers, or analysts, automatically	✔Oct 1, 2020	-	✔Oct 1, 2021
Optimize the performance of emails in the new outbound marketing email editor with A/B testing	Admins, makers, marketers, or analysts, automatically	✔Aug 2, 2021	-	✔Oct 1, 2021
Monitor how your consumption is tracking against your quota	Admins, makers, marketers, or analysts, automatically	-	-	✔Nov 1, 2021

Moments-based

Engage your customers in moments that matter across all customer touchpoints.

Feature	Enabled for	Public preview	Early access*	General availability
Connect Customer Insights and your own data lake with customer journey orchestration	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	-
Send SMS messages using Twilio and TeleSign integration	Admins, makers, marketers, or analysts, automatically	-	-	✔Oct 1, 2021
Export images from outbound marketing to the real-time marketing asset library	Admins, makers, marketers, or analysts, automatically	-	-	✔Nov 1, 2021

Feature	Enabled for	Public preview	Early access*	General availability
Reach more customers with a 10X increase in the scale of interactions in real-time marketing journeys	Admins, makers, marketers, or analysts, automatically	-	-	✔ Nov 22, 2021
Gain a wealth of new actions from a journey by raising triggers from journey steps to run another journey or Power Automate flow	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	To be announced

Personalization

Personalize engagement for each customer.

Feature	Enabled for	Public preview	Early access*	General availability
Create segments for contacts and leads in the new segmentation builder	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	-
Personalize emails to include lists of related data	Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 1, 2021
Gain more control over journey branching conditions through increased attribute support	Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 1, 2021

* You are able to opt in to some features as part of early access on August 2, 2021, 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.

Analytics and AI

Overview

Make faster and better decisions, leveraging the power of analytics and AI. Create email content easily and efficiently with AI-based content ideas.

Use AI-powered ideas to automatically generate content for emails

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 1, 2021	-	-

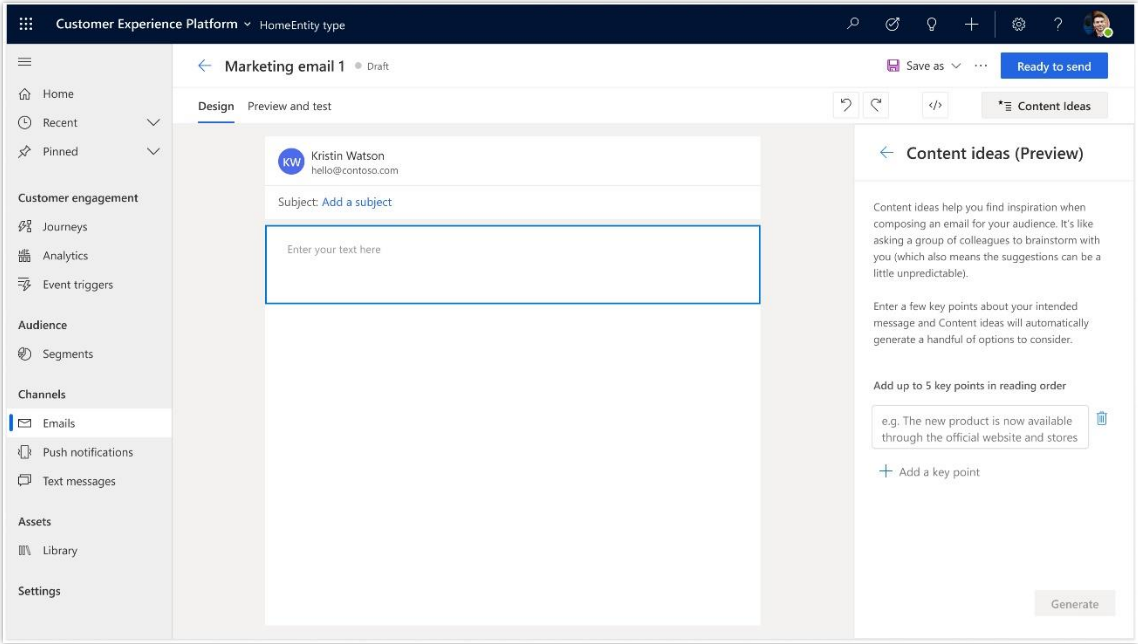
Business value

How great would it be if your email editor could suggest relevant and engaging content? AI-based content ideas do just that. Content ideas help you find inspiration and can be used as a starting point when composing emails for your audience. It’s like asking a group of colleagues to brainstorm with you. Content ideas make creating emails simpler, more efficient, and fun. It's a completely new and innovative functionality with the latest technologies behind the scenes.

Feature details

AI-based content ideas automatically generate a set of content snippets (based on provided key points) to serve as an inspiration for your email. You can review, select, and fine-tune generated content ideas based on your needs.

NOTE This feature will be available for public preview in the United States and in English language environments only. Availability in other geographies and for other languages will be communicated at a later date. As part of the October 2021 release, content ideas will be available in the email editor in outbound marketing. Availability in real-time marketing is planned for November 2021.



Product screenshot shows content ideas to help you find inspiration when composing an email.

See also

[Use AI to kickstart email creation with Content ideas](#) (docs)

Use natural language to create targeted segments

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔Oct 1, 2020	-	✔Oct 1, 2021

Business value

You can now use natural language sentences to build segments faster in Dynamics 365 Marketing. Use simple words to specify the attributes and logic for the segment you want to target so you can reach the exact audience you are looking for. For example, using natural language, you can create a segment of “Contacts who were born between 1970 and 2000 and make more than $50K”.

Feature details

Natural language queries enable the creation of Marketing segment query blocks using natural language, simplifying the creation of complex segment queries. Using natural language makes it faster and easier to get started creating a segment.

Natural language input enables you to use common words and phrases to describe the people you'd like to include in a segment. Once you type and submit a statement, the service will fill the query fields using information collected from your contacts, accounts, and leads.

Here are examples of how to describe segments so you get the best results:

- "Contacts living in Seattle or Chicago"
- "Contacts with a birthday before next month"
- "Contacts who were created last month"
- "Contacts who prefer to get emails"

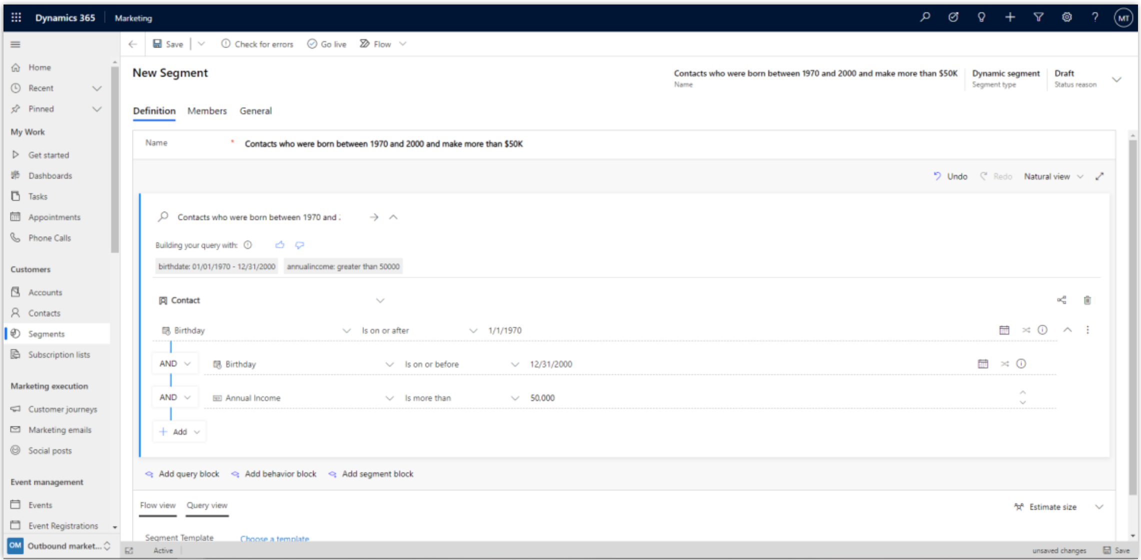
Tips

- Use multiple query blocks. It's best if each query block has its own short query. You can add multiple query blocks, each with its own natural language query to build more complex segments.
- Give feedback. By giving a "thumbs up" or "thumbs down" when your natural language query works (or doesn't work) as intended, you help to improve the AI. Your feedback and suggestions play a big part in improving the answers you get. Your suggestions help train the search to accurately identify context to better predict answers. If you get an answer that isn't what you expected, providing a suggestion will directly impact the model's ability to provide better, more relevant results in the future.

Details

- Natural language input works with Microsoft Dataverse using common entities. Custom entities are not currently supported.
- Natural language processing and machine learning are dynamic, meaning they learn and change over time. The processing is able to identify phrases and expressions that may change from role to role, company to company, and industry to industry.

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



Natural language segment Contacts who were born between 1970 and 2000 and make more than $50K.

Geographic areas

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

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

See also

[Use natural language in real-time marketing journeys](#) (docs)

Optimize the performance of emails in the new outbound marketing email editor with A/B testing

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 2, 2021	-	✔ Oct 1, 2021

Business value

A good way to create an email that resonates with your audience is to test different versions with subsets of your recipients, and then analyze interaction records to determine which one is better received. The new editor in Dynamics 365 Marketing now has the ability to A/B test your emails, allowing you to optimize the performance of your emails.

Feature details

A/B testing in the new outbound marketing email editor allows you to:

- Define different types of A/B tests:
  - **Header (subject, from)**: Lets you choose a different subject or different "from" name for the B version of your design.
  - **Body**: Lets you select one or more design elements in the email body and change those elements' settings, content, or appearance in the B version of the design.
  - **Full content**: Lets you select a different subject, "from" name, and one or more design elements in the email body and then change those elements' settings, content, or appearance in the B version of the design.
- Preview and test-send version A and version B of your email.
- Analyze the results of the A/B test in a customer journey and in email insights.

NOTE If you already have added an A/B test into your email using the old editor, it will be visible and fully supported in the new editor.

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

See also

Design and run A/B tests on your email designs (docs)

Monitor how your consumption is tracking against your quota

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Nov 1, 2021

Business value

You can now view your marketing contact and interaction quota together with consumption levels on the new quota page. This will allow you to better understand how your outreach changes over time. With the new licensing model in place, only those contacts that have been marketed to in the past 12 months will count toward the allocated marketing contact quota.

Feature details

Dynamics 365 Marketing tracks all your interactions with contacts and keeps a detailed record of the results of your marketing initiatives, including all the ways in which each contact interacts and responds, so you can measure performance and build more effective campaigns. The revised quota limits page monitors outbound marketing and real-time marketing quota and usage in one place.

Recent changes to our licensing model have ensured that stale contacts will no longer consume your quota. Marketing contacts that are not marketed to for 12 months will become regular contacts, releasing the allocated Marketing contact back into the pool, ready to be allocated to another contact. The new quota page calculates and displays your Marketing contact usage by taking this new rule into account.

See also

Quota limits (docs)

Moments-based

Overview

Engage your customers **in moments that matter** across **all customer touchpoints**:

- Connect Customer Insights and your own data lake (Azure Data Lake Storage) with customer journey orchestration.
- Send SMS messages using Twilio and TeleSign integration.
- Easily create webinar registration experiences in Teams, then design the participants' journeys in a few clicks using Dynamics 365 Marketing.
- Use account-based profile data from Customer Insights as part of your customer journeys.
- Visualize customer journey interactions on the Customer Insights activity timeline.

Connect Customer Insights and your own data lake with customer journey orchestration

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

Business value

Many customers choose to store their Customer Insights data in their own Azure Data Lake Storage. 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

Customer journeys can use 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.

Send SMS messages using Twilio and TeleSign integration

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 1, 2021

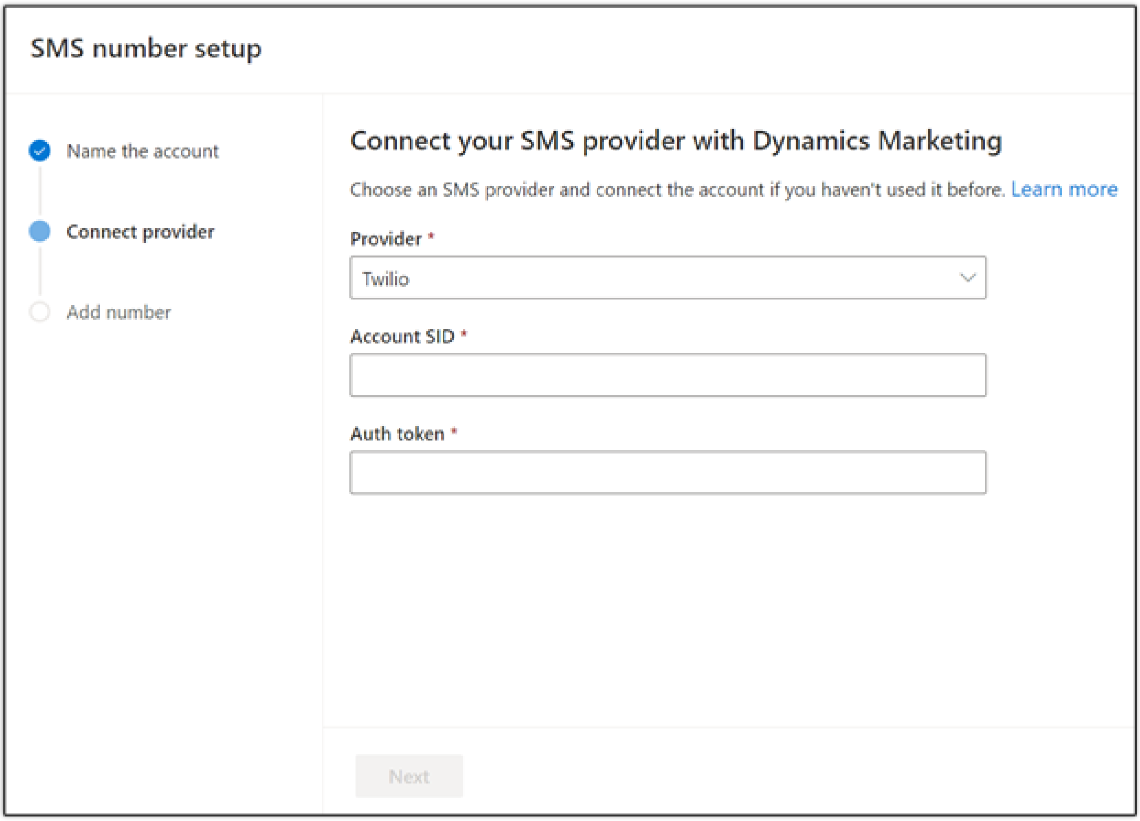
Business value

SMS messaging through the Dynamics 365 Marketing mobile channel creates new opportunities to connect with mobile users. The SMS channel enables fast, transactional communication and marketing messaging to use as a part of campaigns and customer service communication. We're extending these capabilities by enabling integration with Twilio and TeleSign.

Feature details

Integration with Twilio and TeleSign happens through a common Omnichannel service shared with Dynamics 365 Customer Service. You can purchase or reuse existing SMS accounts with Twilio or TeleSign, and it'll be possible to purchase Azure Communication Services phone numbers in the regions where Azure Communication Services SMS phone numbers are supported. For more information, go to Phone number types in Azure Communication Services.

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



Setting up Twilio and TeleSign accounts.

See also

[Add a sender number from a Twilio or TeleSign account](#) (docs)

Export images from outbound marketing to the real-time marketing asset library

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Nov 1, 2021

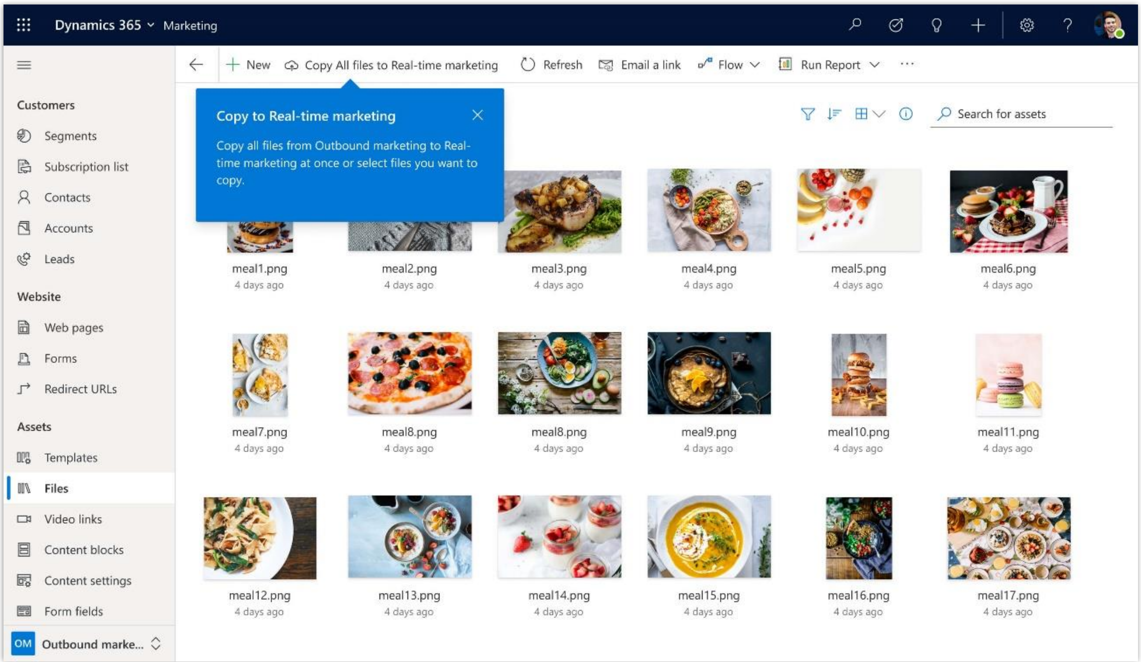
Business value

Transfer assets from outbound marketing to the real-time marketing asset library in just a few steps and reuse them to engage your customers in real time.

Feature details

With the November release, you can now transfer assets from outbound marketing to the real-time marketing asset library in just a few steps. From outbound marketing's file section, choose the assets you want to copy to the real-time marketing asset library and copy with just one click. Alternatively, you can copy all assets from outbound marketing to the asset library.

You can find more information in the asset library section of the product documentation.



Copy all files to real-time marketing at once or select files you want to copy.

See also

Export assets from outbound marketing to the asset library (docs)

Reach more customers with a 10X increase in the scale of interactions in real-time marketing journeys

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Nov 22, 2021

Business value

Prospects and customers are starting to take the lead on how frequently they want to interact with companies they do business with. Companies must be able to respond to customers whenever they want to engage. Now, you can send up to 100 million outbound interactions (email, SMS, or push notifications) per month to a maximum of 20 million contacts using real-time marketing journeys. With the added interaction capacity, you can communicate as much as you need to help move prospects and customers along their buying journey.

Feature details

Send up to 100 million outbound interactions (email, SMS, or push notifications) per month to a maximum of 20 million contacts using real-time marketing journeys.

As we continue to increase scalability across outbound and real-time marketing, please reference the fair use policy. Some additional restrictions may apply.

This feature is only available in real-time marketing.

See also

Fair use policy (docs)

Gain a wealth of new actions from a journey by raising triggers from journey steps to run another journey or Power Automate flow

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

Business value

Because every business is unique, you may need to define custom processes to enhance your journeys. You might have more than one journey that logically functions together. For instance, you may have a loan application that requires an exception approval and you need to keep the customer informed about the approval through a separate journey that runs parallel to the main one. Now, you can easily enable these scenarios by raising a custom event trigger from any point in the journey.

Feature details

- Raise a custom event trigger at any point in the customer journey and use profile data about the customer or prior events to set the attributes for the event trigger.
- Any journey or Power Automate flows connected to the custom event will be triggered 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 together using custom event triggers. For instance, when a welcome journey for a new customer ends, add them to the ongoing nurture journey.
- Create modular customer journeys or Power Automate flows that perform a specialized task and can be called from various points in a bigger journey. For instance, a loan

application journey could have various points that require an exception 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.

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

Personalization

Overview

Personalize engagement for **each customer**:

- Create segments for leads and custom entities with a new, easier-to-use segmentation builder.
- Call Power Automate flows from customer journeys for advanced customization.

Create segments for contacts and leads in the new segmentation builder

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

Business value

To improve marketing return on investment, it is important to target the right audience. The new segmentation builder simplifies segment creation, no matter how complex the logic. In addition, it enables you to build segments on leads, without requiring the lead to have a parent contact. You can then market to these leads directly using customer journeys.

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.

Personalize emails to include lists of related data

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔Oct 1, 2021

Business value

To save time and further personalize your emails, you can now include lists of related data that are specific to the individual receiving the email. For example, add a list of sessions in a conference registration email or a list of purchased items in an order confirmation email.

Feature details

Now in real-time marketing you can create richer emails using relevant lists of data. Similar to outbound marketing capabilities, you can add simple code statements in the designer or HTML view to build out your list data.

For example, add a list of sessions in an event registration email or a list of items in an order confirmation email. In addition, there is now a helper tool in real-time marketing that generates the code for conditional statements and lists, making it easier to ensure your syntax is correct.

You can find more information in the Personalize content section of the product documentation.

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

See also

Personalize content - lists of content (docs)

Gain more control over journey branching conditions through increased attribute support

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔Dec 1, 2021

Business value

Creating personalized journeys for customers based on their demographics and behaviors can help increase engagement. With this release, you can now create journey branches based on any attribute associated with the customer or event trigger that started the journey. In addition, for attributes based on date and time, you can create branches based on relative or partial dates.

Feature details

- Create branches based on all attributes associated with a contact or lead going through a journey, for example, "Check the marital status of the contact."
- Create branches based on all attributes associated with the event trigger that started the journey, for example if the journey is triggered by "incident created," you can now create branches based on all attributes of the "incident created" entity.
- Create branches based on relative and partial date checks, such as checking if a customer's birthday is this month or if their membership is up for renewal in the next 90 days.

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

See also

Attribute branch (docs)

Sales

Overview of Dynamics 365 Sales 2021 release wave 2

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 is centered on the customer relationship. It helps organizations understand customer needs and drives more relevant and authentic engagements, enabling sellers to sell more efficiently.

COVID-19 has accelerated the move to all things digital and changed expectations for how customers want to interact with sellers and companies they do business with. The role of the seller is evolving—customers expect sellers to know them and help them make decisions that will be in their best interest. To achieve this, sellers need to know everything there is to know about the customer, have contextually relevant conversations, and deliver value in every 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.

The focus areas for the Dynamics 365 Sales release wave 2 updates are:

Be productive from wherever you are with new integrations between Microsoft Teams and Dynamics 365

To further enable sellers to be productive from wherever they are, we're adding updates so you can access and update Dynamics 365 records from inside Teams chats and channels, and also providing a new integrated experience inside Microsoft Teams to access critical information about your leads and opportunities right from inside your Teams meetings. Teams chat within Dynamics 365 will also be available, along with enhancements to add stakeholders and send automated chat notifications to Teams users.

Collaborate better with improvements to Microsoft Teams calling with Dynamics 365

More third-party telephony support and critical business insights will be available for any type of call. Embedded Microsoft Teams collaboration and Teams message extensions and actions will be generally available and will include some enhancements to suggested contacts and the overall experience. You'll also be able to access sales records from within Teams meetings and have automated notifications from Dynamics 365 to Teams. Lastly, there will be enhancements to setup and security of the Dynamics 365 app for Teams.

Let Dynamics 365 do the heavy lifting with improved intelligence, productivity tools, and forecasting updates

Account-based Who knows whom will be released in this wave. For forecasting, enhanced capabilities will be available such as sharing and viewing a specific forecast and attribute insights for driving predictive scoring model clarity.

Guided selling gets a boost with Sales Accelerator enhancements and data hygiene

We're enhancing lead generation and nurturing capabilities for improved guided selling. In addition, we'll be making updates to sequences, including LinkedIn actions and preconfigured templates, automated lead routing, and seller and manager KPIs and dashboards.

Enhance the mobile experience for sellers on the go

Enhancements will be made to the mobile experience, so you never miss a detail in your customer engagements, go prepared to customer engagements, find, interact, and create CRM information easily, and log and share information effortlessly.

What's new and planned for Dynamics 365 Sales

This topic lists features that are planned to release from October 2021 through March 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.

Accelerator workspace

The sales accelerator workspace offers a guided selling experience, powered by AI, to enable sellers to close more deals.

Feature	Enabled for	Public preview	Early access*	General availability
Focus sellers on the right actions with a worklist ownership enhancement	Users by admins, makers, or analysts	-	-	✔Oct 1, 2021
Boost sales productivity using an intelligent worklist	Users, automatically	-	✔Aug 2, 2021	✔Oct 1, 2021

Feature	Enabled for	Public preview	Early access*	General availability
Leverage the power of LinkedIn actions as part of smart sequences	Users by admins, makers, or analysts	-	-	✓ Oct 10, 2021
Manage better sales process outcomes for sequences using grid view	Users by admins, makers, or analysts	-	-	✓ Nov 1, 2021
Improving seller productivity with bulk actions	Users, automatically	-	✓ Aug 2, 2021	✓ Nov 1, 2021
Build better relationships with automation and structured workflows with sequence management	Admins, makers, marketers, or analysts, automatically	-	-	✓ Dec 1, 2021
Automatically route leads to the right sellers to improve lead qualification outcomes	Admins, makers, marketers, or analysts, automatically	-	-	Feb 2022
Focus on the highest impact activities with advanced filtering and sorting	Users by admins, makers, or analysts	-	-	Feb 2022
Quickly implement sequences using ready-to-use and preconfigured templates	Admins, makers, marketers, or analysts, automatically	-	-	Feb 2022
Coach sellers with manager dashboards and improve seller efficiency with seller KPIs	Users by admins, makers, or analysts	✓ Dec 3, 2021	-	Feb 2022
Guide sellers with longer details in sequence steps and make those details available in step form	Users by admins, makers, or analysts	-	-	Feb 2022
Improve seller productivity with better quality leads with data hygiene	Users by admins, makers, or analysts	Feb 2022	-	Mar 2022

Feature	Enabled for	Public preview	Early access*	General availability
Easier setup experience	Users by admins, makers, or analysts	Feb 2022	-	To be announced

Collaboration using Microsoft Teams

Enhance the sales collaboration experience within Dynamics 365 Sales through the integration of Microsoft Teams.

Feature	Enabled for	Public preview	Early access*	General availability
Drive seller productivity with a seamless experience between Dynamics 365 and Microsoft Teams meetings	Users by admins, makers, or analysts	Mar 2022	-	
Easily edit a Dynamics 365 record within a Microsoft Teams conversation	Users by admins, makers, or analysts	Mar 2022	-	-
Seamlessly add activities and notes to Dynamics 365 records from within a Microsoft Teams chat or channel	Users by admins, makers, or analysts	Mar 2022	-	-
Share Dynamics 365 records in a Microsoft Teams message	Users by admins, makers, or analysts	Mar 2022	-	-
Quickly add relevant stakeholders to Microsoft Teams chat using suggested contacts	Users by admins, makers, or analysts	Jan 2022	-	Mar 2022
Collaborate with key stakeholders using Microsoft Teams chat from within Dynamics 365	Users by admins, makers, or analysts	✔ Nov 5, 2021	-	To be announced

Digital selling premium showcase

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 license 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	-	-	Jan 2022

Engagement platform and productivity intelligence

The engagement platform and productivity intelligence enables a smooth integration of Dynamics 365 Sales with different communication providers, so sellers can easily onboard digital-selling capabilities.

Feature	Enabled for	Public preview	Early access*	General availability
Advanced and critical business insights for any customer interaction to enable sellers to be more data driven	Users by admins, makers, or analysts	Mar 2022	-	Mar 2022
Make and receive calls and join meetings directly from Dynamics 365	Users by admins, makers, or analysts	Feb 2022	-	Mar 2022

Forecasting and pipeline analytics

Forecasting and pipeline intelligence with predictive scoring helps sales teams uncover top deals and forecast with confidence.

Feature	Enabled for	Public preview	Early access*	General availability
Manage permissions to include relevant users in the forecasting process	Users by admins, makers, or analysts	-	-	✔ Oct 1, 2021
Improve predictive scoring by enabling intelligent field augmentation	Users by admins, makers, or analysts	✔ Aug 1, 2021	-	✔ Oct 1, 2021
Get streamlined views of forecast hierarchies with user filters to more efficiently manage your forecasts	Users by admins, makers, or analysts	-	-	Feb 2022

Mobile

Mobile is an essential part of solving one of the biggest challenges faced by sales organizations today – how to help sellers access what they need, when they need it, wherever they are, and make it easy for them to log and share information in real time.

Feature	Enabled for	Public preview	Early access*	General availability
Quick actions and prioritized worklist to take action from the mobile app	Users by admins, makers, or analysts	-	-	Mar 2022

Relationship intelligence

Relationship intelligence helps sellers use the information in their selling system across Dynamics 365 and Microsoft 365 to identify, build, and nurture relationships with their customers.

Feature	Enabled for	Public preview	Early access*	General availability
LinkedIn Sales Navigator integration migration from cookie-based to token-based authentication	Users, automatically	-	-	✔ Dec 3, 2021

* You are able to opt in to some features as part of early access on August 2, 2021, 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.

Accelerator workspace

Overview

The sales accelerator workspace offers a guided selling experience, powered by AI, to enable sellers to close more deals.

For more information, see [What is the Sales accelerator?]

Focus sellers on the right actions with a worklist ownership enhancement

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

Business value

This functionality will enable each seller to stay on top of their activities and declutter the worklist. For example, if the opportunity is owned by a seller and the product expert has to prepare the demo, the product expert will see the demo preparation activity and take action on it without having leave your Sales Accelerator workspace.

Feature details

Worklists will be populated based on activity ownership instead of entity ownership. This will allow a seller who is responsible to finish the task to stay on top of the activity and would also declutter the entity owner's worklist.

See also

View my records by using the work list (docs)

Boost sales productivity using an intelligent worklist

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Aug 2, 2021	✔ Oct 1, 2021

Business value

Use an updated intelligent worklist as part of your Sales accelerator workspace. Get suggested actions and stay on top of your to-do list. Focus on the right leads with the prioritized pipeline, automated outreach recommendations, and simple integrated engagement channels. This functionality will help organizations reduce lead qualification time. This will also help sellers focus on the key task at hand while similar tasks can be bundled and completed in one click.

Feature details

The worklist user interface is being enhanced to make it more usable and improve the seller's productivity. Enhanced filtering and sorting experience would improve the efficiency of the sellers. The work list in the Sales accelerator helps sellers prioritize their time and effort to ensure that important records aren't left behind.

See also

Prioritize your sales pipeline by using the work list (docs)

Leverage the power of LinkedIn actions as part of smart sequences

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Oct 10, 2021

Business value

LinkedIn integration with sales accelerator will allow you to bring your most important social selling functions directly into your sequences. You can leverage LinkedIn's vast network to recommend actions your sellers can take to build deeper connections.

Feature details

LinkedIn has a network of millions of users and a unique depth and quality of information. Sellers use LinkedIn to research and connect with their customers. This functionality would allow you to leverage LinkedIn Sales Navigator in your sequence to recommend the next best action.

This feature allows users to perform the following LinkedIn actions within sales accelerator:

- InMail
- Connect request
- Introduction

See also

Add LinkedIn activities to sequence (docs)

Manage better sales process outcomes for sequences using grid view

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Nov 1, 2021

Business value

Sequences help sales enablement managers (SEMs) set up structured workflows for their sales teams to progress their pipelines. This enhanced experience will allow SEMs to easily manage the sequences and have a quick view of the status of leads and opportunities.

Feature details

The connected tab within the sequence is enhanced with more details that allow SEMs to work efficiently. Also, you can see details of the status of each connected entity and get a view of which entities are connected through segments.

See also

View sequence in a grid (docs)

Improving seller productivity with bulk actions

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Aug 2, 2021	✔ Nov 1, 2021

Business value

Improve productivity by helping sellers complete repetitive actions efficiently.

Feature details

Improving seller productivity with bulk actions and email engagement insights. Sellers perform similar actions multiple times in a day, such as, introduction emails for all who registered for an event, or share products with all those who opened a link. It takes time and multiple clicks to finish these tasks one by one. The key challenges faced are:

- Lack of visibility of similar actions.
- No simple way to perform these actions at one time.
- Need to review and be sure before taking bulk actions, such as one would like to confirm the email text or the list of contacts receiving an email before the action is taken.
- Need to indicate that a step is completed for internal visibility.

To overcome these challenges, the solution should enable sellers to efficiently perform their activities.

- Collect similar activities together based on activity type, template, or sequence.
- Provide a bulk action to complete activities.
- Provide ability to review and edit if required.
- See the impact of the action, such as an activity gets added to the timeline, or gets removed from the worklist.

See also

Send bulk email (docs)

Build better relationships with automation and structured workflows with sequence management

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 1, 2021

Business value

Sales enablement managers (SEMs) and sales managers need to define the customer engagement best practices and outreach strategies that can scale to an organization's needs, increase sales growth, and optimize sales team productivity. These features will enable SEMs to easily maintain sequences and track progress.

Feature details

Sequence Management: An enhanced UI that allows users to easily filter and manage sequences. Advanced grid that allows users to perform field level filters and mass actions.

Tagging: Over a period of time the number of sequences in the system can increase multifold. This feature can help SEMs to easily maintain these sequences. This will help SEMs to:

- Check if a relevant sequence exists before creating a new one.
- Group similar sequences together.
- Look at a list of sequences relevant to a business unit or scenario.
- Remove all the irrelevant sequences from the view.

See also

Manage tags for sequence (docs)

Automatically route leads to the right sellers to improve lead qualification outcomes

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

Business value

Responding quickly to incoming leads can make or break a deal, particularly in highly competitive markets. The more mature a business gets, and the more complex the prospective customer's needs are, the more challenging it is to maintain that speedy response and personalized touch.

Quickly growing businesses require more sophisticated automation to ensure operational efficiency, proper distribution of leads among their sales team, and to make sure no leads slip through the cracks. The functionality will improve lead conversion ratios due to timely lead assignment and faster lead qualification times.

Feature details

This feature covers following functionalities:

- Define rules for automatic assignment. The following components are included:
  - **Segments**: This is a group of leads that can be assigned to the rule.
  - **Lead attribute**: Lead attributes that need to be considered should be maintained here.
  - **Seller attribute**: The attributes and skills of the sellers that need to be evaluated for lead distribution should be mentioned in the rule.
  - **Distribution method**: Lead can be distributed either through round robin or load balancing methods.
- **Ability to define seller attributes and assign to the seller**: Seller attributes can be specifically defined for lead routing.
- **Maintain sales team and capacity**: The user can maintain the sellers who would receive the leads. The capacity of the sellers can also be used, which would be taken into consideration when distributing the leads.

Focus on the highest impact activities with advanced filtering and sorting

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

Business value

Sellers manage numerous customers and activities in sales accelerators. To quickly finish a task at hand, sellers at times focus on executing the tasks without properly prioritizing them and end up concentrating on activities that have a lower impact on business outcomes. This functionality will help sellers more efficiently engage with the highest priority customers rather than searching.

Feature details

This functionality will enable sellers to filter information based on standard as well as custom fields. The functionality can be enabled from the settings where a sales engagement manager (SEM) can define filters relevant for business scenarios. A SEM would be able to extend the current filter based on standard, custom, and a combination of fields.

Quickly implement sequences using ready-to-use and preconfigured templates

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

Business value

Template sequences can help customers to accelerate your sales processes with faster and easier implementation. These sequences are defined based on industry best practices and proven business processes to help you define a consistent approach to connect with your customers.

Key business benefits:

- Ready-to-use and preconfigured sequences
- Based on industry best practices and proven business processes
- Faster and easier implementation
- Provide guidance on usage of various branching and other sequence capabilities

Feature details

Multiple best practice templates would be made available as part of the product that can be easily copied and customized for your business needs. These template sequences will also showcase how sequence branching and other features can be utilized efficiently.

Coach sellers with manager dashboards and improve seller efficiency with seller KPIs

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Dec 3, 2021	-	Feb 2022

Business value

Using data helps your sales teams drive better outcomes. Keep sales organizations up to date on important KPIs and enable sellers to be more data-driven with their decision making with seller KPIs and manager dashboards.

Feature details

The **manager dashboard** allows managers to view their team's and sequence's performances as well as coach and guide sellers:

- Time taken to convert the leads and opportunities.
- The conversion ratio between leads and opportunity.
- Success rate of the sequences.
- Status of the sequence steps associated with the lead and opportunities.

NOTE This functionality may require a separate add-in license. Please go to Compare plans for more information.

See also

Feature exploration (video)

View and understand sales acceleration reporting (docs)

Guide sellers with longer details in sequence steps and make those details available in step form

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

Business value

Sellers perform various activities to win deals and it's important to guide them during this process to maximize the business impact. With this enhancement, sales managers can provide long, detailed instructions for sellers to follow.

Feature details

Sales managers can now write sequence step descriptions up to 2,000 characters to help sellers with detailed instructions.

- Sellers can expand or collapse detailed instructions.
- Sellers can select and open URLs in the description.
- Sellers can use the description provided in the step details form for reference.

Improve seller productivity with better quality leads with data hygiene

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

Business value

Sellers today often lose time engaging with the wrong leads, struggling with a busy pipeline with irrelevant records, and unable to find the customers that are more likely to close. Ensuring that only quality leads are being assigned to sellers, with accurate data that enables personalized interactions, will save sellers valuable time and allow them to close more business opportunities.

Feature details

Automated process based on AI engine to achieve the following:

- Detection mechanism:
  - Duplicates detection
  - False or invalid leads detection
- Enable automated actions upon detection of any of the above:
  - Update, close, or delete a lead
  - Notify user about detection (seller or admin)

Easier setup experience

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

Business value

The new sales accelerator setup experience is designed to enable sales engagement manager 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 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.

Collaboration using Microsoft Teams

Overview

The need to collaborate with colleagues in the context of customer records is a constant one for sellers of all types, industries, segments, and geographies. These needs are not isolated to instances when a seller is within Dynamics 365 or Microsoft Teams. The reality is that sellers require capabilities to collaborate contextually from both Dynamics 365 and Microsoft Teams. This experience continuum was a focus for 2021 release wave 1 and remains a focus for release wave 2.

In this release, we will enhance the Microsoft Teams embedded chat experience that empowers sellers to stay within their sales workflows and collaborate with stakeholders for the critical information needed to close the deal faster, all from within Dynamics 365. Chats and channels will be linked directly to sales records, enabling a contextual experience unique to the experience within Microsoft Teams. For sellers that require more contextual interactions from within Microsoft Teams, we are building upon our message extensions and message actions capabilities with additional enhancements that enable sellers to receive notifications from Dynamics 365, as well as see their customer records from within the context of a Microsoft Teams meeting.

Drive seller productivity with a seamless experience between Dynamics 365 and Microsoft Teams meetings

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

Business value

While running Microsoft Teams meetings, sellers now have access to sales records they can reference to have contextually relevant conversations with prospects and customers, as well as streamlined note-taking capabilities that enable sellers to save time, be more productive, and drive more revenue while providing organizations with far better data. Additionally, real-time Conversation Intelligence will enable sellers to conduct more valuable and meaningful customer conversations.

Feature details

As a seller, you can:

- Create and join Microsoft Teams meetings directly from Dynamics 365.

- Access and update sales records seamlessly within the context of a Microsoft Teams meeting.
- Capture notes seamlessly during a Microsoft Teams meeting, and have these notes automatically sync back to records in Dynamics 365.
- Leverage premium conversation intelligence for real-time call analysis and insights during a Microsoft Teams meeting.

Easily edit a Dynamics 365 record within a Microsoft Teams conversation

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

Business value

This feature enables quick editing of Dynamics 365 records from a form within a Microsoft Teams conversation and works from the perspective of the Dynamics 365 user or the recipient.

- Allow users to quickly edit a record from a Microsoft Teams conversation to ensure the information is up to date before sending it to teammates, customers, and other stakeholders.
- Send a quickly accessible form to your conversation participants so they can make rapid updates to a record, ensuring that you have the most up-to-date information.

Feature details

This feature provides the following capabilities:

- Conversation participants can quickly update or edit a record from within a Microsoft Teams conversation using adaptive cards.
- Conversation participants can change the state of a record from within a Microsoft Teams conversation.
- Support for customized forms and business rules specific to an organization.
- Access control ensures that only those with required security permissions have write access.

NOTE This feature requires a Dynamics 365 Enterprise license.

Seamlessly add activities and notes to Dynamics 365 records from within a Microsoft Teams chat or channel

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

Business value

With Dynamics 365 and Microsoft Teams integration, sellers can stay productive from wherever they are. Quickly save decisions, notes, and other key sales events to Dynamics 365 without having to context switch out of Microsoft Teams.

Feature details

- Add a note or task to a record's timeline from the context of a Microsoft Teams message in a chat or channel.
- Support customized forms and business rules specific to an organization.
- Ensure only those with required security permissions have write access.

NOTE This feature requires a Dynamics 365 Enterprise license.

Share Dynamics 365 records in a Microsoft Teams message

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

Business value

Users want to surface the customer engagement records in the context of Microsoft Teams conversations. They need a way to search and share Dynamics 365 records directly in the message. Current collaboration features allow Dynamics 365 records to be pinned to Microsoft Teams channels. However, that is the beginning and end of contextualization. To leverage data throughout the conversation, this feature would allow users to search for information in Dynamics 365, share with other participants in their chats or channels, and even allow them to perform tasks from within the conversation.

Feature details

- Send a quick summary of a record in a Microsoft Teams chat or channel as an interactable card.
- Search for Dynamics 365 records organized by relevance.
- Search for and filter Dynamics 365 records to share with your conversation participants.
- Allow conversation participants to add an activity or note to a record through interactable cards.
- Ensure only those with proper security permissions can view details of the record.

NOTE This feature requires a Dynamics 365 Enterprise license.

Quickly add relevant stakeholders to Microsoft Teams chat using suggested contacts

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

Business value

As a seller, you can use the suggested contacts in the embedded Microsoft Teams collaboration experience to discover valuable contacts that are contextually relevant to the record you’re working on. Extending on the initial suggestion engine released in 2021 release wave 1, enhancements will provide additional configuration of data inputs that power the relevancy engine for chat and contact suggestions.

Using the contextually relevant suggestions, you can be more productive by reducing context switching and getting what you need in the current workspace that you're in.

Feature details

As a seller, you get more appropriate contact suggestions based on the app or entity that you’re in.

As an administrator, you can:

- Get more control over the contact suggestions.
- Customize suggestions per Dynamics 365 app.
- Customize suggestions per entity.
- Customize suggestions based on custom fields.

Collaborate with key stakeholders using Microsoft Teams chat from within Dynamics 365

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Nov 5, 2021	-	To be announced

Business value

With Microsoft Teams chat embedded in Dynamics 365, sellers can quickly reach out and collaborate with key stakeholders without leaving their workspace to accelerate deal velocity by connecting sellers with key stakeholders and information.

Feature details

- **Integrated Microsoft Teams chat capabilities**: Native Microsoft Teams chat client featuring rich text editor, file attachments, emojis, GIFs, delivery options, edit or delete messages, like posts, and so on.
- **Contextual chat and channel list**: Enable linking of chats to sales entities (channel linking available today). Chat list changes context based on Dynamics 365 context.
- **People discovery**: Leverage the intelligence of CRM to recommend internal stakeholders and external contacts with whom to collaborate.

See also

Engage in Microsoft Teams chats from within Dynamics 365 (docs)

Digital selling premium showcase

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 a Dynamics 365 Sales Enterprise license 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	-	-	Jan 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 according to your business needs. Each of the premium features will have a capacity limit as follows:

- Users who access and utilize conversation intelligence will be able to do so with 3 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 don't find the Sales Hub app within your tenant, install the Sales solution by following the steps listed here: Install the Sales solution

Engagement platform and productivity intelligence

Overview

The engagement platform and productivity intelligence enable a smooth integration of Dynamics 365 Sales with different communication providers, so sellers can easily onboard digital-selling capabilities.

Advanced and critical business insights for any customer interaction to enable sellers to be more data driven

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

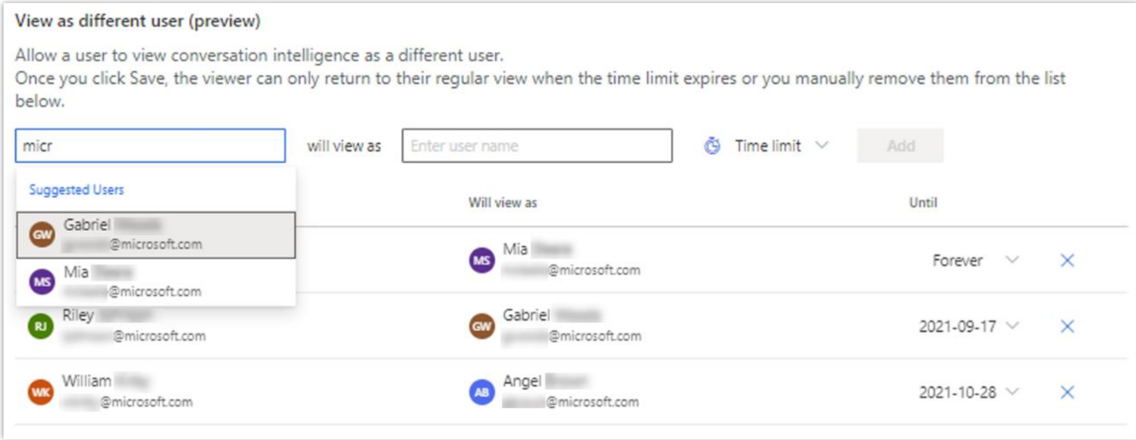
Business value

The more data driven sellers are, the more deals they'll close. And the less time sellers spend on data entry into their CRMs, the more time they can spend on selling. Get points of interest within seconds with more business insights derived across search, calls, and emails with KPI trends, a new executive summary, and more.

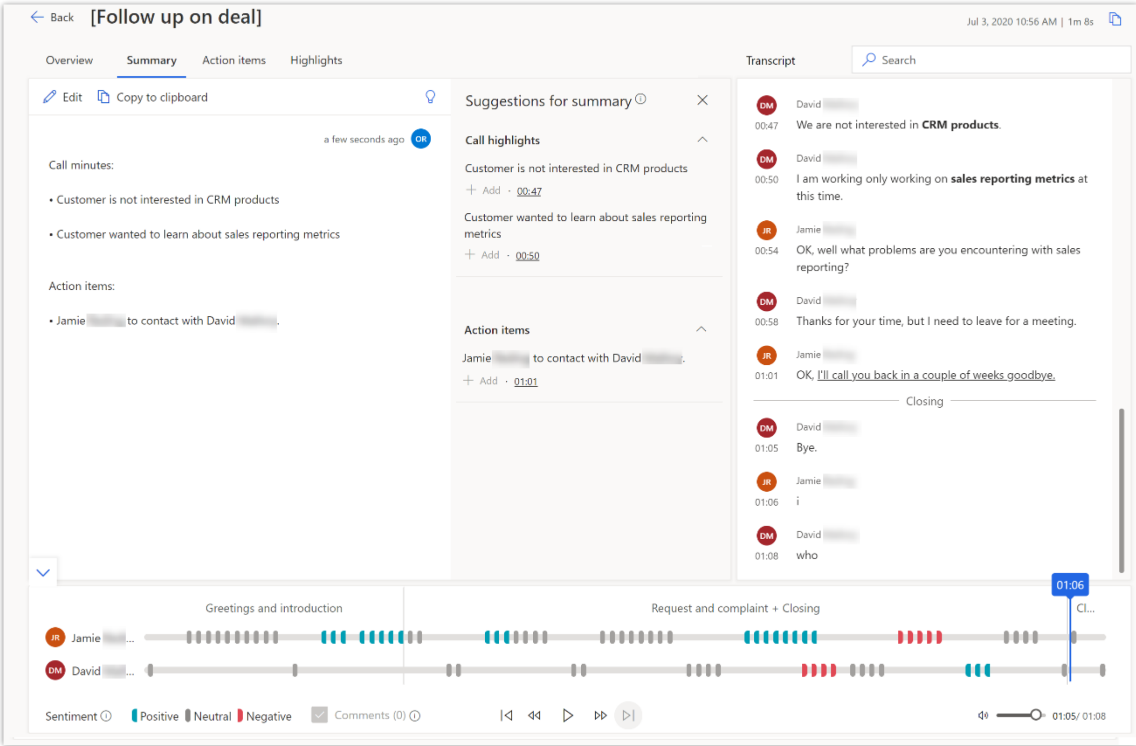
Feature details

- Executive summary for two-party calls.
- Automatic language switching during calls.

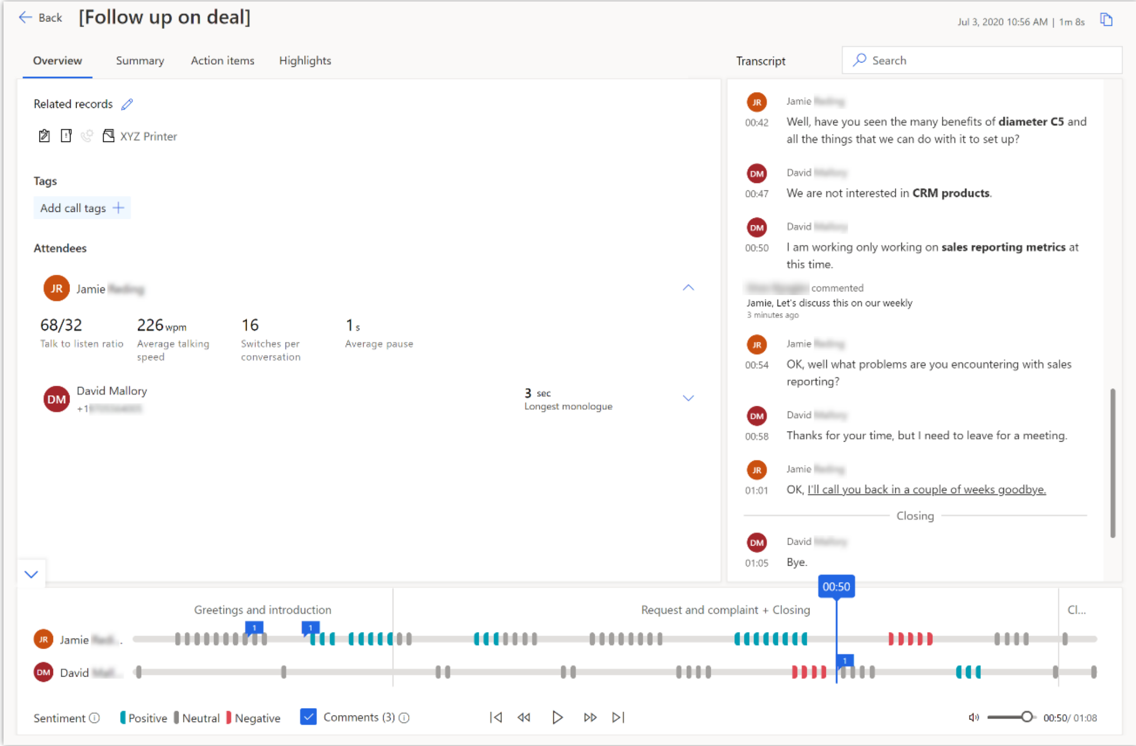
- View-as functionality, to impersonate another user to troubleshoot conversation intelligence stand-alone app.
- Expose comments on call timeline.



Screenshot of view-as settings.



Screenshot of executive summary.



Screenshot of comments on timeline.

Make and receive calls and join meetings directly from Dynamics 365

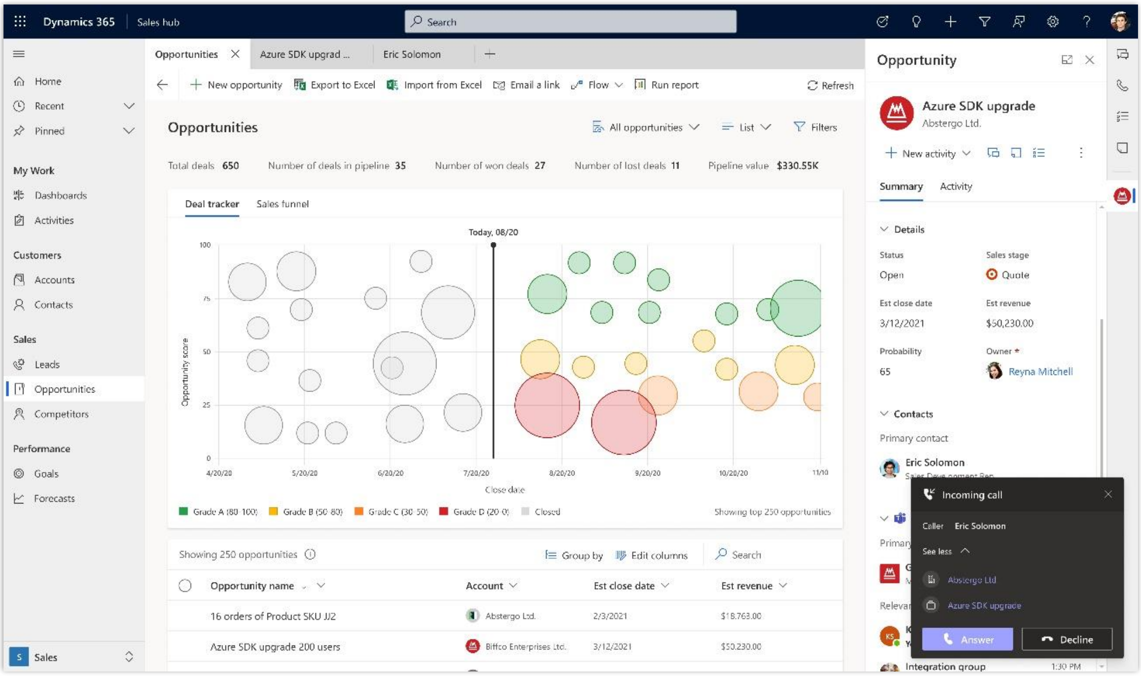
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Feb 2022	-	Mar 2022

Business value

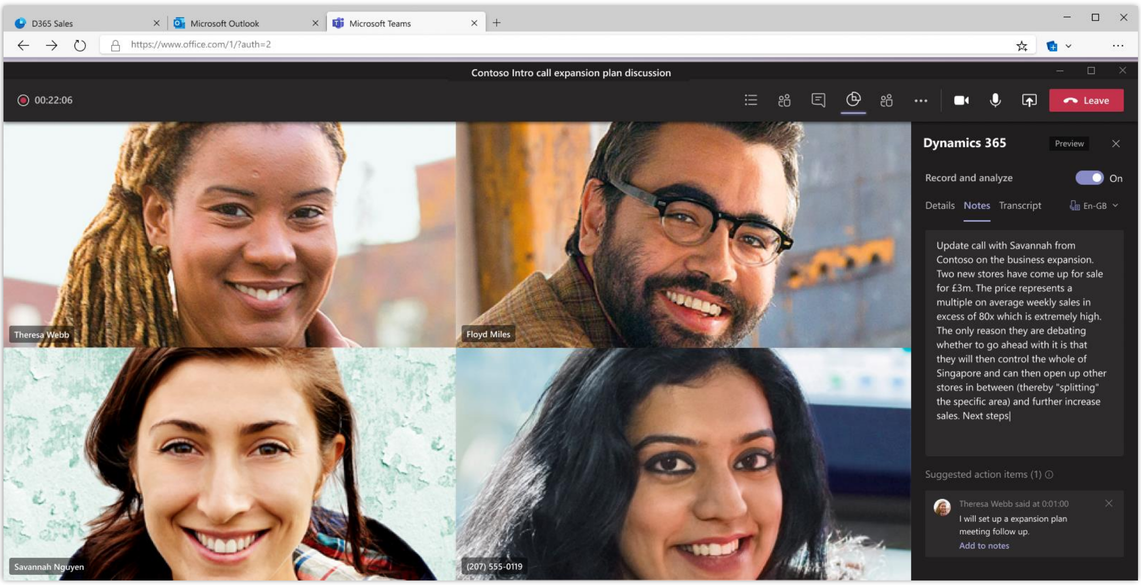
Seamless experience with Microsoft Teams, Outlook, and 3P calling from within Dynamics 365, allowing sellers to collaborate with customers and key stakeholders by making and receiving calls and joining Microsoft Teams meetings from Dynamics 365, and gaining real-time business-critical insights from their engagements.

Feature details

- Microsoft Teams calling and meetings from Dynamics 365.
- Real-time analytics and action items for Microsoft Teams calling and Microsoft Teams meetings.
- Connectivity to Dynamics 365 entities.
- Third-party telephony system (3P) calling in Dynamics 365.
- Incoming calls in Dynamics 365.
- Seller-side-only recording.



Incoming call indication and record's quick view.



Conversation Intelligence panel within Teams client for multi-participant meetings.

Forecasting and pipeline analytics

Overview

To stay ahead of the market and to meet sales quotas, sales teams are constantly pressured to sell more and sell faster. As a seller, it’s important that you spend time on the top deals, prioritizing prospects that are likely to close, and move quickly through the pipeline. It's also imperative that your team accurately projects anticipated revenues from these deals so that teams can take proactive steps to avoid missing goals.

Forecasting and pipeline analytics provide predictive lead and opportunity scoring that helps uncover top deals and to forecast with confidence. Use intelligent scoring to uncover where best to invest your team's time, improve resource allocation, and increase productivity, while helping ensure that rigorous quotas can be met efficiently.

In this release, we'll provide sales teams the ability to share their forecasts with other stakeholders. For example, a sales director can delegate the management of the team's forecast to an assistant or another team member by simply sharing a forecast.

Manage permissions to include relevant users in the forecasting process

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

Business value

During a forecast cycle, sales leaders must be able to include some of their colleagues in the forecast process. Sales managers will be able to share as well as remove access to forecasts with any other Dynamics 365 user.

Feature details

The following capabilities are available as part of this feature:

Administrators will have access to the share settings control on the **Permissions** tab of the forecast configuration page. On this page, administrators can set the share status to indicate one of the following:

- Disable sharing.
- Share as read-only.
- Share as read and adjust.

Once sharing is enabled, sellers will have access to the sharing capability from the forecast grid. They can:

- Click the share icon on one of their records to open the sharing control.
- Specify which user to share that record with.
- Specify whether they want to share as read-only or read and adjust (if both are enabled).
- View which records have been shared and with whom.
- Revoke share access to the records that they've shared.

See also

Share a forecast (docs)

Improve predictive scoring by enabling intelligent field augmentation

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Aug 1, 2021	-	✔ Oct 1, 2021

Business value

Organizations collect a vast amount of CRM data as part of their regular course of business. This data becomes a powerful source of insight when used to train an AI predictive scoring model. Certain attributes may have key values that, when recognized by the model, can further its efficacy and exclude confounding data points. Using field augmentation, you can identify the fields and key values for training the AI model, such as whether a customer is new or returning, an email is legitimate or fake, recent activity, phone number length, and more.

Feature details

As an administrator, you can select an attribute as an augmented field from the edit fields page. Using field augmentation, you can identify the fields and key values for training the AI model. Field augmentation could include:

- Whether a customer is new or returning.
- Whether an email is legitimate or fake.
- Recent activity.
- Phone number length.
- Private or public email domain.
- Contact ID.

See also

Select intelligent fields (docs)

Get streamlined views of forecast hierarchies with user filters to more efficiently manage your forecasts

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

Business value

Complex organizations are supported by employees in a variety of roles. While these roles may be essential for the success of the business, not all of them are opportunity owning or need to forecast future sales revenue. Administrators can filter relevant user records from the forecast hierarchy. This will allow sellers and managers to view only the user records that are of interest for the sales forecasting process, thus decluttering the forecast grid.

Feature details

Declutter the forecast grid by filtering only those records that are of interest for the sales forecasting process.

The following capabilities are available in this feature:

- Administrators will have a new step in the forecast configuration to define hierarchy filters. This step allows the administrators to add rules to specify which hierarchy records should be included within the forecast.
- Users will see the filtered hierarchy in their forecast grid, trend chart, and deal flow charts.

Mobile

Overview

Mobile is an essential part of solving one of the biggest challenges faced by sales organizations today—how to help sellers access what they need, when they need it, wherever they are, and make it easy for them to log and share information in real time.

Quick actions and prioritized worklist to take action from the mobile app

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

Business value

Sellers are engaging with their customers with little time to prepare in advance, making it hard to keep track of related action items and to prioritize actions. The Dynamics 365 Sales mobile app now allows sellers to take quick actions on records and activities. It also includes a to-do list for every record so sellers can take action with relevant context from Dynamics 365 Sales.

Feature details

- Focused to-do views for every record show relevant activities that are associated with the record.

- Shortcuts for quick actions that are common for salespeople to take from their mobile device on records and activities.

Relationship intelligence

Overview

Relationship intelligence helps sellers use the information in their selling system across Dynamics 365 and Microsoft 365 to identify, build, and nurture relationships with their customers.

LinkedIn Sales Navigator integration migration from cookie-based to token-based authentication

Enabled for	Public preview	Early access	General availability
Users, automatically	-	-	✔ Dec 3, 2021

Business value

Allows the user to connect securely to LinkedIn Sales Navigator via Dynamics 365 using a token-based authentication.

Feature details

Users are able to do the following:

- Sign in to LinkedIn Sales Navigator through the LinkedIn Sales Navigator widgets.
- Provide consent to Dynamics 365 to access their LinkedIn Sales Navigator account. Ensure that pop-ups are not blocked in order to allow the consent screen to appear.
- Sign in to their LinkedIn Sales Navigator account through Dynamics 365.

Service

Overview of Dynamics 365 Customer Service 2021 release wave 2

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, knowledge base to 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 and social channels and voice.

For 2021 release wave 2, we are focused on the following areas:

- Enable customers to be up and running quickly.
- Deliver the all-in-one contact center.
- Improve knowledge authoring and management.
- Transform contact center routing.

What's new and planned for Dynamics 365 Customer Service

This topic lists features that are planned to release from October 2021 through March 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.

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 handle multiple interactions at a time, interact with multiple apps without losing context, and enhance their workflow with productivity tools.

Feature	Enabled for	Public preview	Early access*	General availability
Agent workspace inbox view	Users by admins, makers, or analysts	-	-	✓ Oct 4, 2021
Usability improvements for agent workspaces	Users, automatically	-	✓ Aug 2, 2021	✓ Oct 4, 2021

Agent productivity

Agent productivity tools enable easy knowledge base search, provide suggestions for similar knowledge articles and cases, allow for collaboration with contacts, and make available agent scripts with macros to automate tasks in common workflows.

Feature	Enabled for	Public preview	Early access*	General availability
Increase agent productivity with contextual collaboration using embedded Microsoft Teams	Users by admins, makers, or analysts	✓ Nov 5, 2021	-	-

Case management

Case management helps businesses track customer issues across channels and over a period. Agents have full context of the support history and can manage the complete case lifecycle spanning creation, research, and resolution.

Feature	Enabled for	Public preview	Early access*	General availability
Interact with Dynamics 365 records using Teams message extensions	Users by admins, makers, or analysts	Mar 2022	-	-
Improvements to the Universal Resource Scheduling-based service scheduling experience	Users by admins, makers, or analysts	✓ Aug 2, 2021	-	✓ Oct 4, 2021
Modern control for subject entity	Users, automatically	-	✓ Aug 2, 2021	✓ Oct 4, 2021

Feature	Enabled for	Public preview	Early access*	General availability
Scheduling and IoT capabilities in Customer Service workspace	Users, automatically	-	✓ Aug 2, 2021	✓ Oct 4, 2021

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
Community	Users by admins, makers, or analysts	✓ Oct 4, 2021	-	To be announced

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	✓ Dec 20, 2021	-	-
Usability improvements in knowledge management	Users, automatically	-	✓ Aug 2, 2021	✓ Oct 4, 2021
AI-suggested keywords and brief description for knowledge articles	Users by admins, makers, or analysts	✓ Oct 4, 2021	-	✓ Dec 20, 2021

Omnichannel voice

Despite the variety of digital messaging channels now available, phone calls continue to be one of the most popular channels through which customers want to receive support.

Feature	Enabled for	Public preview	Early access*	General availability
Call intelligence	Users by admins, makers, or analysts	-	-	✔Nov 1, 2021
Call recording	Users by admins, makers, or analysts	-	-	✔Nov 1, 2021
Call transcription and real-time sentiment analysis	Users by admins, makers, or analysts	-	-	✔Nov 1, 2021
Consult and transfer	Users by admins, makers, or analysts	-	-	✔Nov 1, 2021
Direct outbound calling	Users by admins, makers, or analysts	-	-	✔Nov 1, 2021
Embedded analytics for voice channel	Users by admins, makers, or analysts	-	-	✔Nov 1, 2021
Intelligent voice bot via Power Virtual Agents and Microsoft Bot Framework	Users by admins, makers, or analysts	-	-	✔Nov 1, 2021
Modern administration experience for Omnichannel voice (number management)	Users by admins, makers, or analysts	-	-	✔Nov 1, 2021
Modern administration for Omnichannel SMS via Communication Services (number management)	Users by admins, makers, or analysts	-	-	✔Nov 1, 2021
Supervisor monitoring and barge	Users by admins, makers, or analysts	-	-	✔Nov 1, 2021
Topic clustering for voice	Users by admins, makers, or analysts	-	-	✔Nov 1, 2021

Feature	Enabled for	Public preview	Early access*	General availability
Voice channel powered by Azure Communication Services	Users by admins, makers, or analysts	-	-	✔ Nov 1, 2021

Service-level agreements

Service-level agreements (SLAs) enable businesses to track support policies and ensure customers are being supported per the support policy to which they are entitled.

Feature	Enabled for	Public preview	Early access*	General availability
Usability enhancements in service-level agreements	Users by admins, makers, or analysts	-	-	✔ Oct 4, 2021

Timeline

The timeline helps agents see all customer interaction history across channels, agents and sales, marketing, and support lifecycle.

Feature	Enabled for	Public preview	Early access*	General availability
Bring your own data to timeline	Users by admins, makers, or analysts	-	-	✔ Oct 4, 2021

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
Customer sentiment prediction for use in intelligent classification of incoming work items in unified routing	Users by admins, makers, or analysts	✔ Oct 4, 2021	-	

Feature	Enabled for	Public preview	Early access*	General availability
Effort estimation for use in intelligent classification of incoming work items in unified routing	Users by admins, makers, or analysts	✔ Oct 4, 2021	-	
Improved historical analytics for unified routing scenarios	Users by admins, makers, or analysts	-	-	✔ Oct 4, 2021
Routing diagnostics for supervisors	Users by admins, makers, or analysts	-	-	✔ Oct 4, 2021

* You are able to opt in to some features as part of early access on August 2, 2021, 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.

Agent experiences

Overview

The agent experience is the heart of Dynamics 365 Customer Service. The key to improving satisfaction in service delivery is enabling agents to take customer requests from any channel, handle multiple sessions at a time, interact with multiple apps without losing context, and enhance their workflow with productivity tools.

In 2021 release wave 2, the inbox view will be integrated with the Customer Service Workspace and Omnichannel for Customer Service apps to allow agents to effectively navigate cases and conversations.

Agent workspace inbox view

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔Oct 4, 2021

Business value

As organizations adopt Omnichannel for Customer Service and Customer Service workspace and deploy additional channels through which customers can initiate support requests, the need is growing for the agent experience to be better optimized for extended conversations with customers. The inbox view in the agent workspace is designed to address the need to quickly triage requests. This helps agents focus on customers and their issues by using customized views, filters, and sort capabilities across all channels of contact.

Feature details

The inbox view is integrated into Customer Service workspace and Omnichannel for Customer Service. This view helps agents more effectively navigate their cases and conversations, as well address their customers' issues in a timely manner. The inbox view leverages core productivity features of the agent desktop, such as timeline, recent cases, AI-based suggestions, and knowledge search.

See also

Use the inbox (docs)

Usability improvements for agent workspaces

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔Aug 2, 2021	✔Oct 4, 2021

Business value

Customer Service workspace and Omnichannel for Customer Service are multisession apps that allow customer service agents to multitask on several customer cases simultaneously and switch among issues seamlessly without losing context of the in-progress work. The usability improvements in these apps in this release will help agents be more productive.

Feature details

The enhancements in the Customer Service workspace and Omnichannel for Customer Service apps include the following:

- Simplified navigation that currently needs to be enabled by administrators will be available by default. More information: Simplify navigation in Customer Service workspace

- Migration of productivity tools to the new extensible app side pane. More information: [Model driven apps support multiple app side panes]

Also, the command buttons in the **Case** form have been reordered for a better user experience.

See also

Use simplified navigation (docs)

Agent productivity

Overview

Agent productivity tools use intelligence and automation to enable agents to find answers to customer questions and help resolve customer issues quickly, thereby improving satisfaction in service delivery.

In 2021 release wave 2, the following enhancements are planned:

- Agents can collaborate with contacts in Dynamics 365 using Microsoft Teams.
- Agents can manage appointments with scheduling and proactively resolve issues created from IoT alerts.
- Extensibility of the app side pane capability for the productivity tools, such as agent scripts and macros.

Increase agent productivity with contextual collaboration using embedded Microsoft Teams

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔Nov 5, 2021	-	-

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

Some of the key capabilities of this feature are as follows:

- Ability to chat with contacts from within Dynamics 365.
- Access to key Customer Service contacts, such as supervisors, queue members, and support experts.

- Access to AI-driven suggestions of agents who resolved similar cases.
- Access to recent Microsoft Teams chat lists.
- Ability to link and unlink chats to case records.
- Access to linked Microsoft Teams chats.
- Message avatar and presence, where users can easily see profile pictures of a chat participant and their availability (presence).

See also

Use Teams chat in Customer Service (docs)

Case management

Overview

When companies deliver great customer service, customers can have a great relationship with them over a period, and throughout that relationship they may have several support inquiries through more than one support channel. Cases help businesses track customers' issues and ensure any agent who helps them at any time has the full context of their support history.

In 2021 release wave 2, we're enhancing the subject organizational structure that will make it easier for agents to view and search the subject tree hierarchy, thereby enabling them to find case subjects faster and decrease overall case resolution times.

Interact with Dynamics 365 records using Teams message extensions

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

Business value

Empower agents and customer service subject matter experts to easily search for and share Dynamics 365 Customer Service records directly in Microsoft Teams chats and channels. These users can also easily edit these records directly from Teams as they collaborate, eliminating the need to switch context or applications to get work done. With message actions, users can append notes or create tasks from Teams chat messages to specific Dynamic 365 records.

Feature details

Message extensions

- Send a quick summary of a record in a Microsoft Teams chat or channel as an interactable card.

- Search for Dynamics 365 records organized by relevance.
- Search for and filter Dynamics 365 records to share with your chat participants.
- Allow chat participants to add an activity or note to a record through interactable cards.
- Ensure that only those with proper security permissions can view details of the record.

Edit records easily in Microsoft Teams

- Chat participants can quickly update or edit a record from within a Microsoft Teams conversation.
- Chat participants can change the state of a record from within a Microsoft Teams conversation.
- Support customized forms and business rules specific to an organization.
- Ensure that only those with required security permissions have write access.

Message actions

- Add a note or task to a record's timeline from the context of a Microsoft Teams message in a chat or channel.
- Support customized forms and business rules specific to an organization.
- Ensure that only those with required security permissions have write access.
- Requires Dynamics 365 Enterprise license.

Improvements to the Universal Resource Scheduling-based service scheduling experience

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Aug 2, 2021	-	✓ Oct 4, 2021

Business value

In the previous release, we released the new schedule board with a modern and highly productive user experience. In this release, we're adding the remaining features to this new schedule board to bring parity with the old schedule board so that customers can switch to the new board and benefit more from the user experience and performance benefits.

Feature details

The Dynamics 365 Customer Service scheduling functionality will be improved in the following ways:

- The new schedule board will be the default view, with an option to switch back to old schedule board if preferred.

- Requirement groups allow you to define groups of resources that would be appropriate for a job and to then schedule all of those resources with a single search. The new schedule board will now support requirement groups, enabling you to directly make or update bookings. This capability will be available in October 2021.

See also

Service Scheduling overview (docs)

Modern control for subject entity

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Aug 2, 2021	✔ Oct 4, 2021

Business value

Dynamics 365 Customer Service includes a subject organizational structure that lets you mark and categorize service cases, knowledge base articles, and products. With this feature, we're introducing a new user experience that will make it easier to view and search the subject tree hierarchy.

Feature details

The new subject control will be available by default for out-of-the box forms, and will provide the following capabilities:

- Easy-to-view subject tree hierarchy
- Ability to search across parent subjects and child nodes
- Highlight search results

See also

Enable search control for subjects in custom forms (docs)

Scheduling and IoT capabilities in Customer Service workspace

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Aug 2, 2021	✔ Oct 4, 2021

Business value

The Dynamics 365 Customer Service workspace app increases agent productivity with the ability to work on multiple sessions at a time in a single workspace experience. Scheduling and IoT capabilities are currently available only in the Customer Service Hub app. This release addresses this gap and brings to Customer Service workspace the ability for agents to seamlessly manage appointments using the scheduling capabilities, and proactively resolve issues created from IoT alerts by leveraging the IoT capabilities.

Feature details

This feature provides service scheduling capabilities within Customer Service workspace (CSW). Key capabilities include the ability to:

- Set up resources, resource categories, services, and so forth.
- View and manage schedules on the schedule board.
- Manage appointment and service activity bookings.

This feature also provides Connected Customer Service capabilities within CSW. Key capabilities include the ability to:

- Manage IoT alerts.
- Manage devices.
- Create a case from an alert.

See also

Connected Customer Service in Customer Service workspace (docs)

Communities

Overview

Self-service is a critical first step in the customer service journey because it helps deliver high up-front resolution rates and increased customer satisfaction due to speed and convenience. Self-service also yields a significant Tier 1 agent cost reduction and better time utilization to build domain expertise. Communities is the engine that powers self-service because 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 (UGC) creation through formal and informal knowledge articles, Q&A forums, and blogs. And by leveraging feedback sharing, communities can join forces to impact and drive your future investments. This helps build trust and brand loyalty by demonstrating that you listen to your customers.

Community

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Oct 4, 2021	-	To be announced

Business value

Customers use the existing, template-based Community portal to offer basic ideation capabilities to their users. Very often, customers need to customize these templates for a richer end-user experience or to fit this experience with their brand. Community is a new portal-based Customer Service feature that provides customers with out-of-the-box capabilities to gather, collect, and respond to product ideas, customer feedback, and suggestions. The rich set of capabilities, combined with configurability, allows enterprises to use their brand to engage with their users through a plug-and-play experience. By promoting continuous engagement between companies and customers, Community can help increase customer loyalty and maximize the return on investment.

Feature details

Community provides the following capabilities out-of-the-box:

For users:

- Post a new idea
- Auto-suggest existing ideas to prevent duplication
- Browse existing ideas
- Filter
- Global and in-forum search
- Upvote
- Comment
- Flag inappropriate content
- Follow
- Share
- View the status and history of ideas users engaged with (personalized space)

For administrators:

- Reply to user content
- Change idea status
- Add a custom header or footer
- Fit to brand colors
- Add quick links
- Manage content, including moderation, and merge duplicate ideas
- Manage users and assign security roles
- Block users

See also

The new Community app and portal in Customer Service (video)

Overview of Community (docs)

Knowledge management

Overview

Knowledge management plays a vital role in enabling organizations to deliver world-class customer care. Allowing 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 helps drive 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 while helping customers to speed up support delivery.

Relevance search integration for knowledge management in portals

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Dec 20, 2021	-	-

Business value

The search engines used by Power Portal search and Dynamics 365 Customer Service search are different. This leads to inconsistent knowledge article search results across the two experiences for the same queries. With Relevance search, you get a seamless search experience with consistent search results. Portal users can now benefit from the steady stream of improvements being made to Relevance search.

Feature details

This feature enables portal users to use Relevance search while looking for knowledge management articles in the knowledge base. Relevance search replaces the current portal global search and has the following key capabilities:

- **Content access levels**: Utilize another level of control that's separate from web roles to control access to knowledge articles on a portal.
- **Filters**: Filter knowledge articles by rating and modified date.

For more information on relevance search support in the Power Apps portals, see Relevance search integration in portals in the Microsoft Power Platform: 2021 release wave 2 plan.

See also

Understand knowledge base search (docs)

Usability improvements in knowledge management

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓ Aug 2, 2021	✓ Oct 4, 2021

Business value

Creating and maintaining high-quality articles can be challenging and time-consuming. Having a simple and intuitive authoring experience will make it easy for the knowledge author to create articles and keep them relevant and accurate. This feature is composed of a set of usability improvements that will improve the knowledge authoring and consumption processes.

Feature details

Key capabilities of the feature include:

- An easy and intuitive experience for adding and managing knowledge article attachments.
- A visual cue to help distinguish internal and external knowledge content in the knowledge search results card.
- Improvements to the publishing experience in the Publish stage of the Knowledge Business Process Flow.

See also

Add a file attachment to a knowledge article (docs)

AI-suggested keywords and brief description for knowledge articles

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Oct 4, 2021	-	✓ Dec 20, 2021

Business value

Keywords and the description are important metadata elements of a knowledge article that help improve searchability and the surfacing of the relevant articles. It's important to have a variety of keywords to help align with the multiple ways that customers talk about their issues. Adding high-quality, diverse keywords and descriptions is time-consuming and often a challenge, especially for new authors. This feature uses AI to suggest keywords and a description for knowledge articles that can help make authors more productive, support them in following authoring best practices, and improve the searchability of knowledge articles.

Feature details

Key capabilities for this feature include:

- Automatic suggestion of article keywords based on an article's title and content present on the article.
- Automatic suggestion of article description based on the article's title and content.

See also

Configure AI suggestions for article keywords and description (docs)

Omnichannel voice

Overview

At Ignite in September 2020, we announced our voice channel for Dynamics 365 Customer Service. Using our Microsoft-built solution, we're providing simpler administration and management experiences without traditional cloud component integration complexities. Embracing this simplicity allows customers to focus on their core business outcomes while benefiting from the purpose-built abstractions of the Microsoft cloud.

In 2021 release wave 2, we're bringing together voice, SMS, and digital messaging channels with an intelligent interactive voice response (IVR) powered by Power Virtual Agents, real-time voice intelligence, insights across all channels, and speech-based self-service and intelligent skills-based routing.

Call intelligence

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔Nov 1, 2021

Business value

The transcript of a call and an in-depth analysis of a particular call recording can help an organization better understand how the engagement with the customer progressed and present opportunities for agent training.

Feature details

Through historical analytics, supervisors will be able to drill into a particular call to view more details. Each call will include voice-specific metrics, such as talk-to-listen ratio, talking speed, and more. Supervisors can also see the detailed sentiment throughout the call, shown alongside the transcript for further analysis. This view helps supervisors better understand how the call went and identify areas for improvement.

This capability leverages the call transcription and sentiment analysis to produce the following metrics:

- Talking speed
- Switches per hour
- Pause before speaking
- Longest customer monologue

See also

View call recordings and transcripts (docs)

Call recording

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Nov 1, 2021

Business value

Customer service agents typically need to review phone calls with customers. Call recording allows agents to record phone calls between agents and customers. This helps the organization to revisit the interaction to better understand the customer's issues in their own words and increase the possibility of resolving the customer's problems or questions. Call recordings are also helpful for training scenarios where an organization can share examples of great customer interactions among the team.

Feature details

When a phone conversation begins between a customer and an agent, the agent will have the option to record the phone call. The agent can pause and resume the recording at any time, and this can help prevent irrelevant or sensitive information from being recorded. Call recordings are stored natively in Dynamics 365 and are related to conversations, cases, and customers. When call recordings are used with call transcription, it is easy for agents to search through conversations and retrieve details.

See also

View call recordings and transcripts (docs)

Call transcription and real-time sentiment analysis

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Nov 1, 2021

Business value

Customer service agents often need to take notes while helping customers during a phone call. Call transcription converts a phone conversation into written words, which reduces the amount of notes an agent needs to take and helps with accessibility. Furthermore, sentiment analysis examines the conversation and identifies the general sentiment or mood of the customer—if they're slightly angry or very disappointed, for example. Call transcription and sentiment analysis are used by the system to proactively analyze cases and provide agents with suggestions for how to resolve issues.

Feature details

Call transcription converts a phone conversation into written words and then stores them as plain text while the call is in progress. Sentiment analysis tags a sentiment on the top of a conversation, and is continually updated as the conversation evolves.

Call transcription and sentiment analysis are included out-of-the-box, with no additional setup or configuration required.

See also

View call recordings and transcripts (docs)

Consult and transfer

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Nov 1, 2021

Business value

Omnichannel for Customer Service offers customer service agents the ability to easily consult with and transfer calls to other customer service representatives, and helps improve agents' ability to resolve customer issues.

Feature details

For customers' issues that require specific expertise to address, while on such a call with a customer, an agent can put the customer on hold and consult with another agent or manager. Agents can also transfer a call to a specific customer service agent, which is referred to as a warm transfer. In other scenarios, the agent can transfer the call to a queue from where it is then routed to the best-available agent based on rules that are configured by your business.

See also

Use agent dashboard and call controls in the voice channel (docs)

Direct outbound calling

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Nov 1, 2021

Business value

The ability of agents to contact customers using voice calling remains one of the most important customer interaction methods in Dynamics 365 Customer Service. Direct outbound calling enables agents to contact customers using our native, fully integrated voice channel based on Azure Communication Services, where voice is another channel for agents and supervisors.

Feature details

Agents can contact customers using voice calling. Direct outbound calls can be initiated using click-to-call directly from phone number fields in the following:

- Cases
- Customer profiles
- Call back activities
- Ongoing chat conversations
- Via a phone dialer

Outbound calls are displayed as conversations in the conversation history, contextually per case/customer and timelines. Supervisors can monitor outbound calls just like any other customer interaction.

This feature includes the following key highlights:

- A fully integrated outbound voice channel without third-party voice integration.
- A sample outbound voice channel that's configured automatically on voice channel provisioning.
- Easy channel administration within the Omnichannel admin experience.
- Outbound voice conversations that are just another conversation type in Omnichannel.
- Ability for supervisors to monitor outbound calls from within the ongoing conversations dashboard like any other agent or customer interaction.

See also

Call a customer (docs)

Embedded analytics for voice channel

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔Nov 1, 2021

Business value

Traditional dashboards have limited interactive capabilities and provide a narrow view into the overall organization. With historical data, embedded analytics for voice channel empowers service managers with the ability to identify problem areas and opportunities for improvement, and provides rich, slice-and-dice capabilities powered by Power BI.

Feature details

Customer service managers or supervisors are responsible for managing the agents who work to resolve customer queries every day through the phone channel. With this release, the embedded analytics provide trends over a period of time to help service managers understand how agents and queues are performing, so they can take corrective measures, provide appropriate guidance to agents, and improve the customer support experience. Key insights cards provide an at-a-glance view into notable trends on core metrics and topics that are important for a supervisor to investigate further in the comprehensive reports. Agent-focused views display core metrics to help better understand the primary areas an agent worked in and identify opportunities for coaching.

With these views, supervisors can:

- Monitor operational metrics—such as inbound calls, calls handled, abandon rates, average talk times, and average speed to answer calls—across channels, queues, agents, and topics.
- Monitor support quality through sentiment analysis across channels, queues, agents, and topics.

See also

Voice channel historical analytics, reports, and call insights (docs)

Intelligent voice bot via Power Virtual Agents and Microsoft Bot Framework

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔Nov 1, 2021

Business value

With speech-enabled Power Virtual Agents, businesses can empower their business users to build and update intelligent voice bots that use built-in natural language processing capabilities to engage conversationally with customers and provide personalized self-service. Bots can be built once and deployed across messaging and voice channels for maximum efficiency and consistency. For more advanced scenarios, businesses can integrate bots built with the Microsoft Bot Framework to work on the voice channel.

Feature details

With this feature, businesses have a familiar bot authoring experience for all the customer service bots, across messaging and voice. Customers can enjoy flexible, free-form service experiences, instead of inflexible menu trees. Bots can easily hand off the call to human agents with the conversation history and context gathered by them. This allows Omnichannel for Customer Service to route the customer from the bot to the best available live agent to provide a seamless and contextual handoff.

The key highlights of this feature include:

- Enable Power Virtual Agents and Microsoft Bot Framework bots to provide intelligent voice bots on the voice channel.
- Support for built-in dual-tone multifrequency as a secondary means to interact with the bot.
- Transfer calls to human agents with full transcript and context.
- Use bots for post-call surveys.

See also

Integrate a Power Virtual Agents bot for voice (docs)

Modern administration experience for Omnichannel voice (number management)

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Nov 1, 2021

Business value

Typically, customer service organizations must manually integrate standalone telephony and customer relationship management (CRM) solutions, which results in fragmented experiences and error-prone data integration. Administrators need to manage resources and phone numbers in the telephony provider’s app and manually bring over this information to the CRM solution. Very often, this setup process requires collaboration between business and IT administrators, adding delay to an already lengthy process.

With the availability of Azure Communication Services, Omnichannel for Customer Service now offers native voice channel. This all-in-one solution empowers business administrators to independently deploy a telephony resource and acquire phone numbers in a few steps, offering a fast and consistent experience.

Feature details

Until now, administrators created resources and managed phone numbers in a separate telephony application and then manually deployed the numbers in the CRM solution. The long, fragmented process is inconsistent and requires continuous maintenance to keep both applications in sync.

With the native voice channel, business administrators can deploy the telephony resource and acquire phone numbers without leaving the Omnichannel admin center app.

The key highlights of this feature include:

- Telephony resource deployment using connection string or sign-in to the Azure account.
- Acquisition of phone numbers of various types and plans.
- Release of phone numbers.

See also

Manage phone numbers (docs)

Modern administration for Omnichannel SMS via Communication Services (number management)

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔Nov 1, 2021

Business value

Typically, customer service organizations must manually integrate standalone telephony and customer relationship management (CRM) solutions, resulting in fragmented experiences and error-prone manual data integration. Administrators need to manage resources and phone numbers in the telephony provider's app and manually bring over this information to the CRM solution. Very often, this setup process requires collaboration between business and IT administrators, adding more delay to an already lengthy process.

With the availability of Azure Communication Services, Omnichannel for Customer Service now offers native new SMS channel. This all-in-one solution empowers business administrators to independently deploy SMS numbers and their acquisition in a few steps, offering a fast and consistent experience.

Feature details

Until now, administrators created resources and managed phone numbers for SMS in a separate application and then manually deployed the numbers in the CRM solution. The long, fragmented process is inconsistent and requires continuous maintenance to keep both applications in sync.

With the native SMS channel, business administrators can deploy the telephony resource and acquire phone numbers without leaving the Omnichannel admin center app.

The key highlights of this feature include:

- Telephony resource deployment using connection string or sign-in to the Azure account.
- Acquisition and management of phone numbers for use as an SMS source

See also

Manage phone numbers (docs)

Supervisor monitoring and barge

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Nov 1, 2021

Business value

Service managers are responsible for the overall quality of customer service, and they often need to observe customer service representatives who are on the phone with customers. Omnichannel for Customer Service allows supervisors to listen in on phone conversations and join a conversation, if needed. This helps supervisors increase the likelihood of resolving customer issues, enforce proper business practices, and identify training opportunities.

Feature details

Supervisors can now use the intraday insights dashboard to monitor phone calls along with other messaging channels. While monitoring phone calls they can review the live transcript of the calls and also choose to join in on the call anonymously as a hidden participant to ensure that the agents are offering the best service possible.

In this feature the supervisor can:

- Monitor ongoing phone calls in their queues.
- Review the live transcript of the call as it is in progress.
- Listen in on the call.
- Announce and join the call to help the agents out with the customers issue in real time.

See also

Monitor calls (docs)

Topic clustering for voice

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Nov 1, 2021

Business value

Topics are automatically generated using AI to organize similar issues into groups. By aggregating metrics from issues grouped into the same topic, organizations get a full view of KPIs and metric impact for each topic. For example, organizations can view the average handle time, sentiment, and customer satisfaction score (CSAT) for a specific topic, and whether the topic is a key driver for any of those metrics.

Feature details

Topics represent semantically similar support issues and help organizations to better identify and respond to issues that their customers face. Supervisors can correlate these topics along with core historical analytics to quickly see common issues by volume, CSAT impact, and new cases, and identify the areas in which they need to invest their time.

In this release, topics will be generated for the voice channel from the transcripts. This capability will help organizations better understand the issues that their customers face and the impact on core business metrics across the spectrum of engagement.

See also

Voice channel historical analytics, reports, and call insights (docs)

Voice channel powered by Azure Communication Services

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Nov 1, 2021

Business value

The new voice channel for Customer Service enables an all-in-one customer service solution without fragmentation or requirement of manual data integration. Our solution provides a single view of the customer that empowers agents to provide personalized service across all channels, and true omnichannel analytics and insights for agents and supervisors alike. Providing organizations with a choice of telephony delivered directly by Microsoft enables quick and easy deployment of a voice channel for their business.

Feature details

We are announcing the expansion of Microsoft Dynamics 365 Customer Service omnichannel capabilities to include a new voice channel, built on Microsoft Azure Communication Services. The addition of this channel gives businesses the scale and reliability of the calling platform that powers Microsoft Teams worldwide today. With native voice, businesses receive seamless, end-to-end omnichannel experiences within a single solution, ensuring consistent, personalized, and connected support across all channels of engagement. This end-to-end solution unifies all points of customer interaction data, enabling businesses to simplify and streamline their processes, gain instant insights into trends, and deliver faster resolution from AI-driven assistance—all while ensuring your data remains secure and compliant, backed by the trusted Microsoft cloud.

Typically, customer service organizations must manually integrate standalone telephony and customer relationship management (CRM) solutions, which result in fragmented experiences for agents and customers across engagement channels. Ultimately, these stitched-together solutions from multiple providers are not only complex to roll out and maintain but create data silos with disconnected insights of customer interactions and agent performance across channels. The addition of the voice channel enables Customer Service to offer businesses a solution that minimizes failure points caused by custom-built, complex integrations, and maximizes the ability to create better customer and agent experiences. This single, holistic solution also makes it easier to scale to meet changing business needs.

This feature enables organizations to adopt Azure Communication Services as a voice provider natively in Omnichannel for Customer Service, and facilitates the following features:

- Phone number procurement and management
- Ability to handle and distribute incoming calls
- Ability to make outbound calls
- Ability to manage SMS (inbound and outbound)
- Deep integration of voice into core Omnichannel for Customer Service functionality
- Real-time sentiment analysis
- Real-time transcription
- Real-time translation
- Real-time smart assist suggestions
- Operations management through supervisor dashboards
- Ability to record and manage phone calls

See also

Introduction to the voice channel (docs)

Service-level agreements

Overview

Businesses use service-level agreements (SLAs) to govern support products that customers either receive as part of their purchase or add on to their purchase. SLAs include policy details, such as how quickly a customer is entitled to receive support, how many support requests, and for how long after purchases a customer can be supported as part of the agreement.

Usability enhancements in service-level agreements

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Oct 4, 2021

Business value

Service-level agreements (SLAs) help businesses to 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

The enhancements in the SLAs include the following:

- **Recalculate SLA on case reactivation**: When a case is resolved with the SLA in *Pending* state the SLA will move to terminal status, such as *Succeeded*. If the case is then reactivated, the customers can choose whether to keep the respective SLAs in the terminal status or recalculate the status based on the current case details. This functionality will be offered as an option through the service configuration settings.
- **Past the deadline, display a timer as running instead of showing terminal status**: You can choose to show the timer with elapsed time, even after the SLA has reached the terminal status, such as expired or failed.

See also

Recalculate SLAs in terminal status (docs)

Timeline

Overview

The timeline is used across Dynamics 365 applications to capture activities such as 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 of the latest activity details with the customer to provide the most personalized support experience.

Bring your own data to timeline

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Oct 4, 2021

Business value

The timeline control provides an easy and immersive experience to view a customer's history across cases, accounts, or contacts. Understanding the customer's interaction history helps agents deliver more personalized service in an efficient and effective manner. Currently, the timeline shows only data that is stored within the customer's instance, which creates gaps in the interaction history that is visible to agents. This feature addresses this issue by allowing customers to bring data from outside their instance for view within the timeline.

Feature details

A new virtual data model provides makers with the ability to develop solutions that allow them to bring data that is not stored in Dataverse and display it on the timeline. The data contract provides full support for the current record card layout and filters, allowing for a seamless user experience, irrespective of the source of the data.

See also

Use custom connectors with the timeline control (docs)

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 2021 release wave 2, routing diagnostics for supervisors and improved historical analytics for unified routing have been planned.

Customer sentiment prediction for use in intelligent classification of incoming work items in unified routing

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Oct 4, 2021	-	-

Business value

Service requests may originate from any channel an organization supports to receive incoming support requests (work items) from customers. To ensure that the request is assigned to the most appropriate agent, work items must include the right details. In the work item classification stage, the rules and machine learning (ML) models can be used to add information on the work item, which can then be used to find the best-suited agent.

Feature details

Intelligent classification ensures that an incoming customer support request (or work item) has the best information available to be routed to the correct queue or agent. The key benefits of intelligent classification are as follows:

- Minimizes the overhead in creating and maintaining logical routing rules.
- Brings data-driven approach to routing by using the runtime "actuals" to predict values.
- The classification evolves over time as new data is produced and organic changes in customer service are automatically reflected in the routing system.

Building on the capability of the intelligent skill finder in unified routing, this wave will include support for other ML-based rules for classification. This includes sentiment analysis to identify customer sentiment and then route the work items to agents who are prepared to handle them.

See also

Identify customer sentiment for use in work item classification in Unified Routing (video)

Use sentiment prediction-based model in work classification preview (docs)

Effort estimation for use in intelligent classification of incoming work items in unified routing

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Oct 4, 2021	-	-

Business value

Service requests may originate from any channel an organization supports to receive incoming support requests (work items) from customers. To ensure that the request is assigned to the most appropriate agent, work items must include the right details. In the work item classification stage, the rules and machine learning (ML) models can be used to add information on the work item, which can then be used to find the best-suited agent.

Feature details

Intelligent classification ensures that an incoming customer support request (or work item) has the best information available to route it to the correct queue or agent. The key benefits of intelligent classification are as follows:

- Minimizes the overhead in creating and maintaining logical routing rules.
- Brings data-driven approach towards routing by using the runtime "actuals" to predict the values.
- The classification evolves over time as new data is produced and organic changes in customer service are automatically reflected in the routing system.

By building on the capability of the intelligent skill finder in unified routing, this wave will include support for other ML-based rules for classification. This includes effort estimation to understand the time required to address the work items and then route them to agents with the correct bandwidth.

See also

Classify incoming work items with effort estimation in Unified Routing (video)

Use effort estimation model in unified routing preview (docs)

Improved historical analytics for unified routing scenarios

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Oct 4, 2021

Business value

While diagnostics provides information on a particular work item, historical analytics help organizations identify trends of cases, conversations, and other work items throughout their organization.

Feature details

Administrators use unified routing and routing rules across the classification and assignment stages to help ensure the work item is assigned to the best suited agent. Embedded historical analytics provides an overview of routing performance of each channel to help optimize the routing strategy and improve the routing and workforce efficiency. Providing organizations a view of the effectiveness of configurations allows them to improve routing configurations to help increase their customer satisfaction and agent satisfaction scores.

See also

Supervisor view of historical analytics for unified routing (docs)

Routing diagnostics for supervisors

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔Oct 4, 2021

Business value

Logic in routing and assignment can be complex, and organizations want insight into what has occurred at each of the decision points. Especially when certain work items take longer time to be assigned or are incorrectly assigned, understanding what rules were evaluated to what result is critical to ensure the system is running as expected.

Feature details

Routing diagnostics helps an organization to better understand the path a work item takes after it comes into the routing system, through all the classification and assignment rules, to ultimately land in a queue or be assigned to an agent. Current routing diagnostics are available for administrators and are more focused on the workstream and queue routing. In this release, routing diagnostics are being introduced to supervisor experiences, and the quality of the diagnostics is being improved.

See also

Access diagnostics for unified routing (docs)

Overview of Dynamics 365 Field Service 2021 release wave 2

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.

For the 2021 release wave 2, we will deliver rich scenarios in several areas including:

- Streamlined onboarding experience for faster time-to-value and production deployment.
- Redesigned work order form that will boost users' productivity by improving information architecture with an enhanced user interface.
- Enhanced frontline worker experience with capabilities such as mixed-reality calling and improvements on the Field Service mobile experience.
- Comprehensive customer engagement capabilities for companies to be in close communication with their customers.
- Enhanced new schedule board experience with essential features carried over from old experience and additional usability improvements.

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 October 2021 through March 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.

Empower frontline workers

Dynamics 365 Field Service empowers frontline workers with new capabilities that boost service productivity.

Feature	Enabled for	Public preview	Early access*	General availability
Windows 10 support for Field Service (Dynamics 365) mobile app	Users by admins, makers, or analysts	✔ Oct 1, 2021	-	-
Field Service (Dynamics 365) mobile app usability enhancements	Users, automatically	-	✔ Aug 2, 2021	✔ Oct 1, 2021
Functional location and asset tree improvements	Users, automatically	-	✔ Aug 2, 2021	✔ Oct 1, 2021
Collaborate throughout the work order lifecycle with embedded Microsoft Teams	Users by admins, makers, or analysts	✔ Nov 5, 2021	-	Jan 2022

Engage end-customers

Dynamics 365 Field Service customer engagement features include self-scheduling and a new landing page for your customers.

Feature	Enabled for	Public preview	Early access*	General availability
Enable customers to schedule service visits with a simple web experience	Users by admins, makers, or analysts	✔ Oct 1, 2021	-	-
Engage your customers with the new customer experiences home page	Users by admins, makers, or analysts	✔ Oct 1, 2021	-	-

Optimize service operations

Dynamics 365 Field Service features for proactive service delivery allow admins and service managers to get tasks done quickly with new simplified workflows.

Feature	Enabled for	Public preview	Early access*	General availability
New feature spotlight in the Field Service Get Started hub	Admins, makers, marketers, or analysts, automatically	-	-	✓Oct 1, 2021
Modular work order pricing	Users, automatically	-	✓Aug 2, 2021	✓Oct 1, 2021
Work order form simplification	Users, automatically	-	✓Aug 2, 2021	✓Oct 1, 2021
Work order ribbon simplification	Users, automatically	-	✓Aug 2, 2021	✓Oct 1, 2021
Enable location sharing by default for new organizations	Admins, makers, marketers, or analysts, automatically	-	-	✓Oct 4, 2021

Resource scheduling

Dynamics 365 Field Service resource scheduling features include key enhancements on bookings, scheduling, and resource optimization capabilities.

Feature	Enabled for	Public preview	Early access*	General availability
Resource work hours extensibility	Users by admins, makers, or analysts	-	-	✓Oct 1, 2021
Improved user experience with new schedule board enhancements	Users, automatically	-	✓Aug 2, 2021	Jan 2022

* You are able to opt in to some features as part of early access on August 2, 2021, 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.

Empower frontline workers

Overview

Service technicians and frontline workers are the essence of any field service organization. They're at the vanguard of providing excellent customer service by fixing their issues. It's critical that frontline workers have the best digital tools, enabling them to engage with their peers, with the back office, and with customers while staying on top of their field duties.

Empowering technicians and frontline workers to perform better service and achieve high first-time fix rates is a core objective of Field Service. The following section includes 2021 release wave 2 features to help service technicians be better at their jobs.

Windows 10 support for Field Service (Dynamics 365) mobile app

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

Business value

The Field Service (Dynamics 365) mobile app 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 your Dynamics 365 applications.

Feature details

The Windows Field Service app will include:

- Robust 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 Field Service mobile app.

See also

Field Service (Dynamics 365) app for Windows 10+ devices (preview) (docs)

Field Service (Dynamics 365) mobile app usability enhancements

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓ Aug 2, 2021	✓ Oct 1, 2021

Business value

With usability enhancements in the Field Service (Dynamics 365) 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 reduce the number of taps needed to perform various common tasks. These enhancements help reduce the time frontline workers need to spend in the app, and lets 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:

- Ability to add up to three custom fields on the mobile booking calendar control. Users will be able to see at a glance information they need to prepare for upcoming service visits.
- Multiline text boxes will now expand to fit the amount of text entered.
- Date and time input will leverage default input controls provided by the device operating system. Use the same input patterns that you are familiar with in other apps on your mobile device.
- Work orders will default to use modern task-completion controls for work order service, work order product, and work order service tasks. Easily check off completed tasks and update products and services used with large, touch-friendly icons.

See also

Use the Field Service Dynamics 365 mobile app to complete work orders (docs)

Functional location and asset tree improvements

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓Aug 2, 2021	✓Oct 1, 2021

Business value

Asset managers and frontline workers need to understand the complete hierarchy of locations and complex hierarchical assets to provide world-class service. These enhancements to the assets and locations tree control make this information easier to search and visualize.

Feature details

The following enhancements make it quicker and easier to find locations and assets to help when visualizing or creating customer location and asset structures.

1. If you initially searched for locations but not assets, check **Show assets** to immediately retrigger the search and show the matched assets.
2. When searching for assets or locations, you can now see how many records match the search.
3. You can expand and collapse multiple nodes of the tree at once with the global expand and collapse buttons.
4. Matched search results are now highlighted even more clearly to help users see the matches.

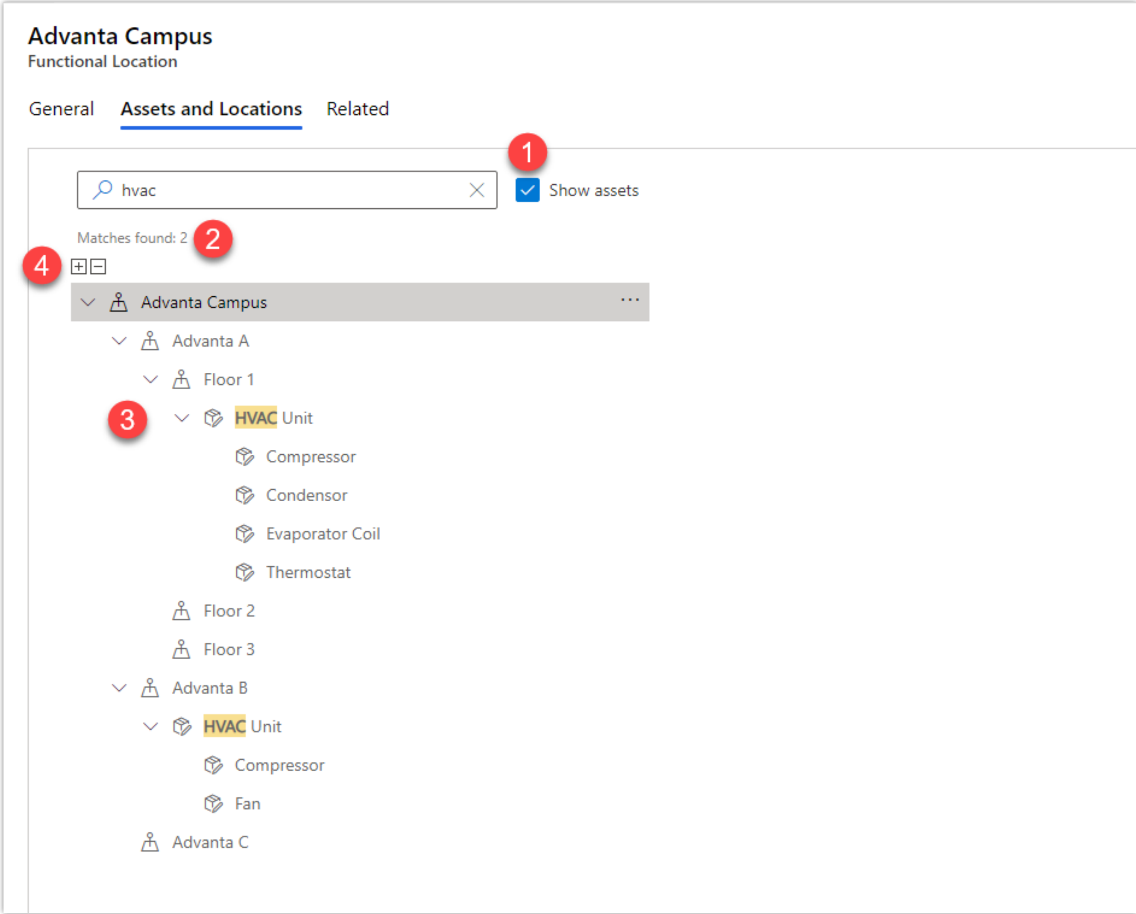


Image showing four enhancements to the assets and locations tree.

See also

Search the functional location tree (docs)

Collaborate throughout the work order lifecycle with embedded Microsoft Teams

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔Nov 5, 2021	-	Jan 2022

Business value

Field service organizations are geographically dispersed between dispatch centers, customer service centers, and customer locations. However, collaboration is critical to ensure an optimal outcome for customers. The work order process requires collaboration between customer service agents, dispatchers, asset managers, account representatives, and multiple frontline workers. For example, dispatchers constantly communicate with frontline workers to understand whether they are running on time with their current job so they can adjust the schedule accordingly. Collaboration has traditionally been a source of pain. At best, when organizations have a collaboration application, people need to leave their workspace and open a separate application to communicate with their colleagues, wasting valuable time that could be better spent helping customers. These conversations are not linked to the work order, which means that as new stakeholders are brought in, they are missing critical context about the work order.

In other cases, organizations do not provide a collaboration application, which means people use their own private tools such as SMS and other chat applications. This exposes organizations to security risks and further disconnects conversations from the rest of the team.

By embedding Microsoft Teams within the work order experience, you can easily collaborate with your entire organization. And when enabled, even external contacts such as customers and third-party subcontractors, always keep the correct information in the work order context.

Feature details

With embedded Microsoft Teams collaboration into Field Service, any user involved in the work order process can collaborate using Teams functionality while seeing all the critical contextual conversations to ensure an optimal outcome.

Teams integration includes the following capabilities:

- Chat with colleagues from within the work order form, even if the conversation is not related to the work order, saving you from switching to the Microsoft Teams app whenever you need to chat. View your existing chats, or initiate a new chat.
- Initiate a new chat with one or many colleagues, and optionally link the chat to the work order. When you initiate a new linked chat, you're creating a brand new chat, which means any previous conversations you had with the chat participants will not be brought into the new discussion, keeping the context of the chat all about the work order.
- If a chat is linked to a case, and the case is then converted into a work order, that chat will automatically link to the work order for seamless cross-departmental collaboration.
- Associate conversations to the work order, making it easy for your team members to see a clear picture of the status and history of the work order, right in the context of their workspace. As new people engage to help complete the work order - such as a new frontline worker to help fix a problem - they can easily join the conversation and help deliver exceptional service.

This integration will allow web users to seamlessly launch the full Microsoft Teams app from the chat pane and frontline workers using the Field Service (Dynamics 365) mobile app to collaborate through the Microsoft Teams mobile app.

See also

Collaborate on work orders with Microsoft Teams (docs)

Engage end-customers

Overview

Frontline workers' engagement with their customers has never been more important. These touchpoints are opportunities for the service organization to build trust and long-lasting relationships with their customers.

The following section includes 2021 release wave 2 features to empower customers to be in closer contact with their technicians and the field service company. Customers can schedule and track their service visits from a single online destination without needing to wait to connect with the contact center.

Enable customers to schedule service visits with a simple web experience

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

Business value

A significant portion of a support agent’s time is spent talking with customers and taking their preferences into account to schedule or reschedule a service visit. By adopting the customer self-scheduling feature, you'll empower your customers to schedule service visits at their convenience, directly from their devices. This will improve their experience by providing them with flexibility, reducing scheduling errors and unwanted rescheduling. It will also reduce your organization's back-office costs by reducing support call volume associated with scheduling and freeing up those resources to focus on other value-driving activities.

Feature details

This is an update to the preview of the feature that was released in 2021 wave 1.

With self-scheduling, you empower your customers to schedule service visits based on their preferences, without having to speak with a customer service agent.

The self-scheduling feature is based on the Power Apps portals, providing a responsive customer-focused interface that can be accessed from any device. The feature follows a similar template-based deployment pattern to that of the track my technician feature, previously released in 2021 wave 1. Your customers can access self-scheduling from the customer experiences home page. You can theme and brand the experience to match your own company styles, giving a consistent look and feel across your own web properties.

Your customers will gain access via direct invitations, which can be automatically sent to new or existing customers. As part of this update, you can also invite an individual customer manually if needed. When customers are scheduling, they will be offered available time slots based on real-time resource availability, location, and skills. This update ensures that suitable resources are automatically assigned to optimize for least travel duration. This logic is based upon the resource setup that you have already configured in Dynamics 365 Field Service. Also part of this update, when customers select a service time, the booking incorporates the expected travel duration and adjusts the start time of the field technician such that the technician arrives at the customer's expected time.

You can also collect important pre-service customer information as part of the scheduling request, which can provide guidance to service technicians when they visit. This feature is initially supported for onsite service visits only.

In this update, we have also improved the experience for administrators by adding validations and error messages while configuring an incident type for self-scheduling.

See also

Enable customers to self-schedule service appointments in Field Service (docs)

Engage your customers with the new customer experiences home page

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

Business value

Making your customers feel empowered is a key aspect of building trust and long-lasting relationships with them. Doing so while reducing your support costs is even more critical for the success of the service organization.

The new customer experience home page is the online destination for your customers to engage with you and manage their service. Instead of calling into a support center for common tasks such as scheduling a service visit or tracking the status of a technician for an ongoing booking, your customers can self-serve through this home page. It gives your customers freedom to check on and manage their service at their own convenience, while lowering your organization’s back-office costs by reducing call volume.

Feature details

The customer experience home page serves as the entry point for your customers to view their service history and manage their service visits.

Only users who are invited to the experience by service organizations can access it after registering on the portal. This secure, authenticated experience protects your customers’ data. The home page will provide your customers a starting point to leverage different engagement experiences. Customers will be able to see a list of their upcoming bookings. For current bookings, they will be able to use the track my technician functionality to locate their technicians. They will also be able to use a self-scheduling feature to create future bookings or reschedule them.

The home page has a responsive interface built on Power Apps portals and is accessible from any device. Users can theme and brand the experience to match their own company's styles, giving a consistent look and feel across your various web properties.

See also

Field Service customer experience homepages (docs)

Optimize service operations

Overview

Optimizing field service operations starts with empowering field service admins to quickly deploy Dynamics 365 Field Service. Simplified workflows mean service managers can more easily manage service work orders, and make sure frontline workers successfully meet customer requirements on time.

The following section includes 2021 release wave 2 features that include a new simplified trial experience, next wave of deployment updates where key features are on by default to decrease admin effort and time to deploy, and work order form usability improvements to increase service manager productivity.

New feature spotlight in the Field Service Get Started hub

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 1, 2021

Business value

The new feature spotlight in the Field Service Get Started hub makes it easier for admins to learn about new features and continuously transform their field service operations.

Feature details

In 2021 release wave 1, we released the Get Started hub as a place for admins to discover and easily adopt Dynamics 365 Field Service. In 2021 release wave 2, we're updating the spotlight at the top of the Get Started hub with a carousel view that introduces new features, along with supporting videos and links to documentation where you can learn more.

See also

Get started with Dynamics 365 Field Service (docs)

Modular work order pricing

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓Aug 2, 2021	✓Oct 1, 2021

Business value

For many field service organizations, pricing is not critical or not something they intend to derive out of their Field Service solution. The new setting makes it simpler to disable pricing in a Field Service implementation where pricing is not relevant or needed within Field Service. Disabling pricing when it isn't relevant removes unnecessary elements from the user interface and business process, and allows organizations to focus their system on concepts that are more critical to their business.

Feature details

For many Field Service organizations, pricing is not something they intend to use within their Field Service implementation. This can be because:

- These service organizations don't need to see pricing information or generate invoices, perhaps because they provide services to their own internal field resources and don't need to calculate a price for an invoice.
- Organizations may intend to generate invoices from their downstream, existing ERP systems and only need Field Service to send over the relevant data that the downstream system uses to generate a price and accurate invoice.

Field Service pricing will continue to be on by default.

To disable, a Field Service administrator or system administrator can change the **Calculate Price** toggle in Field Service settings.

When pricing is disabled, required pricing fields and logic are disabled and removed from the work order, work order product, and work order service records; relevant out-of-the-box views for both web and Field Service mobile app users are updated.

See also

Work order and bookings settings (docs)

Work order form simplification

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓Aug 2, 2021	✓Oct 1, 2021

Business value

Work orders are critical to field service operations, as they capture the customer service required, the work to be done, and when the work must be done. With this wave, we introduce a few simple changes to the work order form that will improve the time and effort required by back-office users and frontline workers to quickly manage the work order's current state and understand or update a work order's committed service timing.

Feature details

Based on customer feedback, we have identified a number of ways for Field Service to simplify the work order form for back-office staff and frontline workers in the field.

This release includes a few important work order form simplifications:

- **Work order completion dialog**: Historically, when a user set the work order to complete, if the work order had bookings in an incomplete state, Field Service would present the user with an error message. With this improvement, we've implemented a dialog to help the user understand why they're blocked and provide them with a simple action to complete or cancel their open bookings and successfully set the work order to complete. This change will help both back-office staff and frontline workers in the field as they navigate a work order through its lifecycle.
- **Simplifying time commitments on work order**: Customers have expressed confusion with the multiple fields currently available to track work order time commitments. In this release, we are hiding the **Date Window Start** and **Date Window End** fields so that time commitments for all use cases leverage the **Time From** and **Time To Promise** fields, including on the Field Service agreements.
- **Label updates**: The work order system status labels were simplified. For example, the status label *Open - Unscheduled* was updated to *Unscheduled*.

For all new implementations, this updated behavior will be the default; existing customers will not be impacted by this change unless their Field Service administrators or system administrators change the **Pre/Post Booking Flexibility Date Field Population** setting in the **Agreements** tab of their Field Service settings.

See also

Work order user interface settings (docs)

Work order ribbon simplification

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Aug 2, 2021	✔ Oct 1, 2021

Business value

Work orders are critical to field service operations, as they capture the customer service required, the work to be done, and when the work must be done. With this wave, we simplify the work order ribbon to improve usability by back-office users and frontline workers so they can more easily trigger the actions important to their daily business.

Feature details

Based on customer feedback, we have identified a number of simplifications for the ribbon on work orders. These changes improve the usability and comprehension of the ribbon on the work order form and work order views.

- **Simplified ribbon for work order**: We've simplified the ribbon by removing the less frequently used commands for the work order's form and list views. This change will be on by default for all new and existing organizations. As needed, a Field Service admin or system admin can bring back all commands by disabling this new functionality using the new setting in **Field Service Settings** > **Show Simplified Work Order Commands**.
- **Improved geocoding and address suggestion dialog**: In this release, the geocode dialog has an improved layout with a larger map, making it easier to move the location marker and update the geolocation along with a simplified autocomplete address field. Any updates made in the geocode dialog will be reflected back on the contextual record, such as work order, account, contact, functional location, and user record types.

See also

Work order and bookings settings (docs)

Enable location sharing by default for new organizations

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 4, 2021

Business value

By enabling location sharing for new organizations, dispatchers can schedule service appointments based on nearby frontline workers; your customers will receive service reminders that include estimated technician arrival times on the service day. This functionality maximizes field service operations while minimizing missed appointments.

Feature details

Admins deploying new Field Service organizations will be ready to monitor and optimize their service operations with location sharing.

Key notes about this functionality:

- Location sharing will be enabled for new organizations only.
- This update won't impact existing deployments, nor organizations in the sovereign cloud.
- Admins can disable location sharing; for more information, see our Field Service documentation.
- When frontline workers download the Dynamics 365 Field Service mobile app, they will get the mobile OS prompts to control how they share their location.
- For location sharing, your data will flow outside your organization's compliance and geographical boundaries. See Microsoft Privacy statement for more information.

See also

Location auditing for the Dynamics 365 Field Service mobile app (docs)

Resource scheduling

Overview

Resource management and scheduling optimization are at the heart of field service management. Resource scheduling is a powerful tool for service organizations to triage the unscheduled work orders and cases and schedule the nearest eligible technicians to deliver service to their customers. The schedule board offers scheduling capabilities for dispatchers, project managers, and resource managers in different views of the board (hours, days, weeks, months, maps, list, and more), as well as extensibility capabilities for partners to tailor functionality to meet their needs.

In the 2021 release wave 2, we are bringing the schedule assistant experience and extensibility to the new schedule board so users can enable the new schedule board as their default experience. We are also enabling extensibility on how users could manage the work hours for frontline workers or project resources, so you can use your custom applications to input these work hours.

Resource work hours extensibility

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

Business value

Many customers choose to create custom applications to manage work hours calendars. Having a programmatic way to create and update work hours calendars will make it easier to include these capabilities in their experiences. Additionally, it will also let customers and partners build integrations with applications such as Dynamics 365 Finance and Supply Chain

Management, and maintain the same work hours for their resources across multiple different systems.

Feature details

With the new resource work hours extensibility, you can use APIs to:

- Update a resource's work hours. For example, a resource works 9 AM to 5 PM, Monday through Friday; these hours can be changed to 10 AM to 4 PM with a 1-hour of break at 1 PM on only Mondays and Wednesdays.
- Delete a resource's work hours. For example, a resource has a day off planned for next Monday, but as the resource's plan change, they can delete the time off.

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.

See also

Edit work hour calendars by using APIs (docs)

Improved user experience with new schedule board enhancements

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔Aug 2, 2021	Jan 2022

Business value

The schedule board is a core piece of functionality for service managers and dispatchers. In 2021 release wave 2, we're adding remaining features to the new schedule board to bring feature parity between the old and new schedule boards so that customers can switch to the new board and experience enhanced productivity through a better user experience.

Feature details

We are bringing the following capabilities to the new schedule board:

- Find availability functionality for finding the best available resources to schedule jobs, which could last from a few minutes to as much as a few months. Single resources (such as accounts, contacts, users, and equipment) or multiple resources (such as crews, pools, and facilities) can be scheduled to jobs.
- Make the settings available on the schedule board tab so users can create and configure their tabs, and don't need to switch back to the old schedule board.

- Custom fields on a work order or requirement can be displayed as a filter on the schedule board, and can also be considered while finding the best available resource via custom attributes by using the Universal fetchXML queries.
- Custom fields on the work order or requirement can be displayed on the booking information or booking alerts that are displayed on hourly view of the new schedule board.
- Customers can use custom JavaScript methods that can be executed prior to creation or update of the bookable resource booking records on the hourly view of the new schedule board.
- The schedule board functionality in hourly view can be extended via different client-side extensions such as scripts, stylesheets, and localization.

See also

Experience the new and improved schedule board in Dynamics 365 Field Service (docs)

Finance and Operations

Overview of Dynamics 365 Finance 2021 release wave 2

Microsoft Dynamics 365 Finance enables organizations to monitor global financial operations in real time, predict outcomes, and make data-driven decisions to drive business agility and growth. Dynamics 365 Finance provides deep data and process integrations across Dynamics 365, Office 365, and partner applications to offer a centralized source of financial information that saves time, facilitates cross-org collaboration, and enables faster, better-informed decisions. It empowers users to do business anywhere, anytime, with an intuitive user interface personalized for their role and preferences.

Driving action through intelligent insights

Finance is the core of all businesses, and there's an immense opportunity to innovate through supporting new business models, embedded intelligence and automation, and reimagining how finance individuals work and interact with their data. Dynamics 365 Finance continues to lead in providing intelligence and automation to our users in a trusted way. The 2021 release wave 2 plan will focus on data-driven insights as part of the general availability of Finance Insights. Finance Insights is our intelligent cash flow offering with automation based on predictive results. Now, users can be empowered with out-of-the-box machine learning for their financial operations. This would include viewing when customers are predicted to pay, forecasting what the budget should be, and viewing forecasted cash positions based on actual accounts payable, accounts receivable and project transactions, and predicted outcomes.

Enhanced usability on everyday activities

To ensure that financial activities close on time, we're enabling our customers to increase productivity when it critically matters the most. Through automation and modernizing the services that our customers use daily, we're bringing enhanced usability and performance around fixed assets, year-end close, and financial dimensions.

Expanding global coverage, decreasing global complexity, and simplifying extensibility

We continue to enhance our globalization offering by focusing on two main areas. Firstly, we'll ship even more countries and regions out of the box, to simplify global Dynamics 365 Finance usage by our customers. In addition to the six new countries and regions we shipped in the last two waves, we'll add Indonesian localization in 2021 release wave 2.

Secondly, we'll continue enhancing our configurable, no-code/low-code globalization capabilities and transform them into globalization microservices that enable enterprise-scale functionality and performance, and further simplify globalization extensibility. We'll bring our Tax Calculation service to general availability and support complex tax compliance scenarios. We'll extend the functionality and country coverage for our Electronic Invoicing service and will enable its integration with any first-party or third-party application via Microsoft

Dataverse. We'll also ship several enhancements of configurable business documents and electronic reporting.

What's new and planned for Dynamics 365 Finance

This topic lists features that are planned to release from October 2021 through March 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

Enhancements to core financial capability put a focus on quality, performance, and customer-requested enhancements.

Feature	Enabled for	Public preview	General availability
Prevent posting depreciation to the same period twice	Users by admins, makers, or analysts	-	✔ Oct 1, 2021
Display lease ID on fixed asset record	Users by admins, makers, or analysts	✔ Aug 31, 2021	✔ Oct 1, 2021
Pass service life from Asset leasing to Fixed assets	Users by admins, makers, or analysts	✔ Aug 31, 2021	✔ Oct 1, 2021
Create collections activities based on payment predictions	Users by admins, makers, or analysts	✔ Aug 31, 2021	✔ Oct 29, 2021
Edit Asset leasing journals	Users by admins, makers, or analysts	-	✔ Nov 5, 2021
Invoice automation – apply prepayments to vendor invoices automatically	Admins, makers, marketers, or analysts, automatically	-	✔ Nov 30, 2021
Prevent automatic one-voucher usage in fixed assets	Users by admins, makers, or analysts	-	✔ Nov 30, 2021

Feature	Enabled for	Public preview	General availability
Reopen lease book status	Admins, makers, marketers, or analysts, automatically	-	✓ Nov 30, 2021
1099 report revisions for 2021	Users by admins, makers, or analysts	-	✓ Dec 22, 2021
Add payment breakdown on lease payments	Admins, makers, marketers, or analysts, automatically	-	✓ Dec 22, 2021
Adjust posting date automatically during invoice posting	Users by admins, makers, or analysts	-	✓ Dec 22, 2021
Lease impairment enhancements	Users by admins, makers, or analysts	-	✓ Dec 22, 2021
Open vendor transaction report	Users by admins, makers, or analysts	-	✓ Dec 22, 2021
Reverse posted bank statements	Users by admins, makers, or analysts	-	✓ Dec 22, 2021
Revert to simple bank reconciliation from advanced bank reconciliation	Users by admins, makers, or analysts	-	✓ Dec 22, 2021
Unmatch all bank statements and transactions	Users, automatically	-	✓ Dec 22, 2021
Create invoice lines based on the quantity option parameter in Accounts payable	Admins, makers, marketers, or analysts, automatically	-	Jan 2022
Financial Dimension service	Users by admins, makers, or analysts	-	Feb 2022
Increase the length of invoice numbers	Users by admins, makers, or analysts	-	Feb 2022
Invoice automation – process vendor invoices during the import process	Admins, makers, marketers, or analysts, automatically	-	Feb 2022

Feature	Enabled for	Public preview	General availability
Lock the main account type and validate the offset account type in payment journals for customers and vendors	Users by admins, makers, or analysts	-	Feb 2022
Use unique journal names for lease modification	Users, automatically	-	Feb 2022

Finance insights

Taking advantage of the power of AI, finance insights enable you to understand your company's cash position and take proactive action to improve it.

Feature	Enabled for	Public preview	General availability
Customer payment predictions	Users by admins, makers, or analysts	-	✔ Jan 10, 2022
External data for cash flow forecasting	Users by admins, makers, or analysts	-	✔ Jan 10, 2022
Forecast bank balance	Users by admins, makers, or analysts	-	✔ Jan 10, 2022
Intelligent budget proposal	Users by admins, makers, or analysts	-	✔ Jan 10, 2022
Treasurer workspace	Users by admins, makers, or analysts	-	✔ Jan 10, 2022

Globalization

Enhancements to globalization focus on further out-of-the-box global expansion and simplifying compliance and extensibility via no-code/low-code services.

Feature	Enabled for	Public preview	General availability
Electronic Invoicing service – configurable e-invoice submission to the Italian SDI system	Users by admins, makers, or analysts	✔ Oct 15, 2021	-

Feature	Enabled for	Public preview	General availability
Configurable business documents – delegated account setup for emailing via electronic reporting destinations	Users by admins, makers, or analysts	✔ Aug 1, 2021	✔ Oct 1, 2021
Configurable business documents – specific destinations via printer management settings	Users by admins, makers, or analysts	✔ Aug 1, 2021	✔ Oct 1, 2021
Configurable business documents – support for configurable images in headers and footers	Users by admins, makers, or analysts	✔ Aug 1, 2021	✔ Oct 1, 2021
Electronic reporting – query reuse for performance improvements	Users by admins, makers, or analysts	✔ Aug 1, 2021	✔ Oct 1, 2021
Tax Calculation service	Users by admins, makers, or analysts	✔ Apr 16, 2021	✔ Oct 8, 2021
Tax Calculation service – sales tax group determination	Users by admins, makers, or analysts	✔ Apr 16, 2021	✔ Oct 8, 2021
Tax Calculation service – supporting multiple VAT IDs	Users by admins, makers, or analysts	✔ Apr 16, 2021	✔ Oct 8, 2021
Tax Calculation service – supporting tax in transfer order	Users by admins, makers, or analysts	✔ Apr 16, 2021	✔ Oct 8, 2021
Tax reporting – supporting multiple tax registration numbers	Users by admins, makers, or analysts	✔ Apr 16, 2021	✔ Oct 15, 2021
Electronic reporting – enhanced parameters per legal entity	Users by admins, makers, or analysts	-	✔ Nov 5, 2021
Electronic Invoicing service – configurable Saudi Arabian e-invoice	Users by admins, makers, or analysts	-	✔ Nov 9, 2021
Tax Calculation service – integration with free text invoice	Admins, makers, marketers, or analysts, automatically	✔ Apr 16, 2021	✔ Dec 10, 2021

Feature	Enabled for	Public preview	General availability
Configurable business documents – specific destinations via printer management settings in the reports (phase 1)	Users by admins, makers, or analysts	-	Dec 2021
Tax Calculation service – enabling tax calculation parameters by tax jurisdiction	Users by admins, makers, or analysts	✓ Apr 16, 2021	Jan 2022
Electronic Invoicing service – configurable Indonesian e-invoice	Users by admins, makers, or analysts	Jan 2022	Feb 2022
Global expansion – Indonesian localization	Users, automatically	Jan 2022	Feb 2022
Tax Calculation service – integration with general journal	Admins, makers, marketers, or analysts, automatically	✓ Apr 16, 2021	Mar 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.

Core financials

Overview

This release in core finance is focused on bringing additional enhancements to core financial functionality and preparing customers for successful year-end close and daily interactions. The focus is on quality, performance, and customer-requested enhancements, modernizing the core daily processes to services around financial dimensions and year-end activities.

Prevent posting depreciation to the same period twice

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 1, 2021

Business value

This feature lets you prevent depreciation from being posted to a period that depreciation has already been posted to.

Feature details

This feature will validate depreciation transactions during posting. The posting process will be stopped if depreciation for the same asset has already been posted for the same period. A message will alert you to that fact, and include the asset ID and book ID.

See also

Fixed asset transaction options (docs)

Fixed asset transaction options (learn)

Display lease ID on fixed asset record

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 31, 2021	✔ Oct 1, 2021

Business value

By updating the asset record in Fixed assets from a transaction in Asset leasing, this feature saves data entry time and helps reduce the possibility of errors by syncing information automatically.

Feature details

This enhancement automatically synchronizes asset IDs in Fixed assets and Asset leasing for fixed assets that were acquired using the initial recognition transaction in Asset leasing. The lease description and lease book are also entered in Fixed assets.

See also

Associate fixed assets with leases (docs)

Create a lease schedule (learn)

Pass service life from Asset leasing to Fixed assets

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 31, 2021	✔ Oct 1, 2021

Business value

By updating the service life of a leased asset in Fixed assets, this feature helps you maintain compliance with current accounting standards. It automates the process of passing service life from Asset leasing to an asset book.

Feature details

This enhancement allows the service life of an asset to be added automatically to the asset book in Fixed assets. The service life information is taken from the lease term or the asset useful life, whichever is less, in Asset leasing. This feature must be enabled in the **Feature management** workspace.

See also

Associate fixed assets with leases (docs)

Associate fixed assets with leases (learn)

Create collections activities based on payment predictions

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 31, 2021	✔ Oct 29, 2021

Business value

Collections process automation can save time by setting up a consistent strategy for your collection process. Customer payment predictions can predict when customers are likely to pay an invoice late. By combining both features, you have one more automated tool to reduce the amount of time spent researching customer invoices and determining collection activities that will help your business get paid faster.

Feature details

Customer payment predictions predicts the likelihood that a customer invoice will be paid on time, late, or very late by assigning a percentage to each invoice. If you know the likelihood of an invoice being paid late, the Collections process automation feature can create collections activities for those invoices. You can also set up a threshold or benchmark percentage. Setting a benchmark helps ensure that collections activities are created only for the invoices where the predicted percentage of being paid late is greater than the percentage you set.

See also

Use Customer payment predictions (docs)

Edit Asset leasing journals

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Nov 5, 2021

Business value

This feature makes it easier to capture vendor invoices on lease payment transactions, while also providing flexibility to edit certain fields on an Asset leasing journal before posting. The feature also helps maintain accuracy by not letting you edit other fields, such as the field that displays the account ID.

Feature details

This feature lets you edit specific fields in Asset leasing journals. You can edit fields that contain information for the invoice number, invoice date, description, sales tax group, and item sales tax group. Other fields, including those for the account, amount, and financial dimensions, can’t be edited.

See also

Set up lease journal names (docs)

Invoice automation – apply prepayments to vendor invoices automatically

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 30, 2021

Business value

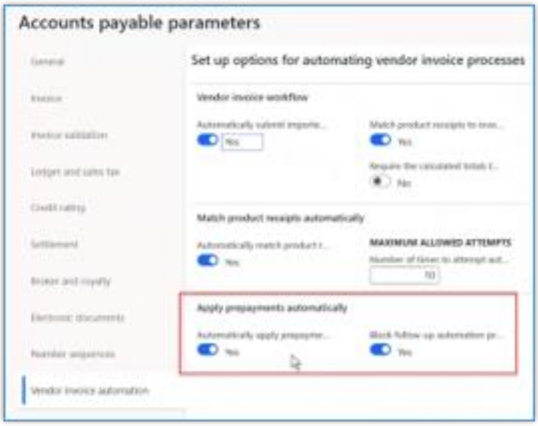
This feature saves effort by your accounting staff and can help reduce errors that can occur when processing information manually.

Feature details

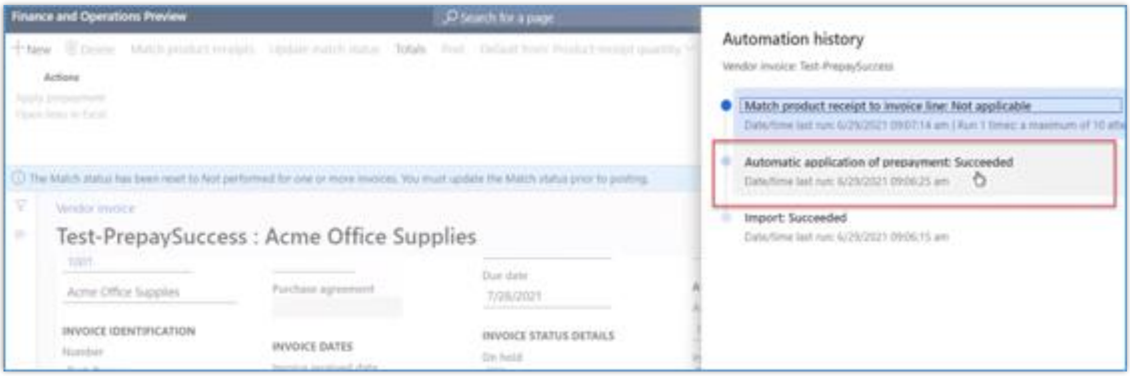
New parameters have been added in Account payable to let the system apply prepayments to vendor invoices automatically.

If this feature isn’t enabled and a purchase order is created based on a purchase agreement, an accounts payable clerk must apply a prepayment to the resulting invoice manually before that invoice can be settled.

When you import vendor invoices with this feature turned on and there's a prepayment on the purchase order, the prepayment will be applied to the corresponding vendor invoice automatically.



Apply prepayment automatically parameter.



Automation history.

See also

[Automatically apply to vendor invoices](#) (docs)

Prevent automatic one-voucher usage in fixed assets

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Nov 30, 2021

Business value

This feature helps ensure that fixed assets don't require, or enable, multiple transactions in the same voucher in the general ledger. Adding this restriction helps avoid downstream issues that can result when multiple transactions are included on a single voucher.

Feature details

Preventing the automatic use of one-voucher functionality in fixed assets helps ensure that fixed-asset transactions won't use the same voucher number for depreciation adjustments when splitting or disposing of an asset, or when recording catch-up depreciation. This also applies to acquisition adjustment transactions when a fixed asset is split.

See also

One voucher (docs)

Fixed asset transaction options (learn)

Reopen lease book status

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 30, 2021

Business value

With this feature, you don’t have to create a new lease contract for an extended lease contract.

Feature details

With this enhancement, if you have a lease book that is closed, you can now reopen it. This makes the lease available for posting adjustments that represent the lease adjustment. This saves time and effort by avoiding the needs to create a completely new lease contract when an existing lease contract is extended.

See also

Adjust leases (docs)

1099 report revisions for 2021

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Dec 22, 2021

Business value

This enhancement maintains compliance with current regulations that apply to 1099 processing for the 2021 tax year.

Feature details

This feature will add new 1099 fields to the 2021 1099-DIV form, 1099-MISC form, and 1099-NEC form. The processing for Electronic filing for 2021 has also been enhanced. These changes will apply to 1099 statements that are included in tax filings in the United States in 2022, for the 2021 tax year.

See also

Year-end activities FAQ (docs)

Add payment breakdown on lease payments

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✓Dec 22, 2021

Business value

The ability to break down payment types on payment schedule lines can provide greater insight into what your organization is paying for through leased assets.

Feature details

This feature lets you define payment types that you can use to break down lease payments by contract. If you're using this feature, the system will add all the payment types and enter the total amount in the **Payment amount** field on the **Lease details** page, which is in the **Payment schedule lines** FastTab.

Adjust posting date automatically during invoice posting

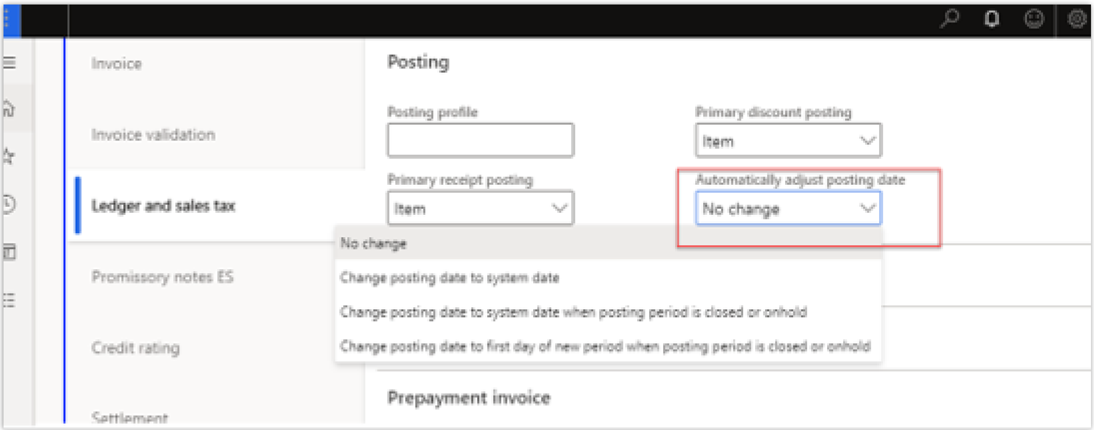
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✓Dec 22, 2021

Business value

This feature reduces the number of manual steps that accounts payable clerks must complete when it's necessary to adjust the posting date on multiple vendor invoices. The feature can also help reduce errors that might be introduced when tasks are completed manually.

Feature details

Sometimes vendor invoices can remain in pending status beyond the time when the accounting period for the specified posting date has closed. When the invoices are ready to be posted, the original posting date can't be used since the period is closed. As a result, the accounts payable clerk must change all the posting dates on the now-unapproved invoices to the newer, open period (next month). This feature adds a parameter that lets the system change the posting date automatically according to your business needs. As a result, the due date, cash discount date, and exchange rate of the vendor invoice can be adjusted accordingly.



Automatically adjust posting date parameter.

See also

Automatically apply to vendor invoices (docs)

Lease impairment enhancements

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Dec 22, 2021

Business value

You can review the new asset balance and financial entry in the right-of-use asset impairment dialog before posting the right-of-use asset impairment, which provides greater insight into the financial effects of a lease impairment.

Feature details

This feature displays the new asset balance and financial entry from the lease impairment process. When you use this feature, you can calculate the new asset balance and display the results, as well as the impact of the financial entry based on the impairment data that's provided.

See also

Impair right-of-use assets (docs)

Open vendor transaction report

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Dec 22, 2021

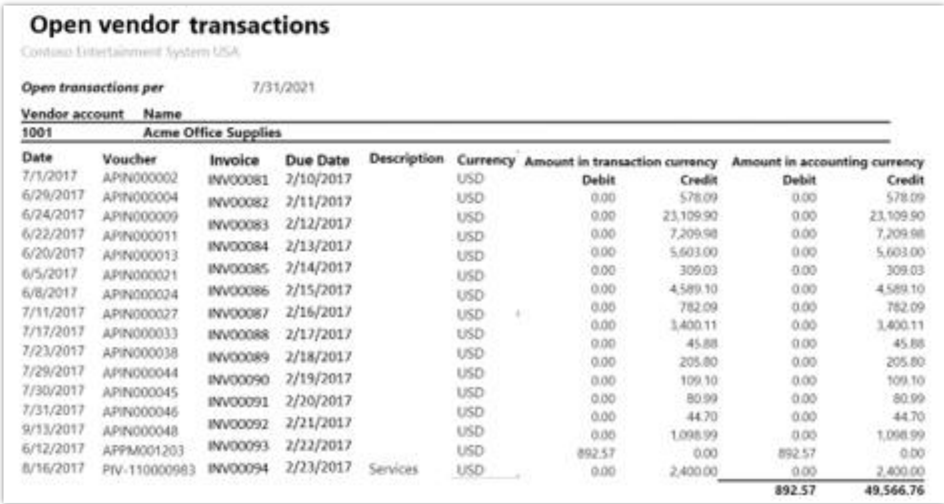
Business value

The open vendor transaction report gives you quick access to detailed information about vendor transactions in one place.

Feature details

This report provides detailed information about the open transactions for each vendor as of a specific date. For each transaction, the report includes the following information:

- Invoice number
- Transaction date
- Voucher number
- Transaction amount in the transaction currency and accounting currency
- Credit balance in the transaction currency and accounting currency
- Debit balance in the transaction currency and accounting currency
- Subtotal amount in the accounting currency
- Payment due date



Open vendor transactions

Contoso Entertainment System USA

Open transactions per 7/31/2021

Vendor account	Name
1001	Acme Office Supplies

Date	Voucher	Invoice	Due Date	Description	Currency	Amount in transaction currency		Amount in accounting currency	
						Debit	Credit	Debit	Credit
7/1/2017	APIN000002	INV00081	2/10/2017		USD	0.00	578.09	0.00	578.09
6/29/2017	APIN000004	INV00082	2/11/2017		USD	0.00	23,109.90	0.00	23,109.90
6/24/2017	APIN000009	INV00083	2/12/2017		USD	0.00	7,209.98	0.00	7,209.98
6/22/2017	APIN000011	INV00084	2/13/2017		USD	0.00	5,603.00	0.00	5,603.00
6/20/2017	APIN000013	INV00085	2/14/2017		USD	0.00	309.03	0.00	309.03
6/5/2017	APIN000021	INV00086	2/15/2017		USD	0.00	4,589.10	0.00	4,589.10
6/8/2017	APIN000024	INV00087	2/16/2017		USD	0.00	782.09	0.00	782.09
7/11/2017	APIN000027	INV00088	2/17/2017		USD	0.00	3,400.11	0.00	3,400.11
7/17/2017	APIN000033	INV00089	2/18/2017		USD	0.00	45.88	0.00	45.88
7/23/2017	APIN000038	INV00090	2/19/2017		USD	0.00	205.80	0.00	205.80
7/29/2017	APIN000044	INV00091	2/20/2017		USD	0.00	109.10	0.00	109.10
7/30/2017	APIN000045	INV00092	2/21/2017		USD	0.00	80.99	0.00	80.99
7/31/2017	APIN000046	INV00093	2/22/2017		USD	0.00	44.70	0.00	44.70
9/13/2017	APIN000048	INV00094	2/23/2017		USD	0.00	1,098.99	0.00	1,098.99
6/12/2017	APPM001203				USD	892.57	0.00	892.57	0.00
8/16/2017	PIV-110000983			Services	USD	0.00	2,400.00	0.00	2,400.00
								892.57	49,566.76

Open vendor transactions report.

See also

[Vendor invoices overview](#) (docs)

Reverse posted bank statements

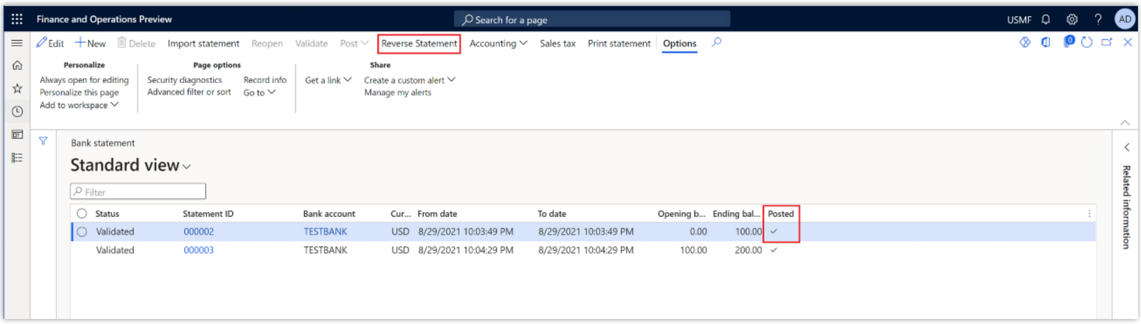
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Dec 22, 2021

Business value

This feature lets you reverse posted bank statements.

Feature details

When bank statements have been posted and no new transactions have been entered, this feature enables the **Reverse Statement** option in the header of the bank statemen. A new field called **Posted** will be added, which indicates the status of the selected bank statement.



Reverse bank statement.

Revert to simple bank reconciliation from advanced bank reconciliation

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Dec 22, 2021

Business value

This feature lets you disable the advanced bank reconciliation functionality for specific bank accounts, which will reduce the complexity of bank reconciliation for users.

Feature details

This feature lets you revert to simple bank reconciliation from advanced bank reconciliation. You can make this change for bank accounts that don’t contain reconciled bank transactions. You can't revert to simple bank reconciliation under the following conditions:

- There are reconciled transactions for the account.
  If you try reverting to simple bank reconciliation, you'll receive the following error message: *Advanced bank reconciliation can’t be turned off because there are reconciled bank transactions for bank account (%1).*

- There are posted bank statements.
  If you try reverting to the simple bank reconciliation for an account that contains posted bank statements, you'll receive the following error message: *Advanced bank reconciliation can’t be turned off because this bank account (%1) contains posted bank statements.*

Unmatch all bank statements and transactions

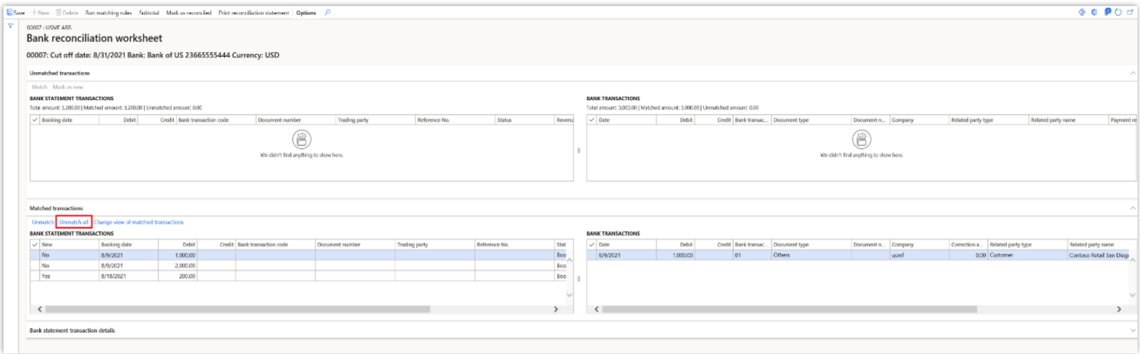
Enabled for	Public preview	General availability
Users, automatically	-	✔ Dec 22, 2021

Business value

This feature enhances efficiency and saves time for users.

Feature details

The **Unmatch all** button is visible on the **Bank reconciliation worksheet** page. The button lets you unmatch all the statements and transactions in one step. When users are going through a bank reconciliation, they'll try to match bank statement lines to bank transactions lines. We already have “Unmatch” functionality to release individual matched lines. This feature lets you select all matched transactions at one time.



Bank reconciliation worksheet - Unmatch all.

Create invoice lines based on the quantity option parameter in Accounts payable

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

Business value

This feature reduces the number of tasks that an accounts payable clerk must complete when additional line items are added to invoices. By automating the process of adding line items, the feature also helps your organization adapt to changing circumstances as efficiently as possible.

Feature details

When a purchase order has been partially invoiced, it’s possible that the invoice contains limited header information along with subtotals. This feature enables the system to create line items automatically when invoices are imported. The feature validates the information to avoid creating lines automatically, while also importing the same lines at a different time.

Financial Dimension service

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

Business value

The creation and validation of unique financial dimension values is a costly operation that can be improved with the Financial Dimension service, which is able to operate on the data in parallel.

Feature details

The new service improves the process of resolving financial dimensions when you import a large number of journals. The service works on dimension data in the imported journals in parallel with the financial dimensions in your existing data, to improve the otherwise time-consuming and labor-intensive process of creating new dimension values that rationalize the existing and imported dimension values.

Increase the length of invoice numbers

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

Business value

This feature increases the length of invoice numbers in Accounts payable, which gives you more flexibility to adapt invoice numbers in ways that better serve your organization's needs.

Feature details

This feature increases the length of vendor invoice numbers by letting you extend specific extended data types based on unique business processes. Extending the data types that determine the length of vendor invoice numbers won't adversely affect other extended data types.

Invoice automation – process vendor invoices during the import process

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

Business value

This feature, part of the vendor invoice automation capability, saves accounts payable clerks time and effort by processing vendor invoices automatically. The feature can also help reduce errors that arise through manual processing.

Feature details

Creating vendor invoices can involve multiple steps including applying prepayments, completing the invoice matching process, validating invoices, and then submitting them to workflow processing. Typically, those steps are completed manually before the invoices are posted. Prior to implementing this feature, importing vendor invoices resulted in a pending vendor invoice. Routine invoice processing steps, such as three-way matching, were completed in the background. This feature lets the system process vendor invoices automatically when the invoices are imported, eliminating the need for additional background processing and freeing accounts payable staff to focus their efforts on exceptions.

Lock the main account type and validate the offset account type in payment journals for customers and vendors

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

Business value

In earlier versions, you could change the account type for the main account and the offset account for payment journals for customers (payment receipts) and vendors (payment distributions). By preventing changes to the main account type and limiting changes to the offset account type for payment journals, this feature helps clarify the purpose of payment journals, whether for customers or vendors, and might help prevent errors that could occur if these account types were inappropriately set.

Feature details

For customer payment journals, the main account type will be set to Customer by default and you won't be able to change it. The new validation process will verify that the offset account type is not set to Customer.

Likewise for vendor payment journals, the main account type will be set to Vendor by default and can't be changed. The validation process will verify that the offset account type for vendor payment journals is not set to Vendor.

Use unique journal names for lease modification

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

Business value

This feature lets you post transactions that modify leases to different journals than the ones used for lease payments, interest, and depreciation transactions. This ensures that the lease journals can have approval steps without affecting modification transactions.

Feature details

This feature lets you define journal names specifically for transactions that modify leases, such as lease adjustments, lease terminations, and lease impairments.

Finance insights

Overview

Finance insights accelerate your digital transformation by bringing the power of AI into your finance processes. As organizations look to make decisions rapidly, reduce risk, and focus on strategic initiatives, it's critical to free finance from repetitive, time-consuming, and low-value daily activities. Taking advantage of the power of AI, finance insights enable you to not only quickly understand your company's cash position, but take proactive action to improve it. By having menial tasks automated or removed, the barrier of developing or hiring AI expertise is bypassed, and you're left with insights to move your business forward.

Customer payment predictions

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Jan 10, 2022

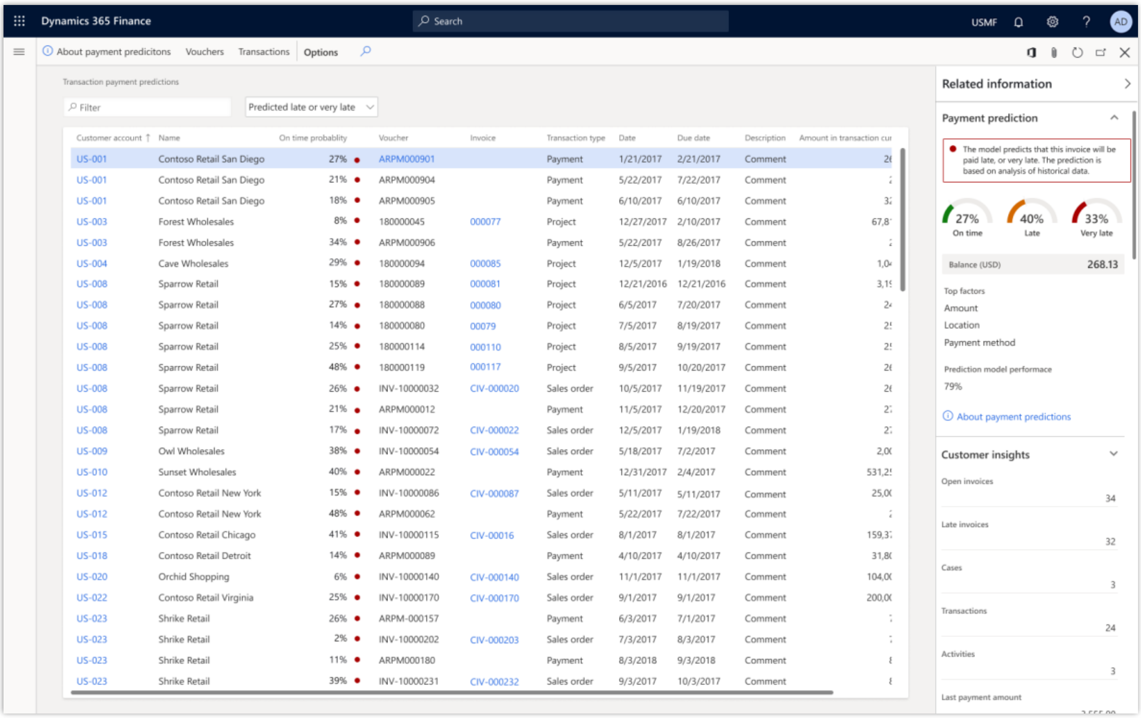
Business value

Knowing when all of a customer's outstanding invoices are likely to be paid, in addition to knowing when specific invoices are likely to be paid, can help businesses optimize the start of collection activities.

Feature details

Customer payment predictions help answer and respond constructively to the following questions:

- When will an invoice or sales order be paid?
- Which customers will pay on time and which will pay late?
- Which invoices or orders will they pay?



Screenshot showing customer payment predictions.

External data for cash flow forecasting

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Jan 10, 2022

Business value

You can enter or import external data into cash flow forecasts, which helps improve the accuracy of forecasts.

Feature details

This feature lets you include external data in cash flow forecasting. It brings the capability to import external data from supporting systems into the cash flow engine to improve the accuracy of cash flow forecasting.

Forecast bank balance

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✓ Jan 10, 2022

Business value

The cash flow forecasting capability in finance insights can help companies monitor and manage their cash balances effectively. It can also help managers make decisions that optimize opportunities in the context of their current cash position.

Feature details

Forecasts of bank balances will be based on recurring activities, in addition to information from customer payment and vendor payments. The bank balance forecasts help treasurers more accurately understand the availability of funds at specific times.

Intelligent budget proposal

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✓ Jan 10, 2022

Business value

Organizations spend a lot of time and resources preparing their budgets, and much of that effort is repetitive and low-value-added. Still more work is needed to prepare line-by-line budgets for each department. Intelligent budget proposals make it easy to gather historical data from actuals or budgets to use for budgeting within Dynamics 365 Finance. The feature uses that data to generate a new budget that can be further refined by staff who possess knowledge and insights that might not be present in historical data.

Feature details

The intelligent budget proposal feature lets you create a draft budget automatically, but with a high degree of confidence, from the use of historical data. The feature must be turned on in the **Feature management** workspace. The more years of budget data that you can provide to the system to generate budget proposals, the more accurate the proposals can be. Having from three to five years of historical data at minimum can help ensure the accuracy of the proposals that are generated.

Treasurer workspace

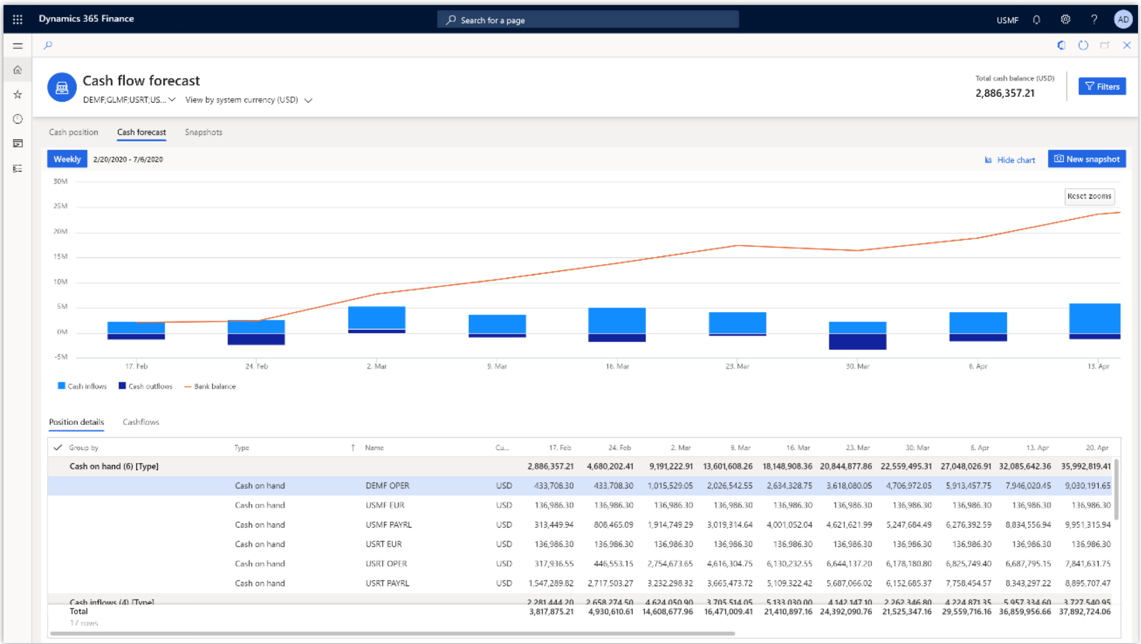
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✓ Jan 10, 2022

Business value

The cash flow forecasting capability in finance insights can help companies monitor and manage their cash balances effectively.

Feature details

This feature adds a new workspace that includes all necessary elements for completing the analysis and activities that treasurers need to successfully manage their organization's cash. The workspace includes payment predictions on open customer and vendor orders and invoices to provide you an accurate cash position. Create cash flow forecast snapshots, edit them, and save them to compare against actuals later.



Screenshot showing projected cash flow.

Globalization

Overview

Globalization of Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations covers not only language translation but also compliance with complex, country-specific regulatory requirements in areas such as tax, audit, business document layouts, and banking. Our focus for 2021 release wave 2 is on two major areas: global expansion and no-code/low-code globalization services.

Global expansion: We'll ship Commerce localization for Russia and will also deliver highly requested e-commerce localization for India that extends the Commerce localization that's already available there. We'll also deliver localization for Indonesia, expanding our global coverage to a total of 44 countries and regions out of the box.

No-code/low-code globalization services: We'll continue enhancing our configurable, no-code/low-code globalization capabilities and transform them into globalization microservices that enable enterprise-scale functionality and performance, and simplify globalization extensibility. We'll bring our Tax Calculation service to general availability and support complex tax compliance scenarios. We'll enhance the functionality and country coverage of the Electronic Invoicing service, and will integrate it with any first-party or third-party application via Microsoft Dataverse, allowing these applications to use our service that supports global trends of real-time tax reporting and business-to-business e-invoicing. We'll also ship several frequently requested features (based on the most popular ideas) for configurable business documents and electronic reporting.

Electronic Invoicing service – configurable e-invoice submission to the Italian SDI system

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 15, 2021	-

Business value

The Electronic Invoicing service is a flexible microservice for exporting and importing configurable e-invoices and transporting messages to and from external web services that are configured by using the Regulatory Configuration Service (RCS). The wide spectrum of supported scenarios is now extended with direct integration to the Italian Sistema di Interscambio (SDI) system, which is dedicated to verifying and transmitting electronic invoices.

Feature details

Electronic Invoicing files can be sent to the Italian SDI using several channels:

- **PEC service**: A message system that allows transmission date and time to be certified, files to be received, and the file integrity to be verified. A certified address can be used to send several files up to 30 MB.
- **SdICoop service**: A collaborative web service application operating on HTTPS. Only one file can be sent at a time by using the system, and the size must not exceed 5 MB. This service is recommended for smaller companies.
- **SdIFtp service**: A data transmission system based on File Transfer Protocol (FTP). This system is designed for larger companies and allows several files of up to 150 MB each to be sent.
- **FatturaPA**: A web service where files can be transferred from a dedicated website. To access the web service, users must have an Entratel or Fisconline password or a national services card (CNS) issued by Agenzia delle Entrate.

This feature enables SDICoop service channels for direct transmission of invoice data. The feature uses electronic invoicing service and requires setup of custom SDI Proxy service in Azure.

See also

Set up Electronic invoicing (docs)

Configurable business documents – delegated account setup for emailing via electronic reporting destinations

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔Aug 1, 2021	✔Oct 1, 2021

Business value

Users of configurable business documents and other electronic reporting formats can send documents, such as customer invoices, by using a generic email address instead of the address configured for the employees.

Feature details

Before this feature, configurable business document emails could be sent only from the current user's email address.

This feature enables a configuration to change the sender's email and use a custom email address, instead of the current user's email address, in electronic reporting destinations.

See also

Email ER destination type (docs)

Configurable business documents – specific destinations via printer management settings

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔Aug 1, 2021	✔Oct 1, 2021

Business value

Business users can set up different printers, specify the number of copies, and choose from other options for business documents.

Feature details

Before this feature, all print management settings were set based on the related electronic reporting destination in a legal entity. This feature enables the setup and edit of business document-specific destinations by using the print management user interface.

See also

Configure print management record-specific ER destinations (docs)

Configurable business documents – support for configurable images in headers and footers

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔Aug 1, 2021	✔Oct 1, 2021

Business value

Business users can output company or customer-specific logos in the headers and footers of business documents such as invoices and packing slips.

Feature details

This feature allows business users to add pictures (left, center, or right) to the header or footer of a Microsoft Excel template for a business document. Users can then use the electronic reporting format mapping designer to configure the document by using company or customer-specific logos.

See also

Design an ER format to generate a report in Excel format with embedded images in page headers or footers (docs)

Electronic reporting – query reuse for performance improvements

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔Aug 1, 2021	✔Oct 1, 2021

Business value

This feature improves the performance of electronic reporting formats that have multiple queries.

Feature details

If there are similar queries and the only difference between them is in the applied ranges, this feature reuses an existing query instead of creating a new one. This improvement applies to:

- The FILTER expression.
- A JOIN constructed from FILTER expressions.

Tax Calculation service

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 16, 2021	✔ Oct 8, 2021

Business value

The digitalization of tax and the steady stream of indirect tax regulations that global businesses encounter, such as VAT and GST, have further complicated existing processes by introducing new industry and compliance risks that challenge leaders in every global enterprise.

Tax Calculation allows you to improve compliance with associated local regulations. The new, configurable microservice (preview) enhances the tax determination and calculation capabilities in Dynamics 365 Finance and Dynamics 365 Supply Chain Management. Tax Calculation is fully integrated out of the box, and enables you to:

- Automate and standardize tax determinations and calculations across countries or regions.
- Use a configurable tax determination matrix and flexible calculation designer to configure and execute complex tax determination rules and calculations by using formulae and conditions.
- Simplify compliance maintenance for local tax regulations.

Feature details

Tax Calculation capabilities include:

- Out-of-the-box integration with Dynamics 365 Finance and Dynamics 365 Supply Chain Management.
- No-code/low-code configuration through the Regulatory Configuration Service (RCS).
- A configurable tax matrix to automatically determine tax rates.
- A configurable tax matrix to automatically determine VAT ID.
- A configurable tax calculation designer to define formulas and conditions.
- Shared tax rates and determination rules across legal entities.

See also

Tax Calculation (docs)

Tax Calculation service – sales tax group determination

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Apr 16, 2021	✓ Oct 8, 2021

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- Automate and standardize tax determinations and calculations across countries or regions.
- Use a configurable tax determination matrix and flexible calculation designer to configure and execute complex tax determination rules and calculations by using formulae and conditions.
- Simplify compliance maintenance for local tax regulations.

Feature details

This feature is part of the Tax Calculation capabilities to support flexible tax determination. With this feature, determination of sales tax group and item sales tax group is supported in the Tax Calculation service:

- Sales tax group and item sales tax group is still populated with the default value on the transaction header and line.
- When tax calculation starts, the value of the sales tax group and the item sales tax group is sent to the Tax Calculation service.
- The Tax Calculation service will provide two matrices, one to determine the sales tax group and one to determine the item sales tax group.
- If a new sales tax group or item sales tax group value can be determined from the matrices, the Tax Calculation service will replace it with the default value. Otherwise, the default values will continue to be used.

- The Tax Calculation service uses the intersection of sales tax group and item sales tax group to determine tax codes and rates.

See also

Sales tax applicability and sales tax group determination logic (docs)

Tax Calculation service – supporting multiple VAT IDs

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 16, 2021	✔ Oct 8, 2021

Business value

The digitalization of tax and the steady stream of indirect tax regulations that global businesses encounter, such as VAT and GST, have further complicated existing processes by introducing new industry and compliance risks that challenge leaders in every global enterprise.

Tax Calculation allows you to improve compliance with associated local regulations. The new, configurable microservice (preview) enhances the tax determination and calculation capabilities in Dynamics 365 Finance and Dynamics 365 Supply Chain Management. Tax calculation is fully integrated out of the box, and enables you to:

- Automate and standardize tax determinations and calculations across countries or regions.
- Use a configurable tax determination matrix and flexible calculation designer to configure and execute complex tax determination rules and calculations by using formulae and conditions.
- Simplify compliance maintenance for local tax regulations.

Feature details

This feature is part of the Tax Calculation capabilities to support multiple VAT ID determination for a single legal entity and its counterparties. The feature supports the following capabilities:

- Maintain multiple VAT IDs under one single legal entity.
- Maintain multiple VAT IDs under one single customer or vendor.
- Automatically determine the correct legal entity VAT ID on transactions.
- Automatically determine the correct counterparty VAT ID on transactions.

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.

See also

[Multiple VAT registration numbers] (docs)

Tax Calculation service – supporting tax in transfer order

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Apr 16, 2021	✓ Oct 8, 2021

Business value

The digitalization of tax and the steady stream of indirect tax regulations that global businesses encounter, such as VAT and GST, have further complicated existing processes by introducing new industry and compliance risks that challenge leaders in every global enterprise.

Tax Calculation allows you to improve compliance with associated local regulations. The new, configurable microservice (preview) enhances the tax determination and calculation capabilities in Dynamics 365 Finance and Dynamics 365 Supply Chain Management. Tax Calculation is fully integrated out of the box, and enables you to:

- Automate and standardize tax determinations and calculations across countries or regions.
- Use a configurable tax determination matrix and flexible calculation designer to configure and execute complex tax determination rules and calculations by using formulae and conditions.
- Simplify compliance maintenance for local tax regulations.

Feature details

This feature is part of the Tax Calculation capabilities to support indirect tax determination, calculation, posting, and settlement on inventory transfer order transactions. The feature supports the following:

- Indirect tax determination, calculation, and posting support for shipping transfer orders.
- Indirect tax determination, calculation, and posting support for receiving transfer orders.
- Indirect tax settlement support for transfer order transactions.
- VAT ID determination support for shipping transfer orders.
- VAT ID determination support for receiving transfer orders.

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.

See also

Tax feature support for transfer orders (docs)

Tax reporting – supporting multiple tax registration numbers

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 16, 2021	✔ Oct 15, 2021

Business value

Businesses can configure a legal entity in the system, and then associate the legal entity with multiple sales tax and VAT registration numbers.

Feature details

When you run tax reports, you can select a specific tax registration number and run the reports for that number. When you execute the VAT Declaration, EU Sales List, and Intrastat, you can select the necessary tax registration number, filter required report transactions based on the number, and then create country-specific formats of the tax report. The functionality is activated together with the Tax Calculation service where the exact tax numbers for a transaction are determined and saved in the system. In the October 2021 release update, the following countries are supported:

- France
- Netherlands
- Sweden
- Switzerland
- United Kingdom

Support for the following countries or regions is planned in subsequent updates of 2021 release wave 2:

- Austria
- Germany
- Spain
- Denmark
- Finland
- Norway
- Belgium

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.

See also

Multiple VAT registration numbers (docs)

Electronic reporting – enhanced parameters per legal entity

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Nov 5, 2021

Business value

Feature enhancements allow business users to more quickly update the setup—or find any issues with the existing setup—of electronic reporting parameters per legal entity.

Feature details

This feature provides several enhancements in electronic reporting parameters per legal entity. These enhancements include:

- Added validation when parameters or lookup conditions are missing.
- Automatic generation of conditions.
- Export from and import to Microsoft Excel for conditions.

Electronic Invoicing service – configurable Saudi Arabian e-invoice

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Nov 9, 2021

Business value

The electronic invoicing service makes it easy to work with configurable invoices in countries and regions that your business is moving into, or is already doing business in, where there's an opportunity to process invoices in a more automated manner. This feature addresses legal requirements coming from the introduction of electronic invoicing in Saudi Arabia.

Feature details

According to regulatory changes, electronic invoice generation is mandated from December 4, 2021, in Saudi Arabia. In the scope of phase 1 Saudi Arabia electronic invoice adoption, the following functionality is implemented:

- Generation of XML files of e-invoices in a format specific for Saudi Arabia.
- Generation of QR codes in printable and electronic invoice formats.
- Introduction of the invoice types, Tax invoice, and Simplified invoice.
- Bilingual report printing for project invoices.

Phase 2 and related requirements of electronic invoice submission and exchange are planned for enforcement by authorities on January 1, 2023.

See also

Get started with Electronic invoicing for Saudi Arabia (docs)

Tax Calculation service – integration with free text invoice

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 16, 2021	✔ Dec 10, 2021

Business value

The digitalization of tax and the steady stream of indirect tax regulations that global businesses encounter, such as VAT and GST, have further complicated existing processes by introducing new industry and compliance risks that challenge leaders in every global enterprise.

Tax Calculation allows you to improve compliance with associated local regulations. The new, configurable microservice (preview) enhances the tax determination and calculation capabilities in Dynamics 365 Finance and Dynamics 365 Supply Chain Management. Tax Calculation is fully integrated out of the box, and enables you to:

- Automate and standardize tax determinations and calculations across countries or regions.
- Use a configurable tax determination matrix and flexible calculation designer to configure and execute complex tax determination rules and calculations by using formulae and conditions.
- Simplify compliance maintenance for local tax regulations.

Feature details

Free text invoice integrates with the Tax Calculation service to support the enhanced features in the Tax Calculation service for more flexible and configurable tax determination and calculation. This includes:

- Enhanced sales tax group determination on free text invoice.
- Enhanced item sales tax group determination on free text invoice.
- Enable multiple tax registration numbers support on free text invoice.

See also

Tax calculation data model (docs)

Configurable business documents – specific destinations via printer management settings in the reports (phase 1)

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Dec 2021

Business value

You can use named Electronic Reporting destinations for more types of business documents that can be generated in Finance by using the Electronic Reporting framework.

Feature details

Before this feature was developed, print management settings were set based on the related electronic reporting destination in a legal entity. The initial feature implementation enables the setup and edit of business document-specific destinations by using the print management user interface in the Electronic Reporting (ER) framework. This feature extends this capability to specific configurable reports:

- Purchase order confirmation
- Sales order confirmation
- Free text invoice and credit note
- Sales order invoice and credit note
- Sales order delivery note
- Project invoice and credit note

Tax Calculation service – enabling tax calculation parameters by tax jurisdiction

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 16, 2021	Jan 2022

Business value

The digitalization of tax and the steady stream of indirect tax regulations that global businesses encounter, such as VAT and GST, have further complicated existing processes by introducing new industry and compliance risks that challenge leaders in every global enterprise.

Tax Calculation allows you to improve compliance with associated local regulations. The new, configurable microservice (preview) enhances the tax determination and calculation capabilities in Dynamics 365 Finance and Dynamics 365 Supply Chain Management. Tax Calculation is fully integrated out of the box, and enables you to:

- Automate and standardize tax determinations and calculations across countries or regions.
- Use a configurable tax determination matrix and flexible calculation designer to configure and execute complex tax determination rules and calculations by using formulae and conditions.
- Simplify compliance maintenance for local tax regulations.

Feature details

This feature is part of the Tax Calculation capabilities to support defining tax calculation parameters by tax jurisdiction in the Tax Calculation service.

Two matrices will be provided in the Tax Calculation service:

- **Tax jurisdiction applicability**: This matrix determines the correct tax jurisdiction for the transaction.
- **Tax jurisdiction parameters**: This matrix determines the correct tax calculation parameters under this jurisdiction.

The following tax calculation parameters are supported in the 2021 release wave 2 plan:

- Deduct cash discount before sales tax calculation.
- Reverse sales tax on cash discount.
- Cash discount is calculated on amount including sales tax – Customer.
- Cash discount is calculated on amount including sales tax – Vendor.

See also

Multiple VAT registration numbers (docs)

Electronic Invoicing service – configurable Indonesian e-invoice

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

Business value

This capability is part of Indonesian localization, which is a newly added out-of-the-box localization that simplifies the global usage of Dynamics 365 Finance by our customers.

Feature details

Electronic Invoicing is a flexible microservice for exporting and importing configurable e-invoices and transporting messages to and from external web services that are configured by using the Regulatory Configuration Service (RCS). The wide spectrum of supported scenarios is now extended with integration to the Indonesian authorities' software and the systems dedicated to verifying and registering electronic invoices.

Global expansion – Indonesian localization

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

Business value

Globalization for Indonesia will now be available out of the box.

Feature details

The country-specific functionality for Indonesia includes:

- Reverse charge
- Invoice and credit note
- Indonesia-specific invoice numbering
- VAT declaration
- WHT declaration
- E-invoicing (E-Faktur Pajak)

Tax Calculation service – integration with general journal

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 16, 2021	Mar 2022

Business value

The digitalization of tax and the steady stream of indirect tax regulations that global businesses encounter, such as VAT and GST, have further complicated existing processes by introducing new industry and compliance risks that challenge leaders in every global enterprise.

Tax Calculation allows you to improve compliance with associated local regulations. The new, configurable microservice (preview) enhances the tax determination and calculation capabilities in Dynamics 365 Finance and Dynamics 365 Supply Chain Management. Tax Calculation is fully integrated out of the box, and enables you to:

- Automate and standardize tax determinations and calculations across countries or regions.
- Use a configurable tax determination matrix and flexible calculation designer to configure and execute complex tax determination rules and calculations by using formulae and conditions.
- Simplify compliance maintenance for local tax regulations.

Feature details

General journal will be integrated with the Tax Calculation service to support the enhanced features in the Tax Calculation service for more flexible and configurable tax determination and calculation.

The scope includes vendor, customer, ledger, project, bank, and fixed assets journals.

Overview of Dynamics 365 Supply Chain Management 2021 release wave 2

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.

Companies need to be agile and change rapidly to meet the new business reality. One of the biggest impacts of the COVID-19 pandemic has been the disruption in supply chains driven by a historical emphasis on efficiency versus resiliency. Enhanced supply chain visibility, multiple business platform support, optimized workforce, agile planning and distribution processes, combined with maximized asset uptime to ensure safe and cost-efficient business continuity, will be key components with investments as follows:

- **Continue to provide comprehensive core capabilities.** Provide enhanced capabilities across product information management, planning, inventory and logistics, manufacturing, and asset management. Enable businesses to scale mission-critical operations in the factory and warehouses using cloud and edge scale units. We'll continue our investments through organic and inorganic means to expand core supply chain capabilities.
- **Enable resilient supply chain and visibility.** Increasing resiliency continues to be a priority for organizations as they emerge from the current crisis and reset strategies to anticipate and minimize disruptions. Organizations will strive toward balancing cost and investments in creating a resilient supply chain and visibility. With investments in key areas such as resource planning, we'll enable businesses to optimize their usage of available material and capacity to avoid stockout situations and keep the business flow.
- **World-class service health and execution.** Customer adoption and satisfaction, and good references, are critical to our success. Our customers should be able to adopt and integrate new business models with ease. New manufacturing execution scenarios allow integration between Supply Chain Management, common manufacturing execution solutions, and shop floor automation systems. We'll continue our investments toward better discoverability, improved trial experiences, improved net satisfaction scores, and other fundamental efforts.

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

This topic lists features that are planned to release from October 2021 through March 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.

Distributed hybrid topology

With Dynamics 365 Supply Chain Management running on the hybrid distributed topology, companies can design their supply chain system to follow the topology of their business.

Feature	Enabled for	Public preview	General availability
[Edge scale units to run distributed workloads at your facility]()	Users by admins, makers, or analysts	✔Apr 23, 2021	✔Nov 1, 2021
[Enhanced manufacturing execution workloads on scale units]()	Users by admins, makers, or analysts	✔Oct 15, 2021	✔Dec 15, 2021
[Enhanced warehouse execution workloads on scale units]()	Users by admins, makers, or analysts	✔Dec 3, 2021	Feb 2022

Inventory and logistics

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

Feature	Enabled for	Public preview	General availability
[Post on-hand adjustments using codes connected to offset accounts]()	Users by admins, makers, or analysts	✔Aug 2, 2021	✔Oct 1, 2021
[Sales quotation referenced data export policy]()	Users by admins, makers, or analysts	✔Aug 2, 2021	✔Oct 1, 2021
[Updates to inventory and logistics feature states with version 10.0.21]()	Users by admins, makers, or analysts	✔Aug 2, 2021	✔Oct 1, 2021
[Warehouse Management mobile app step instructions]()	Users by admins, makers, or analysts	✔Aug 2, 2021	✔Oct 1, 2021
[Soft reservation for the Inventory Visibility Add-in]()	Users by admins, makers, or analysts	✔Aug 9, 2021	✔Oct 1, 2021
[Sealed bidding]()	Users by admins, makers, or analysts	✔Sep 17, 2021	✔Oct 1, 2021

Feature	Enabled for	Public preview	General availability
Deduction and catch-weight enhancements for rebate management	Users by admins, makers, or analysts	✓ Aug 18, 2021	✓ Oct 22, 2021
Work breaks and tracking updates for Landed cost	Users by admins, makers, or analysts	✓ Aug 18, 2021	✓ Oct 22, 2021
Pause tasks in the Warehouse Management mobile app	Users by admins, makers, or analysts	✓ Oct 15, 2021	✓ Dec 31, 2021
Scan barcodes in the warehouse using GS1 format standards	Users by admins, makers, or analysts	Jan 2022	Mar 2022

Manufacturing

New capabilities include integration with third-party execution systems and processes for ensuring material traceability, accurate inventory, and efficiency.

Feature	Enabled for	Public preview	General availability
Updates to manufacturing feature states with version 10.0.21	Users by admins, makers, or analysts	✓ Aug 2, 2021	✓ Oct 1, 2021
Enhanced production floor execution interface for process manufacturing	Users by admins, makers, or analysts	✓ Oct 15, 2021	✓ Dec 10, 2021
Manufacturing execution systems integration	Users by admins, makers, or analysts	✓ Oct 15, 2021	✓ Dec 10, 2021

Planning

Planning Optimization enhancements allow discrete and process manufacturers to perform resource scheduling with finite capacity and capabilities.

Feature	Enabled for	Public preview	General availability
Updates to planning feature states with version 10.0.21	Users by admins, makers, or analysts	✓ Aug 2, 2021	✓ Oct 1, 2021
Planning Optimization support for capability-based resource allocation	Users by admins, makers, or analysts	✓ Sep 30, 2021	✓ Jan 14, 2022

Feature	Enabled for	Public preview	General availability
Planning Optimization support for reorder margin and issue margin	Users by admins, makers, or analysts	✓Nov 19, 2021	✓Jan 14, 2022
Planning Optimization support for priority-based planning	Users by admins, makers, or analysts	✓Oct 20, 2021	Feb 2022

Product information management

Several product information management features are progressing in their feature lifecycle during 2021 release wave 2.

Feature	Enabled for	Public preview	General availability
Share product information across legal entity boundaries	Users by admins, makers, or analysts	Jan 2022	-
Updates to product information management feature states with version 10.0.21	Users by admins, makers, or analysts	✓Aug 2, 2021	✓Oct 1, 2021

Description of **Enabled for** column values:

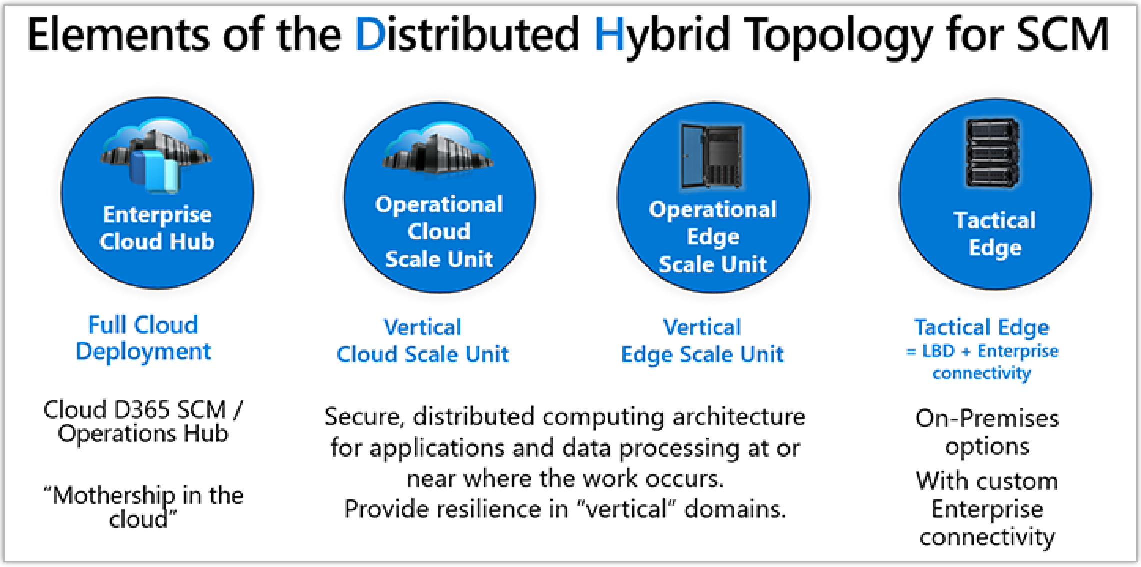
- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
-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

Distributed hybrid topology

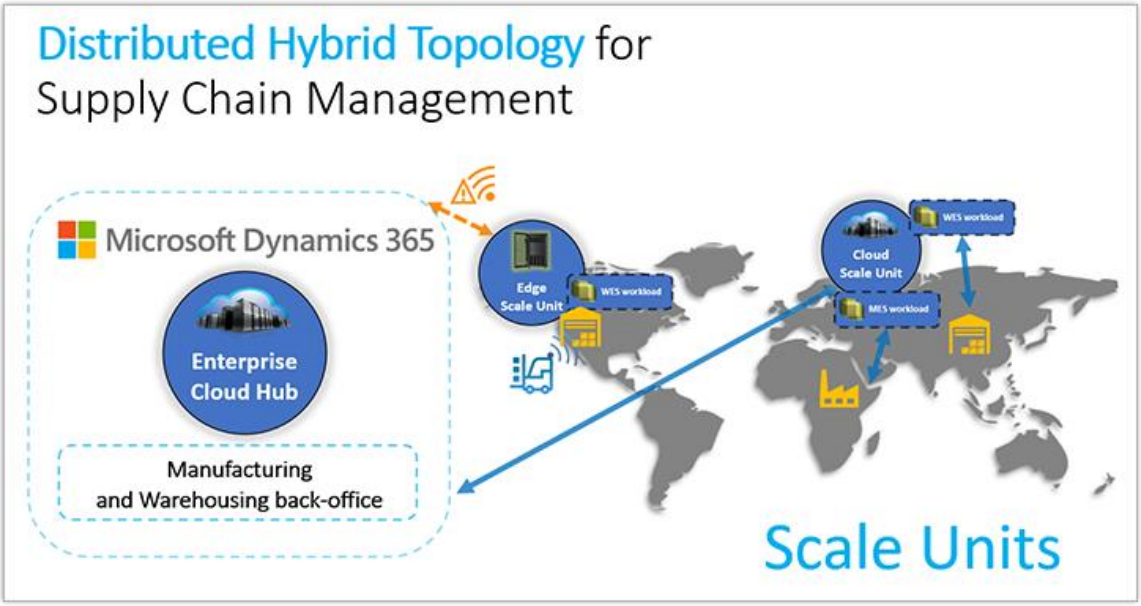
Overview

The distributed hybrid topology extends the supply chain management enterprise cloud hub, with one or more vertical *scale units* in the cloud or on the edge.



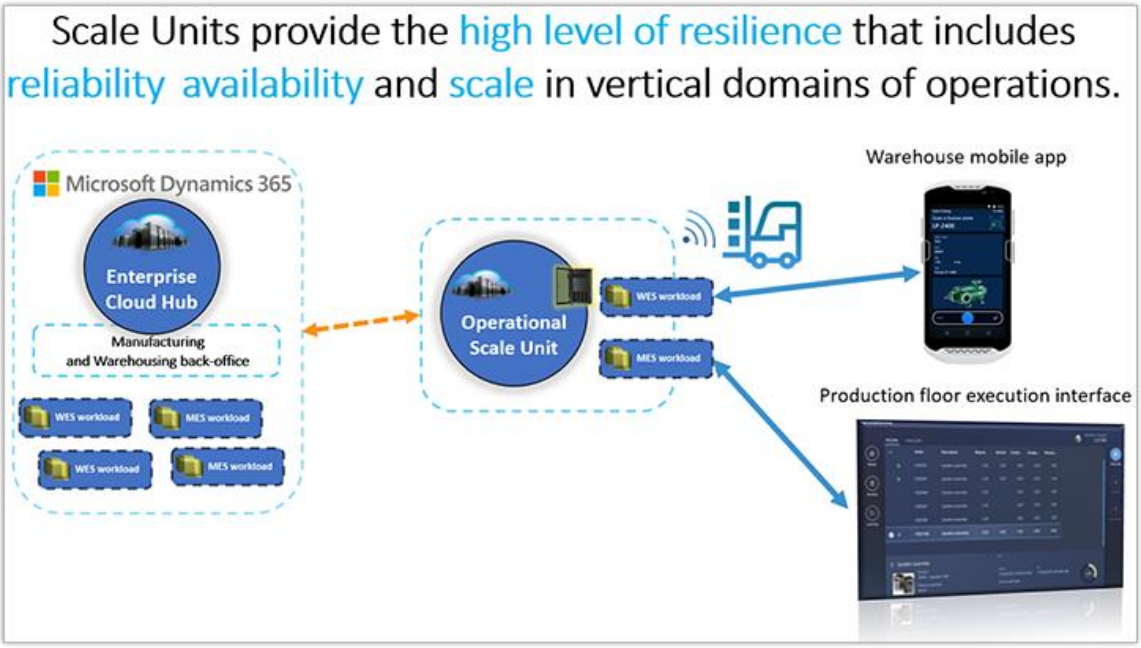
Elements of the distributed hybrid topology.

Scale units run business processes in vertical domains near or where the work occurs to increase resilience and provide higher reliability, extra performance, and maximum uptime.



Distributed supply chain topology.

Scale units can run either in the cloud (in an Azure data center closer to where the work occurs) or on edge hardware running physically on site. Each scale unit runs one or more workloads, each of which provides support for a set of vertical functionalities (such as warehousing or manufacturing).



Scale unit in the distributed hybrid topology for supply chain management.

Distributed hybrid topologies for Dynamics 365 Supply Chain Management have been available since late 2020, and we have continuously expanded and improved its capabilities with each release since then. For the 2021 release wave 2, we're introducing these enhancements to the topology platform and the out-of-the-box workloads for vertical functionality:

- Enhancements for the cloud scale unit platform.
- Capabilities enabling edge scale units, which allow you to run workloads on-premises in your local facility while being connected or temporarily disconnected from the cloud hub.
- Enhancements for topology deployment and lifecycle management capabilities.
- Incremental enhancements for the out-of-the box vertical workload functionality in warehouse and manufacturing execution.

Edge scale units to run distributed workloads at your facility

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 23, 2021	✔ Nov 1, 2021

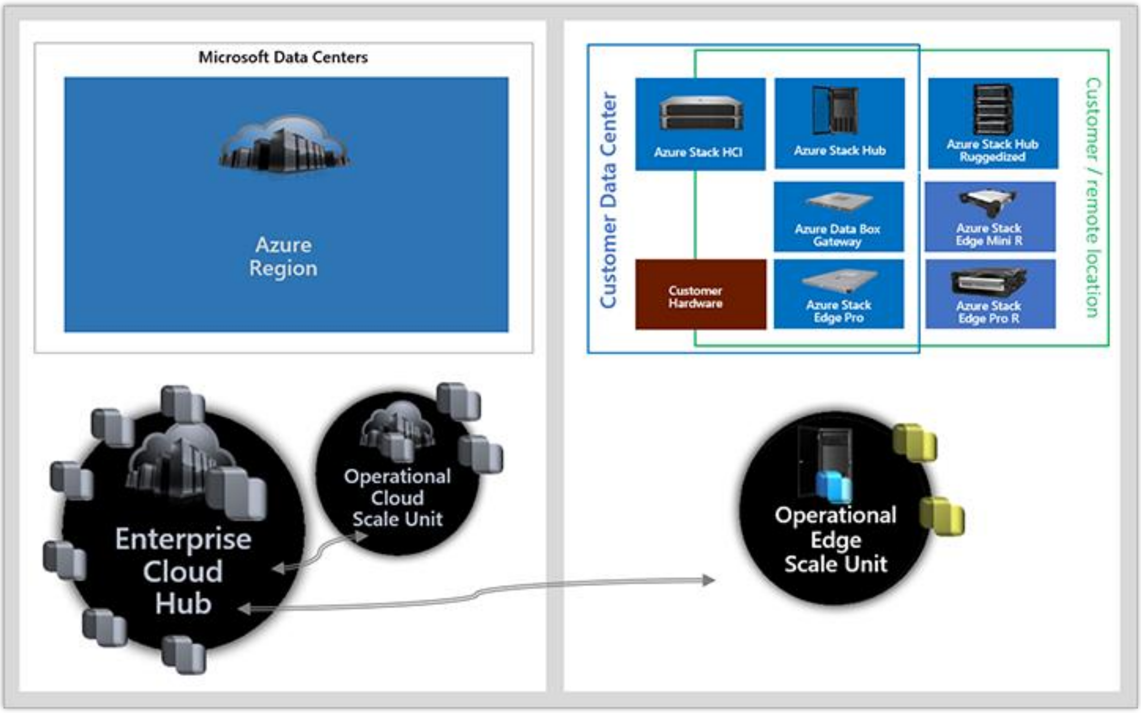
Business value

By enabling you to run vertical functionality workloads at your facility, edge scale units increase the resilience of supply chain business processes. You can run the same workloads that you run in your vertical cloud on the vertical edge. Microsoft provides out-of-the-box workloads for scale units that target processes in warehouse and manufacturing execution.

Feature details

Edge scale units represent the vertical edge in the distributed hybrid topology for supply chain management. They run on-premises, on hardware located at your own facilities, and thereby help to increase the resilience for critical operations in your supply chain. Even if an edge scale unit is temporarily disconnected from the internet, it will continue to run its configured workloads locally. Edge scale units also allow direct integration with other local systems without connecting through the cloud.

Scale units, whether in the cloud or on the edge, always run under the umbrella of your supply chain hub in the cloud and can run the same vertical workload functionality. You can therefore install any of the standard workloads for manufacturing or warehouse execution that Microsoft delivers, and can also run custom workloads.



Edge scale unit, cloud hub, and cloud scale unit with various Azure options.

With 2021 release wave 2, organizations gain the ability to deploy edge scale units using either custom-selected hardware or recommended Azure Stack appliances located at their facility. You can choose to manage your supply chain management workloads yourself or with a partner. Options include:

- **Custom hardware layouts**, which give your organization complete control over your edge unit hardware. Your own IT department selects and maintains the hardware exactly as required by your organization. The only restriction is that your solution must fulfill the hardware requirements for on-premises deployments.
- **Azure Stack appliance**, which provides an integrated hardware and software solution built by trusted hardware partners and delivered ready to use, straight to your datacenter.

See also

[Deploy edge scale units on custom hardware using LBD](#) (docs)

Enhanced manufacturing execution workloads on scale units

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Oct 15, 2021	✓ Dec 15, 2021

Business value

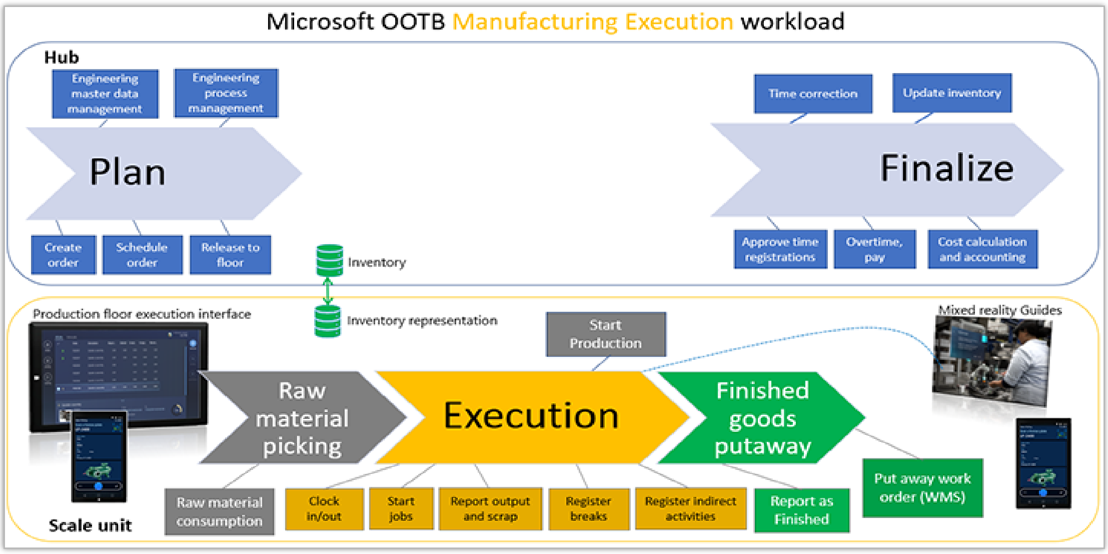
Workers can now begin work on production and batch orders and report them as finished using the warehouse app without requiring a round trip to the hub. These processes can run without interruption even if the connection between the hub and scale unit is lost.

Feature details

Production and batch orders that have a status of *Started* allow material consumption and finished goods to be reported. A dedicated flow called *Start* on the Warehouse Management mobile app enables workers to start a production or batch order. You can set up rules that automatically consume the planned amount of material for each production order (this process is also known as pre-flushing).

It is now possible to use the *Start* flow on a Warehouse Management mobile app that is running against a scale unit. This capability ensures that workers can still start a production order and report material consumption and finished goods, even if the connection between the hub and scale unit is lost.

An open API for registering production start is also provided. This is beneficial for organizations that want to integrate with a third-party MES that provides the start signal.



Out-of-the-box manufacturing execution workload functionality for scale units.

For more information about the benefits of using scale units, go to Cloud and edge scale units for manufacturing and warehouse management workloads.

See also

Manufacturing execution workloads for cloud and edge scale units (docs)

Enhanced warehouse execution workloads on scale units

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 3, 2021	Feb 2022

Business value

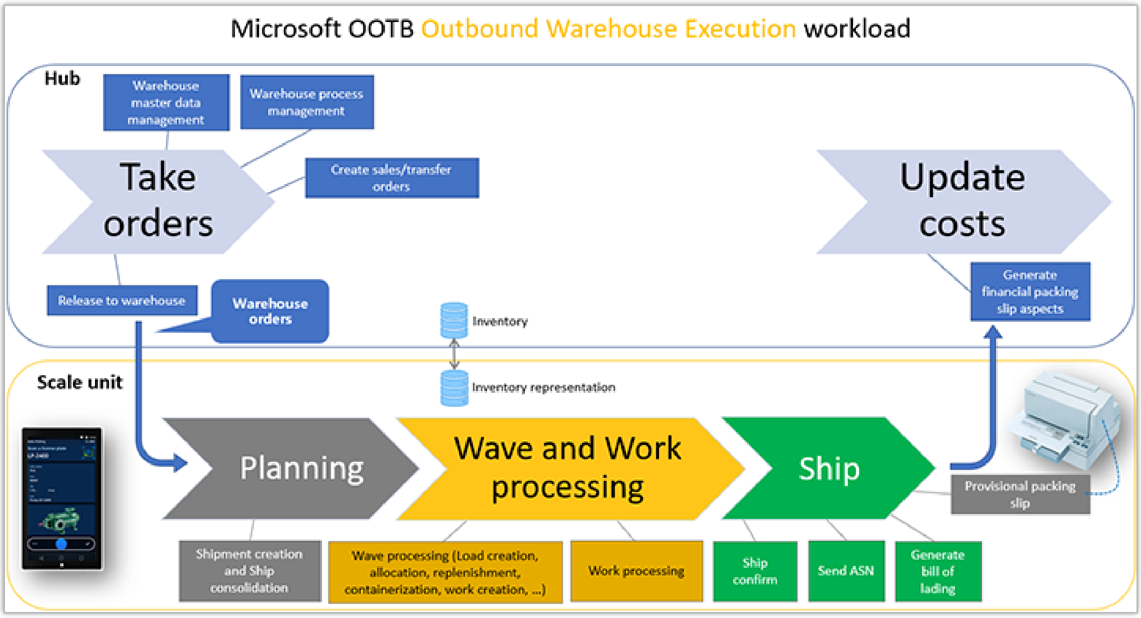
Warehouse execution workloads now provide expanded out-of-the-box capabilities for running scale units as part of a distributed hybrid topology.

Feature details

With warehouse execution workloads running on a scale unit, companies can increase the reliability of mission-critical warehouse processes. Improvements added for this release further enhance the capabilities of these workloads to fulfill organizations' growing requirements.

The warehouse execution workload for scale units now adds the following out-of-the-box capabilities:

- Wave processing functionality that creates all work for a wave now runs entirely within the scale unit.
- Exception handling is available within the scale unit, and users benefit from local processing such as the ability to reduce load line quantities after a short pick.
- Scale units can now generate local outbound shipment confirmations, including advanced shipment notices (ASNs).
- Purchase order item and line receiving with *Mixed license plate receiving* processing via Warehouse management mobile app.



Out-of-the-box warehouse execution workload functionality for scale units.

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

See also

[Warehouse management workloads for cloud and edge scale units](#) (docs)

Inventory and logistics

Overview

This release adds the following inventory and logistics capabilities to Dynamics 365 Supply Chain Management:

- **Global Inventory Accounting Add-in**: Lets you perform inventory account using multiple costing legers so you can comply with multiple accounting standards and internal management accounting at the same time. This is especially useful for international organizations.
- **Soft reservation for the Inventory Visibility Add-in**: Enables external systems to query Supply Chain Management for the inventory position of requested items. The system returns an accurate count of available inventory and temporarily reserves the requested item.
- **Rebate management module enhancements**: The new rebate workbench helps streamline rebate processing. The module now integrates with the existing deduction workbench to let you process rebates as customer deductions.

- **Landed cost module enhancements**: Provides warehouse managers with more control over putaway work for goods-in-transit orders. Improves the Landed cost module's ability to track the arrival dates of imported goods.
- **Post on-hand adjustments using configurable reason codes**: Warehouse and retail store workers doing on-hand inventory adjustments can select the reason for each adjustment while they work. The system can then automatically post each adjustment to the appropriate offset account based on the stated reason.
- **Pricing service**: Enables you to define prices and discounts using flexible price attributes. The service provides an omnichannel pricing engine that can find the product's right price based on the applicable price, discounts, promotions, trade agreement, and more.
- **Warehouse Management mobile app enhancements**: User-customizable step-by-step instructions and localized prompts for workers.
- **GS1 standard barcodes**: The system can now scan GS1 standard barcodes for facilitated warehouse processing.

Post on-hand adjustments using codes connected to offset accounts

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021

Business value

This feature adds efficiency, speed, and clear documentation to the inventory adjustment process in warehouses and retail stores. Warehouse and retail store workers doing on-hand inventory adjustments can select the reason for each adjustment while they work. The system can then automatically post each adjustment to the appropriate offset account based on the stated reason.

Feature details

This feature helps businesses post the value of on-hand inventory adjustments to the appropriate offset account based on the reason for each adjustment. It works by enabling the finance department to establish a collection of possible reasons for each adjustment (such as stolen, damaged, or expired), and to assign an offset account to each reason. It also enhances the Warehouse Management mobile app by giving workers the ability to select the reason for each on-hand adjustment they register using the app. As a result, each adjustment can automatically be posted as a counting journal to the correct account as soon as it's registered.

See also

Reason codes for inventory counting (docs)

Configure and work with inventory management in Dynamics 365 Supply Chain Management (learn)

Sales quotation referenced data export policy

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021

Business value

This feature allows organizations to run incremental exports of sales quotations more quickly.

Feature details

This feature lets you choose whether changes to data referenced by quotations will cause those quotations (or lines) to be included in the next incremental export. Your incremental exports will run more quickly if you choose not to include such quotations or lines. To allow you to set this option, the feature adds a setting called **Skip sales quotation referenced data during change tracking** to the **Accounts receivable parameters** page.

See also

Create and confirm sales quotations (learn)

Updates to inventory and logistics feature states with version 10.0.21

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021

Business value

Turning on features by default helps customers stay current with the latest inventory and logistics capabilities of Supply Chain Management.

Feature details

Inventory and logistics features made mandatory starting in version 10.0.21

Starting with version 10.0.21, the following features will be turned on by default and can't be disabled:

- **Organization-wide work blocking**
- Wave label printing
- Task-based wave demand replenishment

- Associate purchase order inventory transactions with load: Records inbound load IDs for purchase order inventory transactions as warehouse workers register inbound quantities using a mobile device.

Inventory and logistics features enabled by default starting in version 10.0.21

Starting with version 10.0.21, the features listed in the following subsections will be turned on by default, but can still be manually disabled. They are all targeted to become mandatory with 2022 release wave 1.

Cost management

- Compare item price storage
- **Moving average, fallback cost sequence**: Enables the ability to select among three predefined fallback cost sequences for moving average. It impacts scenarios where inventory goes negative and a cost has to be assigned.
- **Show the items with not fully settled transactions in summary format**: Shows items that don't have fully settled transactions in summary format in inventory closing. It hides the details of unsettled transactions.
- Change the terminology of inventory closing cancellation to inventory closing reverse

Inventory management

- **Create transfer order from sales line**: Provides the option in both product and supply menu and delivery alternatives form to directly create a transfer order from a sales line. The general information required to create a transfer order and transfer line will be automatically loaded to the creation dialog from the sales line.
- **Enable inventory quality management parameters warning feature**: Warns users if quality management is disabled when setting up the quality management policies.
- **Auto increment line numbers of inventory transfer order lines**: Ensures that line numbers of inventory transfer order lines are continuous integer values.
- **Allow empty batch attributes values**: Allows empty batch attribute values when closing the batch attributes form.
- **Using unit of measure and unit quantity in inventory journals**: Enables the use of unit of measure and unit quantity in inventory journal lines.
- **Inventory journal approve workflow**: Allows users to configure workflows for the inventory journal approval process.
- Inventory on-hand report storage
- **Transfer Order Cancellation**: Provides the functionality to cancel shipped transfer orders.

- **Unlock Inventory Journal**: Adds a button to inventory journals that allows a materials manager, quality control manager, or warehouse manager to unlock inventory journals that were created by other users and locked by the system.
- Saved views for inventory and logistics

Warehouse management

- **Hide the Total Value field on the All Loads and Load Details pages**: When the **Total Value** field is visible, it has a performance impact on the **All Loads** and **Load Details** pages. This feature hides the field.
- Work line details
- **Make mobile device inventory movement inventory status field editable**: Makes the **Inventory status** field editable in the warehouse mobile device inventory movement flow when moving inventory from a license plate-controlled location.
- Enhanced license plate label layouts
- Control whether to display a receiving summary page on mobile devices
- **Prevent reusing containers from different container build templates during containerization**: Prevents containers created from a given container build template from being used by other container build templates during containerization. For example, if a container was created using one container build template and a new item needs to be packed in a container where a different container build template needs to be used, the first container will not be used even if there is enough space in it to pack the new item.
- **Prompt to resolve ambiguous Loc/LP names**: Lets warehouse workers specify whether the value entered in a **Loc/LP** field in the Warehousing Management mobile app identifies a license plate or a location. If a worker enters (or scans) a **Loc/LP** value that is currently used as a name for both a license plate with physical on-hand and a warehouse location, the app will display a screen that prompts the worker to select **Location** or **License plate**.
- Capture product variants and tracking dimensions in the warehousing app during load item receiving
- Confirm outbound shipments from batch jobs
- **Do not allow to create loads that do not meet wave load building template requirements**: Ensures that a load meets all requirements from its template. Also, if the load mix group is used, the templates should be created both for criteria codes and constraints to be able to create loads with any code.
- **Evaluate all actions for multi-SKU location directives**: For multi-SKU location directives, only one action is evaluated for every location directive line. When this feature is enabled, all actions are evaluated in sequenced order.

Procurement and sourcing

- **Bid submission success message**: Displays a success message when bids are submitted.
- RFQ reference link added to PO
- **Ability to batch confirm accepted purchase orders from vendor collaboration**: Allows users to batch-confirm purchase orders that are accepted with no change via vendor collaboration. A new menu item is available in the **Procurement and sourcing** module for batch scheduling, and a parameter will allow the batch run.
- **Purchasing cXML enhancements**: Includes a set of enhancements to the purchase requisition and purchase order processes when collaborating with suppliers. The external catalog is enhanced with a new trace function that allows administrators to troubleshoot using external catalogs with purchase requisitions. New functionality allows for a purchase order to be sent back to the supplier after being confirmed.
- RFQ questions and answers
- **Display the Open published requests for quotation link as a tile**: The vender bidding workspace provides a link that enables users to open published RFQs. This feature changes that link to a tile, which is more prominent and easier to find on the page. This is located in the **Vendor bidding** workspace.

Sales and marketing

- Charges allocation on a sales order

Warehouse Management mobile app step instructions

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021

Business value

Ramping up new or temporary workers can be challenging because it takes time for them to learn how to perform new tasks. Furthermore, even experienced warehouse workers can often feel uncomfortable when performing new tasks they have never done before. This feature helps workers ramp up faster on new tasks by providing configurable instructions for each step and focusing workers' attention on the most important fields as they work through a flow.

Feature details

Create and display custom instructions for each step of each task flow that you set up for the Warehouse Management mobile app. When provided with well-written instructions, your warehouse workers will be able to start using new flows right away, with no prior training. You can choose which field values to display for each step and highlight the most important of them, which helps workers focus on the most important fields as they work through a flow. With this feature, organizations can:

- **Ramp up workers faster by letting them follow simple instructions for each task step.** Each step of a flow provides instructions that allow front-line workers to understand the task.
- **Provide instructions that match your own processes.** Write your own instructions to match your own business and warehouse processes. You can make the terminology fit your physical space, local abbreviations, and so on.
- **Increase productivity by highlighting the most important parts of each step.** Choose which fields and information should be highlighted for each step to help focus workers' attention (first available in version 10.0.23).

See also

Customize step titles and instructions for the Warehouse Management mobile app (docs)

Configure mobile app step instructions (learn)

Soft reservation for the Inventory Visibility Add-in

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 9, 2021	✔ Oct 1, 2021

Business value

This feature enables order management and point-of-sale systems to communicate directly with Supply Chain Management to find and temporarily reserve requested inventory, thus helping to make sure the inventory can be delivered as promised.

Feature details

This feature adds a soft reservation feature to the Inventory Visibility Add-in for Dynamics 365 Supply Chain Management. It enables external systems to query Supply Chain Management for the inventory position of requested items, returns an accurate count of available inventory, and temporarily reserves the requested items. This temporary booking is called a *soft reservation*. The feature calculates the accurate ready-to-sell quantity by deducting the reserved quantity in near real-time.

The external system later creates a formal sales or transfer order, which it sends to Supply Chain Management for processing. Supply Chain Management then firms the soft reservation to create an actual reservation for fulfillment. The firmed reservation offsets the temporary soft reservation to prevent double deduction from inventory on-hand.

The feature is implemented as an API that external systems can access to learn whether inventory is available and then invoke the soft reservation.

See also

Inventory Visibility reservations (docs)

Sealed bidding

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Sep 17, 2021	✓ Oct 1, 2021

Business value

Promote fair procurement practices by implementing sealed bidding on your requests for quotation (RFQs). Submitted bid details remain encrypted until the bidding period expires.

Feature details

When a vendor submits a bid for an RFQ case set for sealed bidding, the system automatically encrypts details such as prices and quantities for confidentiality until the bidding period expires. At the end of the bidding period, the purchasing agent can then open and evaluate the bids. This feature lets you set some or all RFQ cases for sealed bidding, select an appropriate bidding period for each case, and configure a dedicated Azure Key Vault for encrypting the submitted bids.

See also

Sealed bidding for RFQs (docs)

Deduction and catch-weight enhancements for rebate management

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Aug 18, 2021	✓ Oct 22, 2021

Business value

Keeping track of rebate and royalty programs and calculating them accurately can quickly become time consuming and tedious without the right tools. In addition to a central place to manage rebate agreements, this feature provides organizations with a central place to view and process rebates. It helps to increase customer satisfaction by allowing customers to choose to receive a deduction right away, rather than waiting for a rebate payout. In addition, this feature enables businesses working with catch-weight products to incorporate catch-weight units into rebate calculations.

Feature details

This feature enhances the **Rebate management** module for Dynamics 365 Supply Chain Management. It adds a central rebate workbench to help streamline rebate processing, and it integrates with the deduction workbench to let you process rebates as customer deductions. For catch-weight items, the feature also lets you set up rebate conditions based on the catch-weight unit.

This feature helps streamline the rebate process by adding the following elements to Supply Chain Management:

- **A new rebate workbench**: The workbench lets you view and process all provisions, rebates, and write-off transactions in a central place, rather than requiring you to open each rebate program separately. From the rebate workbench, you can quickly access all provisions and rebate claims, and process or purge the transactions.
- **New Procurement category**: This new category, which has a payment type of **Pay using account payable**, is added to the rebate management posting profile. You can use this category to create the target vendor invoice journal.
- **Rebate management details for sales and purchase order lines**: These new details enable you to view eligible rebates during the order entry process.
- **Deduction workbench enhancements**: This feature adds support for short payment scenarios by enabling users to transform rebates into a deduction.

The feature also provides rebate management support for catch-weight items by letting you specify a unit type of either **Inventory unit** or **Catch weight** for each rebate deal. The unit quantity can be based on a different unit type.

Please note the feature is available from 10.0.21

See also

Manage deductions using the deduction workbench (docs)

Rebate management module (learn)

Work breaks and tracking updates for Landed cost

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔Aug 18, 2021	✔Oct 22, 2021

Business value

Businesses using the Landed cost module can automatically update estimated to actual arrival dates of imported goods based on existing putaway records in the system. This improves accuracy and reduces the need for manual data entry. It furthermore enhances goods-in-transit orders to enable warehouse managers to better manage warehouse work by leveraging functionality already available for purchase orders.

Feature details

This feature enhances the Landed cost module for Supply Chain Management by adding two important new capabilities: tracking updates and work breaks. The tracking update feature enables the system to automatically update the date of arrival of imported goods based on existing records of warehouse putaway work. The work breaks feature enables businesses to gain more detailed control over putaway work for goods-in-transit orders by leveraging familiar functionality already available for purchase orders.

Tracking updates

This feature enables the Landed cost module to accurately record the date of arrival for imported goods. It works by automatically updating the actual completion date for each relevant activity tracking record to match the date at which the related goods are put away at your warehouse. The feature helps to ensure accurate arrival records without relying on manual data entry.

Because this feature works based on inventory transactions, it can also make use of inventory arrival journals and therefore works with advanced warehouse management and the transportation management module.

Work breaks

Previously, the goods-in-transit order receiving process didn't support warehouse work templates with header breaks. This feature adds that support to enable inventory transactions to be split during the goods-in-transit receiving process, which provides the following benefits:

- Warehouse managers can establish work break rules to split large putaway jobs into smaller ones based on item, location, stocking limits, or other factors.
- Work break functionality correctly handles under- and over-deliveries and makes all appropriate adjustments to the underlying data.
- Workers can complete or cancel each work header independently.
- The system correctly handles canceled work for goods-in-transit orders, including after an over-delivery transaction and after applying work breaks. The related goods-in-transit and purchase orders are also automatically updated as appropriate.

See also

Update tracking for put away (docs)

Pause tasks in the Warehouse Management mobile app

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 15, 2021	✔ Dec 31, 2021

Business value

Increase the efficiency of warehouse workers by allowing them to stop their current task to perform another more important one, and then return to the original task without losing any information.

Feature details

Workers using the Warehouse Management mobile app can temporarily pause their current task. They can then start and complete another important task before safely returning to where they left off with their previous work.

For example, a warehouse worker performing a sales picking flow might arrive at a specified location only to find that the required item is no longer present. Previously, the only option would be to abandon the current pick flow and do an item inquiry to find out if more of that item is available at another location. As a result, the worker would lose their sales pick information and run the risk that another worker might grab and restart that same picking work, thus creating inefficiencies. With this feature, the worker can instead pause the current task and go to a secondary flow (the item inquiry flow) to find a new location that contains the item, replenish the location, and then continue the sales pick work. No information is lost and the warehouse pick work is more efficient.

See also

Enable detours in your system (docs)

Configure detours for steps in mobile device menu items (docs)

Scan barcodes in the warehouse using GS1 format standards

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

Business value

This feature greatly simplifies the scanning process in warehouses where pallets and containers are labeled with GS1 barcodes. Warehouse workers can simply scan the GS1 barcode to extract all the needed information in a single scan. This reduces the time associated with the task by eliminating the need to do multiple scans or input information manually, while ensuring accuracy of information logged at the point of scanning.

Feature details

The GS1 barcode format is a global standard for exchanging data between different companies. The standard defines the data format and the various kinds of data that can be encoded using it. GS1 barcodes can have multiple data elements, so a single barcode can include many types of product information including batch, expiration date, and more.

This feature enables the Warehouse Management mobile app to scan a single GS1 barcode and correctly extract all the information needed to process the task at hand.

See also

GS1 bar codes and QR codes (docs)

Set up and deploy GS1 and QR bar codes (learn)

Manufacturing

Overview

This release adds the following capabilities for manufacturers:

- Supply Chain Management can be integrated with common manufacturing execution systems. The solution provides a simple and efficient no-code onboarding process, which reduces overall implementation and operating costs. It helps manufacturers to establish end-to-end visibility and control the production floor.
- The production floor execution interface now enables workers to register batch and serial numbers for raw materials and adjust the amount of material consumed. This ensures material traceability, provides accurate and up-to-date inventory levels, and increases the efficiency of shop-floor workers.
- Workers can now use the Warehouse Management mobile app running against a scale unit to register quantities, batch numbers, and serial numbers of consumed raw materials. This ensures material traceability, accurate inventory records, and shop-floor efficiency, while also enabling manufacturers to take advantage of the increased resiliency and performance offered by a distributed hybrid topology.

Updates to manufacturing feature states with version 10.0.21

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Aug 2, 2021	✓ Oct 1, 2021

Business value

Turning on features by default helps customers stay current with the latest manufacturing capabilities of Supply Chain Management.

Feature details

Manufacturing features enabled by default starting in version 10.0.21

The following features will be turned on by default, but can still be manually disabled. The features are all targeted to become mandatory with 2022 release wave 1.

- License plate for reporting as finished added to the Job Card Device

- **Improvements to the Approve and Transfer jobs dialogs**: Adds two new fields (**Approval group** and **From date**) to the **Approve and Transfer jobs** dialogs. These fields improve the overview of which jobs are going to be approved or transferred.
- **Enable automatic generation of license plate number when reporting as finished in the job card device**: Makes it possible to configure whether the license plate number should be automatically generated or entered manually when reporting as finished from the job card device.
- **Enable partial receipt of subcontracted items and fix an issue with the calculation of scrap for BOM lines of type Vendor**: Enables partial receipt of subcontracted items. Previously, when reporting a partial quantity on a purchase order for a subcontracted service item, the full quantity was updated on the related picking list journal on the production order. Now, the correct partial received quantity is updated. This feature also fixes an issue with an incorrect updated scrap quantity when using BOM lines of type **Vendor**.
- **A new Stop break button has been added to the Job Card Terminal page**: Adds a new Stop break button, which is needed when the parameter Lock employee is selected on the Configure Job Card Terminal page. When the Lock employee parameter is selected, the Job Card Terminal page does not return to the sign-in page when a worker makes registrations (for example, when a worker registers a break). With this configuration, workers must select Stop break when returning from a break in order to continue the current job or register on any other activity.
- Print label from Job Card Device: Enables printing a label when reporting as finished from the job card device. The label is part of document routing and enabled in the **Configure job card for devices** page.
- Feature for locking job card device and job card terminal so that they can be sanitized
- Dynamics 365 Guides for Manufacturing
- Saved views for production control
- Production floor execution

Enhanced production floor execution interface for process manufacturing

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 15, 2021	✔ Dec 10, 2021

Business value

Provides a state-of-the-art and intuitive user experience for process manufacturers and manufacturers that need to report on batch orders. This will make shop floor workers more effective and reduce registration errors.

Feature details

Process manufacturers, and manufacturers that need to report on batch orders, can now take advantage of the production floor execution interface. Workers can use the production floor execution interface to report progress on batch orders, including reporting on co-products and by-products.

Some manufacturers, especially those within the process industries, use batch orders to manage their production processes. Batch orders are created from formulas, which can be defined to have co-product and by-product output. When reporting feedback on such batch orders, the amount of output needs to be registered on the formula item, as do the co-products and by-products.

See also

How workers use the production floor execution interface (docs)

Manufacturing execution systems integration

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓Oct 15, 2021	✓Dec 10, 2021

Business value

Manufacturing execution systems integration offers manufacturers a fast path to realizing their Industry 4.0 ambitions by making it faster and easier to integrate Dynamics 365 Supply Chain Management with common manufacturing execution systems. The solution reduces overall implementation and operating costs. It helps manufacturers to establish end-to-end visibility and control over the production floor.

Feature details

Some manufacturing organizations that use Supply Chain Management, especially those with advanced manufacturing requirements, use a third-party manufacturing execution system (MES) to control their manufacturing activities for machines, equipment, and personnel instead of what is natively available in Dynamics 365. Organizations might choose a third-party MES solution (for example, because it is tailored for their own vertical industry).

In the integrated solution, data exchange is fully automated and near real time, which keeps data current in both systems and eliminates the need for manual data entry. For example, when material consumption is registered in the MES system, the integration ensures that the same consumption is also registered in Dynamics 365, so up-to-date inventory records are available to other important processes such as planning, sales, and so on.

The solution makes it faster, easier, and cheaper for Supply Chain Management users to integrate with third-party MES systems. It offers:

- Business events and interfaces that support key manufacturing execution processes

- A centralized dashboard where the event processing history can be tracked and failing processes can be troubleshooted and resolved

You can enable any or all processes outlined in the following subsections for integration.

Release production orders and production order status change

This process provides the MES system with a business event that the MES can monitor for information about which production orders to produce. Reference data related to the production order is expected to be provided with OData or data entities.

Start production order

This process provides Supply Chain Management with information about production orders being started using the MES system. It ensures that both systems have an up-to-date view of all manufacturing activities.

Report produced or scrapped quantity

This process provides Supply Chain Management with information about the good and error quantities reported on a production job using the MES system, which provides shop floor supervisors with an up-to-date view of production plan progress.

Report material consumption

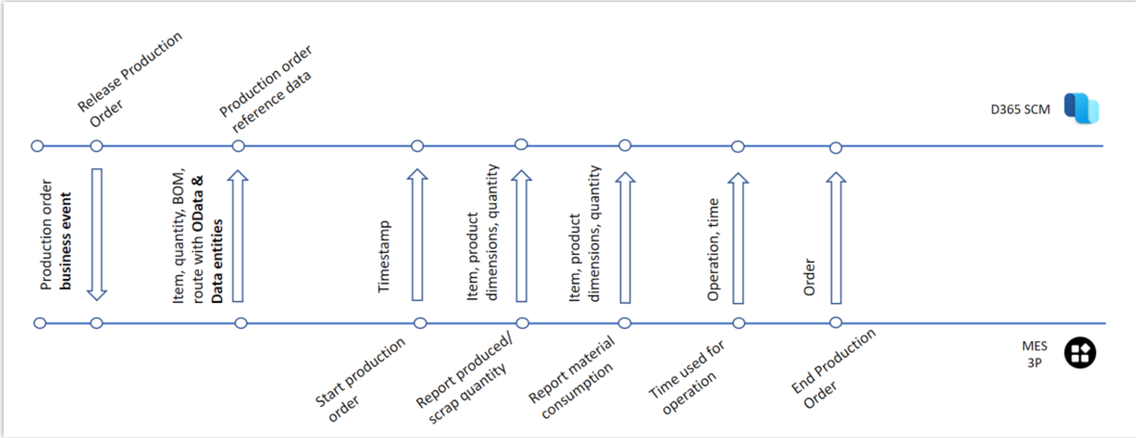
This process provides Supply Chain Management with information from the MES system about quantities of materials consumed. This makes up-to-date inventory records available to other important processes such as planning, sales, and so on.

Report time consumed for the operation

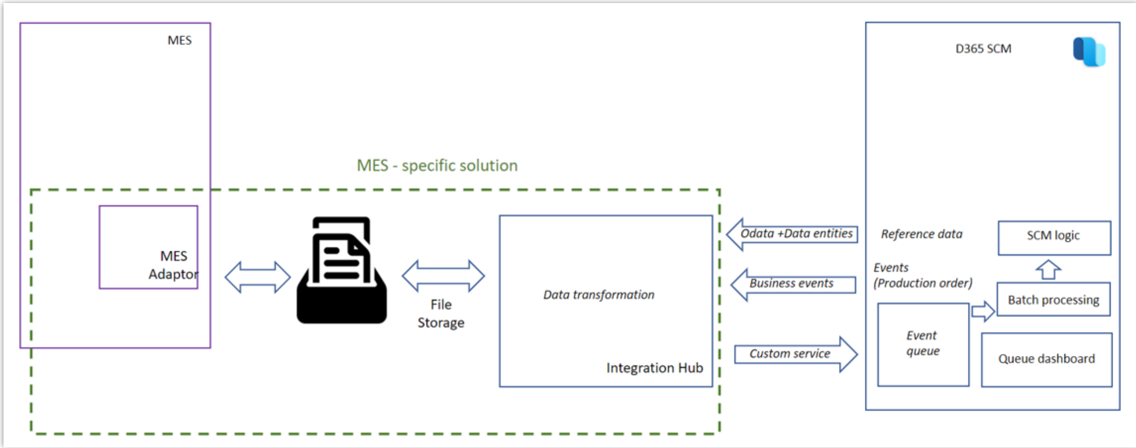
This process provides Supply Chain Management with information on the time used for a specific operation.

End production order

This process tells the MES system that a production order has been updated to its final status of **Ended** in Supply Chain Management, which indicates that no more quantities will be produced for the production order.



Data flow diagram for the manufacturing execution systems integration.



Example of an expected architecture and components of a manufacturing execution systems integration.

See also

Learn about manufacturing execution systems integration (video)

Integrate with third-party manufacturing execution systems (docs)

Planning

Overview

This release adds Planning Optimization support for production scheduling that respects finite resource capacity. Manufacturers can now:

- Use finite scheduling to detect potential future delays caused by limited resource capacity. This helps manufacturers to automatically update their material requirements accordingly and notify impacted customers.

- Allocate resources based on capabilities during scheduling. Instead of assigning specific resources or resource groups to a route operation, the required capabilities can be defined on the route operation. With this setup, scheduling will match the required capabilities with capabilities of available resources to determine the resource assignment for a given production job.
- Support process manufacturing scenarios while taking advantage of Planning Optimization. For process manufacturers, the system now supports batch orders, co-products, by-products, and items with limited shelf life.

Updates to planning feature states with version 10.0.21

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021

Business value

Turning on features by default helps customers stay current with the latest planning capabilities of Supply Chain Management.

Feature details

Planning features enabled by default starting in version 10.0.21

Starting with version 10.0.21, the features listed in the following subsections will be turned on by default, but can still be manually disabled. These are all targeted to become mandatory with 2022 release wave 1.

- Parallel firming of planned orders
- Master planning progress visualization
- **Auto-firming for planning optimization**: Allows auto-firming of planned orders after planning optimization runs. This will automatically firm planned orders falling within the firming time fence in days from **Plan setup** under **Master planning parameters**.
- **Forecast model selection on demand forecast details**: On the **Demand forecast details** page, the user can select the forecast models to be included for the historical forecast.

Planning Optimization support for capability-based resource allocation

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 30, 2021	✔ Jan 14, 2022

Business value

Companies using Planning Optimization can optimize resource usage by deferring resource allocation until productions are scheduled. This flexible solution automates resource selection during production scheduling based on individual operation capabilities and requirements.

Feature details

Planning Optimization now supports production scheduling with flexible resource allocation based on resource capabilities. A *capability* is the ability of an operations resource to perform a particular activity. An operations resource can have more than one capability assigned to it, and a capability can be assigned to more than one resource. Capabilities can be assigned to all types of resources, including tools, vendors, machines, locations, facilities, and human resources. Each capability can be set to ensure the selected resource has the required capability level for a given operation. Capabilities can also include a priority, which is used during scheduling to optimize the resource selection based on highest available priority.

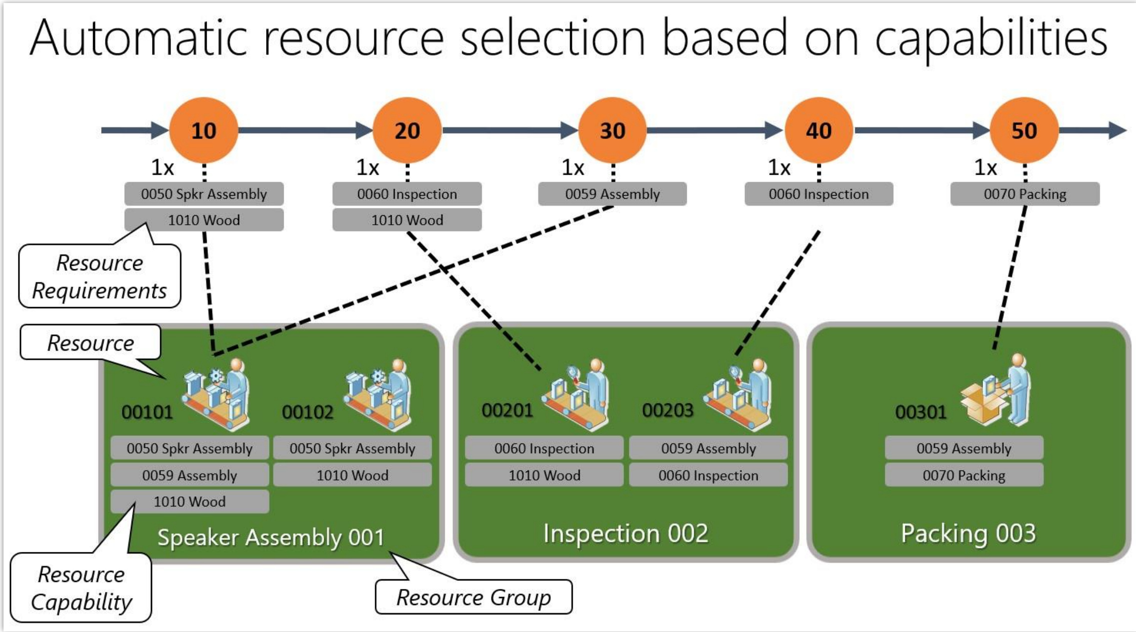
Instead of assigning specific resources or resource groups to a route operation, you can define the capabilities required for each route operation. With this setup, scheduling will match the required capabilities with the capabilities of available resources to determine the resource assignment for each production job.

Capability-based resource allocation is part of the materials resource planning II (MRP II) support provided by Planning Optimization. MRP II helps planners at manufacturing companies control their production schedule, control resource load, and determine delivery lead times. Because Planning Optimization runs as a separate service, it's able to facilitate high performance production planning without slowing down the rest of the system.

With Planning Optimization support for production scheduling, manufacturers can benefit from:

- Significantly improved performance and scalability with in-memory processing.
- Minimized system impact on other processes made possible by moving master planning to its own service.
- Near-real-time insights into requirement changes during office hours.

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



Automatic capability-based resource allocation.

Geographic areas

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

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

See also

[Scheduling with resource selection based on capability](#) (docs)

Planning Optimization support for reorder margin and issue margin

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 19, 2021	✔ Jan 14, 2022

Business value

With *reorder* and *issue* margins, your lead time setup can be simplified for both distribution and production scenarios. This is because the additional buffer margin can be controlled centrally and handled separately from the lead time.

Feature details

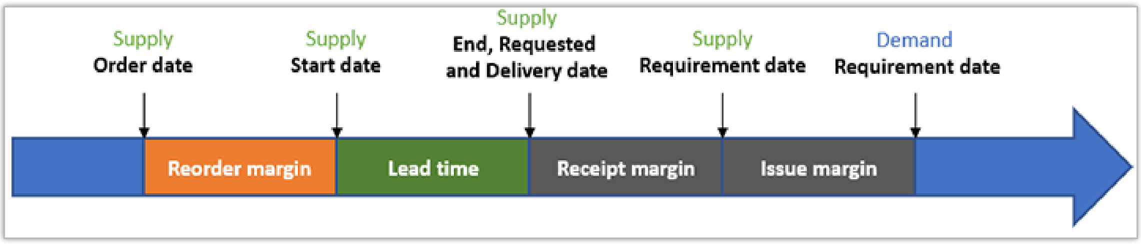
This feature enables the Planning Optimization Add-in for Supply Chain Management to include safety margins of types *reorder margin* and *issue margin* during master planning. Safety margins enable a setup that provides some extra buffer time beyond the normal lead time.

Reorder margin – the buffer time for placing the supply order

The system adds the *reorder margin* before the item lead time for all planned orders during master planning, thereby ensuring adequate time for a supply order to be placed. This margin is typically used as a buffer to allow time for approval or other internal processes that are required while creating supply orders. The *reorder margin* is placed between the supply order date and start date.

Issue margin – the buffer time for handling shipments

The system deducts the *issue margin* from the demand requirement date during master planning. This helps ensure that you have time to react to and ship incoming demand orders. This margin is typically used as a buffer to allow time for shipment and related outbound warehouse processes.



Enable usage of reorder and issue margin.

Planning Optimization benefits

With Planning Optimization, planners can benefit from:

- Improved performance with high data volume.
- Improved system performance made possible by moving master planning to its own service.
- Near real-time insights into requirement changes.

Geographic areas

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

- United States
- Europe
- United Kingdom

- Australia
- Canada

See also

Safety margins (docs)

Planning Optimization support for priority-based planning

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 20, 2021	Feb 2022

Business value

Priority-based planning prioritizes replenishment orders to ensure that urgent demand is prioritized over less-important demand. This enables businesses to increase service levels, reduce inventory levels, and prioritize their usage of supply and available material.

Feature details

Planning Optimization now supports priority-based material requirement planning and demand-driven planning.

Demand-driven planning lets you prioritize replenishment orders to ensure that urgent demand is prioritized over less-important demand. For example, a stockout replenishment order will be prioritized over a standard refill replenishment order. The system can automatically split larger orders into separate smaller orders, with order lines grouped by priority, and then process all high-priority orders first.

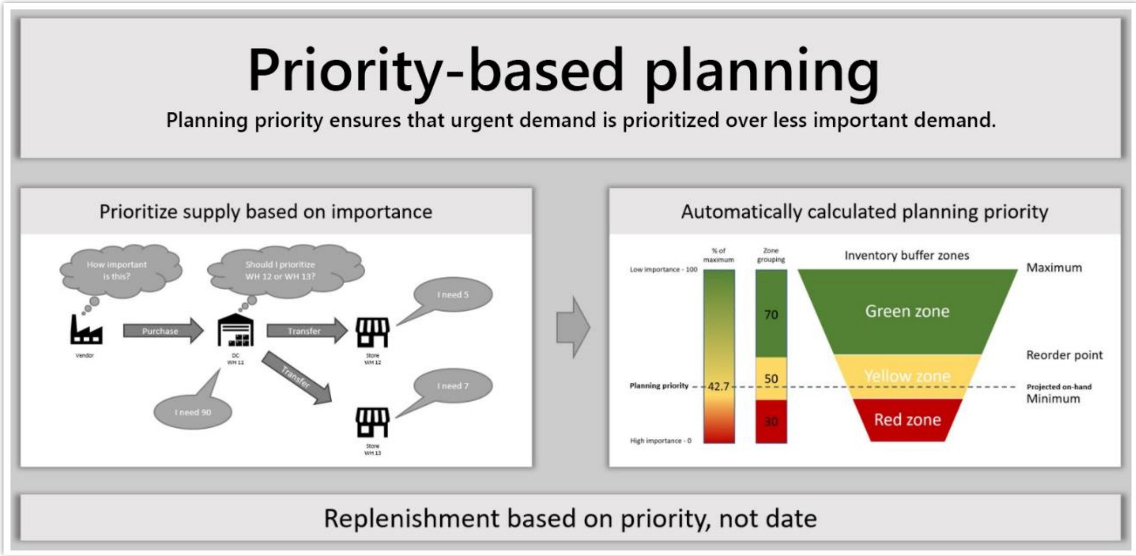
Most industries can benefit from this, and a typical company that implements demand-driven planning can achieve:

- Improved customer service
- Lead time compression
- Right-size inventory
- Lower total supply chain cost

These capabilities enable you to:

- Assign planning priorities to purchase order lines, sales order lines, transfer order lines, and demand forecasts.
- Generate planned orders based on priority from demand and inventory levels.
- Assign reorder points to item coverage rules to add granularity (in addition to minimum and maximum quantities) when planning refill orders.

- Split replenishment automatically based on priority to help optimize the distribution of limited supply.
- Group purchase orders based on priority when firming planned orders.
- Define priority ranges to create a flexible planning priority setup.
- Assign a default planning priority level for each type of order (sales, purchase, and transfer).
- Create intercompany orders, which let you establish a planning priority flow that applies across legal entities.



Priority-based planning overview.

Geographic areas

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

- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Canada

See also

[Planning optimization support for priority-based planning in Dynamics 365 Supply Chain Management](#) (video)

[Priority-based planning](#) (docs)

Product information management

Overview

Turning on features by default helps customers stay current with the latest product information management capabilities of Supply Chain Management.

Share product information across legal entity boundaries

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

Business value

Companies with many legal entities and a large product portfolio (such as large sales and distribution networks) often experience a significant level of duplicated product data. This feature lets you share released product data across legal entities, thereby reducing the volume of data that must be maintained while simplifying the task of maintaining product master data.

Feature details

Cross-company data sharing lets you share released product data among some or all of your legal entities. This enables you to manage just one product record and then release and share it with all specified legal entities.

Keeping a single record simplifies data maintenance. For example, you might share product data between all legal entities that purchase, produce, distribute, or sell the product. Each product can then be released just once to make it visible in all the legal entities that share it. Subsequent updates to the product will also be shared and visible to all those legal entities without duplicating the product-related information.

You can also share specific product data by specifying precisely which tables and fields to share. A template is provided to help simplify the management experience.

Updates to product information management feature states with version 10.0.21

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021

Business value

Turning on features by default helps customers stay current with the latest product information management capabilities of Supply Chain Management.

Feature details

Product information management enabled by default starting in version 10.0.21

Starting with version 10.0.21, the following features will be turned on by default, but can still be manually disabled. They are all targeted to become mandatory with 2022 release wave 1.

- Navigation to BOM version from BOM lines: Enables navigation from BOM lines to the BOM Version page.
- Hazardous materials product information and shipping documentation
- **Strict validation on default order quantities**: Adds the option to apply strict validation to the default order quantities. When the parameter **Validation on default order quantities** is set to **Strict**, stricter validation will be applied. Then the standard order quantity will need to be a multiple of the multiple value. This applies to the purchase order, inventory, and sales order tab.
- Country of origin management feature

Overview of Dynamics 365 Supply Chain Insights 2021 release wave 2

Dynamics 365 Supply Chain Insights helps organizations achieve a supply chain of the future—one that is resilient, sustainable, and capable of sensing, predicting, and mitigating disruptions before they occur. Furthermore it enables organizations to create a digital representation of their physical supply chain and enhance the end-to-end visibility of their entire value chain. It breaks down data siloes by connecting and taking inputs from existing enterprise resource planning (ERP) and supply chain systems across the organization and combining it with best of breed third-party signals to surface supply chain vulnerabilities and insights. Businesses can further invite suppliers to securely share data and gain visibility into their first-, second-, or third-tier suppliers.

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

This topic lists features that are planned to release from October 2021 through March 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
Collaboration with stakeholders to mitigate risks	Users by admins, makers, or analysts	Nov 2021	-
Model the supply chain	Users by admins, makers, or analysts	Nov 2021	-
Visualize and analyze supply chain risks	Users by admins, makers, or analysts	Nov 2021	-

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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Collaboration with stakeholders to mitigate risks

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Nov 2021	-

Business value

Supply Chain Analyst helps to communicate and collaborate with all stakeholders using their favorite Microsoft Office productivity tools, such as Teams. This functionality will improve the agility of Supply Chain Analyst to react to and mitigate risks.

Feature details

Collaboration enables customers to react with agility to discovered risks and helps with mitigation of the risks. The functionality we're introducing will:

- Provide the ability for different personas to collaborate within an organization and across supply chain stakeholders (suppliers and customers) to communicate observations and insights.
- Take actions to mitigate discovered risks.

The solution will leverage Microsoft strengths like Power Platform to build out middleware, Teams for collaboration, and Office (most importantly, Excel) for integration with the customer's existing business processes.

Model the supply chain

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Nov 2021	-

Business value

Dynamics 365 Supply Chain Visibility will be a B2B product that adds value to existing apps in the full spectrum of supply chain management, ranging from tactical applications such as sales, marketing, production, logistics, and order management, to the strategic applications such as planning and finance. Supply Chain Visibility aims to supercharge these apps with holistic observability, predictive insights, and collaboration.

Feature details

Observability provides transparency into the entire supply chain operation and answers fundamental questions about what is happening in your supply chain, inside and outside the walls of the enterprise.

Modeling and prediction provide insights into what could go wrong in your supply chain, based on the observed state and learnings from past experiences.

Collaboration enables customers to react with agility to discovered risks and helps to mitigate the risks.

Visualize and analyze supply chain risks

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Nov 2021	-

Business value

Dynamics 365 Supply Chain Visibility can help you have more reliable supply chain operations, help manage lean inventory, and lower your costs as evidenced in quantitative metrics such as lead times, time to warn, stock-out rate, cost of storage, supply, production, and logistics. Supply Chain Visibility can also help improve business continuity and resilience to disruptions.

Feature details

Modeling and prediction provide insights about what could go wrong in your supply chain operation, based on the current state and learnings from previous actions. Predictive modeling enables:

- **Reactive visibility**: early warning of risk of extreme events along dimensions such as capacity, availability, yield, and quality, and across areas such as inventory, production, and logistics.
- **Proactive visibility**: the ability to simulate what-if scenarios that help identify weaknesses, along the same dimensions and areas as reactive visibility. Proactive visibility helps build resilience against disruptive events like storms, strikes, and closures that may not be conducive toward consistent modeling.

Overview of Dynamics 365 Project Operations 2021 release wave 2

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 2021 release wave 2, we're delivering functionally rich experiences in the following areas:

- Ability to create and manage subcontracts with vendors for projects.
- Ability to add recurring hotel charges.
- Task scheduling enhancements.

What's new and planned for Dynamics 365 Project Operations

This topic lists features that are planned to release from October 2021 through March 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
Task scheduling enhancements from Project for the web	Users, automatically	-	✔Oct 1, 2021
Recurring hotel itemization	Users by admins, makers, or analysts	✔Nov 15, 2021	✔Jan 17, 2022
Subcontractor management for projects in Project Operations Lite Deployment scenarios	Users by admins, makers, or analysts	-	Jan 2022

Feature	Enabled for	Public preview	General availability
Upgrade from Dynamics 365 Project Service Automation to Dynamics 365 Project Operations Lite Deployment phase 1	Users by admins, makers, or analysts	✓ Dec 21, 2021	Feb 2022
Support item requirement for projects with multiple funding sources for stocked/production-based scenarios	Users by admins, makers, or analysts	-	Mar 2022
Use procurement categories in Project Operations for resource based/non-stocked scenarios	Users by admins, makers, or analysts	-	Mar 2022
Support mileage recording by fiscal year	Users by admins, makers, or analysts	Feb 2022	Mar 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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Task scheduling enhancements from Project for the web

Enabled for	Public preview	General availability
Users, automatically	-	✓ Oct 1, 2021

Business value

Task scheduling enhancements are a category of task planning features that accrue to Project Operations from Project for the web. In each release cycle, these enhancements will provide project managers with more control when planning tasks and delivery schedules on projects.

Feature details

For details about scheduling enhancements that will be made in Project for the web, review the [Project for the web release details](#).

Recurring hotel itemization

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 15, 2021	Jan 2022

Business value

This feature improves both the ease of use and accuracy when capturing hotel charges.

Feature details

When capturing recurring charges for hotel stays, users have to manually re-enter the recurring charges for each transaction date. This leads to increased time and effort to capture itemization details. With this capability, a user can select the rate for each recurring charge and the number of recurring charges so that the lines are automatically populated for each day. This feature will be available only for those using the reimagined expense UI. Capabilities include:

- The ability to capture recurring hotel line items like daily room rate, room tax, and non-room tax with minimal user effort.
- A bigger receipt viewing pane for easier itemization of hotel expenses.

Geographic areas

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

- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- South America
- Canada
- India
- Japan
- France
- Korea

- China
- US Gov

See also

Expense itemization (docs)

Subcontractor management for projects in Project Operations Lite Deployment scenarios

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

Business value

This feature provides better visibility and control over all aspects of work on a project.

Feature details

Subcontracting or outsourcing project work to vendors, and managing the vendor resource assignments and delivery of work, is essential in any project-based organization. In this release wave, Project Operations will prioritize comprehensive experiences for managing subcontractors for project-based work. Key capabilities include:

- Billing agreements with vendors using time and material and fixed-bid models.
- Pricing for subcontractor resources.
- Staffing subcontractor resources and insights into resource choices between full-time versus subcontractors.
- Review and reconcile subcontractor time, and clear vendor invoices for payment.

Upgrade from Dynamics 365 Project Service Automation to Dynamics 365 Project Operations Lite Deployment phase 1

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 21, 2021	Feb 2022

Business value

Providing a seamless, 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

The 2021 release wave 2 includes investments that allow existing Dynamics 365 Project Service Automation customers to upgrade to the new Dynamics 365 Project Operations Lite Deployment. Leveraging existing capabilities provides a frictionless upgrade of data from the Project Service Automation application to Project Operations.

The upgrade for customers moving to Project Operations from Project Service Automation version 3 is delivered in three phases. In December 2021, we're targeting customers who don't take a dependency on the work breakdown structure (WBS) or related entities. In the April wave, we'll support customers who have 500 tasks or less in their work breakdown structures. Lastly, after the April wave, we'll support customers who may have one or many projects with a WBS larger than 500 tasks.

See also

Upgrade from Project Service Automation to Project Operations (docs)

Support item requirement for projects with multiple funding sources for stocked/production-based scenarios

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

Business value

Business users can sell items with fixed-price projects that are funded by multiple customers.

Feature details

While working with a project, you may need to acquire an item from a third party to use in the project. To do this, you'll need to create an item requirement on the project that can be picked up from the inventory and billed from your project.

Every billable project has a contract associated with it. This contract may have funding sources to provide funding for the contract, and therefore the project. The most common scenario is where a customer is the funding source. This implies that what you're billing in a project is billed to this customer.

In some cases, a project may have more than one funding source associated with it. In this case, you define rules to specify how much cost and revenue goes to which funding source. In the current system, there is no way to create item requirements for such projects. The main goal of this is to add functionality to support creating item requirements for such projects with multiple funding sources.

Use procurement categories in Project Operations for resource based/non-stocked scenarios

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

Business value

This feature provides a simplified setup to configure project-based procurement. The accounts payable clerk can use not only non-stocked items, but also procurement categories in project purchase orders and pending vendor invoices.

Feature details

With this feature, you can use the procurement categories in project purchase orders and vendor invoices in Project Operations for resource based/non-stocked scenarios. The system will determine which transaction class to use for project actuals and the project subledger based on the project category assigned to the procurement category record.

Support mileage recording by fiscal year

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

Business value

This feature adds the capability to record and total the mileage by fiscal year, which results in an accurate mileage expense calculation for the configured fiscal year.

Feature details

When a user submits mileage expenses, the system resets the mileage logged per employee at the beginning of every calendar year. This reset results in the miles consumed being lost when they are from the previous year, which leads to incorrect mileage calculations. Using this feature, organizations will be able to choose between recording mileage by fiscal year or by calendar year.

Overview of Dynamics 365 Intelligent Order Management 2021 release wave 2

Built on a modern, open platform, Dynamics 365 Intelligent Order Management provides the flexibility companies need to capture orders from any order source, including e-commerce, marketplace, mobile apps, or traditional sources like electronic data interchange (EDI). Companies can fulfill those orders from their own warehouses, third-party logistics (3PL) providers, stores, or drop-ship with vendors or other delivery fulfillment partners using out-of-the-box, prebuilt connectors from an ecosystem of more than 200 Microsoft Power Platform connectors.

Intelligent Order Management leverages an integrated, real-time inventory visibility service, a microservice built on Microsoft Dataverse that is highly scalable and extensible, providing a single, global view of the inventory positions across systems. Intelligent Order Management also uses distributed order management (DOM) to give real-time recommendations for each order so they are fulfilled accurately and in a more cost-effective manner, improving supply chain efficiency to better meet customer expectations.

With Intelligent Order Management, brand owners gain real-time visibility into each step of the order journey, and fulfillment insights in real time through customizable and integrated dashboards that enable their supply chain team to overcome constraints and improve operational efficiency.

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

This topic lists features that are planned to release from October 2021 through March 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
Additional language support	Users, automatically	-	✔ Nov 5, 2021
Enhancements related to delivery tracking information	Users, automatically	-	✔ Nov 5, 2021

Feature	Enabled for	Public preview	General availability
Shipstation provider enhancements	Users, automatically	-	✓ Nov 5, 2021
System monitoring dashboard	Users, automatically	-	✓ Nov 5, 2021
Soft reservations to support order processing	Users by admins, makers, or analysts	Jan 2022	Feb 2022

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
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Additional language support

Enabled for	Public preview	General availability
Users, automatically	-	✓ Nov 5, 2021

Business value

This release adds additional language coverage for English, French, Dutch, and German to enable users to use Dynamics 365 Intelligent Order Management in their chosen language.

Feature details

The following languages are being added to Intelligent Order Management:

- **English**: Australia, Canada, United Kingdom, Ireland, India, Malaysia, New Zealand, Singapore, and South Africa
- **French**: Belgium, Canada, and Switzerland
- **Dutch**: Belgium
- **German**: Austria and Switzerland

See also

Globalization (docs)

Enhancements related to delivery tracking information

Enabled for	Public preview	General availability
Users, automatically	-	✔ Nov 5, 2021

Business value

This feature allows brand owners to capture shipping information from delivery carriers at the fulfillment order level. The shipping information can then be used to provide visibility into delivery, to track and measure fulfillment service level, and remediate late deliveries. Additionally, the details may be used to update order sources and facilitate up-to-date customer communications.

Feature details

This feature provides an application entity model to store information related to the delivery tracking process. This data entity allows provider actions, in-app updates, and views based on delivery status information. The information may be communicated to source systems to enable communications to customers who placed orders and wish to know how and when their orders will be delivered. The feature will enable customer service personnel to make decisions and take action based on the delivery tracking information. Resulting actions may include rerouting or expediting shipments, and notifications to customers.

Many forms of information may be valuable in the context of delivering ordered products to a customer. The delivery information and tracking flows in scope of this feature include:

- **Parcel shipments**: Use of a parcel shipment carriers typically used in the fulfillment of e-commerce orders.
- **Freight shipments**: This information is commonly known as FTL (full truck load) and LTL (less than truck load). It is more common in B2B orders, internal movement of goods, or inbound shipments. It can also be used in B2C e-commerce orders when the product being ordered is larger than the delivery capacity of a parcel carrier.
- **Last mile delivery**: Common examples are home delivery of groceries or meals.

Shipstation provider enhancements

Enabled for	Public preview	General availability
Users, automatically	-	✔ Nov 5, 2021

Business value

This enhancement to the Shipstation provider enables automatic updates to order status and delivery information. That way, customer service and order source systems can provide the most up-to-date information to customers about the delivery of their orders.

Feature details

The delivery information that is updated with this feature includes carrier, mode of delivery, tracking number, shipping label, and delivery status. The information is automatically retrieved from Shipstation and made available in the related orders. Then, the information can be used to notify customers of their order delivery status.

See also

Set up ShipStation provider (docs)

System monitoring dashboard

Enabled for	Public preview	General availability
Users, automatically	-	✔ Nov 5, 2021

Business value

This feature enables interactive system monitoring capabilities so that administrators and power users can analyze integration processing, including transaction successes and failures, for all of their integrations running in Dynamics 365 Intelligent Order Management. The insights provided allow administrators to take action to resolve issues and keep their system running optimally.

Feature details

This feature provides valuable insights that encapsulate the most important information for an Intelligent Order Management system administrator to use to monitor system performance. The dashboard displays performance details, including failure and success status for various messages flowing in and out of Intelligent Order Management.

Soft reservations to support order processing

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

Business value

With Dynamics 365 Intelligent Order Management, you can use the soft reservation functionality in Inventory Visibility to support order processing and track immediately available stocks for further customer demands.

Feature details

This enhancement enables the soft reservation feature to support Intelligent Order Management processes.

With this enhancement, Intelligent Order Management will query the inventory position of requested items and will return an accurate count of available inventory. Intelligent Order Management customers can temporarily reserve the requested items after sales orders or sales requests are created. This temporary booking is called a **soft reservation**. The ready-to-sell quantities are calculated by deducting the reserved quantity in near real time.

Overview of Finance and Operations cross-app capabilities 2021 release wave 2

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 updates per year) that help customers stay current in a consistent, predictable, and seamless manner.

The key driver for all of 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:

- **Power Platform convergence features** are capabilities that bring Finance and Operations apps closer to Microsoft Power Platform. Environment provisioning, authorization and authentication, run-time events, and developer tools are areas that will enable new capabilities that takes convergence forward.
- **Cross-app features** provide ease of use to all users of Finance and Operations apps.
- **Data and process integration features** provide enhanced data exchange experiences between Finance and Operations apps, Microsoft Dataverse, and customer engagement apps in Dynamics 365.

What's new and planned for Finance and Operations cross-app capabilities

This topic lists features that are planned to release from October 2021 through March 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.

Cross-app features

Capabilities and features that apply to all Finance and Operations apps.

Feature	Enabled for	Public preview	General availability
Enhanced support for full feature lifecycle in Feature management	Users, automatically	✔ Aug 2, 2021	✔ Oct 1, 2021
Improved legal entity support for saved views	Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021
Updates to client feature states with version 10.0.21	Users, automatically	✔ Aug 2, 2021	✔ Oct 1, 2021
WCAG 2.1 accessibility support for the Finance and Operations apps web client	Users, automatically	✔ Aug 2, 2021	✔ Oct 1, 2021
Visual Studio 2019 support X++ Development	Admins, makers, marketers, or analysts, automatically	✔ Oct 1, 2021	✔ Oct 1, 2021
RSAT supports parallel execution	Users, automatically	✔ Nov 1, 2021	✔ Nov 1, 2021
New color picker control	Users by admins, makers, or analysts	✔ Sep 3, 2021	✔ Nov 5, 2021
Open-source software update – upgrade Moment and remove jQWidgets	Users by admins, makers, or analysts	✔ Sep 3, 2021	✔ Nov 5, 2021
Power BI integration supports latest Power BI desktop releases	Admins, makers, marketers, or analysts, automatically	-	✔ Nov 15, 2021
Open attachments in a new window	Users by admins, makers, or analysts	✔ Oct 15, 2021	✔ Dec 31, 2021
Removal of header/lines proxy buttons on Details Transaction forms	Users by admins, makers, or analysts	✔ Oct 15, 2021	✔ Dec 31, 2021
Enable auto-update for all sandbox environments	Admins, makers, marketers, or analysts, automatically	✔ Oct 15, 2021	Jan 2022

Feature	Enabled for	Public preview	General availability
RSAT improvements for the out-of-the-box experience and installation	Users, automatically	Jan 2022	Jan 2022
RSAT test lifecycle support and support for on-premises deployments	Users, automatically	Jan 2022	Jan 2022
RSAT support for integration testing, part 1 of 2	Users by admins, makers, or analysts	Feb 2022	Feb 2022
RSAT support for integration testing, part 2 of 2	Users by admins, makers, or analysts	Mar 2022	Mar 2022

Data and process integration

Finance and Operations app data and processes are available in Microsoft Dataverse and Azure Data Lake Storage.

Feature	Enabled for	Public preview	General availability
Increase in Legal Entity limits for dual-write integration	Users by admins, makers, or analysts	✓Sep 27, 2021	✓Oct 4, 2021
Export to Azure Data Lake feature adds regions, including China	Users by admins, makers, or analysts	-	Mar 2022
Get recommendations on best practices via dual-write table map health check	Users by admins, makers, or analysts	-	Mar 2022
Change feeds in data lakes	Users by admins, makers, or analysts	✓Apr 30, 2021	Mar 2022
Finance and Operations data in Microsoft Dataverse – phase 5	Users by admins, makers, or analysts	Jan 2022	Mar 2022

Near-zero downtime

The goal of this initiative is to reduce downtime for maintenance operations such as updates to operating systems, security, apps, and infrastructure.

Feature	Enabled for	Public preview	General availability
Batch OData API	Admins, makers, marketers, or analysts, automatically	✓ Oct 1, 2021	✓ Dec 1, 2021

Power Platform convergence

This section covers the scenarios and features enabled by converging Finance and Operations apps with Microsoft Power Platform.

Feature	Enabled for	Public preview	General availability
New scenarios enabled with Power Platform convergence	Admins, makers, marketers, or analysts, automatically	✓ Jun 30, 2021	✓ Oct 22, 2021

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
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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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Cross-app features

Overview

Cross-app features provide ease of use to all users of Finance and Operations apps. These capabilities improve development, administration, and end-user experiences by addressing some of the key shortcomings we've heard from our customers.

For example:

- Developers will benefit from Visual Studio support for X++ development.
- Administrators will benefit from the auto-update capability that is extended to all Microsoft-managed sandbox environments.
- End users will benefit from improved legal entity support for saved views.

Enhanced support for full feature lifecycle in Feature management

Enabled for	Public preview	General availability
Users, automatically	✓Aug 2, 2021	✓Oct 1, 2021

Business value

This feature makes it easier for customers to stay up to date with the latest features and capabilities provided by Finance and Operations apps and helps to ensure customers are prepared for when features become mandatory.

Feature details

Microsoft product teams will now be able to update the state of optional features to be **On by default**. Previously, the only option for a feature to progress through its lifecycle after being released was to transition it directly to **Mandatory**, which does not permit the feature to be turned off. The ability to change a feature to be **On by default** has been added to provide an intermediate step between features being released and features becoming mandatory.

Features in the **On by default** state are automatically turned on, though organizations will be able to disable these features if more time is needed to validate them. The grid in the Feature management workspace has also been modified to clearly denote feature state (**Preview**, **Released**, **On by default**, **Mandatory**) in the new **Feature state** column.

To help set expectations for when features are expected to transition between states once released, we've made some changes to the documented feature lifecycle and corresponding timelines for features in Feature management. Please read the Feature management overview topic for more details, including some examples of typical timelines for feature progression from **Released** to **On by default** to **Mandatory**.

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
Mandatory	10.0.21	October 2021

See also

[Feature management overview](#) (docs)

[Feature management in Finance and Operations apps](#) (learn)

Improved legal entity support for saved views

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021

Business value

This feature improves user productivity by allowing customers to set the default user experience by legal entity with views. This feature also reduces complexity in the view selector by only showing views that are relevant to the user's current legal entity.

Feature details

An important capability of the saved views feature, in terms of organizational management of personalizations, is the ability to publish views to specific security roles and to specific legal entities. This feature adjusts legal entity support for saved views in three meaningful ways:

- A view published to specific legal entities is only ever shown in those legal entities. This is a change in behavior from the base, saved views feature. This is where a view published to a legal entity is initially available in the view selector only for the selected legal entity, but it is available in any legal entity after the user had first loaded that view.
- Personal views can now be saved as global or belonging to specific legal entities, similar to organization views.
- Default views can be defined per legal entity

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	10.0.21	October 2021
On by default	10.0.25	April 2022
Mandatory	10.0.29	October 2022

See also

Feature management overview (docs)

Personalize Finance and Operations apps - Saved views (learn)

Updates to client feature states with version 10.0.21

Enabled for	Public preview	General availability
Users, automatically	✓Aug 2, 2021	✓Oct 1, 2021

Business value

This information helps customers stay current on the latest client capabilities of Finance and Operations apps.

Feature details

Mandatory features with the 10.0.21 release

- Upgrade to React 17
- Show related document attachments

  Note: This feature has been deprecated and blocked. For more information, see Removed or deprecated platform features.
- Edit basic control values in task recordings
- Allow validation of control state in task recordings

Enabled-by-default features with the 10.0.21 release

These features will be turned on by default, but can still be manually disabled. These are all targeted to become mandatory with 2022 release wave 1.

- New grid control
- Grouping in grids
- Freezing columns in grids
- Saved views
- Designate fields as required using personalization
- Enable a drop-down list on multiline controls
- New HTML editor control
- Email throttling

Features transitioning to being generally available with the 10.0.21 release

- Translation support for organization views
- Embed third-party apps

WCAG 2.1 accessibility support for the Finance and Operations apps web client

Enabled for	Public preview	General availability
Users, automatically	✓Aug 2, 2021	✓Oct 1, 2021

Business value

This feature enables users of all abilities to work with Finance and Operations apps.

Feature details

Toward the Microsoft vision of empowering every person and every organization on the planet to achieve more, Finance and Operations apps now support Web Content Accessibility Guidelines (WCAG) 2.1, the latest accessibility recommendations from the World Wide Web Consortium (W3C), starting with version 10.0.21.

See also

Navigate Finance and Operations apps - Summary (learn)

Visual Studio 2019 support X++ Development

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓Oct 1, 2021	✓Oct 1, 2021

Business value

Visual Studio 2019 is the latest supported release of Visual Studio and offers many new features and improvements.

Feature details

The Visual Studio extension for Finance and Operations apps development in X++ will support Visual Studio 2019, so developers can take full advantage of the latest features and improvements that Visual Studio has to offer.

See also

Visual Studio requirements for X++ (docs)

RSAT supports parallel execution

Enabled for	Public preview	General availability
Users, automatically	✓Nov 1, 2021	✓Nov 1, 2021

Business value

Companies that use the Regression suite automation tool (RSAT) to run test automation can't make full use of the environment when running RSAT. This new feature lets you run multiple instances of RSAT on the environment. This lets you make better use of the environments and share environments between users for a lower cost of maintaining multiple environments. Large independent test suites can be run in parallel rather than being run sequentially. Running in parallel results in faster end-to-end execution times for completing test passes.

Feature details

This release of RSAT supports running multiple instances of the tool on an environment. Earlier versions of RSAT used a communication channel with the Finance and Operations test environment that only allowed single use, and trying to run a second instance at the same time resulted in exceptions. Each test run started by RSAT generates its own browser session for communication that is isolated for the run. It's even possible to continue working manually on the environment while RSAT is running tests.

One user can start the RSAT application multiple times and run different test suites in each of these application instances.

This shared use is also supported on virtual machine environments shared by multiple users, so that each user can run RSAT tests while other users also run tests. There's an option to configure how many concurrent instances the environment can process concurrently. The option can optimize use of environment resources.

This feature can also be used when executing tests from DevOps pipelines, by running multiple pipelines scheduled to run at the same time. This way, multiple test runs can execute in parallel on one environment to help process all tests faster than with earlier versions.

See also

Regression Suite Automation Tool (docs)

New color picker control

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓Sep 3, 2021	✓Nov 5, 2021

Business value

This feature provides a common color picker experience with other Microsoft products.

Feature details

This feature replaces the existing color picker control with the Fluent ColorPicker control to align the experience with other Microsoft products.

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 (and on by default)	10.0.22	November 2021
Mandatory	10.0.25	April 2022

Open-source software update – upgrade Moment and remove jQWidgets

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Sep 3, 2021	✓ Nov 5, 2021

Business value

This feature helps maintain the security of Finance and Operations apps as updated open-source software provides patches for vulnerabilities discovered in earlier versions. Updated open-source software also may include performance enhancements and new capabilities.

Feature details

This feature upgrades Moment.js to version 2.29.1 (from 2.22.2) and removes the jQWidgets library from Finance and Operations applications. The only core controls currently using jQWidgets are the HTML editor control and the color picker. Upgrades to both of these controls to non-jQWidgets controls are available using the **New HTML editor control** and the **New color picker control** features.

IMPORTANT Before enabling this feature, you should test any extensible controls or custom JavaScript code, specifically those utilizing jQWidgets or Moment APIs. This feature is targeted to be required with the April 2022 release, but is currently optional to allow time for migration of affected APIs.

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	10.0.22	November 2021
Mandatory	10.0.25	April 2022

Power BI integration supports latest Power BI desktop releases

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 15, 2021

Business value

Report authors can now leverage the latest features from Power BI Desktop when authoring Finance and Operations analytical reports.

Feature details

With the 10.0.22 release, the Power BI integration has been upgraded so that the reports can be authored with the latest Power BI Desktop releases. The underlying infrastructure is automatically updated as part of the migration to the 10.0.22 release.

Power BI Desktop has added a significant amount of features since the August 2020 release. Users can take advantage of these features, such as the enhanced model view. For more information about the Power BI Desktop features, see What's new and planned for Power BI.

See also

Create analytical reports by using Power BI Desktop (docs)

Open attachments in a new window

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 15, 2021	✔ Dec 31, 2021

Business value

This feature improves user productivity by preventing users from losing context within Finance and Operations apps when opening record attachments.

Feature details

Users might want to open attachments in a new window instead of in place from the **Attachments** page. This is especially useful in cases where attachments are being stored in SharePoint, because opening the attachment in a new page prevents the Finance and Operations user session from resetting.

The **Open attachments in new window** option to change this behavior for all users on the environment can be found on the **Document management parameters** page under the **General** tab.

See also

Configure document management (docs)

Removal of header/lines proxy buttons on Details Transaction forms

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 15, 2021	✔ Dec 31, 2021

Business value

This feature improves the accessibility of the Details Transaction forms.

Feature details

On Details Transaction pages like Sales orders, the pivot tabs allow users to switch between the header and lines aspects of the page. The pivot tabs are implemented as restyled radio buttons and are located to the right of the record title. For improved accessibility on these pages, this feature removes these radio buttons and instead surfaces the native tab controls that are under the record title to allow you to switch between header and lines. Before enabling, you should evaluate the impact of this feature on test assets and task recordings.

See also

Details Transaction form pattern (docs)

Enable auto-update for all sandbox environments

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 15, 2021	Jan 2022

Business value

The auto-update capability will help customers keep all Microsoft-managed cloud environments current with the latest supported version.

Feature details

The auto-update capability will be extended to all Microsoft-managed sandbox environments in Lifecycle Services implementation projects for the cloud.

For customers with add-on sandbox environments, these environments will be included in the service update per your Update Settings in the implementation project.

See also

Configure service updates through Lifecycle Services (docs)

RSAT improvements for the out-of-the-box experience and installation

Enabled for	Public preview	General availability
Users, automatically	Jan 2022	Jan 2022

Business value

Regression suite automation tool (RSAT) installation, maintenance, and the cost of Azure DevOps Test Plan user licenses may hold some companies back from trying RSAT to run test automation. This update provides improved automation options for maintaining an RSAT installation, with regular renewal of certification used for authentication with the Finance and Operations test environment.

The Regression suite automation tool will run under a new trial option without connection to Azure DevOps, so that customers can try out RSAT without a subscription to DevOps. This allows companies a way to gain experience with test automation and determine the value and return on investment before committing to an Azure DevOps subscription.

Feature details

This version of RSAT provides support to automate the process for installing certificates and renewal of these certificates within the 60-day expiration period. This version provides a way for certificates to be pushed out from the environment in Dynamics 365 Lifecycle Services by central maintenance to environments that are running RSAT. This reduces the many manual steps that were required with earlier versions of RSAT, and it helps reduce the total cost of maintaining RSAT installations.

RSAT now includes a new trial mode that allows the upload of tests within RSAT and runs tests without a connection to Azure DevOps. Tests that are maintained while running RSAT in trial mode are not shared with other users but instead are for the exclusive use of the user trying the tool. This new trial mode allows users to try the tool experience without having to invest in an Azure DevOps subscription. Customers can subscribe to Azure DevOps on their own schedules. With a DevOps subscription, RSAT runs in "regular" mode and DevOps features light up.

Further changes to RSAT include capture of additional debugging information for troubleshooting purposes when an issue occurs when using the tool. This debugging information improves the support experience and provides quicker turnaround resolution to issues. Customers can provide feedback in RSAT to help guide further development of the tool.

See also

[Regression Suite Automation Tool](#) (docs)

RSAT test lifecycle support and support for on-premises deployments

Enabled for	Public preview	General availability
Users, automatically	Jan 2022	Jan 2022

Business value

Partners that help build test suites on behalf of other companies don't have support for moving these test suites into their customer's installations. Moving test suites requires a lot of manual work to edit Microsoft Excel files to align with new test case IDs. Updating these variables is difficult and time consuming. This new feature provides integrated tools for exporting and importing test suites between environments without the manual work from changing test case IDs.

Customers that run Finance and Operations apps with an on-premises deployment are not officially supported with the Regression suite automation tool (RSAT). This feature will enable and document how to set up to run with this topology. An RSAT option is added to enable storing screenshots, with steps for documenting how the test case is executed.

Feature details

The Regression suite automation tool (RSAT) includes a new option for exporting and importing test suites. These options allow tests to be created under one installation and moved to another—for example, when a partner develops tests on behalf of a customer and later needs to move these to the customer's installation. This feature can also be used to create a clone of test suites within the same or different environments—for example, to create a new baseline to work from. The import process creates test cases, assigns new IDs to the test cases, and automatically makes changes to Excel parameter files for reference to new cases, including variables added within the test suite.

Finance and Operation apps with on-premises deployments do not have official support of RSAT use. This feature provides updates to RSAT to fully enable use with on-premises installations and document how this is set up.

RSAT will have a new option available under Settings for enabling capture and storage upload of screenshots. This includes the ability to add steps that can be used for documenting how a test case executes, which is useful for user training or auditing needs.

See also

[Regression Suite Automation Tool](#) (docs)

RSAT support for integration testing, part 1 of 2

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

Business value

Companies commonly use applications that integrate with Finance and Operations apps and need to test if these integrations are working. There has not been an easy way to automate testing for integration scenarios. Partners typically have developed special code for integration testing. It's not cost effective for customers to pay partners for this work. This first part of integration testing support provides ways to enable running third-party applications that run either before or after Finance and Operations apps are run.

Feature details

Automation testing of integration is enabled with this feature. The feature provides basic tools that can run a third-party web-based application from an Azure pipeline and can string this together with Regression suite automation tool (RSAT) tasks in the pipeline to create test scenarios across applications. This feature includes support both for running third-party applications before or after RSAT test runs. There is support for handing over a resource between the two applications during the integration and optionally validate the resource toward an expected resource such as a file. The feature supports both integrations where a third-party application process runs before or after RSAT runs on a Finance and Operations app.

This feature release is the first of two planned releases that provide support for integration testing. These feature releases will enable more integration scenarios. This work will be scoped from requirements collected from a representative set of existing customers running RSAT test automation.

RSAT support for integration testing, part 2 of 2

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

Business value

Companies commonly use applications that integrate with Finance and Operations apps and need to test that these integrations are working. There has not been an easy way to automate testing for integration scenarios. Partners typically have developed special code for integration testing. It's not cost effective for customers to pay partners for this work. This first part of integration testing support provides ways to enable running third-party applications that run either before or after Finance and Operations apps are run.

Feature details

This feature includes additional automation testing support for integration testing. It adds support to more integration scenarios, as requested by customers running Regression suite automation tool (RSAT). It also will focus on providing ways for users without developer skills to create and run third-party applications.

Data and process integration

Overview

Data and process integration features provide enhanced data exchange experiences between Finance and Operations apps, Microsoft Dataverse, and customer engagement apps in Dynamics 365 through dual-write functionality. The data and process integration features also focus on presenting Finance and Operations data in Azure Data Lake Storage.

From a process perspective, the dual-write functionality helps in building a unified end-user experience for Dynamics 365 customers whose business processes span across front office and back office applications. From an analytics perspective, data in Azure Data Lake adds tremendous value for advanced AI features such as predictions through aggregate measurements.

Increase in Legal Entity limits for dual-write integration

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔Sep 27, 2021	✔Oct 4, 2021

Business value

The increased limit supports customers who need to integrate more than 40 legal entities between Finance and Operations apps and Microsoft Dataverse during a live synchronization.

Feature details

A legal entity is an organization that is identified through registration with a legal authority. Legal entities can enter into contracts and are required to prepare statements that report on their performance. In Finance and Operations apps, company is a type of legal entity. Currently, when integrating Finance and Operations apps with Dataverse using dual-write live synchronizations, you are limited to 40 legal entities. To support adoption of dual-write, especially by enterprise customers, the limit is increasing to 250 legal entities for live synchronizations.

To use the new limits, you must update to version 10.0.22 of Finance and Operations apps.

Initial synchronizations are still limited to 40 due to larger data volumes and associated operations.

See also

June 2020 release (docs)

Export to Azure Data Lake feature adds regions, including China

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

Business value

Customers can leverage the **Export to Data Lake** feature and retire the use of Bring your own database (BYOD).

Feature details

The **Export to Data Lake** feature is built using a microservice that exports Finance and Operations app data to Azure Data Lake and keeps the data fresh. The **Export to Data Lake** feature is now available in additional geo-regions, including China.

See also

Configure export to Azure Data Lake (docs)

Get recommendations on best practices via dual-write table map health check

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

Business value

The dual-write health check makes sure you meet the minimum system requirements and grants access to the apps that must connect to each other.

Feature details

The dual-write out-of-box table maps have predefined table and field mappings that enable the flow of data between finance and operations apps and Dataverse. Because every business is different, dual-write supports customization so you can change table maps and field mappings. To review your customizations, you can run a table map health check that runs best practices checks against your customizations and provides recommendations.

See also

System requirements and prerequisites (docs)

Change feeds in data lakes

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 30, 2021	Mar 2022

Business value

Data lakes are changing the way customers store and work with data. Data lakes are ideal for storing large amounts of data at a fraction of the cost of storing them in a relational database. You can bring large amounts of historical data, as well as data from other systems to your data lake. Data can be transformed into summaries, as well as combined with other data on-demand.

When working with large data volumes and by applying changes to the data that changed only since last run, you can save a lot of compute costs as well as time to process.

For example, you can apply changes to financial summary data every few minutes, as opposed to reprocessing the entire financial summary at day's end or on a monthly basis. This way, you not only save on compute costs, but also enable near-real-time financial reporting.

Feature details

A *change feed* is an immutable (never modified) transaction log of all data changes in Finance and Operations apps. Change feed data, available in customers' data lakes, provides a chronological log of all data changes within Finance and Operations apps.

Using the change feed, customers can identify changes to data (inserts, updates, as well as deletes) at a transaction-level detail. They can build data pipelines that react near real-time to changes in Finance and Operations data.

A change feed, once written to a data lake, is never modified or deleted. Customers can use the change feed to audit data changes within Finance and Operations apps as well.

See also

Change data in Azure Data Lake (docs)

Finance and Operations data in Microsoft Dataverse – phase 5

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

Business value

This feature facilitates seamless data exchange between Finance and Operations apps and Microsoft Dataverse and customer engagement apps. Some of the key converging concepts such as customers, quotations, orders, and address book are harmonized between front-office and back-office apps for a unified experience.

Feature details

We are continuously making dual-write a seamless experience by harmonizing the converging concepts between Finance and Operations apps and customer engagement apps. Dual-write allows businesses to exchange near-real-time data in a synchronous, bidirectional fashion beyond application boundaries, giving users a unified experience.

Knowing every business is unique, we have made the dual-write framework extensible. This includes enabling custom entities, as well as extensions to existing entities, to fully use Microsoft Dataverse and surrounding tools for your most important business data. For more information, see [Dual-write home page].

The supported scenarios can be further enriched by customers and partners so they extend across Finance and Operations apps, Dataverse, and customer engagement apps.

In 2021 release wave 2, we will improve the operational aspects of the dual-write orchestration package, improve the demo experience, and release the following features from a previous phase:

Capability name	Status	Minimum requirements
Activities integration	In progress	Dual-write
Single view for party and its related data	Not started	Dual-write

See also

Dual-write home page (docs)

Near-zero downtime

Overview

Today, customer environments running Finance and Operations apps need sustained downtime for maintenance operations. These maintenance operations include updates to operating systems, security, apps, or infrastructure that are needed to modernize the platform. We are investing in features that will help to reduce these downtime requirements, creating a scenario where there is almost zero downtime for maintenance operations.

In 2021 release wave 2, we are greatly reducing the downtime that is required for maintenance updates. Some of the investments included in this initiative will allow batch jobs to be retried and updates to the operating system patching window to take effect without taking the entire system offline.

Batch OData API

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 1, 2021	✔ Dec 1, 2021

Business value

This feature enables users to automate the scenarios end to end using Power Automate to retrigger failed jobs due to transient infrastructure issues.

Feature details

The batch functionality now exposes an OData API that can be used to requeue batch jobs. Customers can use the OData endpoint to requeue batch jobs that are in a terminal state. This can be integrated with any automation using Power Automate, custom APIs, and so on.

See also

Batch OData API (docs)

Power Platform convergence

Overview

Microsoft Power Platform provides a suite of capabilities for Dynamics 365 applications via the Power Platform admin center. Today, Finance and Operations apps are not managed by the Power Platform admin center; however, over time more and more management capabilities will be migrated from Dynamics 365 Lifecycle Services to the admin center.

In the interim, customers will be able to unlock features, such as dual-write, virtual entities, add-ins, create/update/delete events, business events via Dataverse, and more via Microsoft Power Platform integration functionality in Lifecycle Services.

New scenarios enabled with Power Platform convergence

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jun 30, 2021	✔ Oct 22, 2021

Business value

Microsoft Power Platform integration removes the barriers to entry for customers to fully harness the Microsoft Power Platform stack with each of their Finance and Operations environments. Features such as dual-write become a one-click experience to set up. Add-ins are now unlocked for an environment using Microsoft Power Platform integration. Virtual entities are also made available by default in the environment. Business events and create/update/delete (CUD) events in Finance and Operations apps are also integrated with

Microsoft Dataverse. Note that CUD events are only going to be available with Microsoft Power Platform integration.

Feature details

Microsoft Power Platform provides a suite of capabilities for Dynamics 365 applications via the Power Platform admin center. Today, Finance and Operations apps are not managed by the admin center; however, over time more and more management capabilities will be migrated from Dynamics 365 Lifecycle Services to the admin center. In the interim, customers will be able to unlock features, such as dual-write, virtual entities, add-ins, CUD events, business events via Dataverse, and more via Microsoft Power Platform integration functionality in Lifecycle Services.

Set up Microsoft Power Platform integration

Using a new experience on each environment in Lifecycle Services, customers can complete the initial setup of the Microsoft Power Platform environment. This will provision an environment of the same type (sandbox or production) in the Power Platform admin center. This environment in the admin center will have the same name as the one from Lifecycle Services, and you will also see the Finance and Operations URL populated on the environment in the admin center. This environment will be powered by Microsoft Dataverse and will have several platform solutions preinstalled for virtual entity support, dual-write orchestration, and more.

Unlock dual-write application setup

Once the setup is completed in Lifecycle Services, the dual-write application setup button will be enabled. From here, customers who want to enable this functionality can do so from Lifecycle Services in a fast and easy manner. Customers can then choose which entity maps to sync from inside the Finance and Operations app.

Virtual entities

Virtual entities are installed in the environment with the Microsoft Power Platform integration. It will no longer be required to set up manual connections between the environments as the environments are preconnected.

Authentication and authorization

Starting in a preview with version 10.0.20, and generally available with version 10.0.22, Finance and Operations users who use virtual entities will no longer be required to be manually added or managed in Dataverse. When Microsoft Power Platform integration is enabled, Finance and Operations users will be automatically added to Dataverse just in time when users access virtual entities from Power Apps. This functionality can be used by enabling flight BusinessEventsCDSIntegration in Finance and Operations apps.

Finance and Operations business events in Dataverse

Starting in a preview with version 10.0.20, and generally available with version 10.0.22, when Microsoft Power Platform integration is enabled, business events in Finance and Operations apps will converge with business events in Dataverse. This will mean that, when a business event happens in a Finance and Operations app, the event will be available in Dataverse. Subscribers to Finance and Operations business events will receive the event from Dataverse. This will also enable execution of C# plug-ins in Dataverse for Finance and Operations scenarios that execute in response to business events.

Finance and Operations CUD events in Dataverse

Starting in a preview with version 10.0.20, and generally available with version 10.0.22, when Microsoft Power Platform integration is enabled, CUD events will be available for Finance and Operations OData-enabled data entities. It will be possible going forward to subscribe to create, update, and delete events on Finance and Operations OData-enabled entities. CUD events will be exposed via virtual entities in Dataverse. The CUD operation in a Finance and Operations app can happen via the Finance and Operations user interface, Power Apps/Power Portal using virtual entities, or from Finance and Operations OData APIs. The CUD event will consistently trigger the entity regardless. This also enables execution of C# plug-ins in Dataverse for Finance and Operations scenarios that execute in response to CUD events.

Dev tools

The Plugin Registration Tool will enable registering C# plug-ins for the CUD events and business events coming from Finance and Operations apps. With the release of a Visual Studio extension for Microsoft Power Platform, developers can explore Dataverse environments and write, register, deploy, and debug C# plug-ins directly from within Visual Studio. For developer audiences already working in Visual Studio, such as Finance and Operations developers, this will provide one work space (Visual Studio) to author their customizations across the Dynamics 365 apps in Dataverse and Finance and Operations apps.

Unlock additional features

Additionally, once the setup is completed in Lifecycle Services, the add-ins experience will be enabled as one-click installs from the environment details page.

See also

[Microsoft Dataverse integrations](#) (learn)

Human Resources

Overview of Dynamics 365 Human Resources 2021 release wave 2

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 also 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 2021 release wave 2, we are focusing on three key areas:

- **Broaden the human capital management (HCM) ecosystem**: Continue broadening our HCM ecosystem through integration APIs and strategic partnerships.
- **Reimagine the employee experience**: Expand our investments in the employee experience and bringing those experiences into the flow of work.
- **App unification**: Deliver app unification through a simplified platform with better application lifecycle management tooling and extensibility.

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 October 2021 through March 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.

Benefits management

Benefits management provides you with a flexible solution that supports a wide variety of benefit options. Human Resources also includes an easy-to-use employee experience that showcases your offerings.

Feature	Enabled for	Public preview	General availability
Benefits notifications	Users by admins, makers, or analysts	Feb 2022	Mar 2022
Redesigned bulk actions inquiry in Benefits management administration	Users by admins, makers, or analysts	Feb 2022	Mar 2022

General

We're enhancing our user experience, and we're providing general improvements to Human Resources that apply to multiple workspaces and forms.

Feature	Enabled for	Public preview	General availability
Consistent environment management and integrations between Human Resources and Finance and Operations apps	Admins, makers, marketers, or analysts, automatically	Jan 2022	To be announced
Create one set of human resources capabilities within Dynamics 365	Admins, makers, marketers, or analysts, automatically	Jan 2022	To be announced

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
Improved extensibility options	Admins, makers, marketers, or analysts, automatically	Jan 2022	To be announced

Leave and absence

The leave and absence workspace provides a flexible framework for creating new leave plans, workflows for managing requests, and an intuitive self-service page for employees to request time off.

Feature	Enabled for	Public preview	General availability
Manage employee sick leave	Users by admins, makers, or analysts	Mar 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.

Benefits management

Overview

Benefits management provides you with a flexible solution that supports a wide variety of benefit options. Human Resources also includes an easy-to-use employee experience that showcases your offerings.

Benefits notifications

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

Business value

Often times employees need to be contacted regarding their benefits. The benefits notifications feature allows benefits administrators to contact employees through email, based on the employees benefit enrollment progress. Email notifications can be used to send instructions to employees or reminders to complete their enrollment.

Feature details

Benefits notifications enhancements enable the benefits administrator to:

- Notify employees of their open enrollment status.
- Notify employees about plan updates due to qualifying events.
- Notify new hires when they are able to select their benefits.

Redesigned bulk actions inquiry in Benefits management administration

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

Business value

This feature will provide a simplified user experience by adding bulk editing capabilities to Benefits management administration in Human Resources.

Feature details

Often, benefits administrators enroll employees or confirm the selections employees make from Employee self service. The only way to do that currently is through the **Worker benefits update** page on an employee-by-employee basis, which can be time consuming and repetitive.

With the new inquiry view, benefits administrators will be able to:

- Quickly select and confirm the selection of all employee benefit enrollments.
- Look at different data pivots based on plan types, employee types, and plan bundles, and do bulk selections based on those pivots.
- Look at flex credit allocations for applicable plans and quickly identify anomalies where credits aren't completely allocated.
- Look at enrollment information based on custom criteria (filter based on query) and save those custom views as shortcuts.

General

Overview

We're enhancing our user experience, and we're providing general improvements to Human Resources that apply to multiple workspaces and forms.

Consistent environment management and integrations between Human Resources and Finance and Operations apps

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jan 2022	To be announced

Business value

Dynamics 365 Human Resources will merge back into the Finance and Operations infrastructure, but will continue to be licensed as an independent application, like Finance and Supply Chain Management. This will bring together disparate Human Resources data into a single solution to create market clarity, improve extensibility, and drive consistency across Finance and Operations apps. These new capabilities will provide a consistent admin experience for managing the application lifecycle for Human Resources.

Feature details

Deploying, updating, and integrating among applications can be a complex process. It becomes even more complex when you need different approaches for different applications. By driving consistency among Human Resources and other Finance and Operations apps, you can better plan and manage how you deploy, update, and integrate Human Resources. You'll be able to manage environments, updates, and integrations for Human Resources the same way you do for other Finance and Operations applications, such as Finance, Supply Chain Management, and Project Operations.

This feature provides you with consistency when it comes to:

- Management of environments within Dynamics 365 Lifecycle Services, issue search, and Regression Suite Automation Tool (RSAT).
- The experience for how upgrades, updates, and hotfixes are applied to environments.
- Integration options with Microsoft Power Platform using virtual entities and dual-write.
- The experience for how continuous delivery of custom solutions or extensions is applied to environments.
- Regional availability.

Key benefits of the product merge.

Create one set of human resources capabilities within Dynamics 365

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jan 2022	To be announced

Business value

This feature will merge the capabilities from the standalone Human Resources app into the Finance and Operations infrastructure.

Feature details

Within Dynamics 365 today are two sets of human resources capabilities. One set is in the standalone Human Resources application, which uses a different infrastructure than Finance and Operations apps. The other set of capabilities is in the legacy Human Resources module in Dynamics 365 Finance. This causes confusion for customers and partners about which set of capabilities to use.

Merging the Human Resources infrastructure into the same infrastructure as other Finance and Operations apps, such as Finance, Supply Chain Management, and Project Operations, eliminates the confusion about which set of capabilities to use. You'll have a single set of human resources capabilities within Dynamics 365.

The capabilities and investments that have been made in Human Resources will be available within Finance.

Some of these capabilities include:

- Leave and absence management
- Benefits management
- Task management

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.

Improved extensibility options

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jan 2022	To be announced

Business value

This new capability will allow the same extensibility options in Human Resources that customers today get from all other Finance and Operations apps.

Feature details

Being able to extend Dynamics 365 Human Resources is key to many organizations to ensure that specific business processes related to industry, region, or company policy are enabled. By improving the options available to extend Human Resources, companies can provide employee-facing experiences to complete forms or update their information, and they can also extend the business logic associated with these actions to complete business process requirements.

Improving extensibility options enables companies to:

- Take advantage of the tooling available as part of Finance and Operations cross-app capabilities.
- Continue using Microsoft Power Platform tools to extend when needed.

Leave and absence

Overview

The leave and absence workspace provides a flexible framework for creating new leave plans, workflows for managing requests, and an intuitive self-service page for employees to request time off. Analytics help your organization measure and monitor leave balances and usage for your leave plans.

Manage employee sick leave

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

Business value

This feature provides organizations with the ability to manage employee sick leave in more detail to meet company and regulatory policies.

Feature details

This feature provides organizations with the ability to manage employee sick leave in more detail to meet company and regulatory policies. Sick leave management will include the following capabilities:

- Open-ended sick leave requests
- Return-to-work notices
- Sick leave reporting
- Management and approval of sick leave requests

Commerce

Overview of Dynamics 365 Commerce 2021 release wave 2

Dynamics 365 Commerce is an end-to-end solution delivering seamless commerce across all channels, encompassing sales, mobility, intelligence, and productivity, to help customer-facing businesses achieve more in a cloud-first, mobile-first way. The app 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 capabilities, 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.
- **Getting everything to build and run digital commerce**: 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, while increasing conversions and average order values.
- **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:

- **Customer segmentation and targeting**: Digital commerce organizations will be able to use site builder to target customer segments with specific page layouts and content.
- **Integration with Microsoft Clarity**: Organizations can use Microsoft Clarity to view how end users interact with pages across their site, including mouse-action recordings, heatmaps, and analytics.
- **Customer-specific catalogs**: Organizations can define specific product catalogs by business partner organization, which will restrict the business buyers to see and order products only from the catalog associated with their organization.

- **Enhanced reordering experience**: Business buyers will be able to reorder the entirety of a past order or pick and choose individual products from a past order for reorder.
- **Reassign admin privileges**: Admins of business partner organizations can designate one or multiple other users as admins and will also be able to revoke the admin privileges of another admin user.

What's new and planned for Dynamics 365 Commerce

This topic lists features that are planned to release from October 2021 through March 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
Customer segmentation and targeting	Admins, makers, marketers, or analysts, automatically	-	✔Oct 1, 2021
Updates to Commerce globalization feature states with version 10.0.21	Users, automatically	-	✔Oct 1, 2021
Commerce localization for Russia	Users by admins, makers, or analysts	✔Aug 2, 2021	✔Oct 1, 2021
Enforce custom query change tracking configurations on retail transaction tables due to performance impacts	Admins, makers, marketers, or analysts, automatically	✔Aug 2, 2021	✔Oct 1, 2021
Enhanced reordering experience in e-commerce	Users by admins, makers, or analysts	✔Aug 2, 2021	✔Oct 1, 2021
Support inventory movement between in-store locations from POS	Users by admins, makers, or analysts	✔Aug 2, 2021	✔Oct 1, 2021
Grant and revoke B2B e-commerce business partner user admin privileges	Admins, makers, marketers, or analysts, automatically	-	✔Oct 30, 2021

Feature	Enabled for	Public preview	General availability
Require moderator for ratings and reviews	Users by admins, makers, or analysts	-	✔ Nov 5, 2021
Enable order lookup for guest checkouts	Users by admins, makers, or analysts	✔ Sep 3, 2021	✔ Nov 5, 2021
Save customer addresses asynchronously for sync and async customers	Users by admins, makers, or analysts	✔ Sep 3, 2021	✔ Nov 5, 2021
Delay exact price calculation for orders and quotes to improve performance	Users by admins, makers, or analysts	✔ Sep 10, 2021	✔ Nov 5, 2021
Geo-detection and redirection for e-commerce sites	Users by admins, makers, or analysts	✔ Sep 10, 2021	✔ Nov 5, 2021
GST in e-commerce for India	Users by admins, makers, or analysts	-	✔ Dec 31, 2021
Improved pricing computation performance by using flattened discount tables	Users by admins, makers, or analysts	✔ Oct 8, 2021	✔ Dec 31, 2021
Commerce analytics	Users by admins, makers, or analysts	✔ Nov 15, 2021	Feb 2022
Digital signing of retail transactions for Norway based on fiscal integration framework	Users by admins, makers, or analysts	-	Feb 2022
Improved stock count operation in POS	Users by admins, makers, or analysts	✔ Dec 3, 2021	Feb 2022
Improvements to payment flows for pick-up order processing in POS	Users by admins, makers, or analysts	✔ Dec 3, 2021	Feb 2022
Parity in creating customers asynchronously	Users by admins, makers, or analysts	Dec 2021	Feb 2022
Integrate Microsoft Clarity with Dynamics 365 Commerce	Users by admins, makers, or analysts	Jan 2022	Feb 2022

Feature	Enabled for	Public preview	General availability
System monitoring and diagnostics for e-commerce	Admins, makers, marketers, or analysts, automatically	Feb 2022	Mar 2022
Chat in Commerce with Power Virtual Agents and Omnichannel for Customer Service	Admins, makers, marketers, or analysts, automatically	Jan 2022	To be announced
Dynamics 365 Commerce – Merchandising Connector	Users, automatically	✓Jan 13, 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.

Customer segmentation and targeting

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✓Oct 1, 2021

Business value

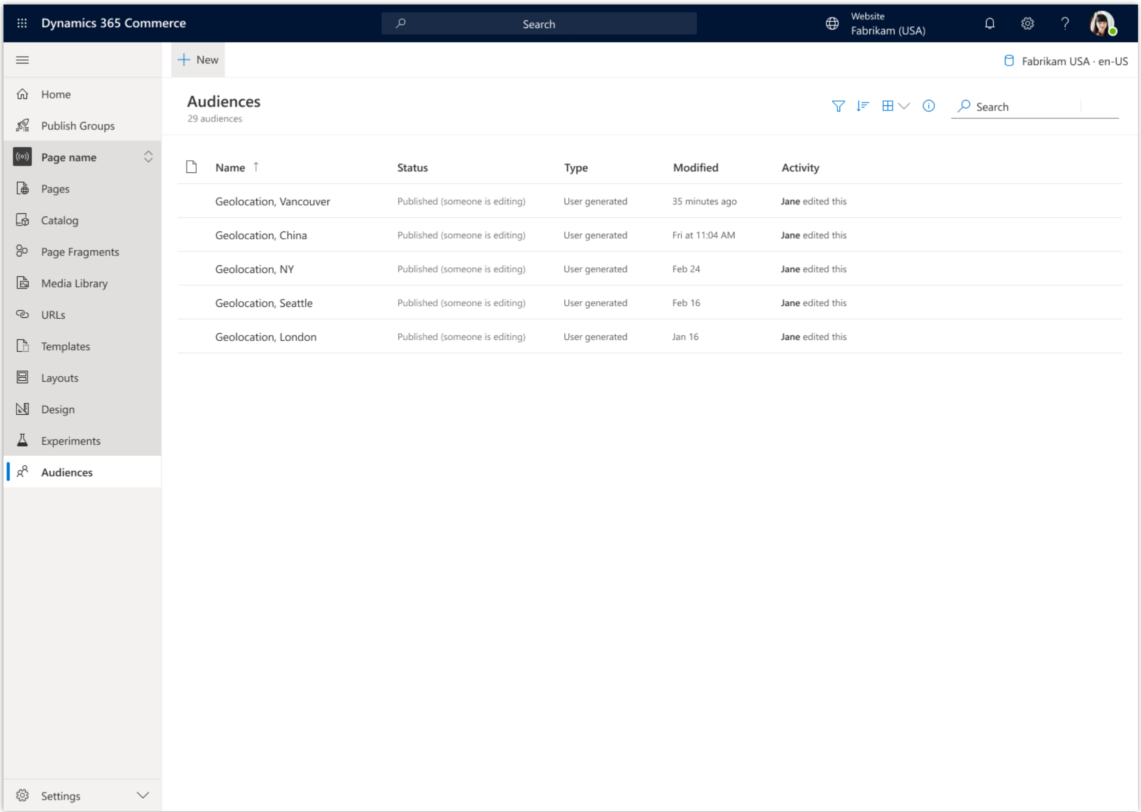
Dynamics 365 Commerce enables organizations to increase customer engagement and satisfaction by using tools in site builder to target specific customer segments with different experiences based on the shopper’s device, geo-location, and other dynamically derived attributes from the shopper's browser request.

Feature details

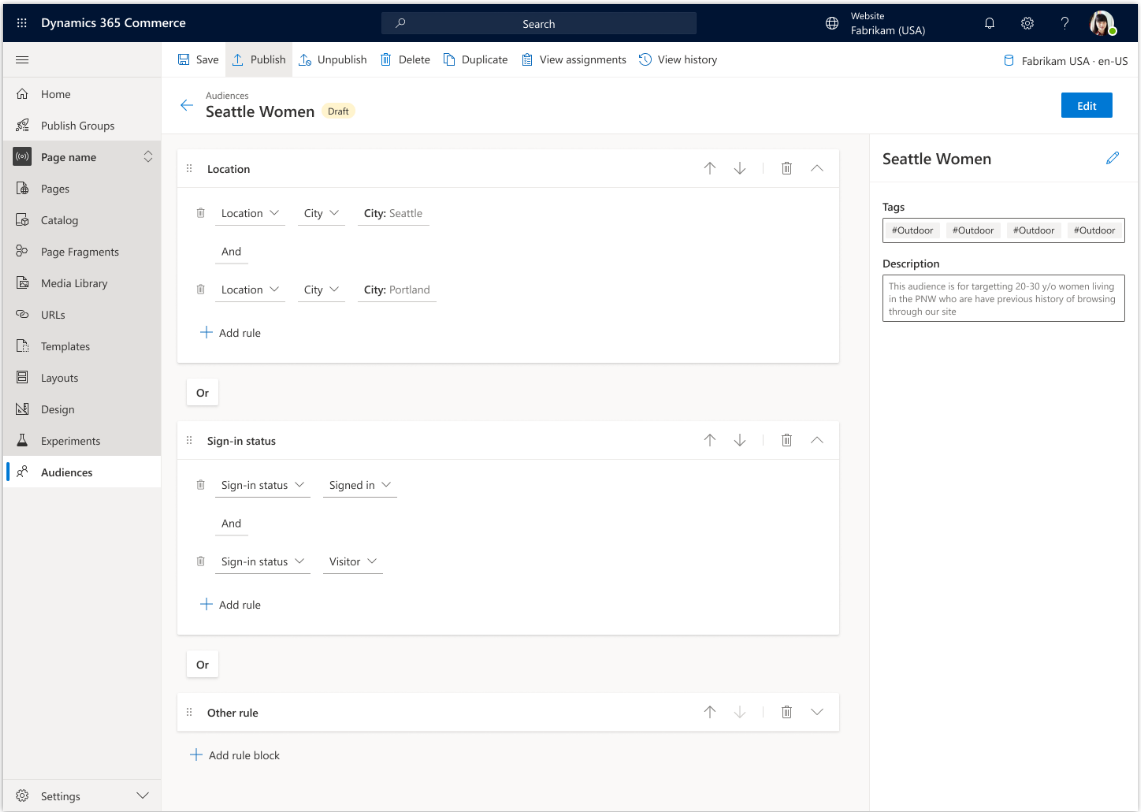
This feature will enable segmentation of customer data such as device type, geo-location, market, or language, gathered from the customer's web browser. Site builder can then be used to generate audience groupings that can be applied to campaigns and experiments across the digital commerce channel.

Content variants can be authored in site builder and associated with targeting rules to ensure easy authoring with powerful results.

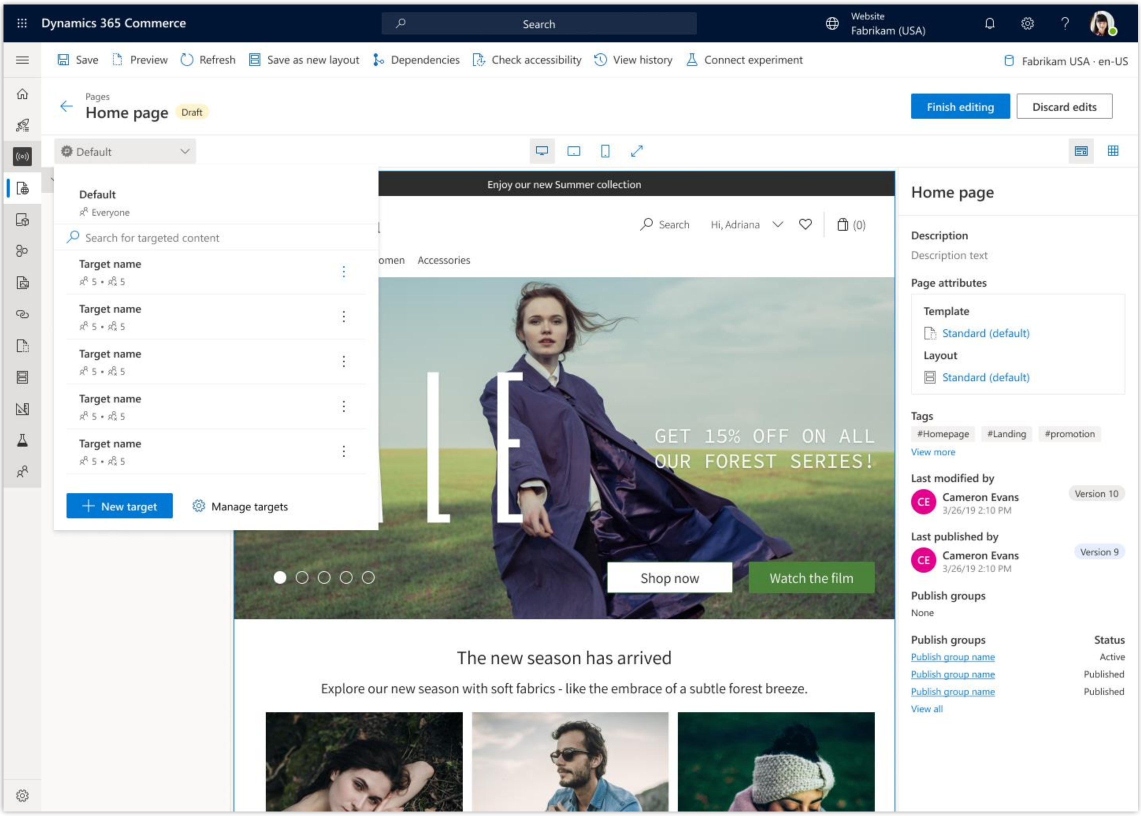
Segmented targeting will support page layouts and content-based scenarios within site builder.



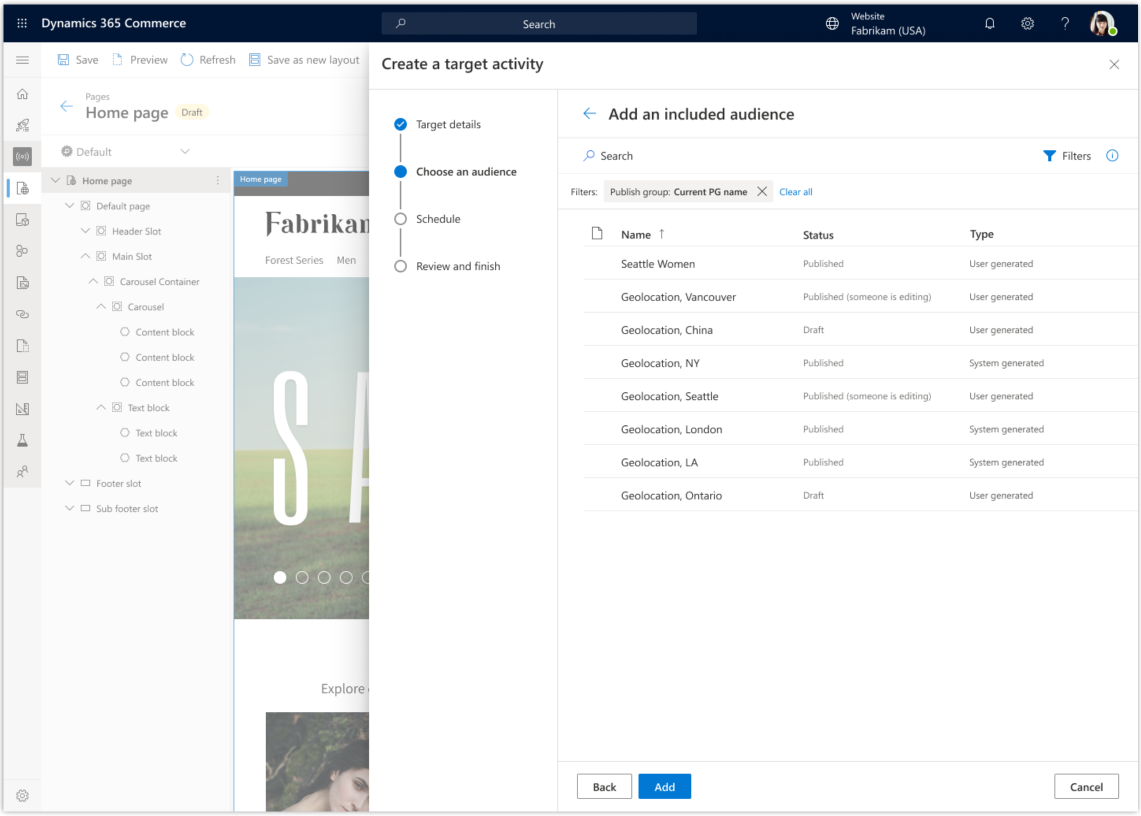
Easily create and manage customer audiences directly in the Dynamics 365 Commerce Site Builder.



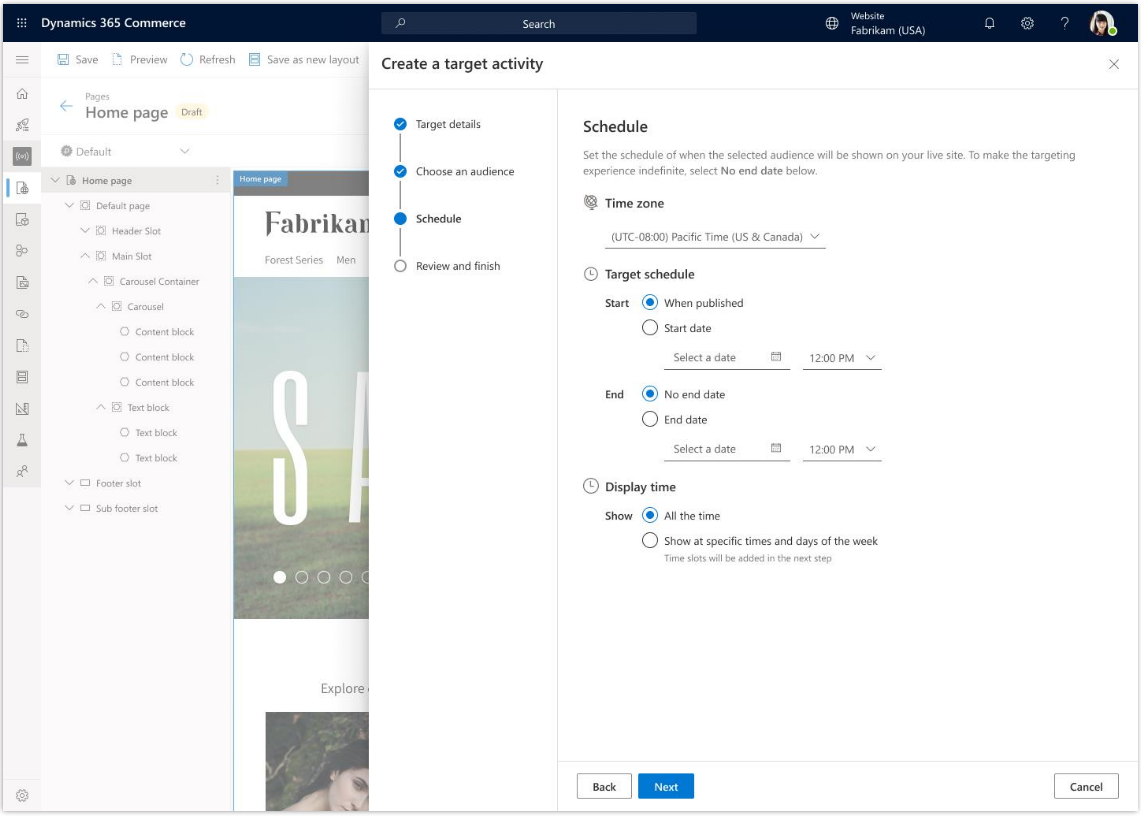
Use rules to tailor customer audiences to meet precise business needs and increase conversion rates.



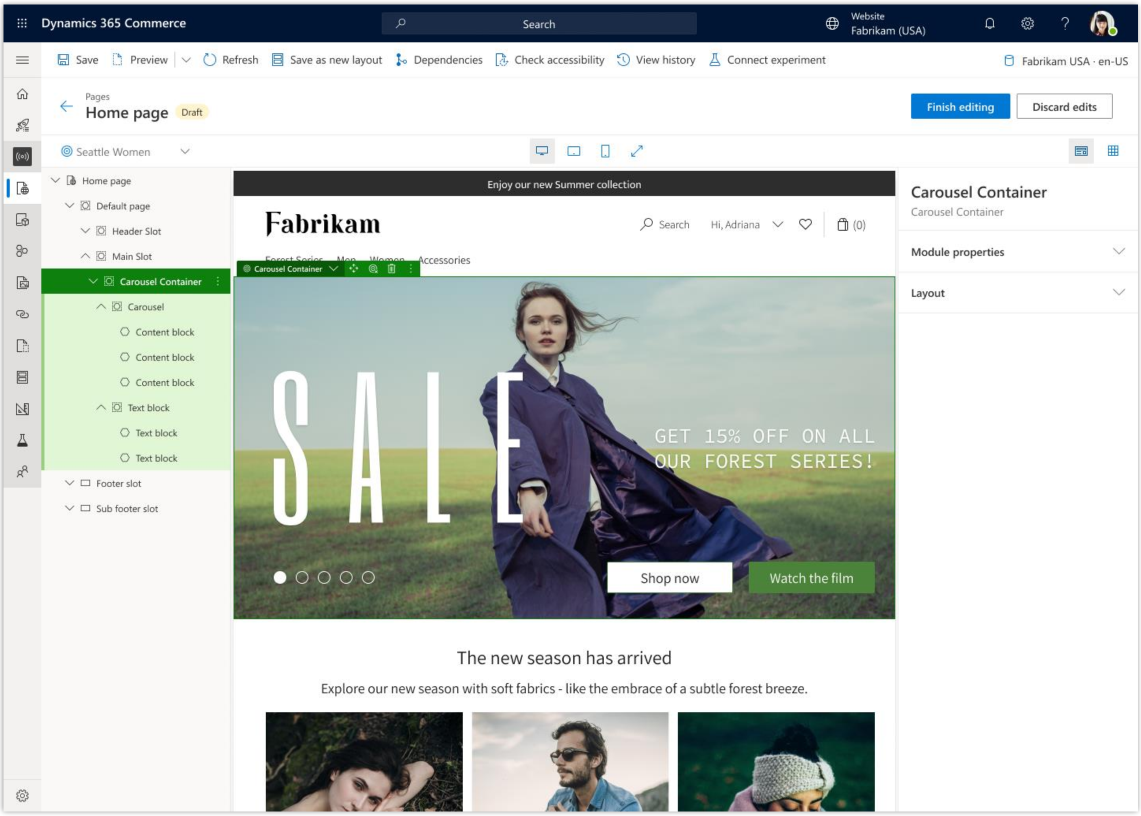
Easily select or create targeted activities in the Dynamics 365 Site Builder's visual page builder.



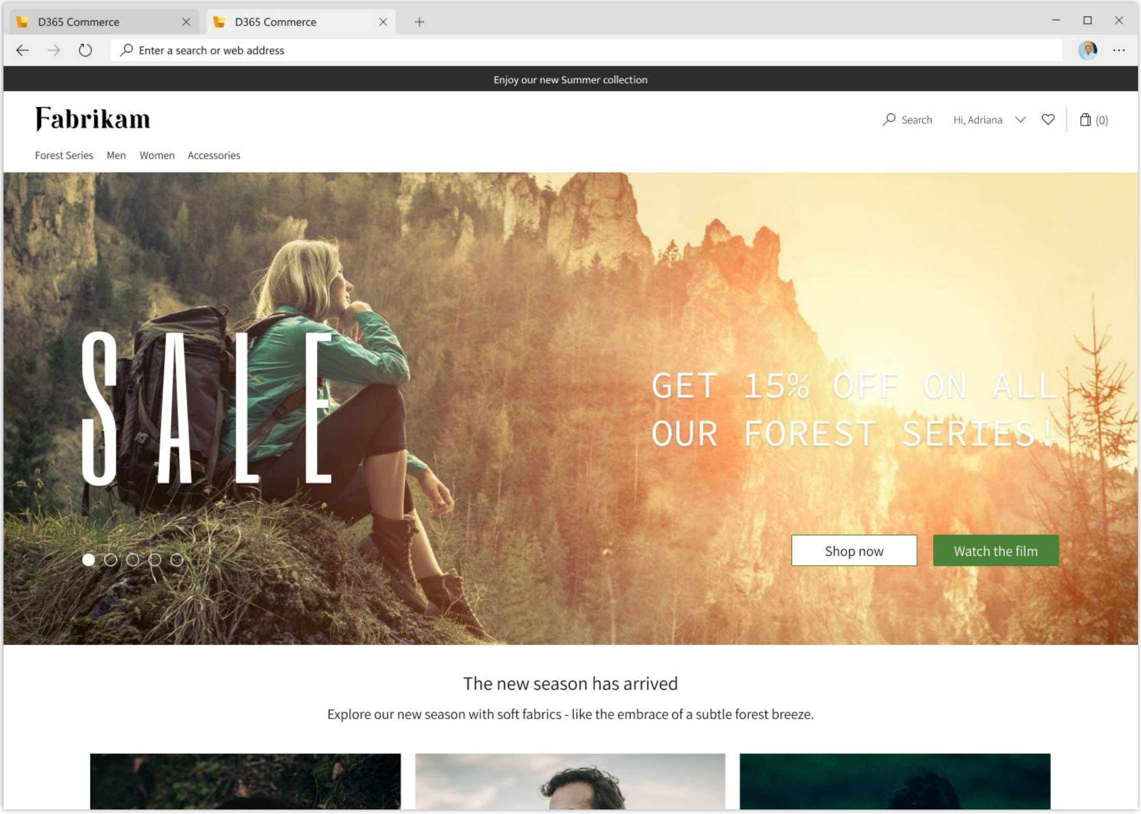
Select which audiences will receive a differentiated marketing experience.



Select a date and time for the targeted activity to go into effect for your customers.



Edit the differentiated marketing experience directly in visual page builder.



Preview and share the differentiated marketing experience with colleagues before it goes live.

See also

Device, market, and geolocation targeting (docs)

Updates to Commerce globalization feature states with version 10.0.21

Enabled for	Public preview	General availability
Users, automatically	-	✔ Oct 1, 2021

Business value

Several Commerce globalization features are progressing in their feature lifecycle starting with the version 10.0.21. This will streamline the feature configuration process for customers deploying Commerce in various countries or regions.

Feature details

These features will be turned on by default in Commerce version 10.0.21, but they can be manually disabled:

- Support for internal and external connectors in the fiscal integration framework.

- (India) Search customers by tax registration numbers in Commerce point of sale (POS).
- (Italy) Customer information management in Commerce POS.
- (Retail GST for India) Update credit notes with references to original invoices.
- (Poland) Customer information management in Commerce POS.
- User-defined certificate profiles for retail stores.

Commerce localization for Russia

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 2, 2021	✔ Oct 1, 2021

Business value

With this release, Commerce customers with operations in Russia will be able to move to the modern Dynamics 365 Commerce service and ensure their implementation is compliant with local regulatory requirements in Russia.

Feature details

Commerce localization for Russia includes features critical for implementations of Dynamics 365 Commerce in Russia, such as handling of cash payments, prepayments, and customer returns, and processing of gift card operations and loyalty point redemptions according to local requirements. It also includes a sample of integration of point of sale (POS) with fiscal printers.

At the time of general availability, this functionality will provide the following capabilities:

- Processing of cash payments using petty cash journals in Commerce headquarters.
- Processing of prepayments and posting of VAT for prepayments in Commerce headquarters.
- Handling of customer returns according to local requirements.
- A sample of the integration of the POS with a fiscal printer.

The fiscal printer integration sample leverages the fiscal integration framework, supports one of the popular fiscal printer models available on the Russian market, and enables registration of sales in various cash-and-carry and customer order sales scenarios. It also provides options for error handling in basic scenarios such as when retry is possible, as well as more advanced scenarios such as registering a completed transaction that was not previously registered in the fiscal printer. The sample is a part of the Retail SDK and can be built and used as-is. Implementation partners can also extend the integration functionality to cover all required retail scenarios or build integration with other fiscal printers based on the sample.

The following capabilities will not be available at general availability, but may be made available in later updates:

- Support of customer orders in fiscal printer integration.
- Restrictions on returns of items that belong to selected item groups.
- Aggregation of sales and returns that are registered within one shift.
- Processing of issued gift cards as prepayments and a fiscal printer functionality to support this.
- Processing of a loyalty point redemption as a price discount in a retail transaction and a fiscal printer functionality to support this.
- Payment integration.
- Cash collection from retail stores.
- E-commerce capabilities for Russia.
- Gift card policies.
- Pricing enhancements.
- Labeling enhancements.
- N-1 support for upgrade from AX 2012 R3.

See also

Commerce localization for Russia (docs)

Enforce custom query change tracking configurations on retail transaction tables due to performance impacts

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 2, 2021	✔ Oct 1, 2021

Business value

This feature will improve the performance of Dynamics 365 Commerce when using the Data Management export framework combined with change tracking capabilities on retail transaction tables.

Feature details

This change will be released in Commerce version 10.0.21.

The retail transaction-related entities impacted by this change are:

- RetailTransactionAdditionalAddressLineEntity

- RetailTransactionAddressLineEntity
- RetailTransactionAffiliationLineEntity
- RetailTransactionAttributeEntity
- RetailTransactionBankedTenderTransEntity
- RetailTransactionCashManagementTransEntity
- RetailTransactionChargeTaxTransEntity
- RetailTransactionDisabledValidationRuleEntity
- RetailTransactionDiscountLineEntity
- RetailTransactionEntity
- RetailTransactionFiscalCustomerEntity
- RetailTransactionFiscalTransEntity
- RetailTransactionFiscalTransExtendedDataEntity
- RetailTransactionGTETaxLineEntity
- RetailTransactionIncomeExpenseLineEntity
- RetailTransactionInfoCodeLineEntity
- RetailTransactionLoyaltyLineEntity
- RetailTransactionLoyaltyRewardPointsLineEntity
- RetailTransactionMarkupLineEntity
- RetailTransactionPaymentLineEntity
- RetailTransactionPaymentLineV2Entity
- RetailTransactionSafeTenderTransEntity
- RetailTransactionSalesLineEntity
- RetailTransactionSalesLineV2Entity
- RetailTransactionServiceProfileEntity
- RetailTransactionSupplementaryInvoiceEntity
- RetailTransactionTaxLineEntity
- RetailTransactionTaxMeasureEntity

In Commerce versions 10.0.20 and earlier, if a user configures **change tracking** in the **Data Management Framework** at the entire entity or primary table level for any of the retail transaction tables listed, massive data export updates are triggered when any record related to the retail transaction is changed. For example, changes to a customer address or a store channel configuration. The data export updates cause a performance impact on the environments, as the core retail transaction entities aren't changed and, in general, retail transactions entities rarely change after their initial creation.

In Commerce versions 10.0.21 and later, if a user enables **change tracking** in the **Data Management Framework** for any of the retail transaction-related entities listed, the user cannot select the option to enable change tracking for the entire entity or the primary table. Instead, only the **enable custom query** option configuration is available. The custom query option will ensure that change tracking will only be triggered by changes to core retail transaction tables and not by changes to other tables that have a reference relationship to the retail transaction table.

If an organization already has change tracking enabled for any of the retail transaction entities listed above and they are configured with the **Enable entire entity** or **Enable primary table** configuration, upgrading to Commerce version 10.0.21 will not immediately change the change tracking configuration for these entities. Upgrading to Commerce version 10.0.21 should not cause any regression or negative impact to an existing data export configuration on any of the tables listed.

After upgrading to Commerce version 10.0.21, if a user enables change tracking on a retail transaction-related entity for the first time, or if they disable change tracking on an existing retail transaction entity and then later try to re-enable change tracking for that entity, the user will no longer be able to turn on change tracking at the entire entity or primary table level, and only the **enable custom query** option will be available.

Organizations can modify the **DefaultCTQuery** method to extend the customer query and add additional tables to the query if needed.

Enhanced reordering experience in e-commerce

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Aug 2, 2021	✓ Oct 1, 2021

Business value

According to research, sites that support reordering of previously purchased items see a high percentage of customers using this capability. With this release, Dynamics 365 Commerce will help organizations improve customer retention by enhancing the reordering experience.

Feature details

This feature introduces the following enhancements to the existing reordering ("buy it again") function for e-commerce sites:

- The "order details" module has a configurable option for site builders to enable or disable the reordering function.
- Instead of taking customers to the product details page, the enhanced reordering function adds items directly to the shopping bag.

- With the enhanced reordering function, customers can add an individual item, multiple selected items, or all items in an existing order to their shopping bag.

Support inventory movement between in-store locations from POS

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Aug 2, 2021	✓ Oct 1, 2021

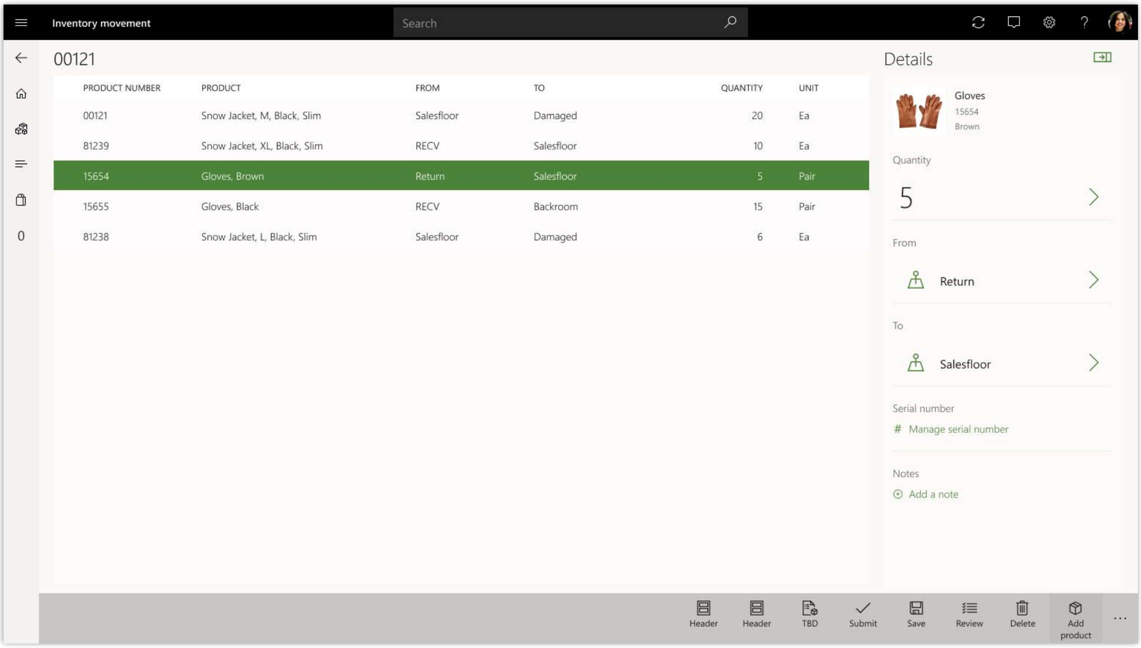
Business value

Dynamics 365 Commerce customers can reduce their legacy IT costs by enabling inventory movements between in-store locations directly from their point of sale (POS).

Feature details

This feature enables a new store inventory management operation in Commerce POS that allows users to move inventory of one or more specific products from one inventory location to another within a store warehouse.

- The feature leverages the inventory transfer journal capability from Commerce headquarters to drive the inventory movement processing.
- The new operation supports a barcode scanning experience to add products into the movement request.
- The new operation allows users to enter serial numbers during the movement for serial-controlled products.
- The review function is available in this operation for users to precheck missing or incorrect data prior to submitting the request.



Inventory movement operation in POS

Grant and revoke B2B e-commerce business partner user admin privileges

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Oct 30, 2021

Business value

This feature enhances the productivity of users of a business partner organization in a B2B scenario by making it possible for admins to grant and revoke admin privileges.

Feature details

As a part of the onboarding process for a business partner organization, the person initiating the request to become a business partner is designated as the admin user for that partner. In the capacity as the admin, this person has some enhanced privileges. Organizations might have a need to designate additional users as admins or revoke the admin privileges of an existing admin. This feature enables an admin user to designate and revoke admin privileges for a different business partner user.

The following capabilities are planned as part of this feature:

- A user with admin privileges can grant admin privileges to one or more non-admin users.
- A user with admin privileges can revoke the admin access of one or more admin users.

- The ability to validate that at least one admin user is associated with a customer hierarchy.

See also

Manage business partner users on B2B e-commerce websites (docs)

Require moderator for ratings and reviews

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✓ Nov 5, 2021

Business value

With this feature, businesses can opt in to require manual moderation and manual publish of ratings and reviews, instead of having ratings and reviews automatically published to an e-commerce site. Azure Cognitive Services will continue to filter profanity in titles and content. With this feature, businesses have more control over the content that's published to their sites.

Feature details

This feature enables the following capabilities for businesses:

- Businesses can enforce moderation before ratings and reviews are published to their e-commerce sites.
- Ratings and reviews must be approved before they are published to an e-commerce site.
- Moderators can filter ratings and reviews that have been approved and not approved.
- Moderators can approve ratings and reviews for publishing or take down ratings and reviews if they have a valid business reason.

See also

Enable manual publishing of ratings and reviews by a moderator (docs)

Enable order lookup for guest checkouts

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Sep 3, 2021	✓ Nov 5, 2021

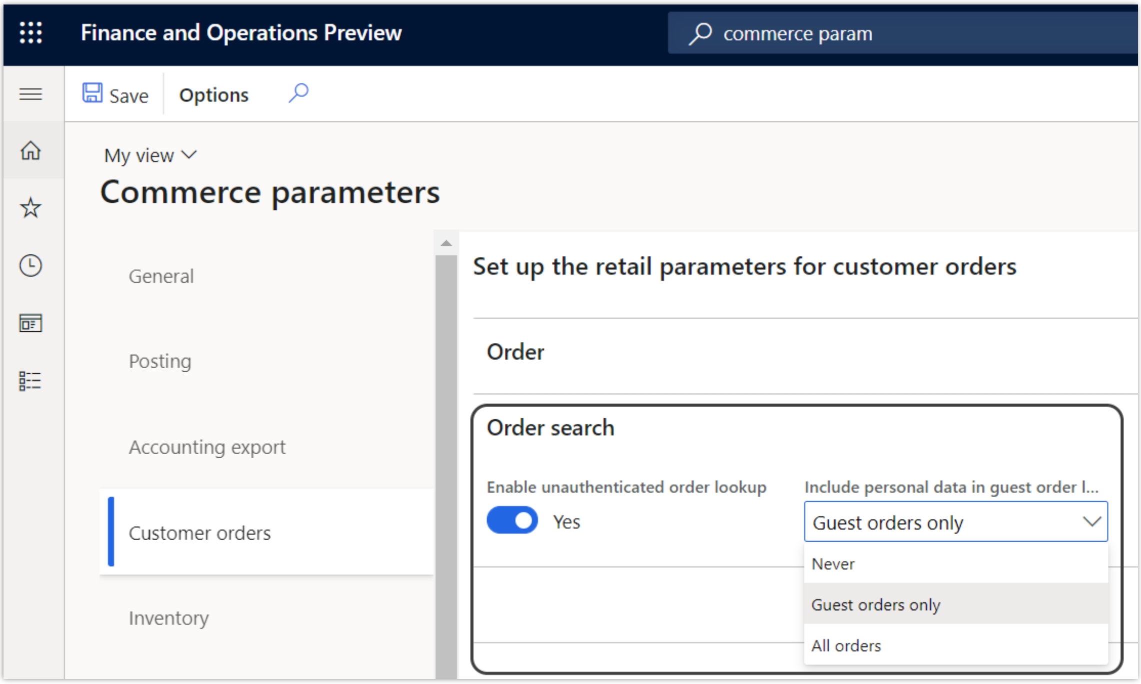
Business value

Guest checkout is an essential capability for reducing friction and increasing conversion rates, but it creates challenges when offering features and services that typically require authentication. By offering a way to look up orders for guest checkouts, organizations can provide those customers with easy access to order status information while creating opportunities for engagement and retention.

Feature details

When you enable order lookup for unauthenticated users, a new API is enabled on the Commerce Scale Unit (CSU) that allows orders to be looked up using the order confirmation ID (sometimes referred to as the channel reference ID) and the customer's email address.

Because order details for an order can contain personal information such as the customer's shipping address and last four digits of their credit card, Dynamics 365 Commerce provides options for choosing whether personal information is displayed when orders are looked up. These options are available in **Commerce parameters** in Commerce headquarters, in the same place where you can enable the order lookup API.



Screenshot of order lookup options under Commerce parameters in headquarters.

Once configured, customers who check out as guests can then look up their order in two ways:

- By using a form on your e-commerce site. Use the country/region picker module that is included in the Commerce module library.
- By selecting a button or link in a transactional email. That URL can be easily assembled using placeholders provided by the transactional email system. Instructions will be provided in the feature documentation.

Both options will take customers to the order details page that is currently used for displaying orders.

See also

Enable order lookup for guest checkouts (docs)

Save customer addresses asynchronously for sync and async customers

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 3, 2021	✔ Nov 5, 2021

Business value

Retail stores and e-commerce sites commonly capture a customer's shipping address. In a retail store, the address is usually captured on the cashier's counter during checkout. Similarly, on an e-commerce site, a customer usually provides their shipping address during checkout. For any shopping channel, it's important that the address capture is fast and reliable, so that the customer can complete the checkout quickly. Any glitches during the checkout process can result in an abandoned cart or transaction. With this feature, asynchronous customer address creation decouples the address creation to the availability of the headquarters app.

Feature details

With this feature, when a new address is saved on any customer profile from a point of sale (POS) or e-commerce site, it will be saved asynchronously to the headquarters. That way, the performance and reliability relating to saving customer addresses is improved. For both sync and async customers, the address will be initially saved in the channel database and then will be synced to headquarters using the **P-job** and **Synchronize customers and channel requests** job. If this feature is enabled, any number of customer addresses can be captured for async customers.

See also

Customer management in stores (docs)

Delay exact price calculation for orders and quotes to improve performance

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 10, 2021	✔ Nov 5, 2021

Business value

Dynamics 365 Commerce supports the creation of discounts such as mix-and-match, threshold, and quantity discounts (multiline discounts). These discounts are applied when more than one sales line on the sales order or sales quote combine and become eligible for the discount. Whenever a new line is added to the order, the pricing engine evaluates the entire cart to determine whether any of these discounts can be applied. As the sales order gets larger, adding a new line gets slower. It's common for B2B companies and some B2C companies to have large order sizes, and therefore taking orders can become time consuming. This feature allows organizations to delay the price and discount calculation as a means to improving performance.

Feature details

With this feature, organizations can configure Commerce to delay the exact price and discount calculation for a sales order or sales quote as it's being created or edited in a call center. If the feature is enabled, the pricing engine only considers the sales line that is being added or edited and ignores the other sales lines. In this case, the net amount for an item includes the price calculation and simple discounts (for example, discount percentage or amount off on an individual item), but the mix-and-match, threshold, and quantity discounts aren't applied. The user can select **Recalculate**, **Totals**, or **Complete** if they want an exact calculation while adding sales lines.

See also

Delay exact price and discount calculation for improved performance (docs)

Geo-detection and redirection for e-commerce sites

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 10, 2021	✔ Nov 5, 2021

Business value

Dynamics 365 Commerce will allow you to provide the most relevant and personalized shopping experience for your e-commerce customers based on their geographic location. You can grow customer engagement and retention when you can provide the products, category hierarchies, pricing, payment methods, product storytelling, and delivery options that are tailored to customers in specific countries and regions.

Feature details

Geo-detection and redirection gives you the ability to detect your customers' geographic location, and use that information to suggest or redirect them to the marketized and localized site that's most appropriate for them in their current location. Geo-detection and redirection consists of the following components and capabilities:

- **Enable location-based services for your e-commerce site**: When you enable location-based services site settings, your customers' location (as determined by information from their browser) is used to determine their country or region. That information will be used to offer them the best site URL based on your channel configuration.
- **Declare the countries and regions that your online channels support**: You can now associate one or more countries or regions with an online channel in Commerce headquarters. This list of countries and regions is exposed in site builder to use for configuring the e-commerce experience.
- **Associate countries and regions with channels and languages**: Every unique channel and language combination can be associated with a country or region that you specify for that channel in Commerce headquarters. The mappings you create are used to select the best URL for customers when they arrive at your site.
- **Display a country picker**: When your customers land on a URL that is not intended for the country or region they're in, you can display a site selector experience that lets them select the site for their country or region or continue on to the site they originally requested.
- **Auto-redirect customers**: You can choose to automatically redirect customers to the most appropriate site for the location they're in rather than prompting them to choose.
- **Save customer site preference**: When your customers select a site, their preferences will be persisted for the customer. It will also be used the next time the customer visits the site to automatically redirect him or her to the customer's desired site. Customers can always change their preferred site through the site picker.

See also

Set up geo detection and redirection (docs)

GST in e-commerce for India

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Dec 31, 2021

Business value

This feature enables Dynamics 365 Commerce customers in India to implement e-commerce capabilities by ensuring the Goods and Services Tax (GST) is calculated on e-commerce orders.

Feature details

This feature includes the following capabilities:

- The GST can be calculated for an e-commerce order based on the delivery and invoice information specified on the order.
- GST can also be calculated for shipping charges included in an e-commerce order on the line level.
- Customer registration numbers (such as GSTIN or PAN) can be specified in a customer profile on an e-commerce site.

See also

Goods and Services Tax (GST) integration for e-commerce sites for India (docs)

Improved pricing computation performance by using flattened discount tables

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 8, 2021	✔ Dec 31, 2021

Business value

The performance of the pricing engine is a critical factor to the overall performance of a retailer’s transaction workflows. The ability to find applicable discounts and compute prices in a performant manner can significantly contribute to revenue boost, profit margin growth, and an increase of customer lifetime value.

Feature details

This feature optimizes the discount publishing and lookup procedures of the Dynamics 365 Commerce pricing engine by leveraging flattened data schema. With this feature enabled, discount data configured in Commerce headquarters is denormalized before it's sent to channel databases. The publishing of flattened discount data occurs automatically when a discount is enabled. This process helps achieve faster discount lookup and computation at runtime.

See also

Retail discounts (docs)

Commerce analytics

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 15, 2021	Feb 2022

Business value

Dynamics 365 Commerce analytics enables organizations to make informed data-driven decisions about their business with rich insights from transactional data as well as from behavioral e-commerce user data. Unified omnichannel insights allow for a cohesive end-to-end view of business operations. Robust extensibility allows organizations to extend and customize the insights to suit their unique business needs. Commerce analytics is built on a modern scalable platform, and enables organizations to use powerful industry-leading and familiar tools such as Power BI and Azure Synapse Analytics.

Feature details

This feature enables native analytics based on Dynamics 365 Commerce sales, operational insights, and e-commerce web activity. The feature also enables high-scale data storage using Azure Data Lake, standardized analytics schema using Common Data Model, high-performance querying using Azure Synapse Analytics, and interactive visualization using Power BI.

Turn-key analytics will be available for business users and data analysts in Commerce headquarters, as well as embedded scoped access at the point of sale (POS) for store managers and store associates. This feature also empowers data engineers with standardized access to both aggregated and disaggregated data for custom ad-hoc querying and extending and customizing default reports. This feature includes the following key reports:

Core sales analytics. This category of reports provides essential sales and operational insights needed to run commerce business operations:

- Sales and margin performance.
- Inventory analysis.
- Loyalty and gift card analysis.

Core e-commerce web activity analytics. This category of reports provides insights about visitor engagement on your e-commerce website:

- E-commerce sales conversion funnel.
- E-commerce product impressions.
- E-commerce page module conversion and effectivity.

Mashups. This category of reports provides unique insights about your e-commerce visitor engagement by combining web activity data with historical transactional data:

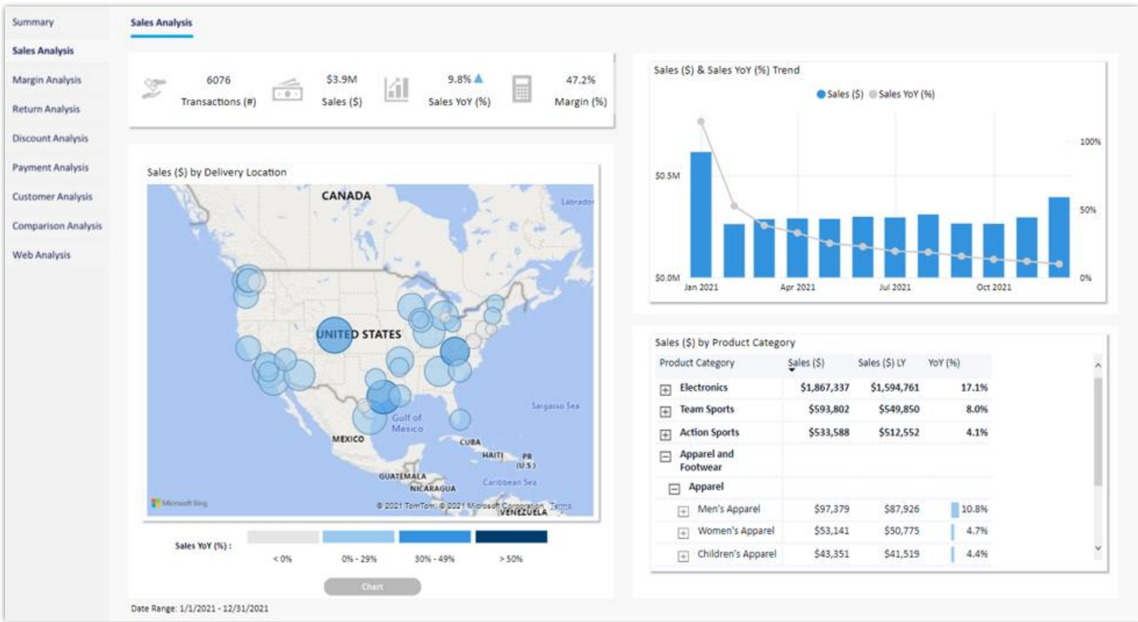
- E-commerce conversion funnel by customer lifetime value (LTV).
- E-commerce acquisition analysis by gross margin return on inventory investment (GMROII).
- E-commerce product impressions by product category hierarchy.

Point of sale (POS). This category of reports provides contextual operational insights for store managers and cashiers directly at the POS:

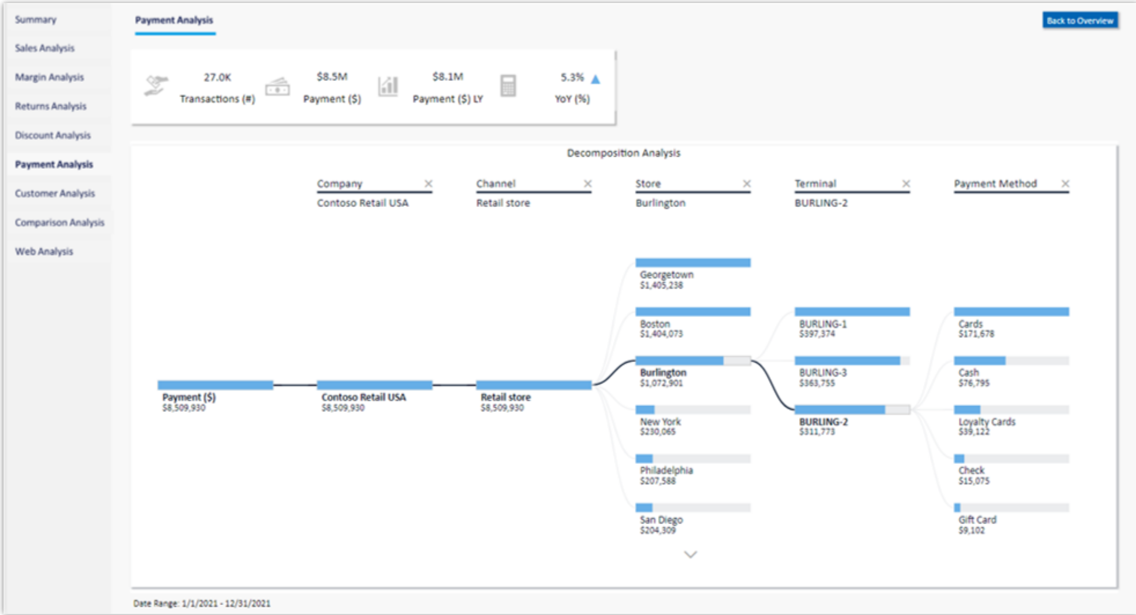
- Channel sales.
- Customer RFM and spend analysis.
- Order activity.

Connected Spaces. This category of reports provides insights about shoppers in your store by correlating sales transactional insights with observational data collected by in-store sensors and cameras:

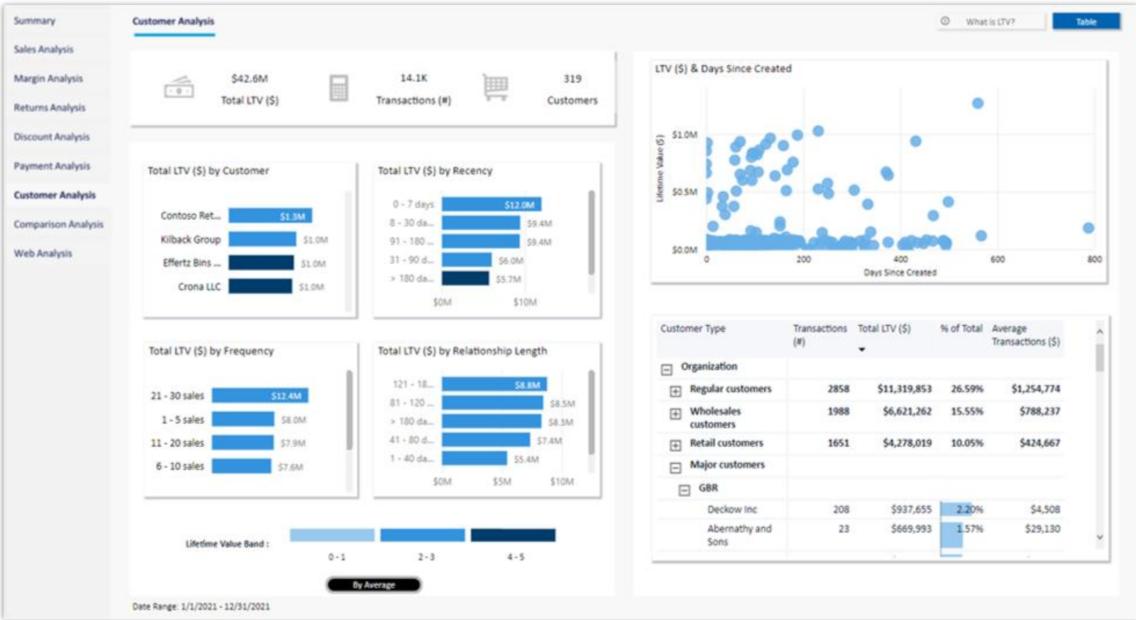
- Foot traffic analysis.
- Queue length.
- Display effectiveness.



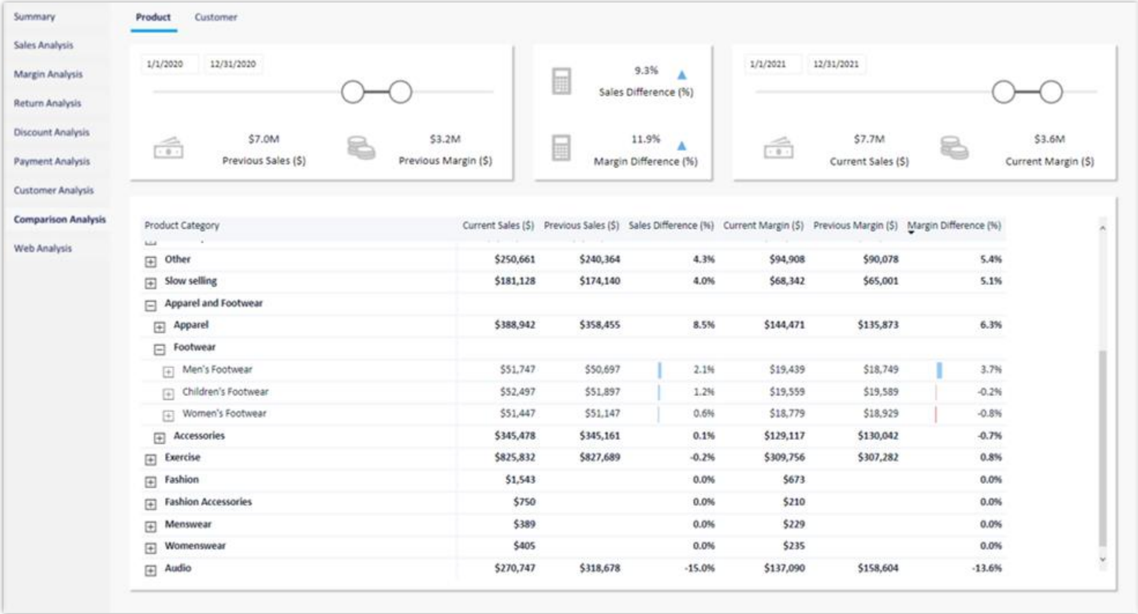
Commerce Analytics - Sales insights.



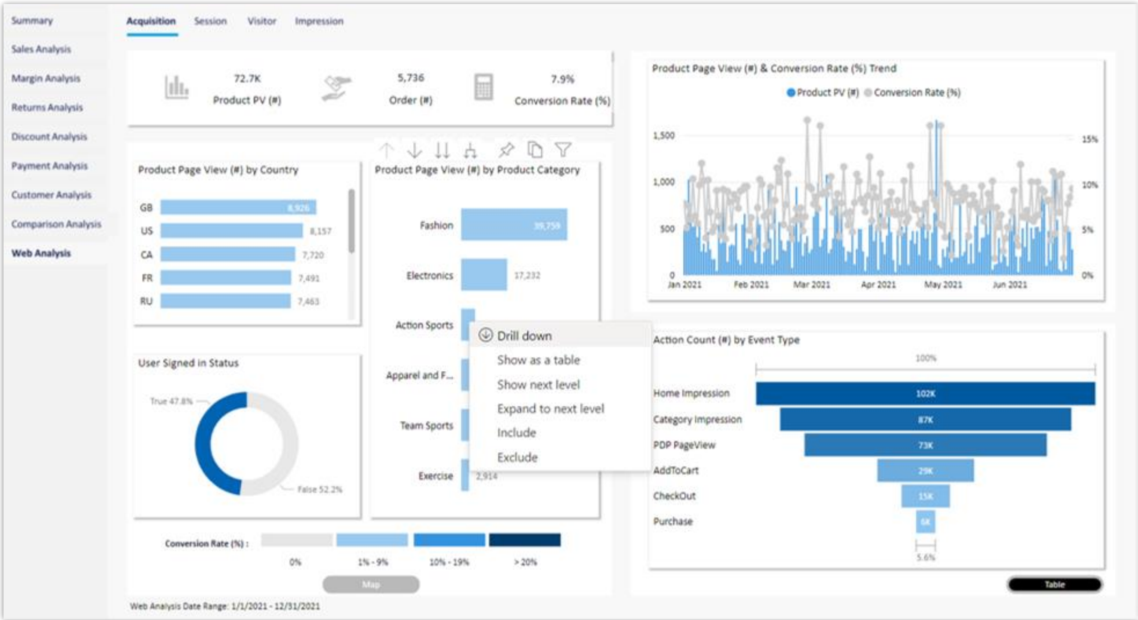
Commerce Analytics - Payment method insights.



Commerce Analytics - Customer metrics.



Commerce Analytics - Metrics comparison.



Commerce Analytics - E-commerce web analysis.

See also

[Commerce analytics (Preview)](docs) (docs)

Digital signing of retail transactions for Norway based on fiscal integration framework

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

Business value

This new capability makes the implementation of Dynamics 365 Commerce easier for customers in Norway because the digital signing functionality that is required to be compliant with local cash regulations is now based on the fiscal integration framework.

Feature details

According to local cash register regulations in Norway, any retail sale must be digitally signed, and an excerpt from the signature must be printed in the customer's receipt for the sale. The sample of digital signing of retail transactions for Norway now takes advantage of the fiscal integration framework, which means it supports all of the built-in fiscal integration capabilities. The sample is included in the Retail SDK and must be configured and built in order to be used. The functionality enables fiscal registration of sales by means of digital signing in various cash-and-carry sales and customer order scenarios, as well as fiscal registration of audit events of various types. The digital signing capabilities leverage user-defined certificate profiles and allow using certificates stored either in Azure Key Vault or local storage.

The fiscal integration framework enables multinational retailers to build common point of sale (POS) solutions that are compliant with different local fiscal regulations in the countries or regions that they operate in.

Improved stock count operation in POS

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 3, 2021	Feb 2022

Business value

With this new capability, Dynamics 365 Commerce customers can improve the productivity of in-store personnel by enabling core stock counting activities directly in point of sale (POS) and eliminating the need to use Commerce headquarters or the Warehousing mobile app.

Feature details

This feature introduces several functional and experience enhancements to the stock count operation in the POS app:

- An optimized user experience for scanning barcodes that provides an easier way to add counting lines and update counted quantity.
- Support of in-parallel counting by multiple users. Counted quantities can be entered by users separately with data reconciliation occurring afterward.
- Support of serial-controlled items by entering serial numbers, and location-controlled items by specifying counting location during the counting process.
- New worker permission in Commerce headquarters to control whether the counting results submitted from POS should be directly posted to backend ERP system or should involve review processes.
- The improved operation uses the asynchronous document processing framework to eliminate timeout issues in the current stock count operation when users attempt to post large counting journals to Commerce headquarters.
- The review function is embedded in the operation to facilitate necessary data validations and ensure smooth processing and error handling.

See also

Commerce inventory management (docs)

Improvements to payment flows for pick-up order processing in POS

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 3, 2021	Feb 2022

Business value

Dynamics 365 Commerce now makes it easier for Cloud point of sale (CPOS) and Modern point of sale (MPOS) users to identify pre-existing card payments available to an order when customers are performing a pick-up in store. This capability reduces the chances of taking a new payment when the customer may already have an existing card payment that can be applied against the order. Choosing existing payments when they are available also speeds up the checkout process during pick-up.

During in-store pickup, when the order is retrieved and there are pre-existing card payments available, an indicator will inform the POS user of the available payment methods. Updated action dialogues provide clearer paths to use the existing card payment options to complete payment for the pick-up. Users will have the option to choose one or apply all existing card payment options if multiple pre-existing payments are available.

Feature details

When enabled, this feature will provide the following user interface changes in POS:

- Improved messaging is shown at the start of the transaction view indicating when existing card payments are available.
- A more prominent **Existing payment options** section is available when tendering against the amount due.
- The option to **Apply all** or choose individual existing payment options during the checkout is provided.
- The process flow for applying an existing payment on the pick-up order has been adjusted so that it aligns to the standard checkout and payment flow.

See also

Multiple available payment methods for in-store pickup (docs)

Parity in creating customers asynchronously

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2021	Feb 2022

Business value

High availability and high performance are expected for all e-commerce sites today. To help meet these expectations, Dynamics 365 Commerce e-commerce sites will no longer have to rely on real-time communication with Commerce HQ for creating and editing customers. By enabling parity between creating a customer in synchronous mode and asynchronous mode, businesses can choose asynchronous mode for creating customers, thereby avoiding real-time communication with Commerce HQ.

Feature details

This feature adds the following capabilities while creating customers asynchronously:

- The ability to capture title and affiliations derived from the default customer record, and second contact information such as phone and email, while creating customers asynchronously.

Integrate Microsoft Clarity with Dynamics 365 Commerce

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

Business value

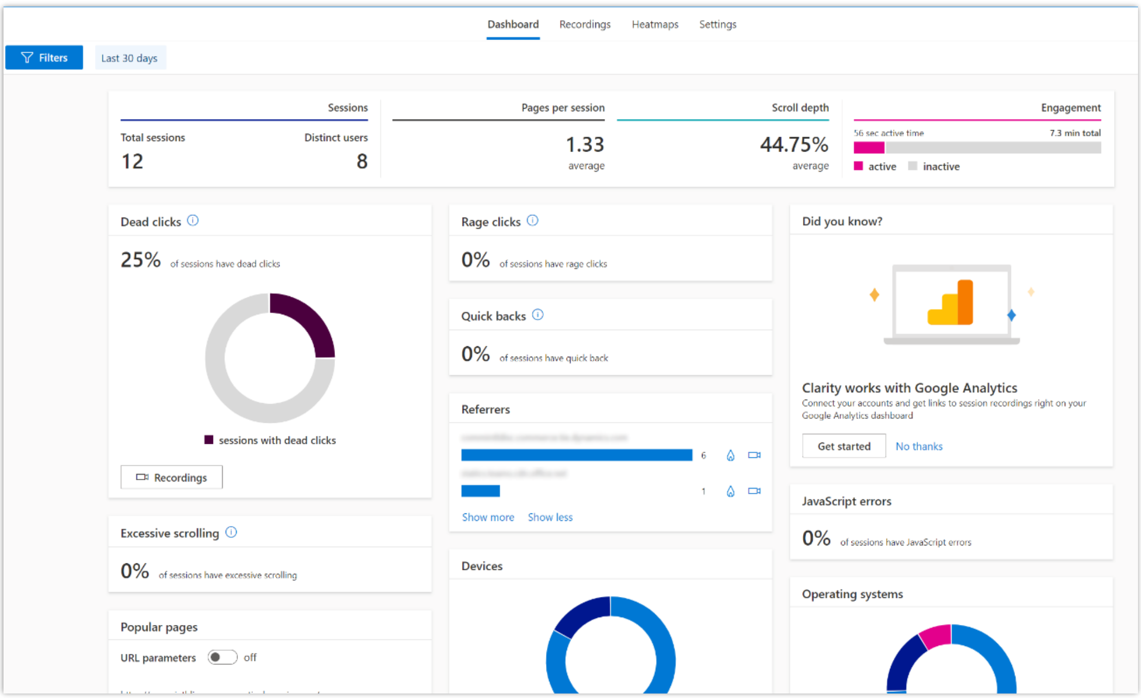
This new capability will allow Dynamics 365 Commerce customers to use data-driven insights from Microsoft Clarity to improve website design and increase customer engagement.

Feature details

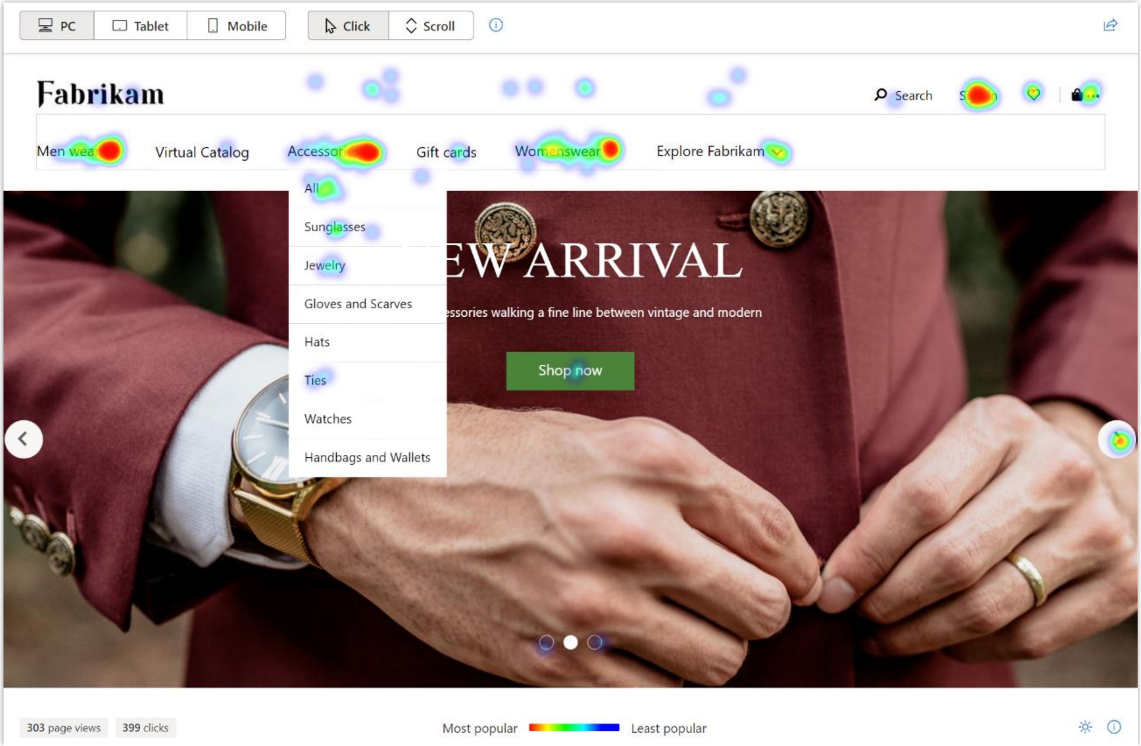
Microsoft Clarity is a powerful analytics tool that can provide a visual representation of user interaction data across your site. Clarity allows you to view how end users interact with pages across your site with mouse-action recordings and page heatmap views. Analytical data is represented in a clear visual manner so you can better understand how customers interact with your page content. With Commerce and Clarity together, you can review visual customer interaction data across your site to inform design changes of your site pages.

When you enable Microsoft Clarity with Commerce, you can:

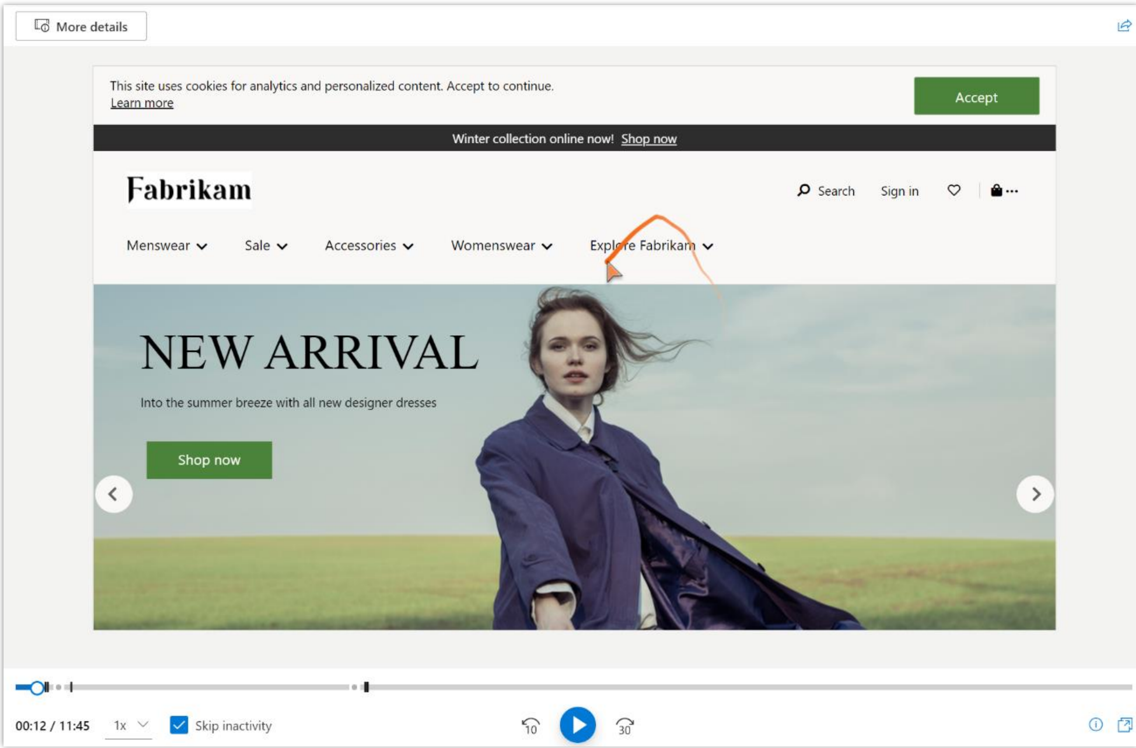
- Use a single drop point for your Clarity script that will apply across all pages within your site.
- Access Clarity configuration settings in your site settings.
- Use a quick-launch button to open the Clarity Portal in a new tab.
- Reduce the time it takes to track, review, and adjust site content based on real site interaction data.



The Clarity dashboard provides traffic and user session metrics for your project's domain.



Clarity Heatmaps bring user click or scroll data neatly overlaid on your site page for reference.



Clarity user session recordings offer anonymous real user interactions playback.

System monitoring and diagnostics for e-commerce

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

Business value

This new capability will improve the productivity and efficiency of IT admins by providing the system diagnostics that reduce the time to detection, mitigation, and resolution for live-site incidents.

Feature details

Access to system diagnostic logs allows much better visibility for IT admins and enables improved time to detection, time to mitigation, and time to resolution of live-site incidents. IT admins are able to determine key contributing factors of incidents, which allows for targeted engagement with Microsoft support teams, or with implementation partners, ISVs, or other stakeholders.

System health visibility also allows IT admins to provide more informed support to their users. For instance, when fielding a support call from a website visitor, an IT admin can easily pinpoint when exactly the issue occurred, whether the issue was caused by an extension, and whether the issue is widespread or limited to specific e-commerce channels. Also, the IT admin can determine issue resolution as soon as the issue is resolved. The IT admin can also configure custom alerts for specific system health conditions for proactive monitoring using Microsoft Azure Monitor.

This feature enables IT admins to access diagnostic logs in Application Insights for e-commerce components. The following event types are included:

- Page views (all page views).
- All dependencies.
- Background calls (modeled as page view dependencies), from browser and NodeJS.
- User displayed error messages (modeled as exceptions), including 404 pages.
- Multistage cart operations (modeled as page view dependencies).

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	To be announced

Business value

This feature provides opportunities for you to grow overall customer satisfaction, increase cart conversion to sales, grow personalized engagement and retention with your customers, enhance your customer service experience through integration of human agents and self-service Power Virtual Agents chatbots, and improve the agent experience with real-time customer profiles, order, and purchasing data.

Feature details

Customer service functionality will be added to Dynamics 365 Commerce by leveraging the capabilities in Dynamics 365 Omnichannel for Customer Service and Power Virtual Agents.

Site administrators will be able to configure the chat widget on an e-commerce site with proactive notification capability based on unique criteria. The chat can be proactively triggered based on triggers like time spent on the site, number of visits to a page, cart value, or number of items in the cart. The context of the customer will be passed to Power Virtual Agents and Omnichannel for Customer Service for a chatbot or a human agent 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. A commerce call center embedded within the Omnichannel for Customer Service agent interface provides agents with a PCI-DSS compliant application to take orders, create replacements, and return orders easily.

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 headquarters and Commerce Server APIs to take action on behalf of the customer using Power Virtual Agents.

Dynamics 365 Commerce – Merchandising Connector

Enabled for	Public preview	General availability
Users, automatically	✔ Jan 13, 2022	To be announced

Business value

Customers, ISVs, or partners can build Power Apps or Power Automate flows for Dynamics 365 Commerce business processes by using the Dynamics 365 Commerce Merchandising Connector. The connector simplifies the process of using the Dynamics 365 Commerce APIs.

Feature details

A connector is a proxy or a wrapper around an API that allows the underlying service to communicate with Microsoft Power Automate, Microsoft Power Apps, and Azure Logic Apps.

It provides a way for users to connect their accounts and leverage a set of prebuilt actions and triggers to build their apps and workflows.

Dynamics 365 Commerce Merchandising Connector exposes actions for Power Apps or Power Automate to build custom applications in Microsoft Power Platform. These actions are exposed as Anonymous APIs so additional authentication is required in the connector.

Actions:

- **SearchProducts**: Searches and returns the product details based on product ID or the search keyword.
- **GetProductInventory**: Gets the product inventory information based on the product ID and location.
- **GetCategories**: Gets the channel navigation hierarchy configured for the channel.

In the future, more actions will be added to the connector.

For more information on the connector and how to use it in Power Apps or Power Automate, see:

[Connectors]()

[Connector reference overview]()

[Overview of connectors for canvas apps]()

Fraud Protection

Overview of Dynamics 365 Fraud Protection 2021 release wave 2

Microsoft Dynamics 365 Fraud Protection brings together account protection, payment protection, and loss prevention, providing a 360-degree view of the fraud landscape to merchants to help them discover and combat fraud efficiently and effectively. We are investing in three areas in this release to amplify our customers' ability to fight fraud: payment service provider (PSP) enablement, unhindered Fraud Protection trials, and deeper purchase and account protection fraud analytics.

Payment service provider enabled

With the new functionality, PSPs can offer Fraud Protection as a value-added service to their customers. Optimized experiences will enable PSPs to easily integrate Fraud Prevention into their existing infrastructure and enable them to combat fraud on behalf of their merchants or with their merchants. PSPs will be able to observe and manage fraud with their many merchants across multiple verticals and within merchants with deep hierarchies.

Evaluate Fraud Protection unhindered

Any user in your organization can evaluate all Fraud Protection capabilities for free and without the need for Azure AD tenant admin privileges.

Deeper analytics and reporting to amplify fraud observability, investigation, and mitigation

Fraud Protection will provide out-of-the-box curated data sets, metrics, and Power BI reports for purchase protection and account protection. This powerful functionality will help amplify the capacity of your fraud analyst to immediately observe and understand potential suspicious activity. Using the Power BI platform, your analyst can drive deep investigations that will inform a more complete strategy for protecting your business from fraud.

What's new and planned for Dynamics 365 Fraud Protection

This topic lists features that are planned to release from October 2021 through March 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
Deep analytics and reporting to amplify fraud observability, investigations, and mitigations	Users, automatically	✔ Oct 1, 2021	-
Payment service provider (PSP) enabled	Users, automatically	✔ Oct 1, 2021	-
Evaluate Dynamics 365 Fraud Protection unhindered	Users, automatically	Feb 2022	-
Integration wizard	Admins, makers, marketers, or analysts, automatically	✔ Jun 3, 2021	Mar 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.

Deep analytics and reporting to amplify fraud observability, investigations, and mitigations

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 1, 2021	-

Business value

Dynamics 365 Fraud Protection will provide out-of-the-box curated data sets, metrics, and Power BI reports for purchase protection and account protection. This powerful new functionality will help amplify the capacity of your fraud team to immediately observe and understand potential suspicious activity, without needing to consult or hire data scientists.

Using the Power BI platform, your team can drive deep investigations that will inform a more complete strategy for protecting your business from fraud.

Feature details

Fraud Protection will provide curated data sets, metrics, and Power BI reports for purchase protection and account protection.

- The score rule optimizer, fraud tracker, rule monitor, and monthly business review reports for purchase protection will enable you to analyze historical transaction data, perform operational tasks, and make informed operational decisions. For example, you'll have access to data to help you make decisions pertaining to the score threshold, rejection of risky transactions, estimating score threshold impact, analyzing fraud trends and performance, and conducting deep dive analysis with a lens on purchase fraud.
- The threat vulnerability analyzer and threat vulnerability trend reports for account protection will enable you to analyze account protection session data, investigate threat and fraud attacks at the session level, and make informed operational decisions. For example, you'll have richer insights pertaining to setting the score threshold, segmenting threat traffic, estimating score threshold impact, analyzing abusive traffic patterns, and validating machine learning score performance. The interactive tool will provide intelligence on various dimensions including geolocation, device configuration, IP, and reason code. The report from the tool will refresh every 24 hours with the latest account protection sessions and will retain account login and account creation sessions from the previous four weeks. The threat vulnerability trend report retains account login and account creation metrics and data from the previous four months.

See also

Threat vulnerability analyzer tool (preview) (docs)

Payment service provider (PSP) enabled

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 1, 2021	-

Business value

With this new functionality, payment service providers (PSPs) will be able to offer Dynamics 365 Fraud Protection as a value-added service to their customers. Optimized experiences will enable PSPs to easily integrate Fraud Protection into their existing infrastructure and enable them to combat fraud on behalf of their merchants or with their merchants. PSPs will be able to observe and manage fraud with their many merchants across multiple verticals and within merchants with deep hierarchies.

Feature details

Fraud Protection will have multiple new features that enhance payment service providers' ability to offer Fraud Protection as a value-added fraud protection service to all their merchants.

PSPs will be able to integrate Fraud Protection easily into their existing infrastructure to manage PSP taxonomies that encompass many merchants and multiple hierarchies within each merchant entity. PSP-focused experiences will be added to Fraud Protection to manage the creation and addition of multiple merchants and to observe and manage merchant fraud performance across a single merchant, multiple merchants, and across PSP verticals using AI and other fraud management features in Fraud Protection such as rules and lists.

See also

Payment service provider enablement (preview) (docs)

Evaluate Dynamics 365 Fraud Protection unhindered

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

Business value

Any user in your organization can evaluate all of the Fraud Protection capabilities for free and without the need for Azure Active Directory (Azure AD) tenant admin privileges, thus streamlining the evaluation process.

Feature details

Microsoft Dynamics 365 Fraud Protection will be available in a free trial version, available directly from the web. This will allow potential users to easily try Fraud Protection without the need for Azure AD tenant admin privileges. Fraud stakeholders and decision makers can more quickly evaluate the capabilities of Fraud Protection with the trial version.

Integration wizard

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jun 3, 2021	Mar 2022

Business value

This feature will help customers onboard to Dynamics 365 Fraud Protection easily and quickly, saving time and resources. It will also demonstrate the value Fraud Protection will bring to the business.

Feature details

This feature will enable customers to onboard to Dynamics 365 Fraud Protection in an easy and engaging way. There will be an immersive out-of-the-box experience that demonstrates the full capability of the product as it would be experienced by the customer after integration and after being used over several months. The wizard will walk the customer through a guided series of steps with immediate verification. The steps include configuration of device fingerprinting, bot protection, multifactor authentication challenge, and calls into risk assessment APIs.

As customers go through the integration process, there will be a progress bar that shows how the customer is advancing. In addition, there will be a state-of-the-art unified data upload experience with an extensive set of data connectors, making the experience a self-service model for customers to onboard data from their home systems.

See also

Integration experience (docs)

SMB

Overview of Dynamics 365 Business Central 2021 release wave 2

Dynamics 365 Business Central is a comprehensive business application solution that is designed and optimized for small and midsized organizations. For 2021 release wave 2, Business Central investments center on helping users get to productive usage faster, whether they are new or existing customers. We expand the built-in tours to cover more standard entities for better onboarding of additional business roles. We continue our *Better with Microsoft 365* investment by bringing further capabilities to the Business Central and Teams experience. Finally, and not least, we continue our rapid expansion to more countries and regions. In 2021 release wave 1, Business Central added 13 new countries and regions. In release wave 2, we expect to announce availability in more than 10 more countries and regions.

Some examples of our investments in various areas:

Administration: In 2021 release wave 2, Business Central delivers new capabilities to simplify and improve the way our partners administer tenants. Administrators enjoy new experiences for managing licenses and permissions.

Application: You can now get better explanations and guidance on errors that are caused by problems in posting setup and dimensions. Improvements to reporting, bank reconciliation, and supply chain capabilities will also help customers be more productive.

Better with Microsoft 365: Share a record from the browser client in Microsoft Teams.

Country and regional: We continue our rapid expansion in more countries with 10 or more new markets in this release wave.

Development: We continue to deliver new capabilities for developers.

Governance and administration: This wave adds more operations in the *Operation log* section of the Business Central admin center.

Modern clients: We improve the discoverability of reports across departments by applying a filter to the links that are shown in the Role Explorer.

Onboarding: Built-in tours cover more standard entities to support the onboarding of more business roles. A new help pane will help users get unblocked faster when they experience an issue.

Service and platform: We continue our effort in improving the performance of Business Central.

What's new and planned for Dynamics 365 Business Central

This topic lists features that are planned to release from October 2021 through March 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 2021 release wave 2, we deliver updates based on the most popular requests for improvement, such as the finance and supply chain areas.

Feature	Enabled for	Public preview	General availability
Use new templates with same flexibility as configuration templates	Users by admins, makers, or analysts	-	✔ Oct 1, 2021
Account schedules – Budget Name filter for columns and more templates added	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Add additional columns through personalization in various pages to gain more insight	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Add non-inventory items on requisition and planning worksheets	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Advance Payments localization for Czech (extension) (Czechia)	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Bank and payment reconciliations	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Banking Documents localization for Czech (extension) (Czechia)	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Chart of Accounts Overview page – aligning columns with Chart of Accounts page	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Feature	Enabled for	Public preview	General availability
Couple records between Business Central and Dataverse (and apps for Dataverse) in bulk	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Default line type in the sales and purchase documents	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Edit in Excel in recurring general journals and intercompany general journals	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Enable or disable Item References from Inventory Setup	Users by admins, makers, or analysts	✔ Sep 1, 2021	✔ Oct 1, 2021
Improved user experience to keep posting setup and dimension issues from going wrong	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Integrate Business Central and Microsoft Dataverse with more efficient synchronization of multiple records	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Item variant code on demand forecasts	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Keep track of historical IBAN number when vendor bank account number changes	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
List of trusted apps	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Locations for non-inventory items	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
More control over address information data entry	Users by admins, makers, or analysts	✔ Sep 1, 2021	✔ Oct 1, 2021
More control over currency exchange rate adjustment	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
New automation API to create user groups	Users by admins, makers, or analysts	✔ Sep 1, 2021	✔ Oct 1, 2021

Feature	Enabled for	Public preview	General availability
Posting Preview can now show G/L and VAT entries in hierarchical view and is easily extensible	Users, automatically	Sep 1, 2021	Oct 1, 2021
Production BOMs and routes on stockkeeping units in planning scenarios	Users, automatically	Sep 1, 2021	Oct 1, 2021
Remove obsolete reports 204, 205, 206, and 207	Users, automatically	Sep 1, 2021	Oct 1, 2021
Rounding for base unit of measure	Users, automatically	Sep 1, 2021	Oct 1, 2021
Support alternative units of measure in warehouse documents for items that are tracked by serial numbers	Users, automatically	Sep 1, 2021	Oct 1, 2021
Tour of Business Central to help users get to know the basics	Users, automatically	Sep 1, 2021	Oct 1, 2021
Unlock time sheets in Business Central using assisted setup and data entry on mobile devices	Users by admins, makers, or analysts	Sep 1, 2021	Oct 1, 2021
Use multiple units of measure when synchronizing items and resources to Dynamics 365 Sales	Users, automatically	Sep 1, 2021	Oct 1, 2021
Send mail from entities using Word templates as body or attachment	Users, automatically	Sep 2, 2021	Oct 1, 2021
Customer Consent capabilities for all features that exchange data with third-party services	Users, automatically	Sep 12, 2021	Oct 1, 2021
Document attachments are available on mobile devices	Users, automatically	Sep 1, 2021	Oct 10, 2021
Shipping agent information is copied from sales orders to warehouse shipments	Users, automatically	-	Nov 22, 2021

Feature	Enabled for	Public preview	General availability
Use currency symbol in data synchronization with Dataverse	Users by admins, makers, or analysts	-	✓ Nov 30, 2021
Synchronize multiline text fields between Business Central and Dataverse (and Dynamics 365 Sales)	Users by admins, makers, or analysts	-	✓ Dec 9, 2021
Delegated admin can create job queue entries and request approval by a licensed user	Admins, makers, marketers, or analysts, automatically	Jan 2022	Feb 2022

Better with Microsoft 365

In 2021 release wave 2, we invest in 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
Enhancements to Microsoft Teams integration	Users, automatically	-	✓ Oct 1, 2021
Centralized Deployment of Office add-ins	Admins, makers, marketers, or analysts, automatically	✓ Aug 1, 2021	✓ Oct 1, 2021
Enhancements to the Outlook add-in	Users, automatically	✓ Aug 1, 2021	✓ Oct 1, 2021
Enhancements to working with Microsoft Excel	Users, automatically	✓ Aug 10, 2021	✓ Oct 1, 2021
AL access to viewing and sharing files in OneDrive	Users by admins, makers, or analysts	✓ Sep 6, 2021	✓ Oct 1, 2021
Share a record link to Microsoft Teams	Users, automatically	✓ Sep 6, 2021	✓ Oct 1, 2021

Country and regional

We increase the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature	Enabled for	Public preview	General availability
Country and regional expansion – Argentina	Admins, makers, marketers, or analysts, automatically	-	✓ Nov 15, 2021
Country and regional expansion – Bulgaria	Admins, makers, marketers, or analysts, automatically	-	✓ Nov 15, 2021
Country and regional expansion – Chile	Admins, makers, marketers, or analysts, automatically	-	✓ Nov 15, 2021
Country and regional expansion – Puerto Rico	Admins, makers, marketers, or analysts, automatically	-	✓ Nov 15, 2021
Country and regional expansion – Slovakia	Admins, makers, marketers, or analysts, automatically	-	✓ Nov 15, 2021
Country and regional expansion – Ukraine	Admins, makers, marketers, or analysts, automatically	-	✓ Nov 15, 2021

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
Extend general ledger posting aggregations (Invoice Post. Buffer refactoring)	Users, automatically	✓ Oct 1, 2021	-

Feature	Enabled for	Public preview	General availability
Generated documentation for AL language	Admins, makers, marketers, or analysts, automatically	-	✔ Oct 1, 2021
Profiling AL performance with snapshot debugger	Admins, makers, marketers, or analysts, automatically	✔ Aug 1, 2021	✔ Oct 1, 2021
Transactional installation and sync of extensions on-premises	Admins, makers, marketers, or analysts, automatically	✔ Aug 1, 2021	✔ Oct 1, 2021
Richer access control for extension source in cloud environments	Admins, makers, marketers, or analysts, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Componentization of Image module	Users, automatically	✔ Sep 2, 2021	✔ Oct 1, 2021
Module to integrate Azure Blob service REST API	Admins, makers, marketers, or analysts, automatically	✔ Sep 2, 2021	✔ Oct 1, 2021
Change publisher or extension name	Admins, makers, marketers, or analysts, automatically	✔ Oct 1, 2021	✔ Oct 1, 2021
Collectable errors in AL	Users, automatically	✔ Oct 1, 2021	✔ Oct 1, 2021
Error dialogs with detailed messages for better troubleshooting	Users, automatically	✔ Oct 1, 2021	✔ Oct 1, 2021
Force sync of customer-specific extensions in online environments	Admins, makers, marketers, or analysts, automatically	✔ Oct 1, 2021	✔ Oct 1, 2021
Performance – support for included columns in keys	Users, automatically	✔ Oct 1, 2021	✔ Oct 1, 2021
Performance – support for non-clustered column store indexes	Users, automatically	✔ Oct 1, 2021	✔ Oct 1, 2021

Feature	Enabled for	Public preview	General availability
Use two-dimensional barcodes in reports (Business Central online)	Admins, makers, marketers, or analysts, automatically	-	✓ Dec 1, 2021
AL compiler diagnostic messages includes URLs	Admins, makers, marketers, or analysts, automatically	✓ Dec 7, 2021	✓ Dec 7, 2021

Governance and administration

The 2021 release wave 2 delivers a set of admin and governance capabilities designed to help admins and IT pros set up, secure, manage, govern, and monitor customer environments.

Feature	Enabled for	Public preview	General availability
Automatic installation and update of dependencies when updating apps in the Business Central admin center	Admins, makers, marketers, or analysts, automatically	-	✓ Oct 1, 2021
Manage access to environments using Azure Active Directory groups	Admins, makers, marketers, or analysts, automatically	-	✓ Oct 1, 2021
Admins can handle scheduled tasks after a point-in-time restore	Admins, makers, marketers, or analysts, automatically	✓ Sep 2, 2021	✓ Oct 1, 2021
Data archive extension and archiving entries before deleting in Date Compress batch jobs	Admins, makers, marketers, or analysts, automatically	✓ Sep 2, 2021	✓ Oct 1, 2021
Copying environments of different types	Admins, makers, marketers, or analysts, automatically	-	✓ Nov 15, 2021
Operations log enhancements	Admins, makers, marketers, or analysts, automatically	-	✓ Nov 15, 2021

Feature	Enabled for	Public preview	General availability
Restart environments	Admins, makers, marketers, or analysts, automatically	-	✔ Nov 15, 2021
New license file format to support larger licenses	Admins, makers, marketers, or analysts, automatically	-	✔ Nov 16, 2021
Manage access to environments using Azure Active Directory Conditional Access	Users by admins, makers, or analysts	-	✔ Dec 14, 2021

Microsoft Power Platform

With Business Central 2021 release wave 2, we improve the integration with Microsoft Dataverse and Microsoft Power Platform.

Feature	Enabled for	Public preview	General availability
Enhanced security in synchronizing data between Business Central and Dataverse	Admins, makers, marketers, or analysts, automatically	-	✔ Oct 1, 2021
Show reports from named and shared Power BI workspaces in Business Central	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Enhance Power Automate and Power Apps connector to support filter and search	Admins, makers, marketers, or analysts, automatically	✔ Nov 21, 2021	✔ Nov 26, 2021
Use secondary read-only database for Power BI reporting	Users by admins, makers, or analysts	✔ Jan 4, 2022	Feb 2022

Modern clients

In 2021 release wave 2, 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
Unhindered data entry across rows	Users, automatically	✔ Aug 9, 2021	✔ Oct 1, 2021
Usability improvements to the Business Central web client	Users, automatically	✔ Aug 10, 2021	✔ Oct 1, 2021
Additional accessibility improvements for mobile and tablet mode	Admins, makers, marketers, or analysts, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Decimal separator on numeric keypad matches region setting	Users by admins, makers, or analysts	✔ Sep 1, 2021	✔ Oct 1, 2021
Discovering reports and administration areas in Role Explorer	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Introduce updated desktop installable app	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Open a file in OneDrive to view and share reports from Report Inbox and Attachments	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Refreshed peek experience on related records	Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021
Search from the Help pane	Users, automatically	✔ Sep 6, 2021	✔ Oct 1, 2021
Share a Business Central report or attachment	Users by admins, makers, or analysts	Feb 2022	Mar 2022

Onboarding

In Business Central 2021 release wave 2, we continue to improve the onboarding experience for Business Central.

Feature	Enabled for	Public preview	General availability
Expanded coverage of in-app tours to more controls	Users by admins, makers, or analysts	✔ Sep 1, 2021	✔ Oct 1, 2021

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
OData callers can specify read-only intent in GET requests	Admins, makers, marketers, or analysts, automatically	-	✓Oct 1, 2021
Job queue entries are more resilient toward failures	Users, automatically	✓Oct 1, 2021	✓Oct 1, 2021
Performance – partial records on list pages	Users, automatically	✓Oct 1, 2021	✓Oct 1, 2021
Performance – partial records on TableRelation lookup pages	Users, automatically	✓Oct 1, 2021	✓Oct 1, 2021
Protect the Business Central Server against excessive background sessions for an environment	Users, automatically	✓Oct 1, 2021	✓Oct 1, 2021
Signal about the usage of read scale-out in reports added to Application Insights telemetry	Users by admins, makers, or analysts	-	✓Nov 15, 2021

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 2021 release wave 2, we deliver updates based on the most popular requests for improvement. We'll invest in better reporting, better management of dimensions, and several improvements to the supply chain area.

Use new templates with same flexibility as configuration templates

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 1, 2021

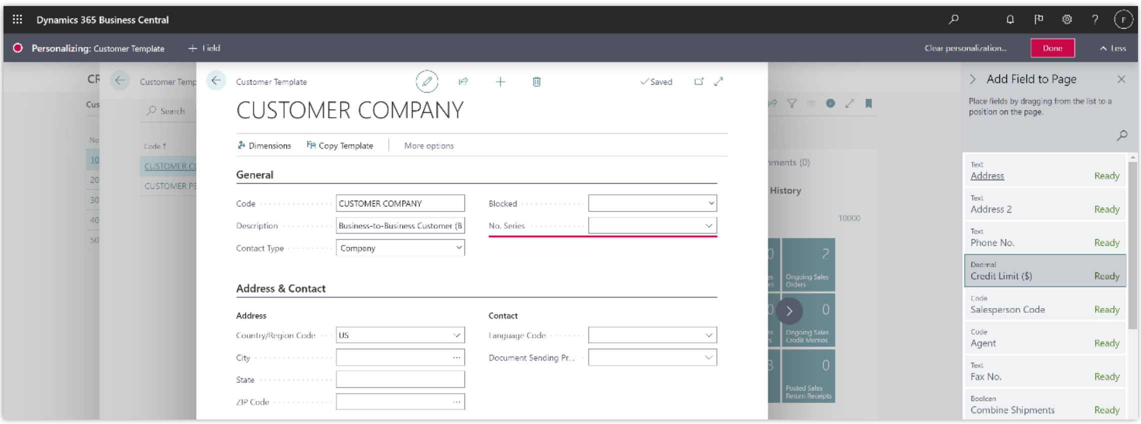
Business value

To make sure that customer, vendor, item or employee data is created quickly and accurately, you can use templates to standardize settings when new records are created. For example, this helps ensure that settings for posting and reporting are correct, so that productivity is not interrupted when people are entering data.

Feature details

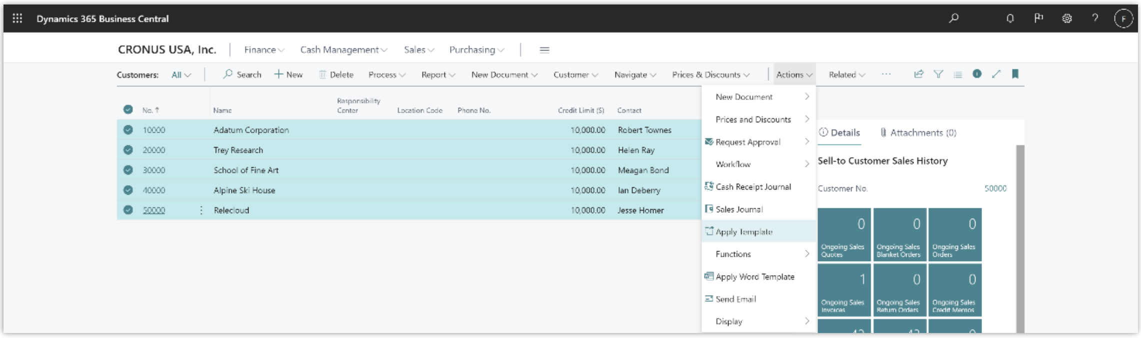
You can now use the capabilities of configuration templates with the new templates for customers, vendors, items, and employees. These include the ability to add any field, and to save and apply templates from customer, vendor, item, and employee lists.

For example, you can use personalization on the **Customer Template** page to add a **Credit limit** field to a template.



Shows how users can add new fields to customer templates using personalization banner.

You can then use the **Apply template** action to apply the new customer template to one or more customers.



Shows how to apply customer template on selected record in customer list.

You can also save a specific customer, vendor, item, or employee record as a template by using the **Save as Template** action.

Configuration templates are still available to help with developer, data migration, and integration scenarios; however, we recommend using the new customer, vendor, item, and employee templates instead.

Our developer documentation explains how to extend the new templates, and sample code shows how to keep master data and templates synchronized.

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

Register New Customers (docs)

Account schedules – Budget Name filter for columns and more templates added

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 1, 2021	✓ Oct 1, 2021

Business value

Account schedules are a fast way for businesses to generate custom G/L reports. To help you get started more easily, we've added even more templates. Set a filter on Budget Name and create an account schedule that reports on actual versus budgets for both a budget and a forecast (a second budget), which is often a reporting requirement for financial departments.

Feature details

To help users get off to a good start when using account schedules to create custom G/L reports, we've added several new templates for account schedules. The ANALYSIS, REVENUE, and CASHFLOW account schedules are now available in demonstration and trial (setup data only) companies. The new account schedules are mapped to the chart of accounts that can be used for product demonstrations, but they can easily be adapted to any chart of accounts.

For Column Layout, there's a new Budget Name field so that you can filter on a specific budget (or budgets) for that column. This way, you create account schedules that report on actual versus budget figures for both a budget and a forecast (which is a second budget).

Row No.	Description	Actual - Month	Budget - Month	Variance - Month	Actual - YTD - last year	Actual - YTD	Budget - YTD	% Variance - YTD	Forecast - Year	Budget - Year
	INCOME STATEMENT	–	–	–	–	–	–	–	–	–
	INCOME	–	–	–	–	–	–	–	–	–
40100	Income, Services	–	–	–	-28,501.00	29,132.97	26,219.67	11.11	29,132.97	26,219.67
40200	Income, Product Sales	-58,231.00	-56,000.00	-2,231.00	-280,534.30	-236,188.30	-266,161.57	-11.26	-177,957.30	-623,161.57
40250	Job Sales	–	–	–	–	–	–	–	–	–
40300	Sales Discounts	–	–	–	2,637.16	1,303.77	1,173.40	11.11	1,303.77	1,173.40
40400	Sales Returns & Allowances	–	–	–	–	–	–	–	–	–

Account schedule using multiple budgets.

Column No.	Column Header	Column Type	Ledger Entry Type	Amount Type	Budget Name	Formula	Show Opposite Sign	Comparison Period Formula	Comparison Date Formula	Show
1000	Actual - Month	Net Change	Entries	Net Amount			☐	FY[CP]		Always
2000	Budget - Month	Net Change	Budget Entries	Net Amount	BUD2021		☐	FY[CP]		Always
3000	Variance - Month	Formula	Entries	Net Amount		1000-2000	☐			Always
3900	Actual - YTD - last year	Net Change	Entries	Net Amount			☐	-1FY[1..CP]		Always
4000	Actual - YTD	Net Change	Entries	Net Amount			☐	FY[1..CP]		Always
5000	Budget - YTD	Net Change	Budget Entries	Net Amount	BUD2021		☐	FY[1..CP]		Always
6000	% Variance - YTD	Formula	Entries	Net Amount		100*((4000-5000)/5...	☐			Always
7000	Forecast - Year	Net Change	Budget Entries	Net Amount	FORE2021V2		☐	FY[1..12]		Always
8000	Budget - Year	Net Change	Budget Entries	Net Amount	BUD2021		☐	FY[1..12]		Always

Column Layout using the new Budget Name filtering.

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.

See also

[Prepare Financial Reporting with Account Schedules and Account Categories]() (docs)

Add additional columns through personalization in various pages to gain more insight

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 1, 2021	✓ Oct 1, 2021

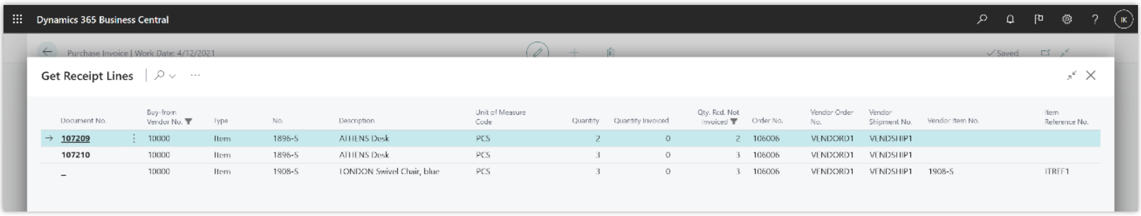
Business value

Different businesses and users need different information to complete business processes. Personalization is a powerful tool that lets people tailor the information that pages contain by dragging fields or columns from a list to the page. Based on feedback from our community, we've added more fields and columns to choose from on several pages.

Feature details

Get Receipt Lines page

You can add the **Order No.**, **Vendor Order No.**, **Vendor Shipment No.**, **Vendor Item No.**, and **Item Reference No.** columns to the **Get Receipt Lines** page.

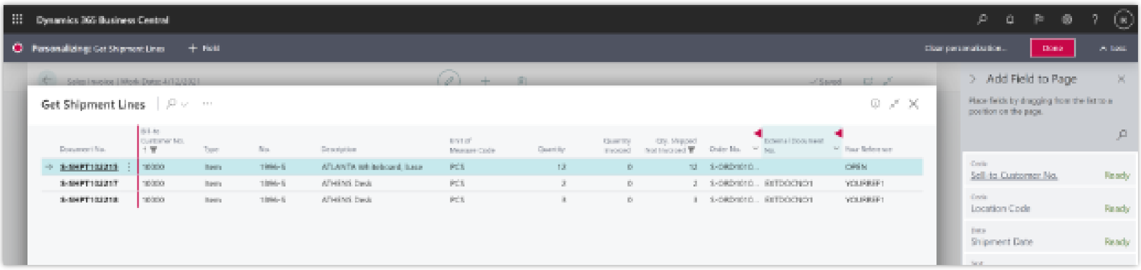


Shows Get Receipt Lines page with new columns.

Thank you for submitting [this idea](#).

Get Shipment Lines page

You can add the **Order No.**, **External Document No.**, and **Your Reference** columns to the **Get Shipment Lines** page.

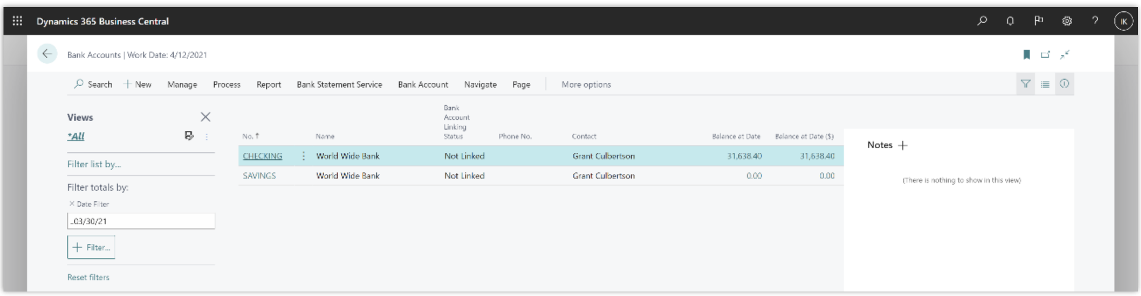


Shows Get Shipment Lines with new columns.

Thank you for submitting [this idea](#).

Bank Accounts page

The **Bank Accounts** page contains the **Balance at Date** and **Balance at Date (LCY)** columns.

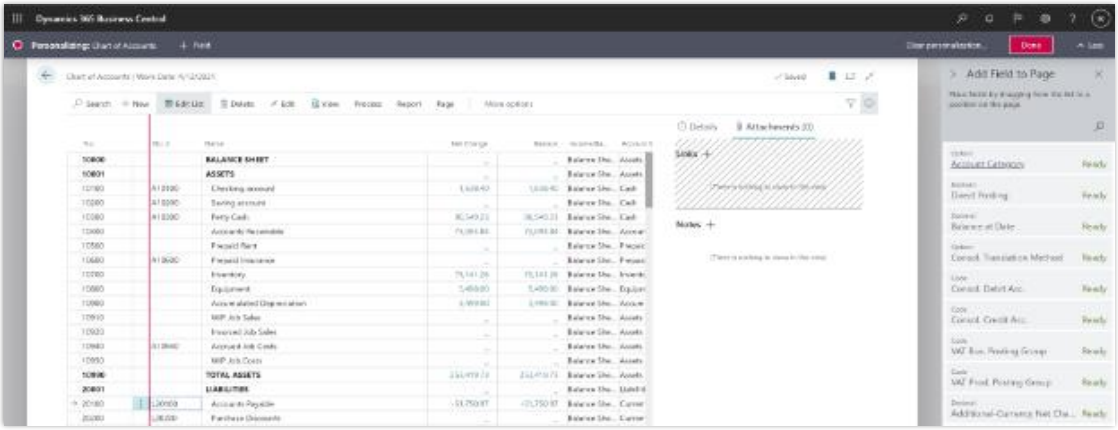


Shows bank accounts list with new columns.

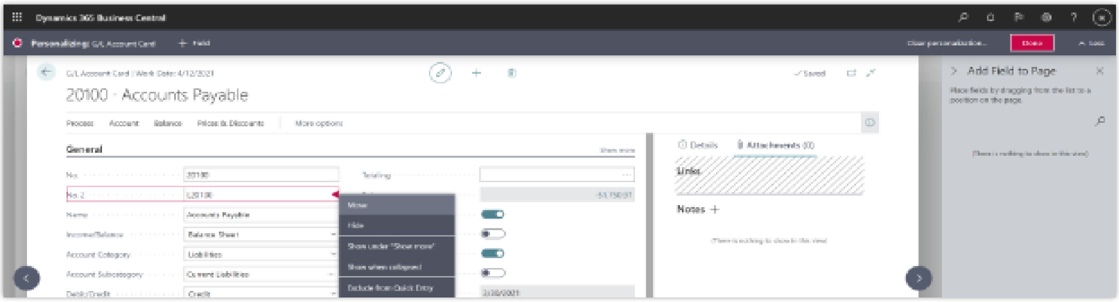
Thank you for submitting [this idea](#).

Chart of Accounts and G/L Account Card pages

You can add the **No. 2** column for alternative accounts to the **Chart of Accounts** page, and as a field on the **G/L Account Card** page.



Shows chart of accounts list page with new column.

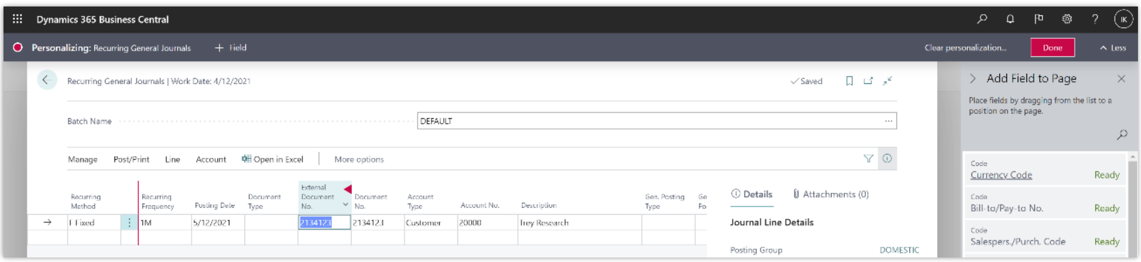


Shows G/L Account Card page with new field.

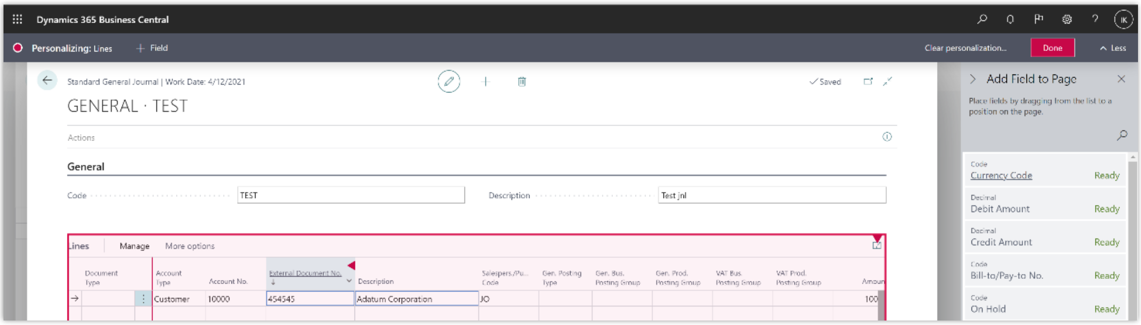
Thank you for submitting [this idea](#).

General Journals and Recurring General Journal pages

You can add the **External Document No.** column to the **General Journals** and **Recurring General Journals** pages.



Shows Recurring General Journals page with new column.



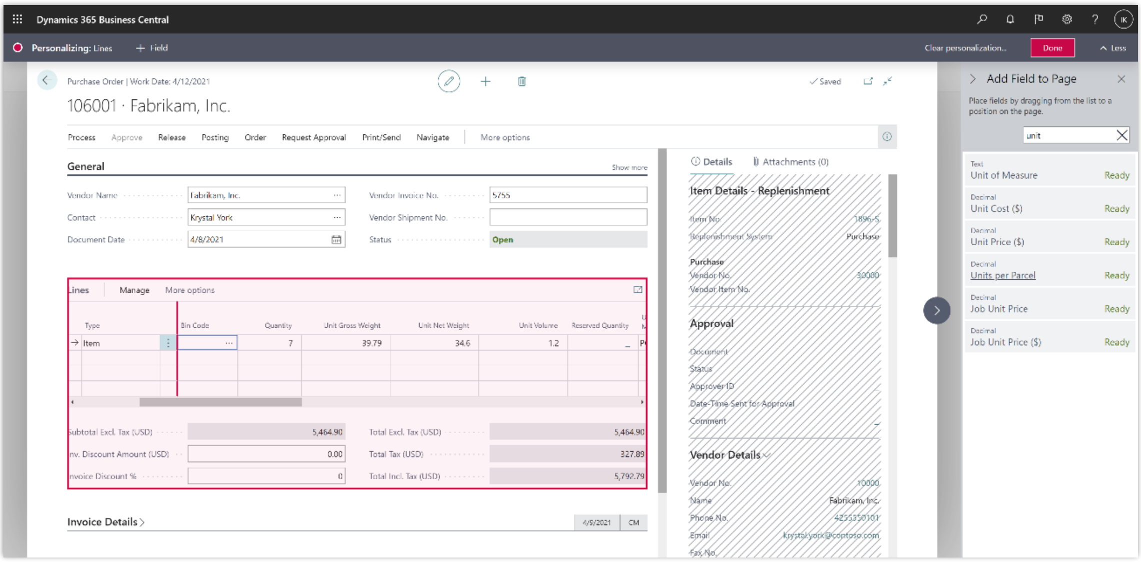
Shows Standard General Journals page with new column.

Thank you for submitting this idea.

Sales, purchase, and archive documents

You can add the **Unit Gross Weight**, **Unit Net Weight**, **Unit Volume**, and **Units per Parcel** columns to pages for the following documents:

- Sales documents and sales archive documents such as blanket orders, quotes, orders, return orders, and more.
- Purchase documents and purchase archive documents such as blanket orders, quotes, orders, return orders, and more.
- Sales shipment report data set.

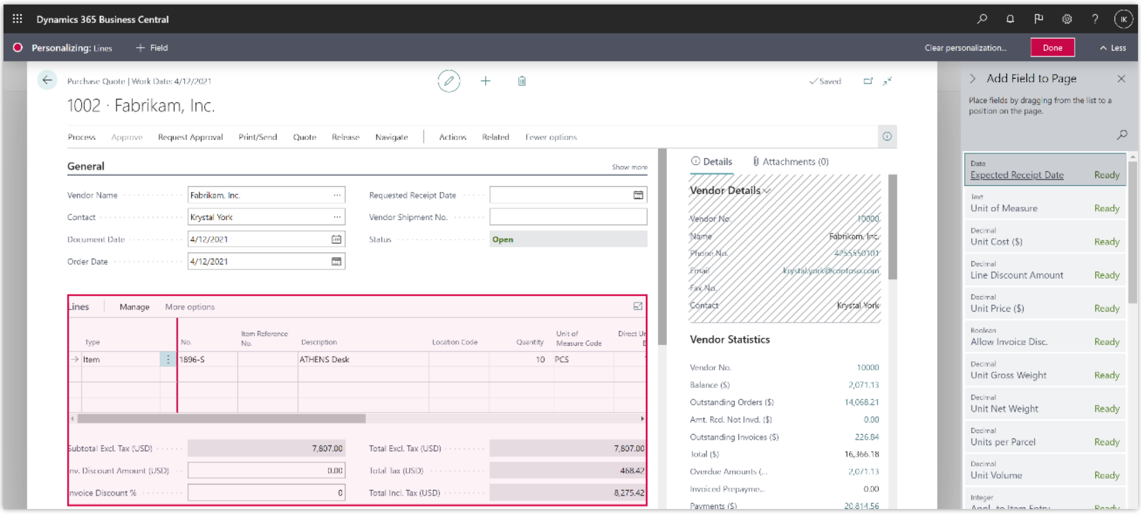


Shows purchase order with new columns.

Thank you for submitting this idea.

Purchase documents

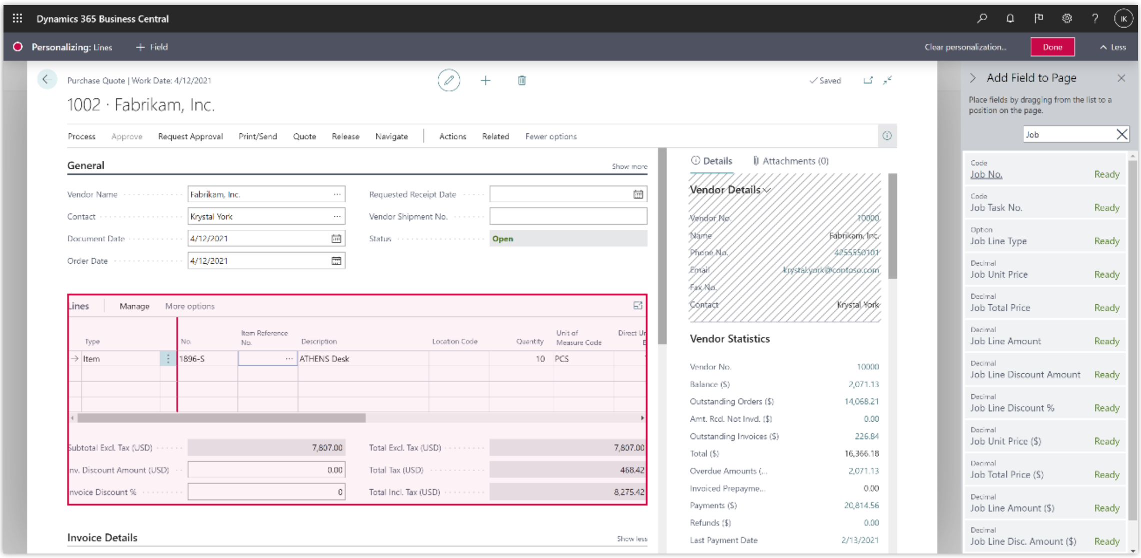
You can add the **Expected Receipt Date** field to the **Purchase Quotes**, **Purchase Quote Archives**, and **Purchase Orders** pages.



Shows Purchase Quotes page with new Expected Receipt Date field.

Thank you for submitting [this idea](#).

Additionally, you can add fields related to jobs, such as **Job No.**, **Job Task No.**, **Job Planning Line No.**, and more.

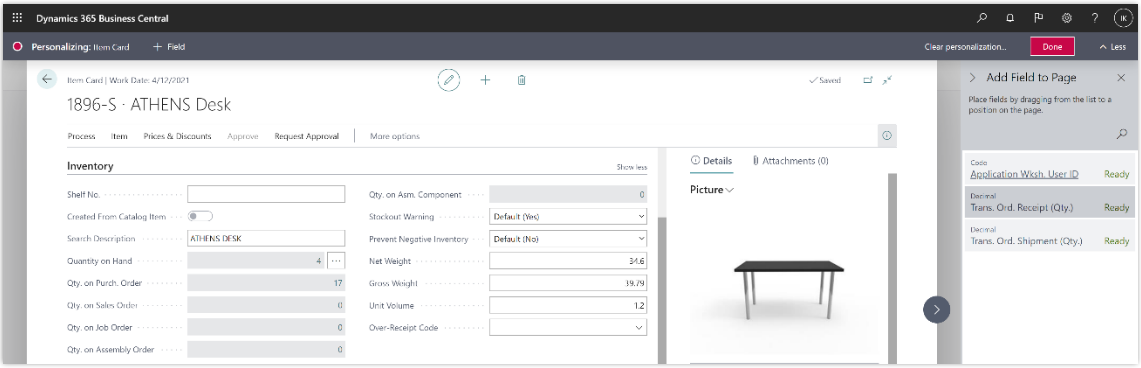


Shows jobs-related columns that can be added to purchase document lines.

Thank you for submitting [this idea](#).

Item Card page

You can add the **Transfer Order Receipt** and **Shipment Quantities** fields to the **Item Card** page.

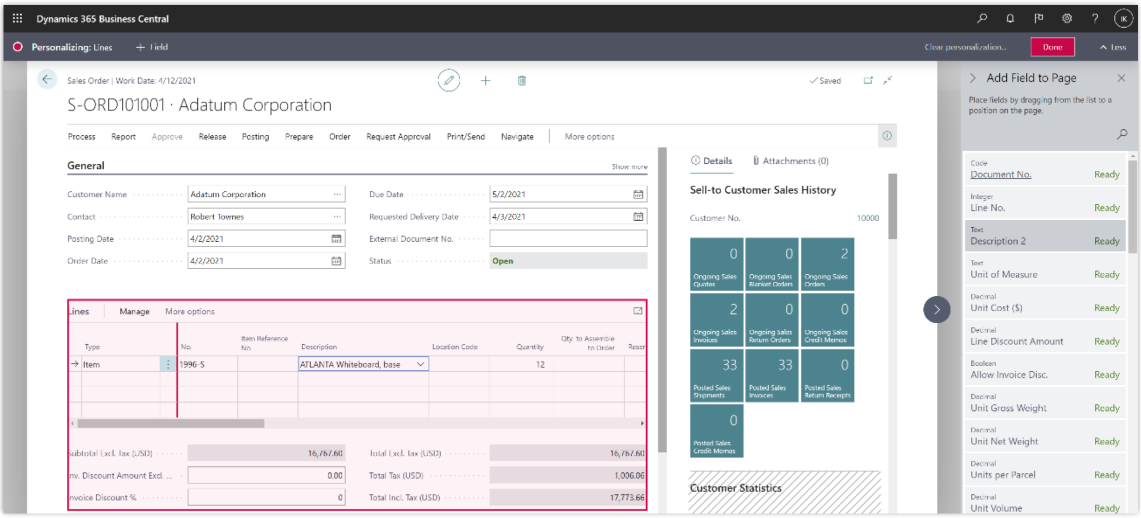


Shows Transfer Order Receipt and Shipment Quantity fields available for personalization on Item Card page.

Thank you for submitting this idea.

Description 2 fields

You can add the **Description 2** field to all sales, service, purchase drafts, and posted and archived document lines.

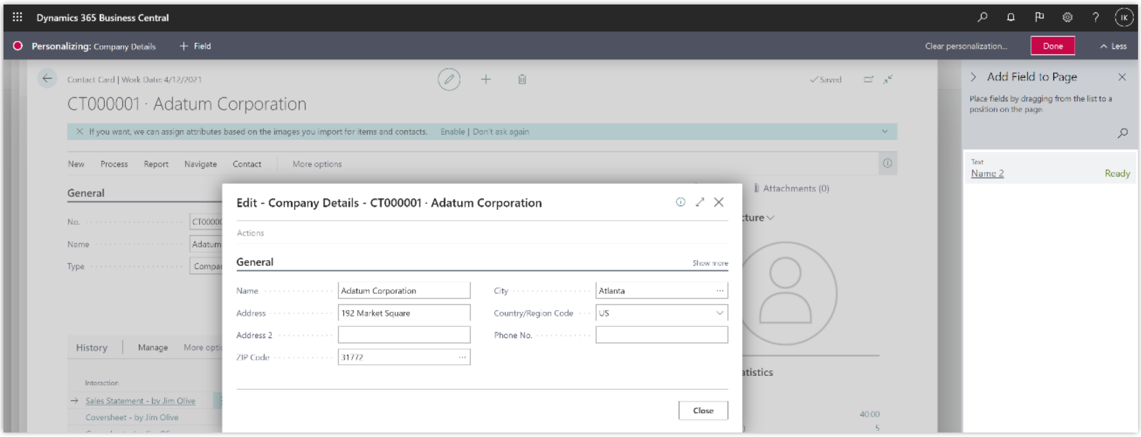


Shows Description 2 field in list of available fields to add to sales order lines.

Thank you for submitting this idea.

Name 2 fields

You can add the **Name 2** field to the Contact Card and list pages, **Contact Company Details** page, and the Resource Card and list pages.



Shows Company Details page with Name 2 in list of available fields to add through personalization.

Thank you for submitting this idea.

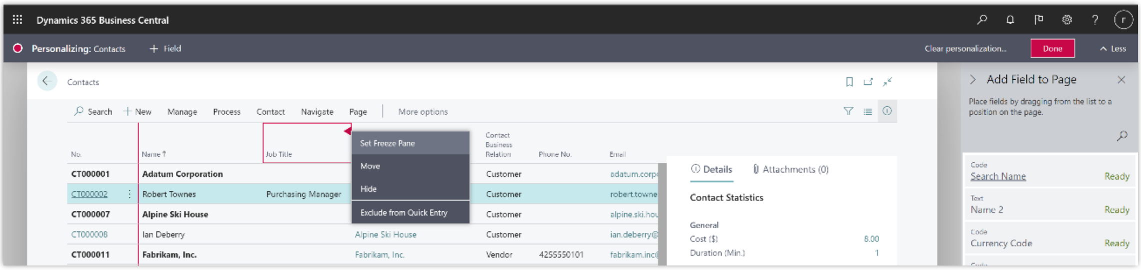
External Document No. field

You can now add **External Document No.** field to the Aged Accounts Receivable report's Word layout.

Thank you for submitting this idea.

Contact Job Title

You can add the **Contact Job Title** field to the Contact Card and list pages, **Contact Company Details** page, and the Resource Card and list pages.

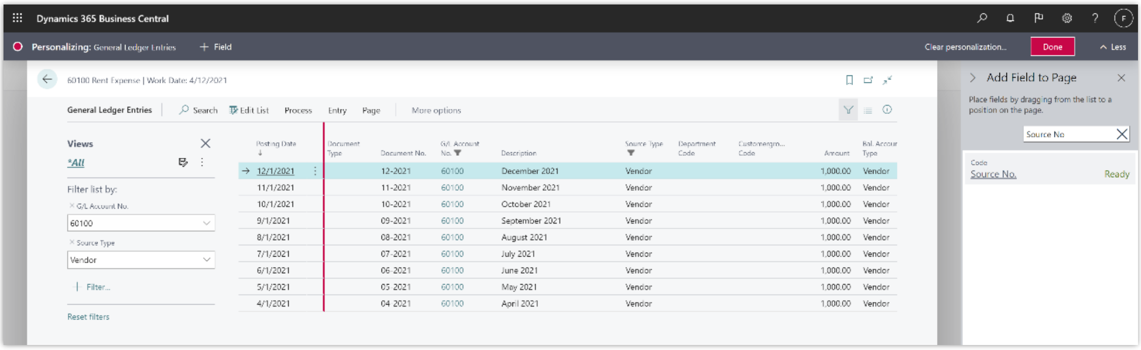


Shows Contact Job Title added to Contacts List page through personalization.

Thank you for submitting this idea.

Source Type and Source No.

You can add the **Source Type** and **Source No.** fields to the **General Ledger Entries** page. Filtering General Ledger Entries by, for example, Source Type Vendor and specific Vendor No. in the Source No. field, gives you a list of entries to be used in expenses by vendor analysis.



Shows Source Type and Source No. fields added through personalization to General Ledger Entries.

Thank you for submitting [this idea].

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.

See also

[What's new in Supply Chain for Dynamics 365 Business Central] (video)

Add non-inventory items on requisition and planning worksheets

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 1, 2021	✓ Oct 1, 2021

Business value

Some businesses use requisition or planning worksheets to enter information about the items they want to order, and then create orders for the items all in one go. Enabling the worksheets to handle both physical inventory items, such as chairs, and non-inventory items, such as services, gives businesses a unified procurement process.

Feature details

You can process non-inventory lines in much the same way as other types of items. If you use requisition and planning worksheets as the starting point for purchase orders in your procurement process, you can manually enter lines for non-inventory items on the worksheets. Then, when you create your purchase orders, the non-inventory items will be included. This allows you to use same procurement process for inventoriable and non-inventoriable items.

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.

See also

Add non-inventory items on requisition and planning worksheets (video)

About Planning Functionality (docs)

Advance Payments localization for Czech (extension) (Czechia)

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

The Advance Payments module helps companies meet regulatory requirements for registration and posting advanced payments (prepayments) include VAT requirements in the Czech Republic.

Feature details

Use the **Advance Payments** module to create invoices and make payments before goods or services are delivered.

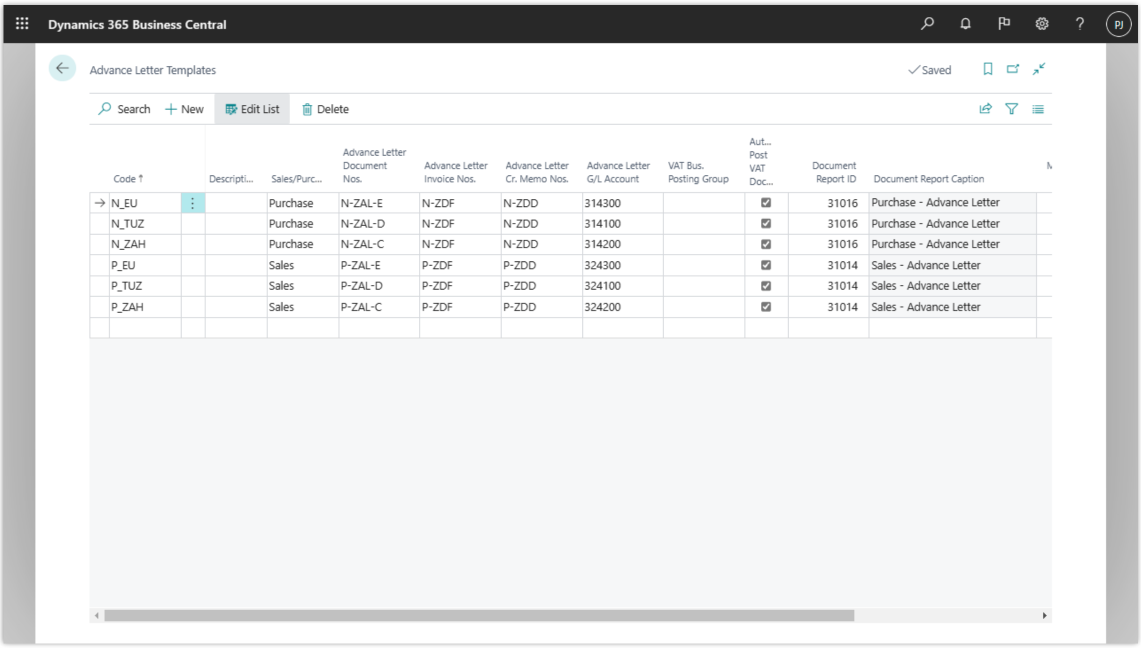
With the Advance Payments functionality, you can receive advance invoices from suppliers, issue advance invoices to customers, make advance payments including payments subject to VAT, and include advance payments on receipts. It also provides relevant tax documents that are required by legislation, and outputs for financial statements and VAT reports.

The module includes the following documents:

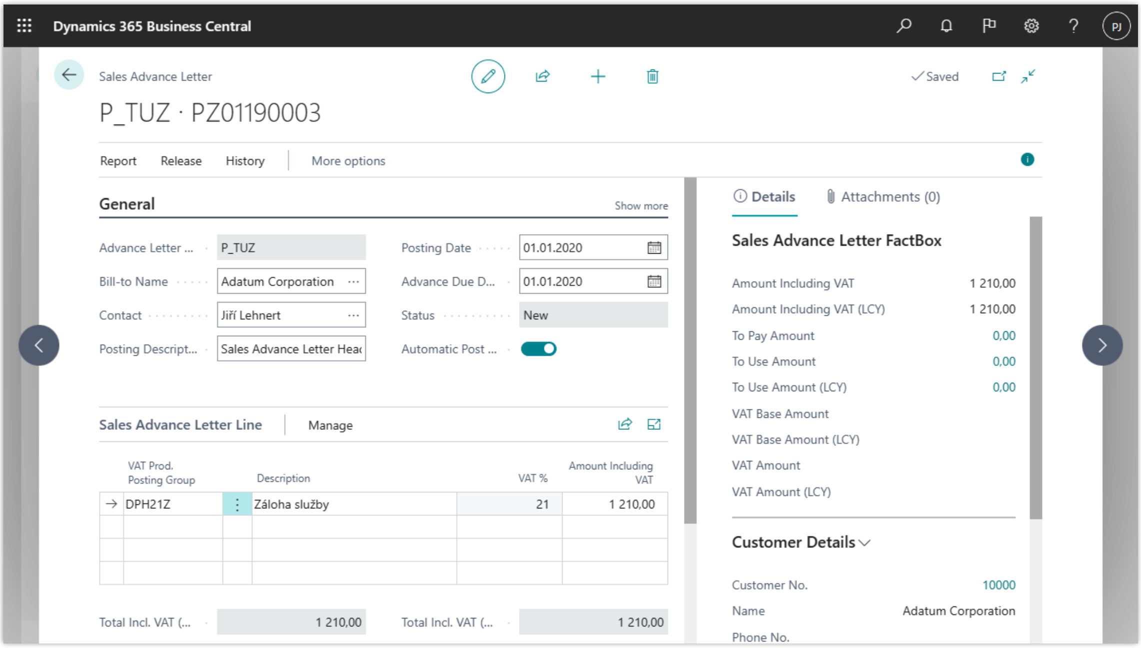
- Sales and purchase advance invoices.
- Advance payments received and issued.
- Tax documents and tax credit notes for advance payments received or issued.

Main functions of the module:

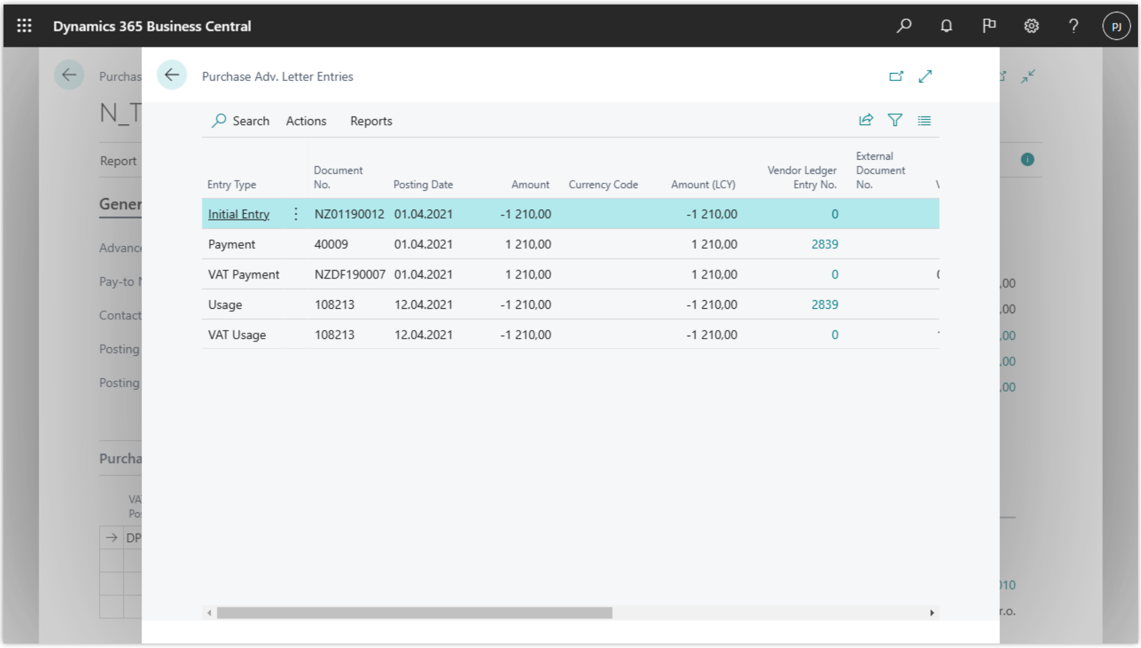
- Create sales or purchase advance invoices according to the settings in the **Advance Payment Templates** page.
- Create advances from sales orders based on a percentage or amount entered.
- Proposing advances into a payment order and, on the other side, payment of advances by the bank.
- Connect to the **Cash Desk** module to pay advances by cash.
- Issue and print advance tax documents for advance payments automatically or manually.
- Manage the use of paid advances by the final invoice.
- Close unused advances including a tax settlement.
- Manage exchange rate differences between the advance payment and invoice when you work with foreign currencies.
- Unassign payment to an advance invoice or additional linking.
- Unlink the final invoice from an advance payment or additional linking.
- Reports for recapitulation of payments and drawdown of advances, reports for recapitulation of VAT on advances.



Advance Letter Templates.



Sales Advance Letter.



Purchase Adv. Letter Entries.

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

Advance Payments Localization for Czech (docs)

Bank and payment reconciliations

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 1, 2021	✓ Oct 1, 2021

Business value

Bank and payment reconciliations are key processes for all businesses by providing an overview of whether the cash flow is accurate, and that all transactions have been accounted for. In this release wave, we have focused on the bank reconciliation process.

Feature details

The **Bank Reconciliation** page has been enhanced with the following capabilities:

- Bank ledger entries are now filtered so only ledger entries after the statement's ending date are shown, making it simpler to get an overview.
- The layout of the test report has been cleaned up, making it simpler to read. The report will also use the statement date as a filter for the G/L account as well as the bank account, so that the focus is on the period being reconciled.
- When applying auto-matching, the user can decide to not overwrite any of the already matched entries, or to overwrite all.
- Many-to-1 matching is now possible so many bank statement lines can be matched against one bank ledger entry. This will support scenarios such as a bank statement splitting up sales into payment methods for which you only posted one bank ledger entry.
- When you transfer differences to be posted in a general journal, the entries will be auto-matched when you return to the bank reconciliation, reducing the redundant manual step.

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.

See also

[Bank reconciliation and payment reconciliation journals in Dynamics 365 Business Central] (video)

[Reconcile Bank Accounts] (docs)

Banking Documents localization for Czech (extension) (Czechia)

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 1, 2021	✓ Oct 1, 2021

Business value

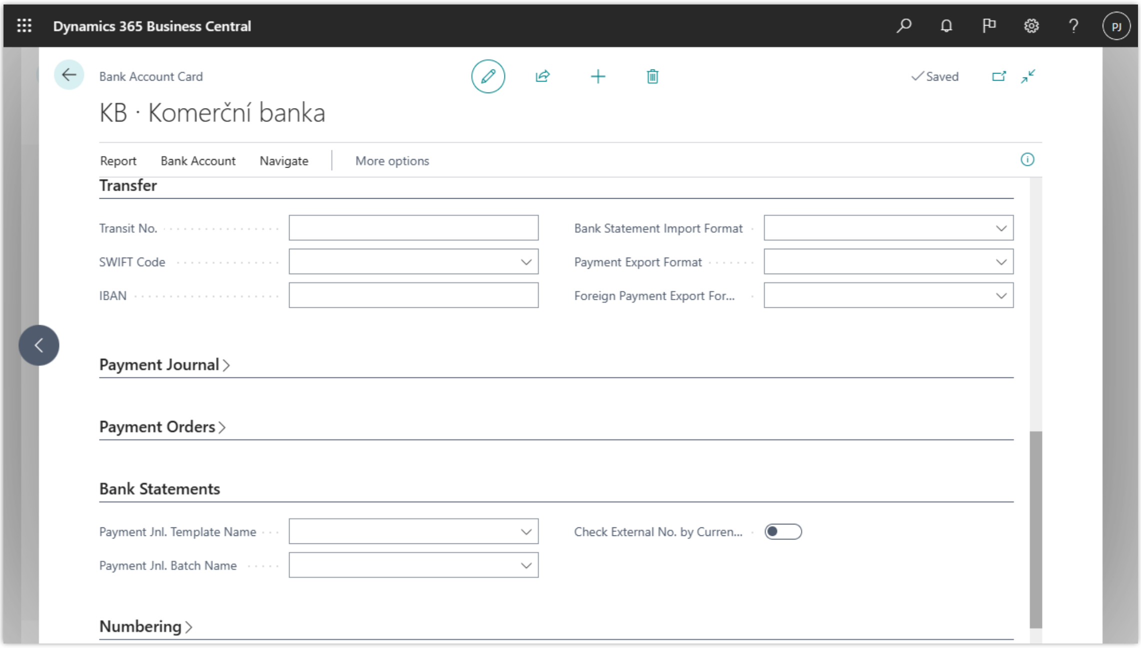
This feature provides improved efficiency and reduces the risk of mistakes when users must specify bank account data for a customer or vendor by capturing the bank-specific information and eliminating the need to re-enter it each time.

Feature details

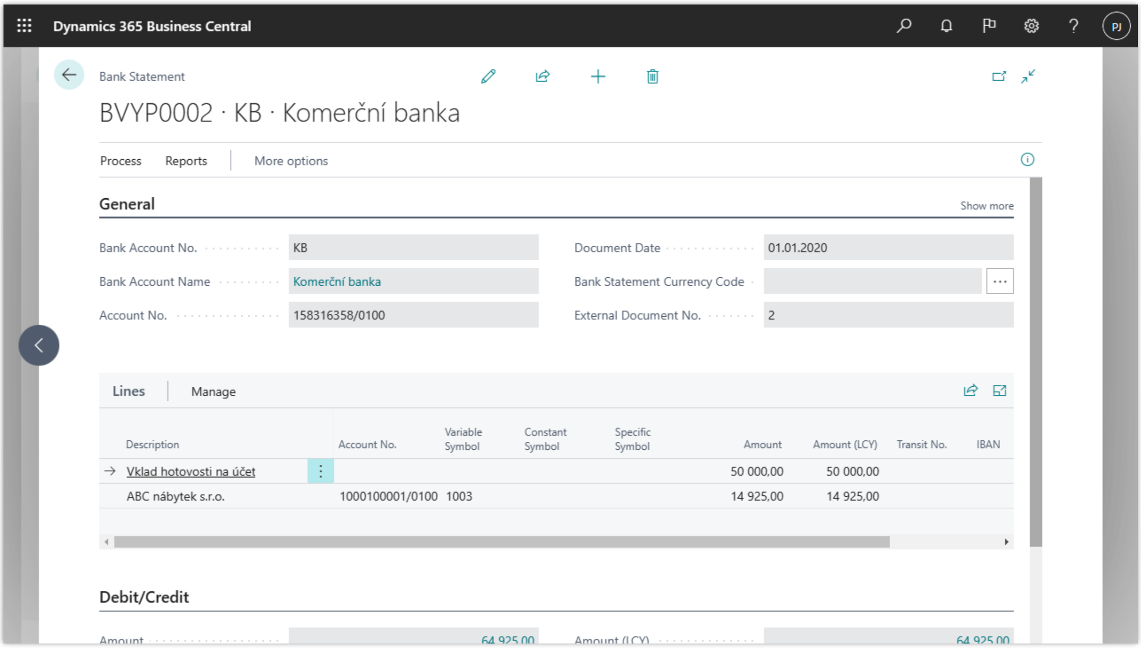
Use the Banking Documents app to create *payment orders* and *bank statements* in a format that respects local practices. You can use an unlimited number of bank accounts from various banking institutions and in different currencies. You can import and export bank files to and from the bank-specific software.

The extension provides the following key features:

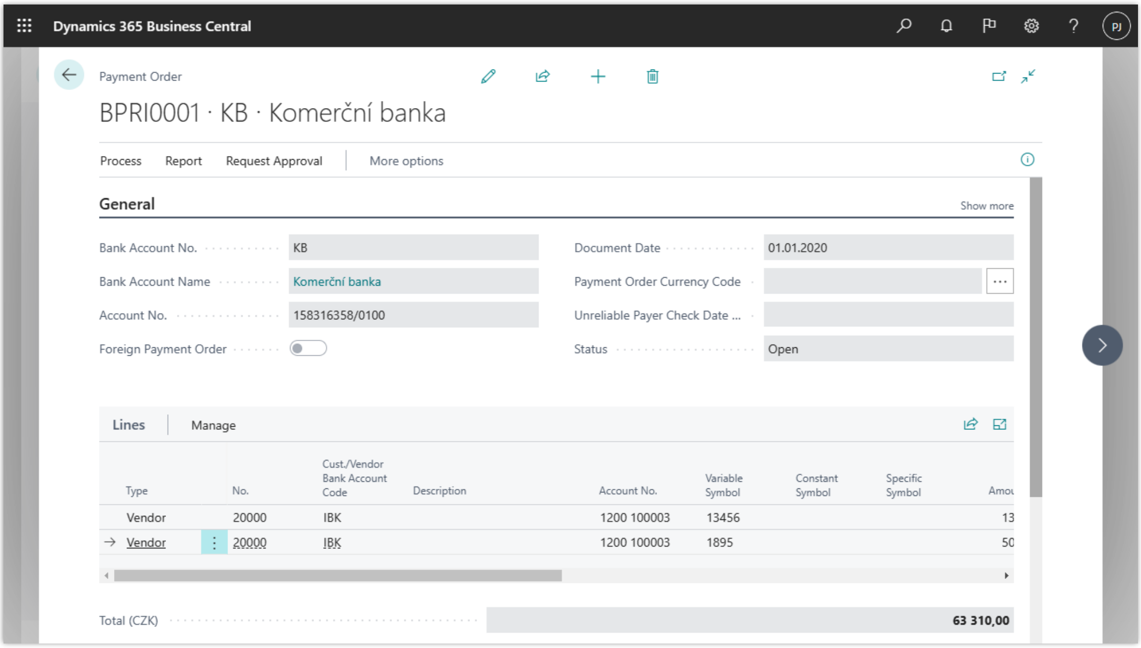
- Create, issue, and export a payment order.
- Create, import, and issue a bank statement.
- Rollover of bank statements into the payment journal.
- Pair entries in the payment journal, and post the journal lines.



Bank Account Card.



Bank Statement page.



Payment Order document.

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

[Banking Documents Localization for Czech](#) (docs)

Chart of Accounts Overview page – aligning columns with Chart of Accounts page

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

The Chart of Accounts Overview page provides an overview of a company's chart of accounts in a tree structure. To make the overview easier to digest, we've aligned the column layout with that of the Chart of Accounts page.

Feature details

The Chart of Accounts page displays accounts in a hierarchical list that offers fast access to the key information for each account. However, the list is static, and if you have a lot of accounts you might have to do a bit of scrolling to view information for different accounts. If you just want a quick overview of the basics, such as net changes and balances, the Chart of Accounts Overview page is a useful alternative. The column layout on the page is now the same as you'll find on the Chart of Accounts page (there are just fewer of them), so you won't have to reorient yourself, and you can expand or collapse the hierarchical levels to condense the view.

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

Understanding the General Ledger and the COA (docs)

Couple records between Business Central and Dataverse (and apps for Dataverse) in bulk

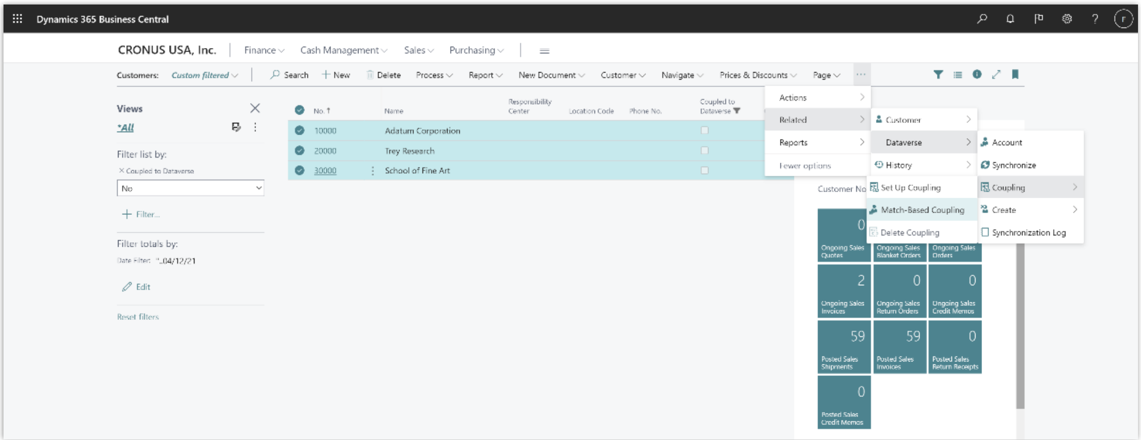
Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

When you integrate Business Central with Microsoft Dataverse or Dynamics 365 Sales, both systems often already contain data. Because data in Dataverse can come from multiple sources, there might be data that you don't want to transfer to Business Central because it could impact financial reports and other business processes, such as invoicing and tax calculations. Bulk-coupling speeds up the process of coupling multiple records, while letting you define rules to control how the couplings are made.

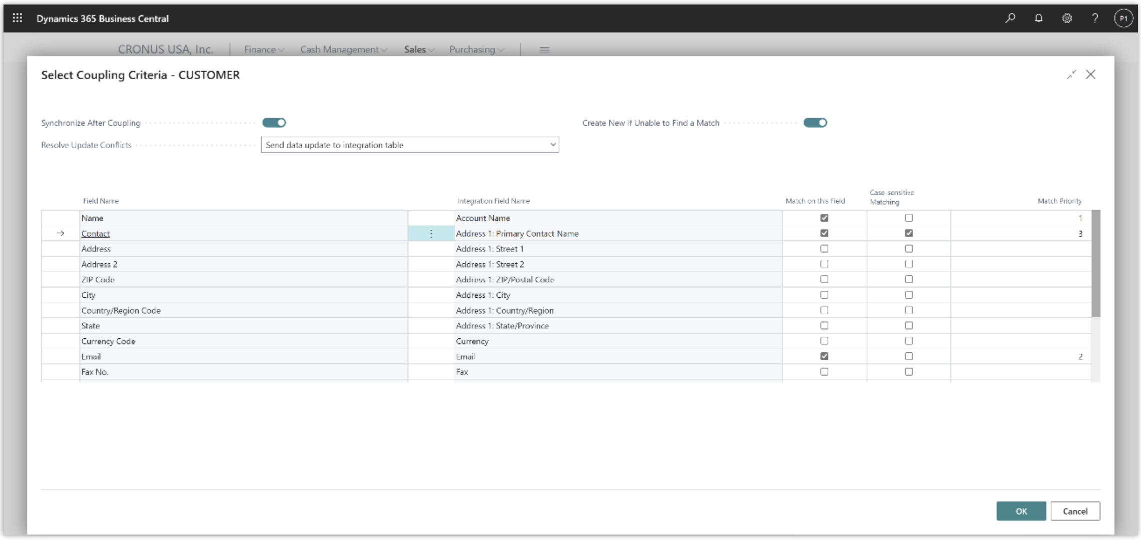
Feature details

When you couple the records that you want to synchronize data for in each application—for example, a customer in Business Central and an account in Dataverse—you can filter and choose the data to synchronize using the new **Coupled in Dataverse** column. To match and couple selected records between Business Central and Dataverse or Dynamics 365 Sales, you use the **Match-Based Coupling** action.



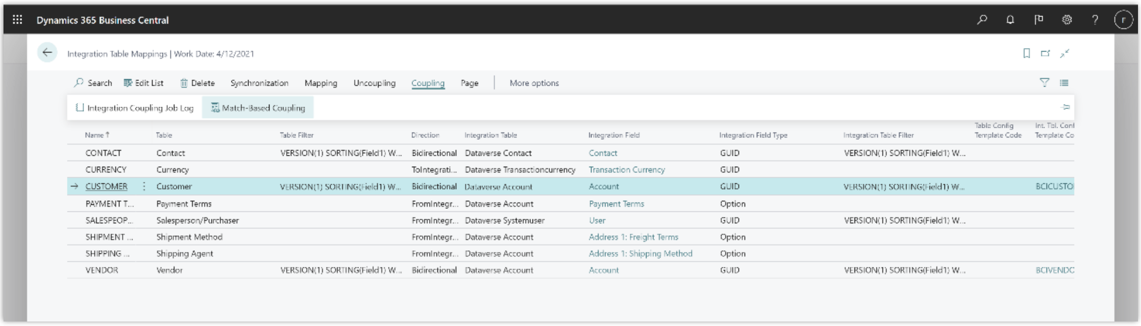
Shows customer list with Coupled to Dataverse column and Match-based coupling action.

The **Select Coupling Criteria** page allows you to select the fields to match by choosing the **Match on this Field** column. You can also set a **Matching Priority** for fields, and specify whether you want Business Central to create new records when a match isn't found by turning on the **Create New If Unable to Find a Match** toggle.



Shows Select Coupling Criteria page.

Rather than writing custom business logic in a per-tenant extension to define how to match and couple records between Business Central and Dataverse or Dynamics 365 Sales, you can define the fields to match on the **Integration Field Mapping** page for entire mapping.



Shows new Match-Based Coupling action in Integration Table Mappings page.

Business Central will use those settings to automatically match and couple records. Additionally, this also makes it easier to migrate data from Business Central (on-premises) to Business Central online.

Tell us what you think

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Thank you for your idea

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See also

Coupling Records (docs)

Default line type in the sales and purchase documents

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

Whether your company deals with physical goods or uses Business Central only to book financial transactions, you probably deal with some type of purchase or sales documents. You can now specify a default type for these documents and save a little time when preparing them.

Feature details

Sales and purchase documents can contain different types of lines, such as G/L Account, Item, Resource, or Fixed Asset. In this release you can select the default line type that will be suggested when you create new documents. You can specify the default type for sales on the **Sales & Receivable Setup** page, and for purchases on the **Purchase & Payables Setup** page, in the **Document Default Line Type** field. Afterward, the first line on the document will always use the default type that you specified, and you can start working with lines by selecting values in the **No.** field. Of course, you can change the type on the line if needed. If you do, the next lines that you create will use type from the previous line. The default value affects only the first line.

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.

See also

Set default line types for sales and purchase documents (video)

Setting Up Sales (docs)

Edit in Excel in recurring general journals and intercompany general journals

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

One of the reasons the Edit in Excel feature in Business Central is so popular is that it provides a fast way to enter data. For example, you can use templates for journals, make quick bulk edits, and so on. Businesses can now use the feature to speed up data entry on recurring general journals and intercompany G/L journals.

Feature details

The Edit in Excel feature has been around for a while on pages where businesses often bulk-edit data, but to extend its availability even further, we've added it to the following pages:

- Recurring general journals
- Intercompany general journals

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.

Enable or disable Item References from Inventory Setup

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

To help people focus on their work, we're reducing the number of fields and actions that are displayed by hiding the related features until an administrator enables them. This feature introduces that for item references.

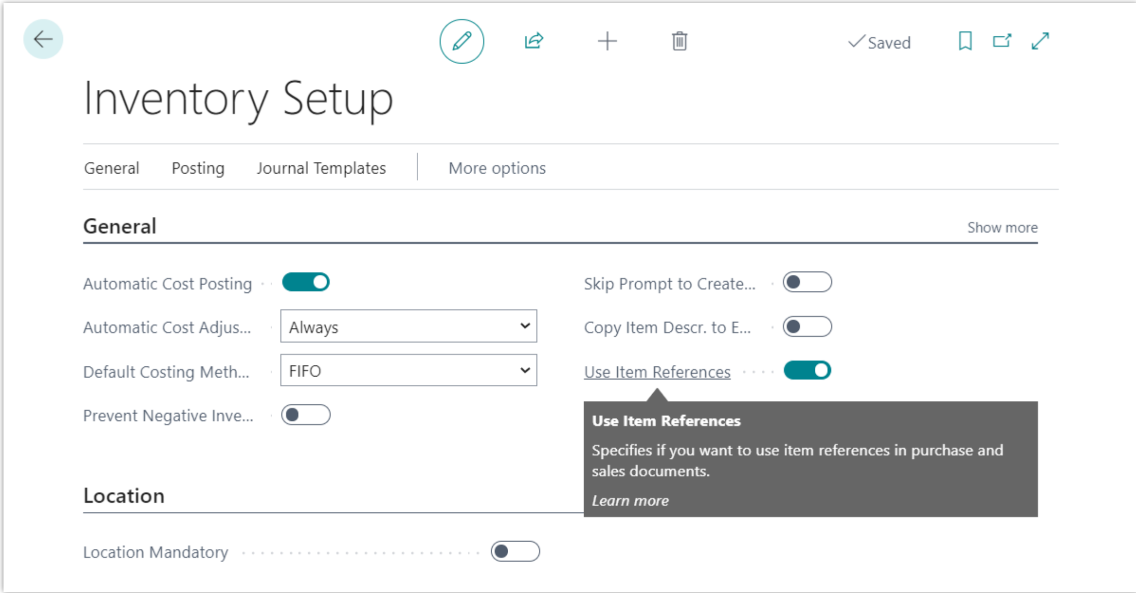
Feature details

This is the last step in the journey to replace **Item Cross-References** with **Item References**, which started a year ago to address one of the top-voted suggestions Write longer item references. To avoid disruption for users and partners, these two features coexisted and **Item References** was controlled by a feature switch on the **Feature Management** page. In this release, **Item References** will be the only option.

What this means for you

- If you use cross references, we will convert existing cross references to item references. There is full parity between features and the only change is the name of the controls. Instead of "cross references," you'll see "item references."
- If you don't use cross references, the related controls are not shown on the Item Card, Vendor Card, and Customer Card pages, and from sales and purchase documents. If you decide to use **Item References**, your administrator can easily activate the feature by turning on the **Use Item References** toggle on the **Inventory Setup** page.

For more information, see Use Item References.



Use Item References field in the Inventory Setup.

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.

See also

[Use Item Cross References]() (docs)

Improved user experience to keep posting setup and dimension issues from going wrong

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

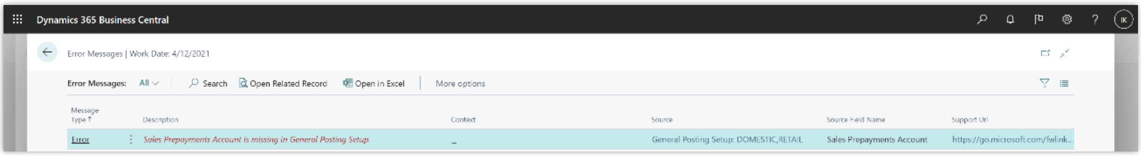
Business value

Posting groups and dimensions can be difficult concepts to understand. It's best to set up posting groups and dimensions up front. However, many companies do that as they go and resolve issues as they arise. We've added tools that support learning by capitalizing on concrete examples—for example, when documents are using posting groups that are not set up correctly or have incorrect dimensions or dimension values. Accountants, controllers, and finance people know how specific transactions need to be posted, and guidance when things go wrong with posting setups and dimensions will make it easier to resolve issues.

Feature details

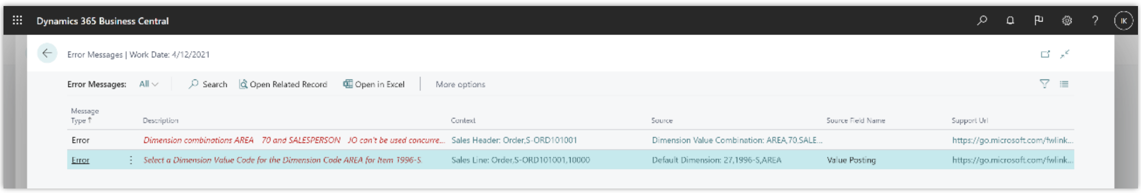
Product telemetry shows that posting groups and dimensions errors are typically caused by incorrect setup. We've made changes to clarify the errors and provide guidance on how to resolve them. You can now investigate issues with posting setups on the **Error Messages** page across the application:

- The **Description** column shows details about the error.
- The **Source** and **Source Field Name** columns point to the posting setup page where the error occurred, and link to a page where you can resolve the issue. This requires the user to have permissions to do so.
- The **Support URL** column provides a link to a troubleshooting guide.



Shows Error Messages page with posting group error example.

Additionally, for dimension issues the **Error Messages** page provides a link in the **Context** column that opens a page where you can fix the issues in the document. This also requires that the user has permissions to do so.



Shows Error Messages page with dimension error example.

NOTE The error handling described here is not available on Item, Resource, Employee, and Fixed Asset Journals and for G/L accounts added in local versions of posting groups.

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

[Setting Up Posting Groups](#) (docs)

Integrate Business Central and Microsoft Dataverse with more efficient synchronization of multiple records

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

The data exchanged between Business Central and Microsoft Dataverse is synchronized based on a schedule. Occasionally, there are situations where a business requires multiple records to be created, synchronized, or restored manually on an ad hoc basis. This feature decreases the number of synchronization jobs that are run in such cases, making synchronization of multiple records faster and users more productive.

Feature details

When users select multiple records, such as hundreds of customers or contacts, Business Central creates a single synchronization job per batch of selected records. This greatly reduces the load on the task scheduler that runs the background jobs, and makes it easier for users to stay below the limits for queue entries. This new way of synchronizing batches of selected records also considers Dataverse request limits by ensuring that the batches are processed in smaller sizes.

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

Mapping the Tables and Fields to Synchronize (docs)

Item variant code on demand forecasts

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

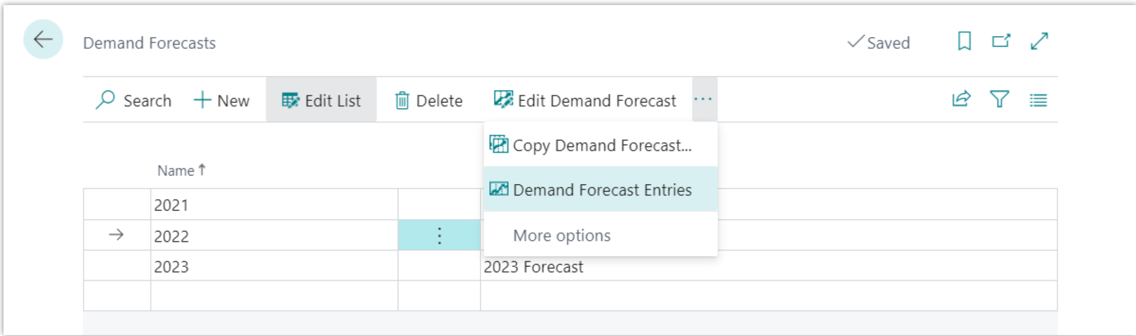
Accurate demand forecasting gives businesses valuable insight into their position in the market, which helps decision makers shape their strategies for pricing, business growth, and market potential. The ability to include the right level of detail on item variants in demand forecasts unlocks planning capabilities and reduces lead times for companies that don't have an inflow of sales orders and manage many nearly identical items.

Feature details

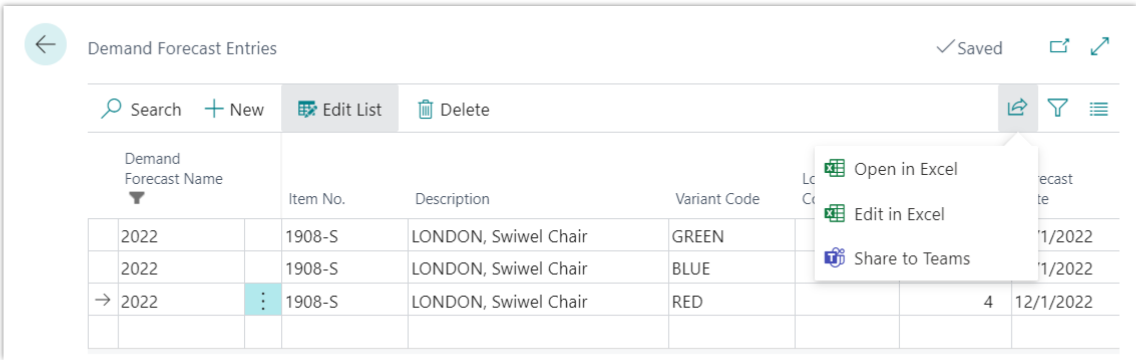
Item variants are a great way to keep your list of items under control, especially if you have a large number of items that are almost identical and vary, for example, only in color. Rather than setting up each variant as a separate item, you can set up one item and then specify the various colors as variants of the item.

In this release, you can register anticipated demand not only with respect to locations and dates, but with item variants as well. This unlocks planning capabilities for companies that don't have a steady inflow of sales orders, and operate using large lists of almost identical items.

You can now include item variants in demand forecasts. If you search for **Demand Forecast** you'll find a new **Demand Forecast Entries** result. We've added the **Variant Code** field to the **Demand Forecast Entries** page, and you can create entries directly, or use the **Edit in Excel** action for bulk editing. The only setup required for using item variants in demand forecasting is that you turn on the **Use Forecast by Variant** toggle on the **Manufacturing Setup** page to plan each variant individually.



Demand Forecast Entries.



Edit Forecast in Excel.

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.

See also

[Include item variants in demand forecasts]() (video)

[Create a Demand Forecast]() (docs)

Keep track of historical IBAN number when vendor bank account number changes

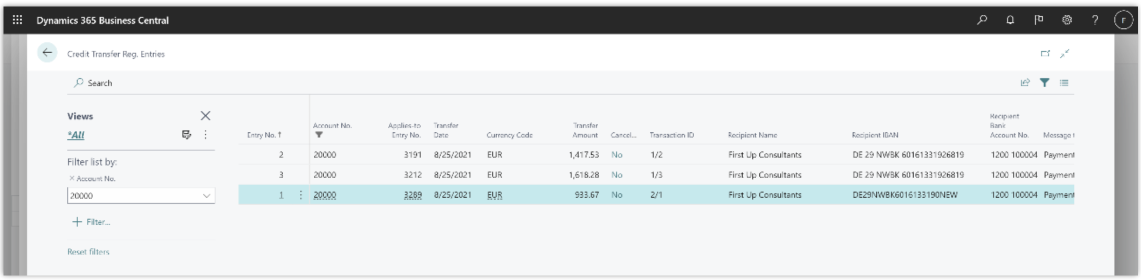
Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

Changing the IBAN on vendor bank accounts that have already been transacted with can cause historical credit transfer register entries to appear as missing because Business Central cannot find the IBAN for the entries.

Feature details

You can now safely change IBAN numbers on vendor bank accounts without it affecting your historical credit transfer register entries. Credit transfer register entries now store the Recipient IBAN, Recipient Bank Account No. that was specified in the Vendor Bank Account, and Recipient Name fields on the Vendor card when the entries are created.



Shows new Recipient IBAN, Bank Account No and Name fields on Credit Transfer Register Entries page.

NOTE No action is needed from existing customers, as the upgrade to 2021 release wave 2 will fill in these fields in their existing Credit Transfer Reg. Entries automatically.

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

Register New Vendors (docs)

List of trusted apps

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

Customers can more easily find and install relevant third-party add-ons to help support the business needs.

Feature details

With a large number of apps available on AppSource, and with business continuity in mind, customers might not want to install an app directly from AppSource until they know the app won't interfere with their business. With this release wave, partners can preload a list of apps into the customer's Business Central to help the customer choose apps that are relevant for their business, industry, and growth. By proxy of the partner, customers can safely install apps that have been preselected for them.

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

Onboarding experiences in Business Central (docs)

Locations for non-inventory items

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

Now you can track statistics for non-inventory items by location, in the same way as inventoriable items or resources. This gives you better insight into, for example, the location for which a service was purchased.

Feature details

Based on your feedback, we have aligned service items and non-inventory items with other types, such as G/L accounts, item charges, and fixed assets. You can now specify a location for these types of items in supported transactions, and the location will be copied in the item ledger, values, and job ledger entries. This is useful for reporting purposes and cases when there is one document, such as a purchase order, with multiple non-inventory items meant for different locations.

NOTE Warehouse operations are not supported for service and non-inventory items.

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.

See also

[About Item Types]() (docs)

More control over address information data entry

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

Typically, businesses use an external service that was built to validate address information in their country or region. When you need to update address information, the structured approach that these services use may not always be what's right for some scenarios. Therefore, Business Central now offers a more flexible means of entering address details.

Feature details

You can set the **Require Country/Region Code in Address** by selecting this field on the **General Ledger Setup** page. When this field is selected, because the address format is related to the selected **Country/Region**, changes to **Country/Region Code** field on addresses for customers, contacts, or vendors will reset the values in other address fields.

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.

See also

[Changing Language and Region](docs) (docs)

More control over currency exchange rate adjustment

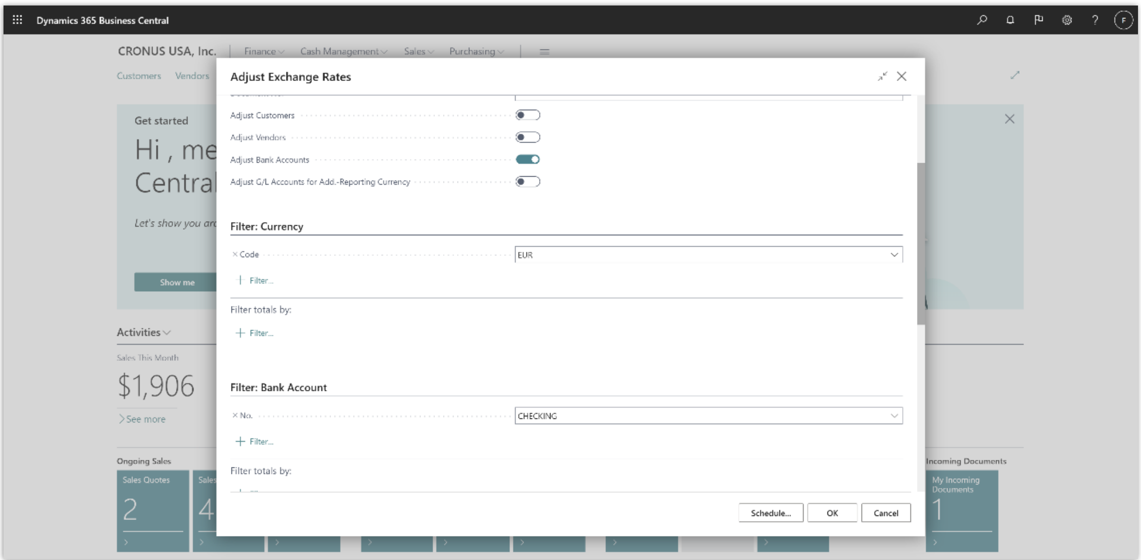
Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

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 more control over how they adjust exchange rates.

Feature details

You can now run exchange rates adjustments only for selected customers, vendors, or bank accounts using the **Adjust Exchange Rates** batch job, where you simply select whether to adjust exchange only for a customer or bank account, and then use the filter options to select the specific customers, vendors, or bank accounts for which to adjust exchange rates.



Shows Adjust Exchange Rates report with new options to only adjust customer, vendor or bank account.

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

Update Currency Exchange Rates (docs)

New automation API to create user groups

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Sep 1, 2021	✓ Oct 1, 2021

Business value

This contributes to decreasing the total onboarding time of new customers and takes away manual labor on the partner side.

Feature details

The new API plays a part in the initial deployment of a customer environment together with the other Automation APIs that allow for a scripted creation of the environment, company, application of configuration packages, user permissions, and more.

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

Introduction to automation APIs (docs)

Posting Preview can now show G/L and VAT entries in hierarchical view and is easily extensible

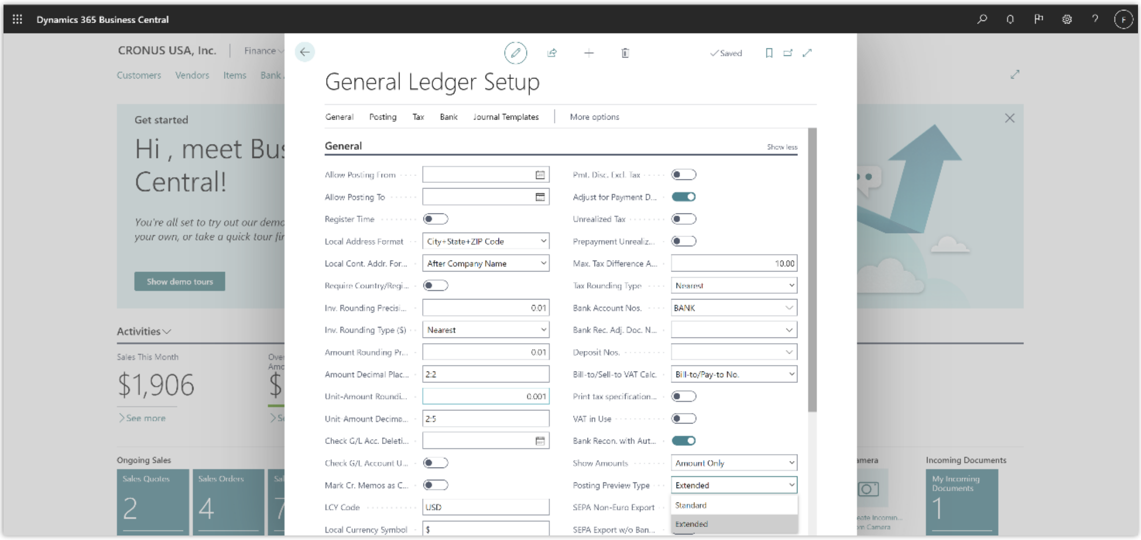
Enabled for	Public preview	General availability
Users, automatically	✓ Sep 1, 2021	✓ Oct 1, 2021

Business value

When posting journals or documents with a large number of entries, accountants want to make sure that the posting will be correct beforehand. Previewing the posting helps prevent the need for corrections, making accountants more productive.

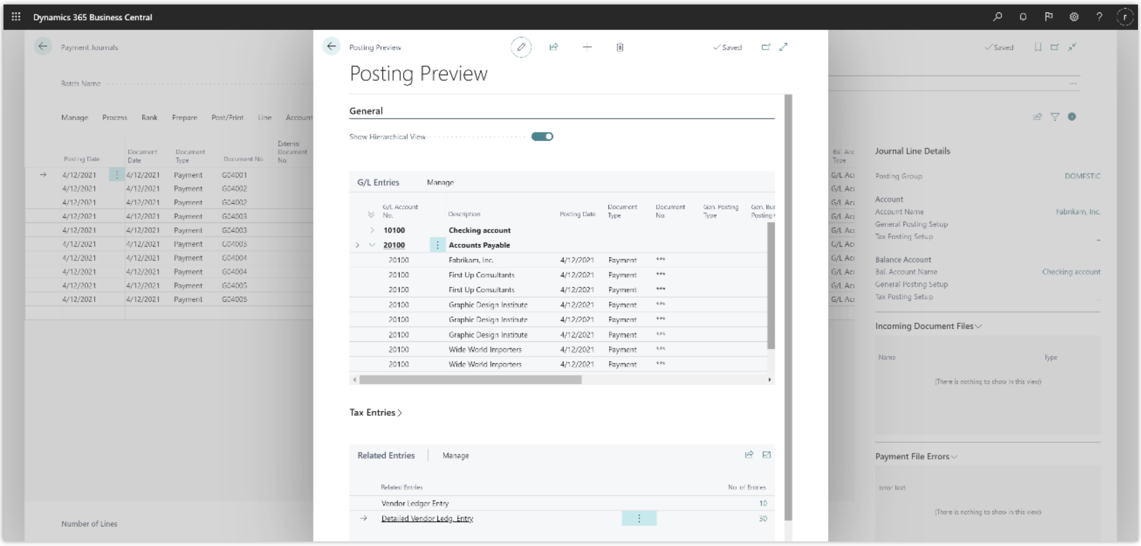
Feature details

You can enable the new way of showing Posting Preview by choosing **Extended** in the **Posting Preview Type** field on the **General Ledger Setup** page.



Shows new Posting Preview Type field in General Ledger Setup page.

When the extended posting preview is turned on, you can choose to preview a posting using the **Preview Posting** action (or the Ctrl+Alt+F9 keyboard shortcut)—for example, on a payment journal. On the Posting Preview page, you can choose **Show Hierarchical View** to group the entries.



Shows new capability to show grouped view of general ledger entries in Posting Preview.

Partners can easily extend the posting preview either by adding types of ledger entries that are relevant for their industry, or by modifying the way entries are grouped.

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

Preview Posting Results (docs)

Production BOMs and routes on stockkeeping units in planning scenarios

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 1, 2021	✓ Oct 1, 2021

Business value

Many businesses use stockkeeping units (SKUs) in their inventory management processes. Because SKUs often contain important information about the items, they're also valuable in production processes. You can leverage the information from SKUs by assigning them to production bills of material (BOMs) and routes. Additionally, it's easy to update the BOM and route on SKUs. You can simply specify a BOM and route on an item and they will be assigned to the SKU.

Feature details

We have increased the number of business processes that take into account the values in the Production BOM and Production Routing fields defined on SKUs. These include the following processes:

- Capable-to-promise called from sales orders.
- Planning worksheet, including the Calculate Net Change Plan, Calculate Regenerative Plan, and Get Action Messages actions.
- Order planning.

By default, the Production BOM and Production Routing fields are available on SKUs.

NOTE When you create a SKU, the production BOM and route are not copied from the item to the SKU. This is useful when you have many SKUs, but only one BOM or route and want to use the default values from the items.

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.

See also

Using production BOMs and routes on stockkeeping units in planning scenarios (video)

Production planning (docs)

Remove obsolete reports 204, 205, 206, and 207

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

We've removed several reports in favor of newer versions. Enjoy modern report layouts that are easier to customize and faster to generate by using the reports that are based on layouts from Microsoft Word. Your external-facing documents, such as invoices and orders, will benefit from the switch.

Feature details

Before 2021 release wave 1, we announced that we were planning to replace several reports with newer versions, and now it's time for the final cleanup. The 2021 release wave 1 was the last release in which the following reports were available.

Deprecated report	Recommended report
204 Sales - Quote	1304 Sales - Quote
205 Order Confirmation	1305 Sales - Confirmation
206 Sales - Invoice	1306 Sales - Invoice
207 Sales - Credit Memo	1307 Sales - Credit Memo

If you still use one or more of the deprecated reports, now is the time to take the following actions:

1. Start using the recommended reports. These support Word layouts.

2. Clone the deprecated reports to a custom range, and switch to the cloned reports.

How to check if your company uses old reports

Report Selections – Sales

Search for **Report Selection – Sales** and check which reports are configured to be used for *Quote*, *Order*, and *Credit Memo*.

Customer report layouts

Inspect the content of the **Custom Report Selection** table (object ID 9657). For more information, see [View a table object directly from the client].

Once you know which customers use these reports, you can replace them on the **Document Layout** page for each affected customer, or you can use configuration packages to update in bulk.

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.

Rounding for base unit of measure

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

You can assign a base unit of measure to items, but sometimes items serve more than one purpose and are sold, received, or consumed in different measures in sales, purchase, and production processes. That means it's important to be able to handle items in alternate units of measure, depending on the process, and accurately convert those measures to the base unit of measure.

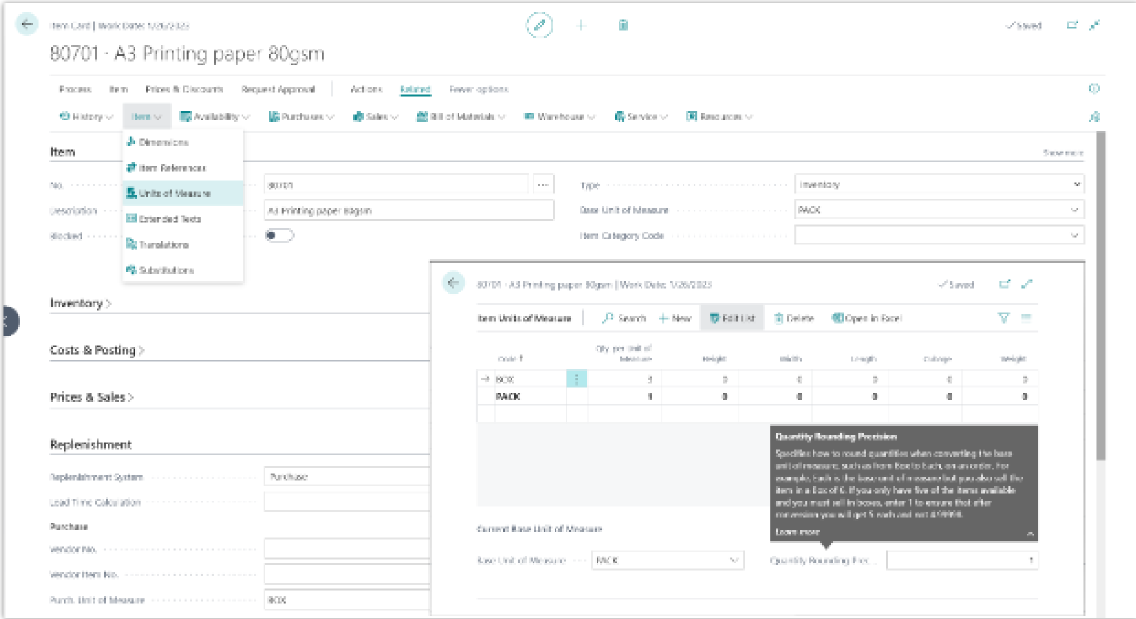
Feature details

You can specify a rounding precision for base units of measure to guide users on what to enter for a given business process, and reduce rounding issues when using alternate units of measure.

When an item serves different purposes, you can set up alternate units of measure for it. The base unit of measure for the item defines how you store it, and the alternate units of measure define how you handle it in purchase, production, or sales documents. For example, you may buy the item on pallets and only use single pieces in production.

When you use alternate units of measure, the value in the **Qty. per Unit of Measure** field helps calculate the quantity in base unit of measure, which can lead to rounding issues.

For example, you're receiving 1 box that contains 6 items from your supplier. When the items arrive at the warehouse, you discover that 1 of the 6 items is missing. You decide not to post the receipt of 1 box, but to change quantity to 5/6 pieces instead. That will be converted to a receipt of 4.99998 pieces. To receive a whole number, the **Quantity Rounding Precision** field lets you specify a value that will, for example, convert the quantity to 5 pieces.



Quantity Rounding Precision

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

[Round quantities in the base unit of measure](#) (video)

[Set Up Units of Measure](#) (docs)

Support alternative units of measure in warehouse documents for items that are tracked by serial numbers

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

Alternative units of measures for inventory pick and inventory put-away are now supported for items with serial number tracking.

Feature details

In this release we're connecting the dots between the features for tracking items, assigning alternative units of measure, and basic warehouse management so that they support inventory picks and inventory put-ways for items that are tracked by their serial numbers. The following scenario illustrates the new capability:

1. Create an **Item Tracking Code** and enable both **SN Specific Tracking** and **SN Warehouse Specific Tracking**. For more information, see Track Items with Serial, Lot, and Package Numbers.
2. Create a new item and assign the item tracking code to it. Also create an alternative unit of measure for the item. For more information, see To set up multiple item units of measure.
3. Create and release purchase order for location that requires put-away.
4. Create inventory put-away.

Business Central creates inventory put-aways and automatically splits the line from the purchase order into multiple lines so that a warehouse employee can enter serial numbers for the items. Business Central will also split source documents when creating the pick. In previous versions, these scenarios worked only for base units of measure.

See also

Set Up Item Tracking with Serial, Lot, and Package Numbers (docs)

Tour of Business Central to help users get to know the basics

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

Customers can now experience less friction when starting to use Business Central.

Feature details

Since 2021 release wave 1, we and our partner community have provided educational tours to guide users through the application. But until now, the tours were limited to pages and controls that are defined by the AL language. With 2021 release wave 2, we expand the use of these tours so they can also include teaching tips that are defined by the platform to call out system controls, such as the top navigation bar as well as controls for sorting and filtering. These tours can provide an introduction to a better understanding of the home page. In all, users can more easily learn the basics of the Business Central user interface.

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.

Unlock time sheets in Business Central using assisted setup and data entry on mobile devices

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 1, 2021	✔ Oct 1, 2021

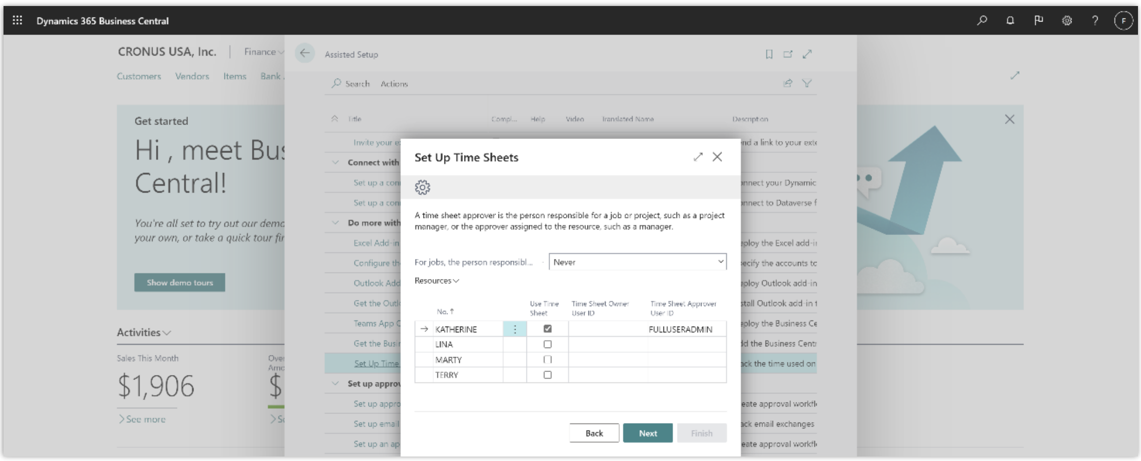
Business value

Getting to that first time sheet entry should be as painless as possible. Many employees use time sheets, and as the time sheet administrator or manager, you want to make sure that Business Central has you covered when you create time sheets for the first time, or you add an employee or resource to record the time spent on tasks.

A busy professional on the road using mobile devices (Android or iOS) needs to be able to provide time sheet entries in an easy and productive way while on the go.

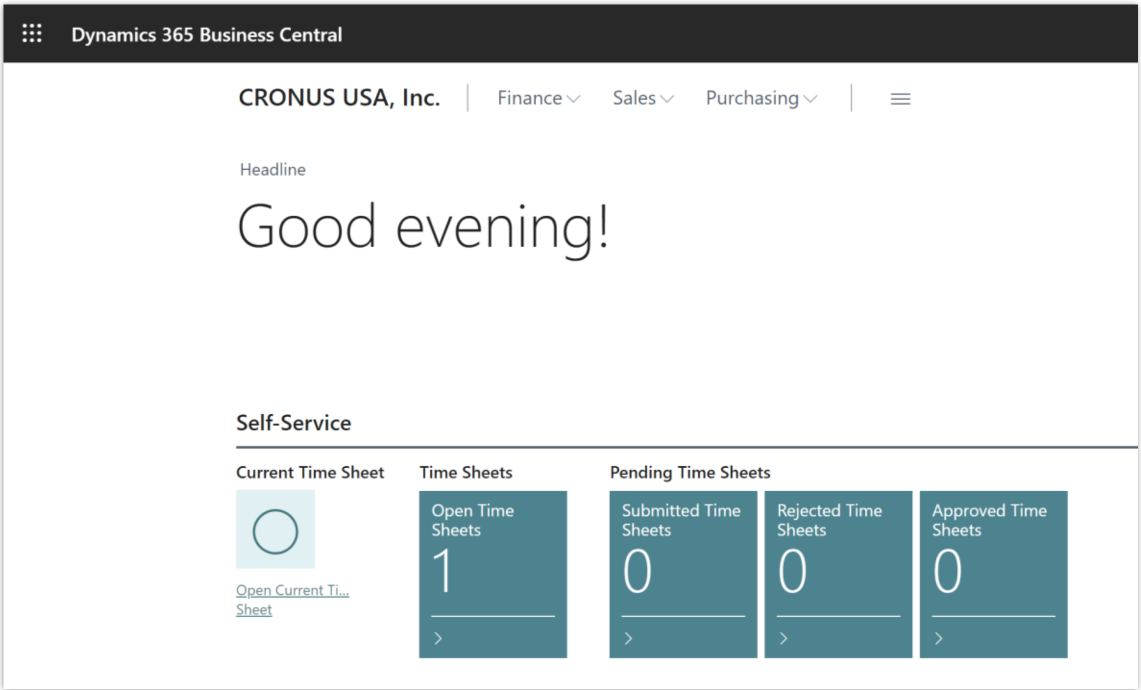
Feature details

You can now use the **Set Up Time Sheets** assisted setup guide to help you set up time sheets and specify the participants in the process. Participants include the time sheet administrator, the employees or resources who register time, and the approvers.



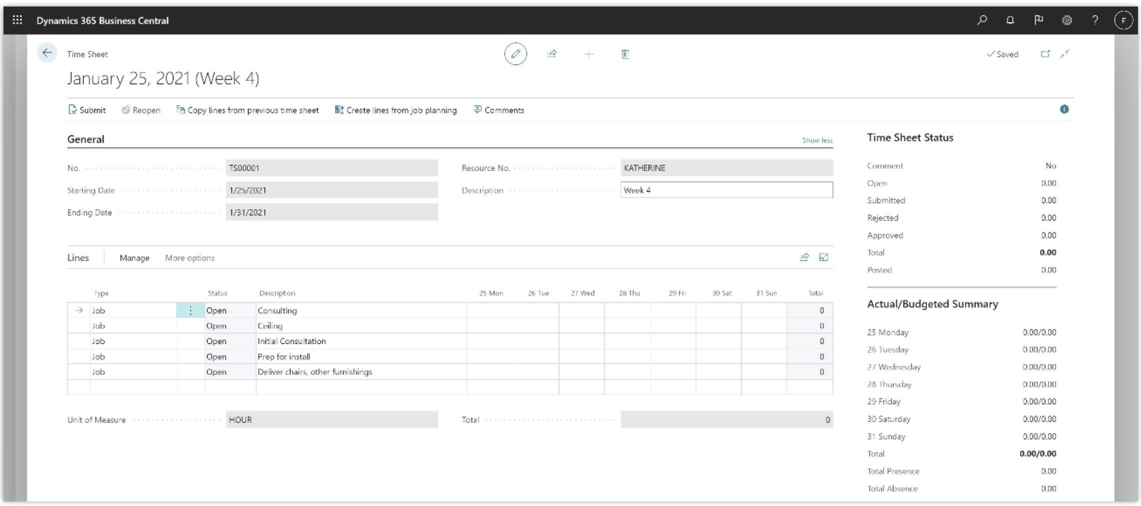
Shows Set Up Time Sheets assisted setup guide.

Self-service activities on role centers, such as the Team Member home page, have now been updated to include the **Open Current Time Sheet** action that takes the user to the latest time sheet in their **Open Time Sheets** page.



Shows new Open Current Time Sheet action on Team Member role center self-service activities.

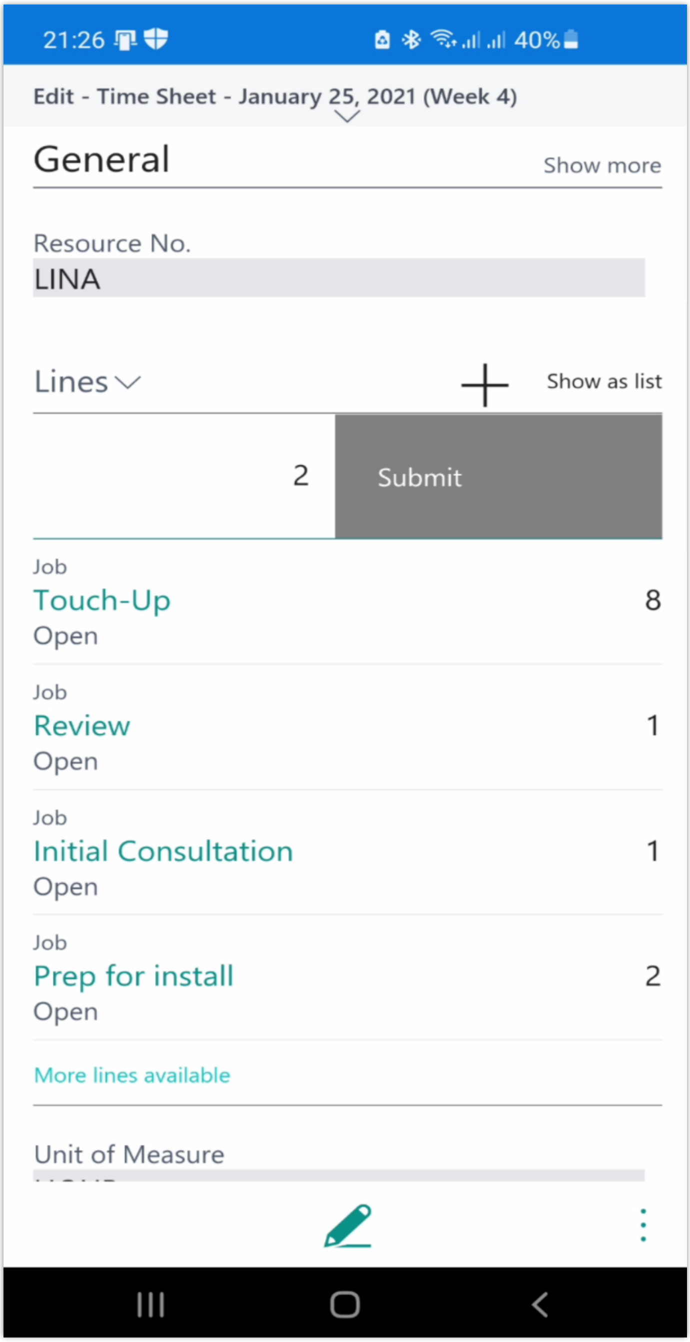
The **Time Sheet** page is now more focused to allow users to name a particular time sheet as they want, making the caption more prominent and showing key information about the time sheet. The page now clearly indicates units of measure together with totals.



Shows updated Time Sheet page.

The **Time Sheet** page has been converted from a worksheet to a document page, which makes it available on Business Central mobile devices (Android or IOS).

Mobile users can now add time-related entries to register time spent on tasks. They are no longer blocked by having to switch to a complex user interface on a desktop device. Users now have access to a simplified version of the experience designed for mobile.



Shows Time Sheet page on mobile device (Android).

NOTE You must have the **Feature Update: New time sheet experience** feature enabled in the [Feature Management](#) page to use this capability.

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.

See also

[Unlock time sheets using an assisted setup guide]() (video)

[Set Up Time Sheets]() (docs)

Use multiple units of measure when synchronizing items and resources to Dynamics 365 Sales

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

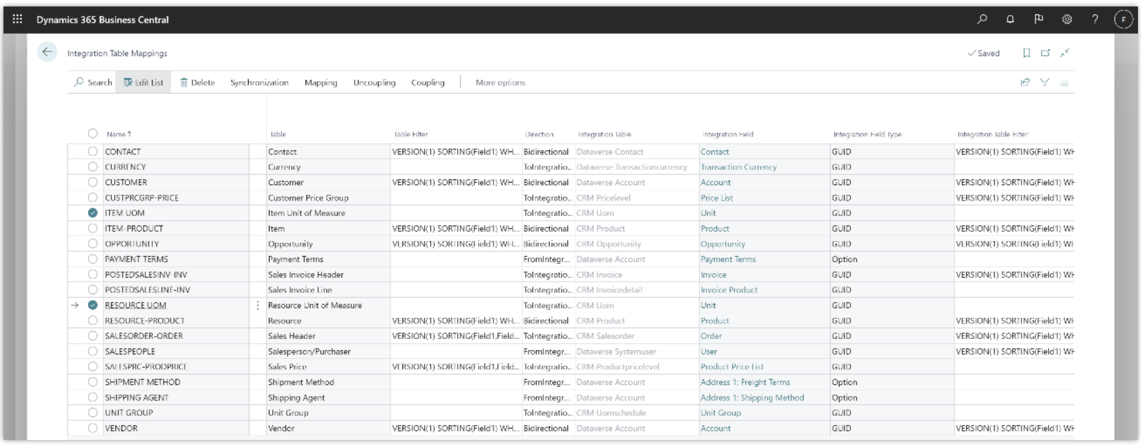
Business value

Businesses often track inventory for items in one unit of measure, such as pieces, but due to different market needs they may sell the items in several different units of measure, such as boxes or containers. Integration between Business Central and Microsoft Dynamics 365 Sales now allows these services to exchange information about items in multiple units of measure.

Feature details

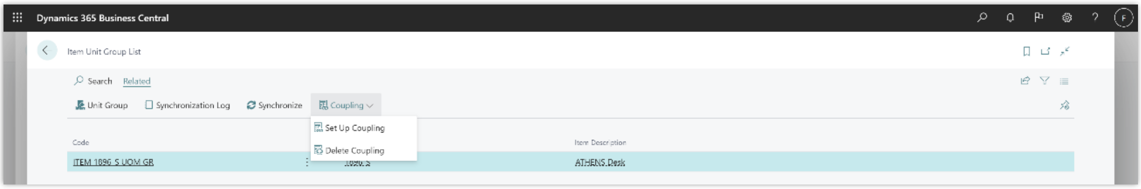
When you enable the **Feature Update: Multiple Units of Measure Synchronization with Dynamics 365 Sales** feature in [Feature Management](), Business Central will create unit groups for items and resources through the data update process.

You can now view two new integration table mappings for Item Units of Measure (ITEM-UOM) and Resource Units Of Measure (RESOURCE-UOM).



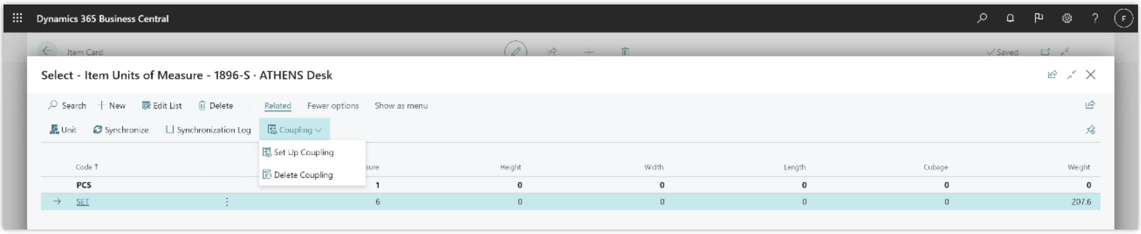
Shows new Item and Resource Unit of Measure mappings in Integration Table Mappings page.

Item or resource unit groups automatically generate sets of units of measure for items and resources that match the units in Dynamics 365 Sales. On the **Item Unit Group List** or **Resource Unit Group List** pages, you can view coupled unit groups by choosing the **Unit Group** action, you can synchronize unit group data by using the **Synchronize** action, and couple or delete unit groups by choosing **Coupling**, **Set up coupling** or **Delete coupling**.



Shows new Item Unit Group List page.

From the **Item Units of Measure** and **Resource Units of Measure** pages, for each units of measure in a unit group, you can now view the coupled unit by choosing the **Unit** action, use the **Synchronize** action to synchronize unit data, or couple or delete a coupling by choosing **Coupling**, **Set up coupling** or **Delete coupling**.



Shows new Unit, Synchronize, Synchronization Log, and Coupling actions on Item Units of Measure page.

NOTE You need to have the **Feature Update: Multiple Units of Measure Synchronization with Dynamics 365 Sales** feature enabled in Feature Management 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.

See also

Synchronization Rules (docs)

Send mail from entities using Word templates as body or attachment

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 2, 2021	✓ Oct 1, 2021

Business value

Within Business Central, the user can communicate via emails with the relevant business parties and generate these mails in a structured and professional way using Word templates to combine the Word text with information from Business Central.

Feature details

The Send Email action is now available on the Business Central entities that have an email address, such as customers, contacts, vendors, salesperson/purchasers, employee, users, and bank accounts pages. You can now compose and send emails from any page that displays the entity. When you do, Business Central keeps the link between the entity to which the email is sent and the email itself, giving you a record of the emails that were sent to each entity.

When you compose an email for an entity—for example, on the Vendor Card page—you can use Word templates to apply standard and personalized content to the business communication, without having to re-enter the content. The Word template will create the content of the email, and can personalize it by using the mail merge features in Word to add data from the entity in Business Central.

Additionally, you can attach the finished document to the email. Attaching the document provides additional flexibility, because the auto-generated content from the template speeds up the process of creating the email, while allowing you to manually personalize the content of the message.

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

Interacting with business partners in Dynamics 365 Business Central (video)

Using Word Templates for Bulk Communication (docs)

Customer Consent capabilities for all features that exchange data with third-party services

Enabled for	Public preview	General availability
Users, automatically	✓Sep 12, 2021	✓Oct 1, 2021

Business value

All features that exchange data with third-party services, such as government reporting, have an **Enable** toggle and a consent dialog that must be viewed before the customer can use the feature. This gives the administrator better control of the data exchange from Business Central to third-party entities.

Feature details

Business Central capabilities enable companies to seamlessly integrate with other parties to achieve business goals or statutory obligations.

In the setup pages for each feature that exchanges data from Business Central to another service, a message will inform the user that the data might be shared with third-party systems and flow outside of the organization's selected geographic boundaries. The message will provide options to turn on or turn off the feature, so that the user can control the data share.

NOTE If a feature is already enabled and in use, to avoid disruptions of ongoing business processes, it will remain enabled until the administrator takes action to disable it.

The following features are in scope for the consent capabilities:

- AMC Banking Fundamentals
- EU VAT Reg. No. Validation Service
- OCR Services
- PayPal Payments Standard
- Electronic Invoicing - Tradeshift
- Envestnet Yodlee Bank Feeds Service
- United Kingdom: Making Tax Digital for VAT Capabilities in Dynamics 365 Business Central
- Spain: SII - Invoice and Credit Memo Types in Sales and Purchase Documents
- Czech Republic: Core Localization Pack for Czech
  - Registration number verification
  - Electronic registration of sales
  - Currency Exchange Rate

- VAT unreliable payer check

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.

Document attachments are available on mobile devices

Enabled for	Public preview	General availability
Users, automatically	✓Sep 1, 2021	✓Oct 10, 2021

Business value

Access information about document and master data attachments from your mobile device.

Feature details

Based on your feedback, we changed the page type for the **Document Attachment Details** (object ID 1173) from *Worksheet* to *List* so that this page is now available on mobile devices. That improvement is particularly useful for those who must review attached documents before approval.

Document Attachment Detail page.

Shipping agent information is copied from sales orders to warehouse shipments

Enabled for	Public preview	General availability
Users, automatically	-	✓Nov 22, 2021

Business value

You can create warehouse shipments from sales orders faster and with less friction by automatically copying information about the shipping agent from the order to the shipment. This helps ensure that warehouse workers get this important information, and that your goods get to where they need to be.

Feature details

Sales orders and warehouse shipments both contain information about the shipping agent. This includes the External Document No., Shipping Agent Code, and the Shipping Agent Service Code fields. To save you time, when you use the Create Warehouse Shipment action to create a warehouse shipment from a sales order, Business Central will copy the information in those fields from the sales order to the shipment.

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 currency symbol in data synchronization with Dataverse

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✓Nov 30, 2021

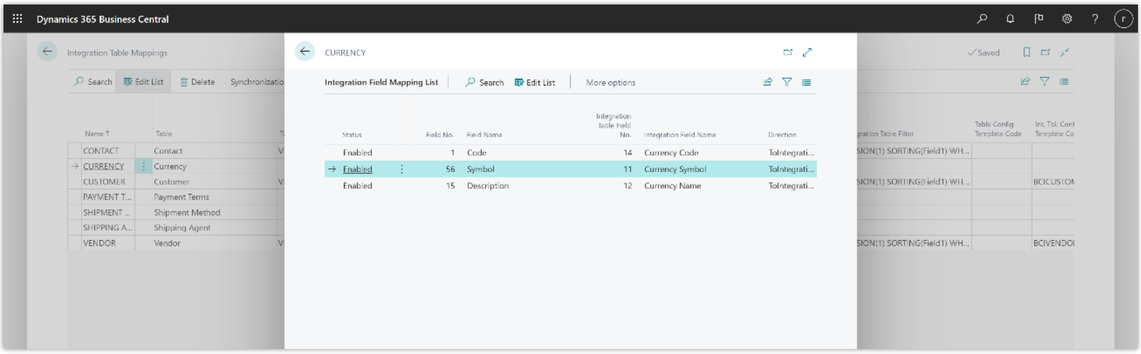
Business value

Including currency symbols with amounts makes it easier to visually scan and understand financial figures. If your Business Central is integrated with Microsoft Dataverse, you can now synchronize currency symbols between the two apps.

Feature details

When you synchronize data for currencies between Business Central and Dataverse, the standard field mappings for integration tables can now include the Symbol field from the

Currency table. That means if you want to synchronize currency symbols, you no longer need to customize the integration table mappings. To add the Symbol field to the standard mapping, you must turn on the **Feature Update: Currency symbol mapping in a Dataverse integration** feature in Feature Management.



New mapping for currency symbol in Integration Field mapping list.

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

Synchronizing Data in Business Central with Microsoft Dataverse (docs)

Synchronize multiline text fields between Business Central and Dataverse (and Dynamics 365 Sales)

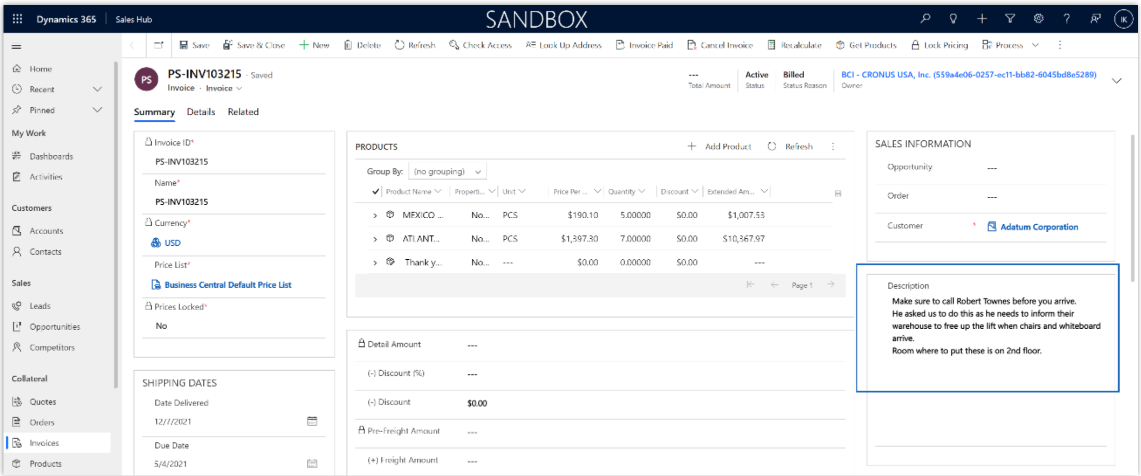
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Dec 9, 2021

Business value

Businesses that use multiline texts in descriptions on documents such as orders and invoices, in Dataverse or Dynamics 365 Sales, can now synchronize such data to and from Business Central.

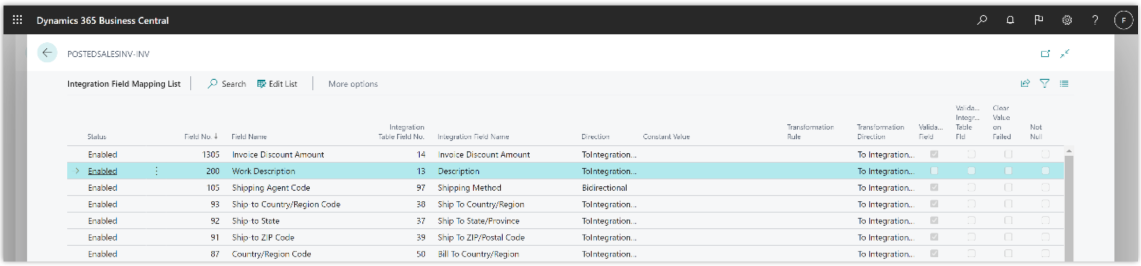
Feature details

When you enter work descriptions (multiline texts) on sales quotes, orders, and invoices in Business Central, the descriptions are transferred to the Description field in Dynamics 365 Sales.



Shows Invoice in Dynamics 365 Sales with Description transferred from Work Description.

You can enable or disable synchronization of the Description field while synchronizing posted sales invoices from the user interface and by using customizations for sales orders and quotes.



Shows Integration Fields Mapping page with new Work Description field mapping.

Developers can also extend data synchronization to include more multiline text fields in synchronization between Business Central and Dataverse or Dynamics 365 Sales.

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

[Integrating with Dynamics 365 Sales](#) (docs)

Delegated admin can create job queue entries and request approval by a licensed user

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

Business value

Microsoft partners use the delegated admin role to set up and manage certain aspects of Business Central on behalf of their customers. However, the role is restricted in some ways. In earlier release waves, one of these restrictions was the ability to create job queue entries and set them as ready to run for customers. The job queue is an important tool for setting up and configuring companies in Business Central. With this update, delegated admins can create job queue entries and request approval from a licensed user.

Feature details

Business Central provides the delegated admin role so that people who are not employed by the customer, typically Microsoft partners, can set up and configure business processes for the customers. The delegated admin role is not, however, a licensed user in Business Central, and often is only assigned temporarily, so there are some limitations to what they can do. For example, delegated admins cannot set up tasks that might be run after the delegated admin relationship has been revoked, such as job queue entries.

Job queue entries are a useful tool for running setup and configuration processes in Business Central, and delegated admins must be able to create and run them in their customer's tenant. This release wave adds support for the delegated admin to create job queue entries and set them as ready to run. Then, a licensed user from the customer can start the job queue entry to complete the process that the delegated admin created.

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

Delegated Administrator Access to Business Central Online (docs)

Better with Microsoft 365

Overview

In 2021 release wave 2, we invest in better integration with Excel. We also improve the support for collaborative business processes in Microsoft Teams so that you can bring Business Central pages into a Teams channel.

Enhancements to Microsoft Teams integration

Enabled for	Public preview	General availability
Users, automatically	-	✔ Oct 1, 2021

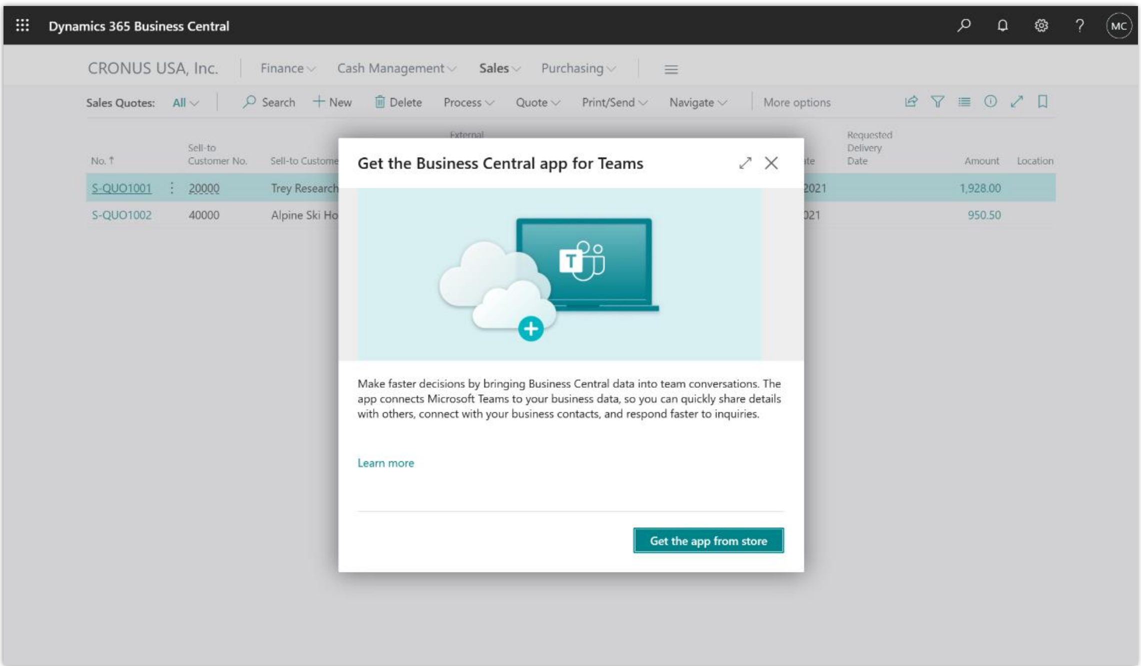
Business value

The Business Central app for Microsoft Teams connects Teams to your business data, so you can quickly share details with your team, connect with your business contacts, and respond faster to inquiries.

Feature details

The 2021 release wave 2 includes the following improvements to the Business Central app for Teams:

- Users in the Business Central clients have a new wizard that guides them through installing the Business Central app for Teams.



The wizard that helps users install the Teams app.

- New sign-up experience for users who are installing the app but don't have a Business Central subscription. Users will be redirected to a page where they can read about and sign up for a trial subscription.

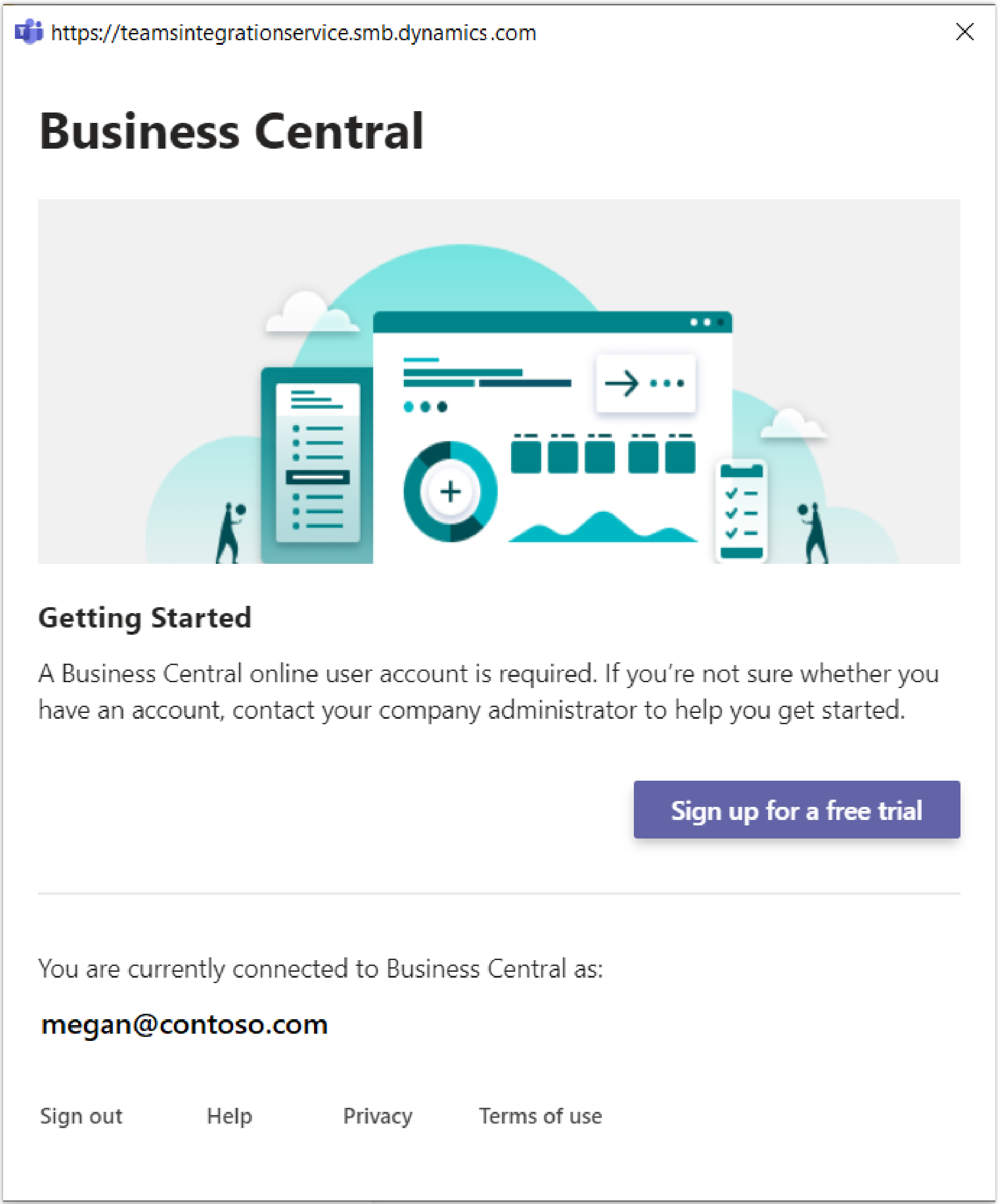


Illustration of the in-Teams window that assists users in signing up for a trial.

- Added support for Chinese language (zh-CN). Other languages will be added later during the release wave.

In addition, you have new ways of sharing data between Business Central and Teams. For more information, see the following related feature: [Share a record link to Microsoft Teams]

See also

[Teams FAQ] (docs)

Centralized Deployment of Office add-ins

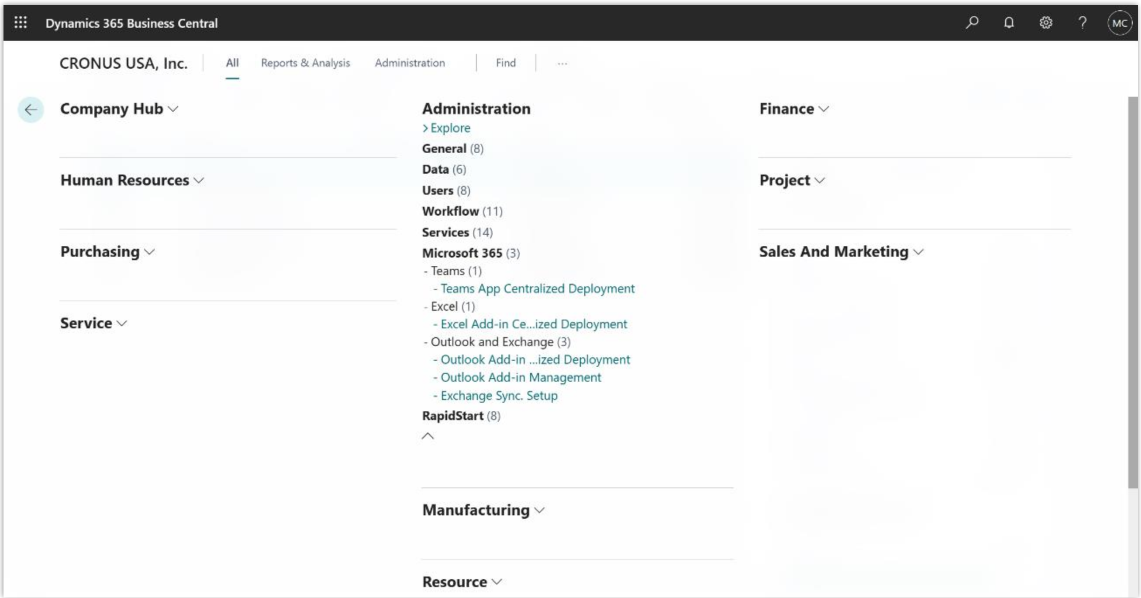
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 1, 2021	✔ Oct 1, 2021

Business value

The security of your business data is important to us. Administrators are in control of how Office add-ins for Business Central are deployed to individuals, groups, or the entire organization, by using best-of-breed compliance and policy settings in Microsoft 365.

Feature details

When getting started with Business Central, assisted setup wizards guide administrators through the process of configuring the Business Central Office add-ins. Deployment wizards are now easily discoverable in the **Assisted Setup** page, or in the role explorer under **Administration**.



The Role Explorer displaying the administration role with Microsoft 365 functionality.

Excel add-in

The new Centralized Deployment assisted setup guides administrators through the manual task of configuring Microsoft 365 to deploy add-ins to select users within the organization, or when individual acquisition from the Office Store has been turned off.

To experience the assisted setup for Excel, sign in to your online Business Central environment, then search for 'Excel Add-in Centralized Deployment' or simply navigate to this link.

Outlook add-ins

The Centralized Deployment assisted setup for Outlook add-ins replaces the earlier Business Inbox setup wizard. The new assisted setup will walk administrators through the manual task of configuring Microsoft 365 or Exchange Server to deploy add-ins to select users within the organization.

To support improved security in Exchange and take advantage of custom Exchange policy, the assisted setup no longer automates deployment by using legacy basic authentication.

To experience the assisted setup for Outlook, sign in to your online Business Central environment, then search for 'Outlook Add-in Centralized Deployment' or simply navigate to this link.

App for Teams

A new Centralized Deployment assisted setup guides administrators through the manual task of configuring Teams admin center to deploy the Business Central app for Microsoft Teams to all users or select users within the organization.

To experience the assisted setup for Teams, sign in to your online Business Central environment, then search for 'Teams App Centralized Deployment' or simply navigate to this link.

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

Get the Business Central Add-in for Outlook (docs)

Enhancements to the Outlook add-in

Enabled for	Public preview	General availability
Users, automatically	✔ Aug 1, 2021	✔ Oct 1, 2021

Business value

Set up your business inbox in Outlook to respond faster to inquiries from your customers, vendors, and prospects.

Feature details

Using the add-ins

The 2021 release wave 2 includes various functional improvements:

- You can use the add-ins with companies that have symbols or non-English characters in the company name.

- When viewing an email from a vendor, you can use the **Send to Incoming Documents** action from the **Contact Insights** pane to register an incoming document record in Business Central with the email attachments.
- The **Aged Accounts Receivable** chart is available again in the **Contact Insights** pane.
- The sample email that helps you get started with Outlook add-ins has been refreshed.
- A simplified wizard guides individual users through installing Outlook add-ins. Automated installation of the add-ins for Business Central online now uses the more secure OAuth 2.0 that replaces legacy basic authentication.

To try it out, search for the **Get the Outlook Add-in** page, or sign in to your Business Central online environment and navigate to https://businesscentral.dynamics.com/?page=1832.

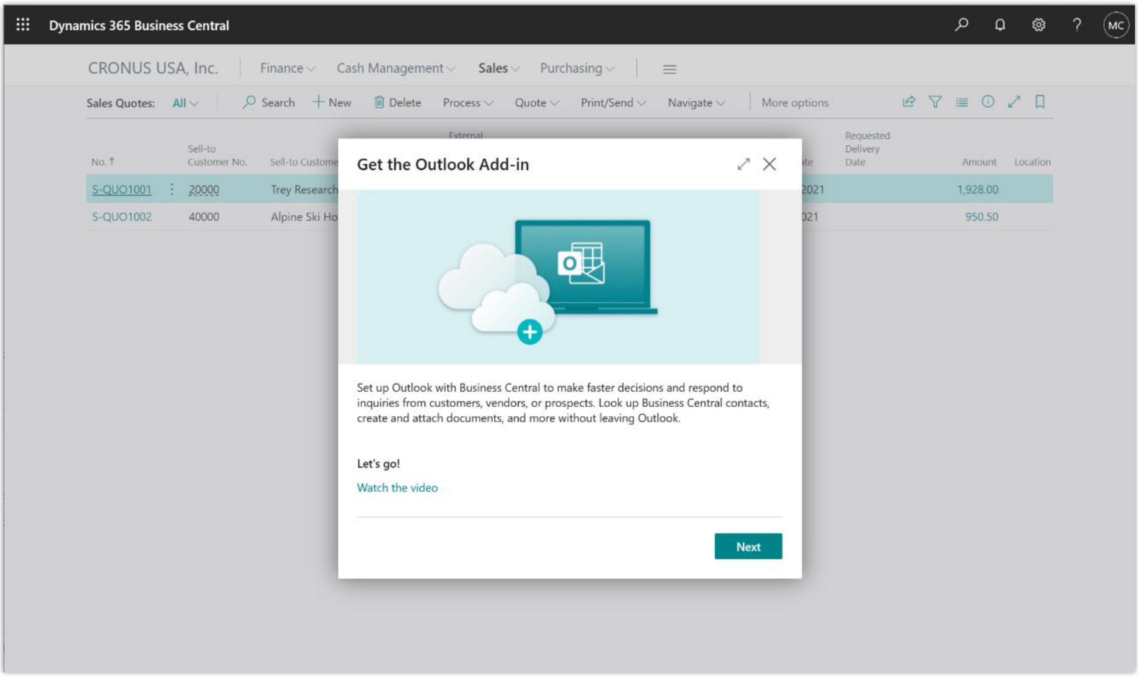
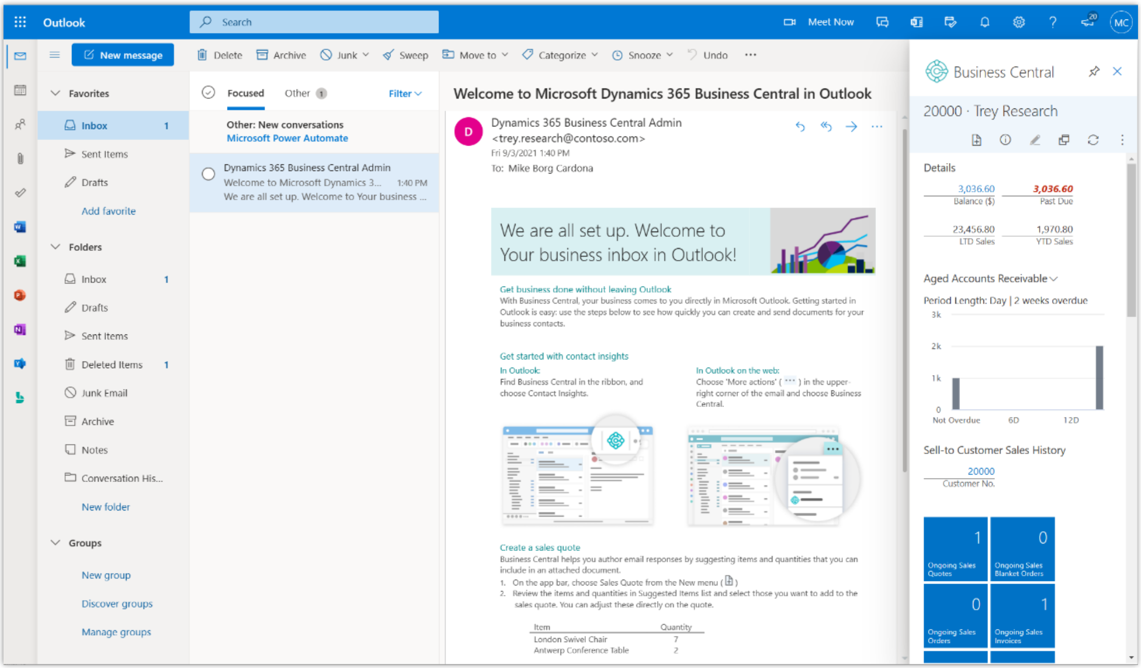


Illustration of a new wizard that assists users in installing the Outlook add-ins.



Outlook for the web, displaying the sample email sent by Business Central.

Add-in administration

The 2021 release wave 2 includes various technical improvements for deploying and using Outlook add-ins:

- An assisted setup wizard guides administrators through configuring Microsoft 365 for centralized deployment of the Outlook add-in to individuals, groups, or everyone within their organization. For more information, see the Centralized Deployment release plan. To try it out, search for the **Outlook Add-in Centralized Deployment** page, or sign in to your Business Central online environment and navigate to https://businesscentral.dynamics.com/?page=1831.
- The **Office Add-in Management** page has been renamed to **Outlook Add-in management**, focusing exclusively on Outlook add-ins.
- With the introduction of OAuth 2.0, the Outlook add-ins now fully support multi-factor authentication if that has been configured in the Microsoft 365 admin center.

Update to minimum requirements

In the 2021 release wave 2, version 19 of Business Central, the Outlook add-ins require the Outlook client to be version 2012 or later, and will also require that the WebView2 component is installed to the relevant devices. Users of Outlook clients that don't meet the minimum requirements might not be able to sign in to the add-in from version 19 and later.

For more tips and tricks to help you get an optimal experience with Outlook, see Optimizing Outlook for Your Business Inbox.

About the legacy Outlook synchronization capability

In this release wave, we deprecate the legacy Outlook synchronization feature. The Business Central components for Outlook can no longer be installed from the installer for Business Central (on-premises), and the feature can't be accessed from Business Central.

See also

Optimizing Outlook for Your Business Inbox (docs)

Enhancements to working with Microsoft Excel

Enabled for	Public preview	General availability
Users, automatically	✔Aug 10, 2021	✔Oct 1, 2021

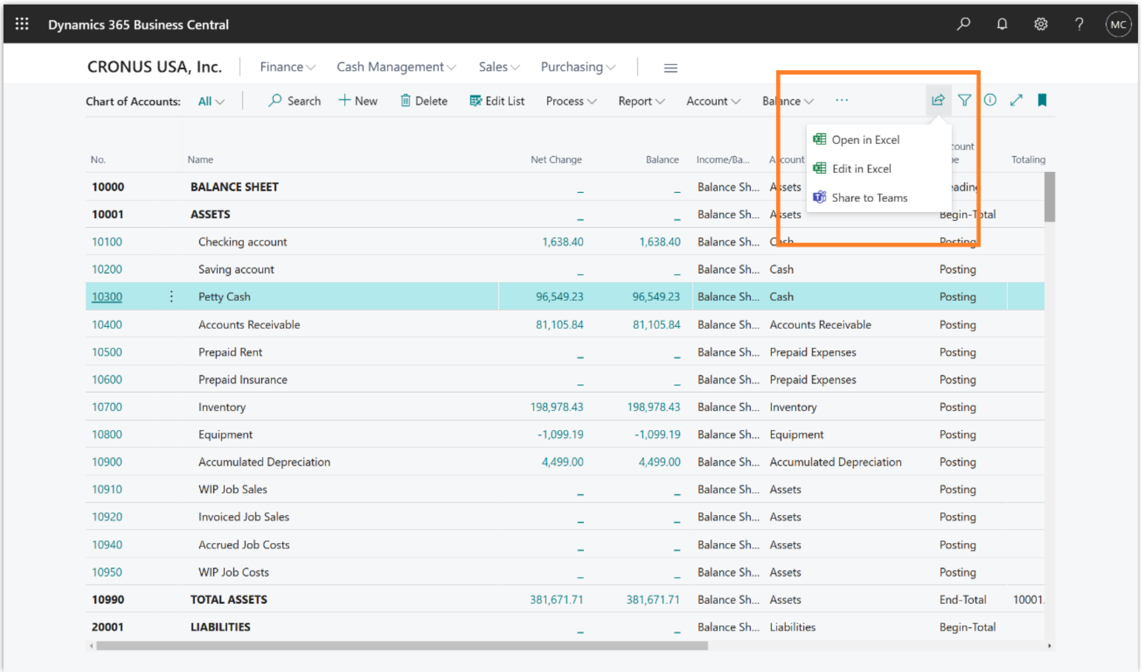
Business value

For many of our customers, Microsoft Excel remains the app of choice for quick data analysis, sharing tabular data, bulk correcting, or entering records. Business Central continues to mature Excel-related features for exporting to Excel and working with the Excel add-in, making them more easily discoverable and reachable through the new Share menu.

Feature details

A new home for Open in Excel and Edit in Excel

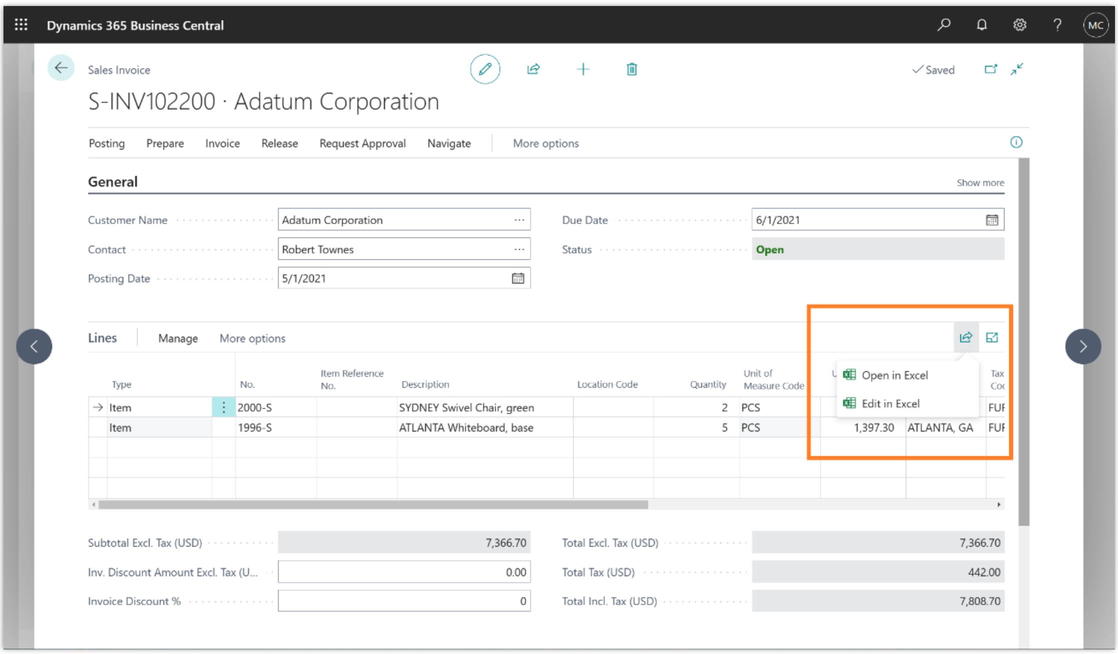
The 2021 release wave 2 introduces the **Share** icon and menu in which users will find the *Open in Excel* and *Edit in Excel* actions. This applies to list pages, such as the Items list, and also to list parts that display a full menu, such as the **Lines** part on a sales order.



A list page displaying the Share menu with pair of Excel actions.

Downloading embedded lists to Excel (Open in Excel action)

Lists that are embedded in a part on a page can now be exported to Excel. For example, you can export sales lines on a sales order, list parts on the Role Center, or lists in the FactBox pane. Similar to full-page lists, the **Open in Excel** action downloads a static copy of your list as an Excel file, applying your filters and sort order just as shown on screen.



The new Share menu on a part displaying the Excel pair of actions.

You can enable this feature ahead of time as early as Business Central 2021 release wave 1 (update 18.3). Starting in Business Central 2021 release wave 2 (update 19.0), this is enabled on all environments.

Exporting reports to Excel

From a report request page, users can export report data to Excel. The Excel file will only include the raw data, not the report layout. For more information, see the related release plan: Save report dataset to Excel from the request page

You can enable this feature ahead of time as early as Business Central 2021 release wave 1 (update 18.3). Starting in Business Central 2021 release wave 2 (update 19.0), this is enabled on all environments.

Other enhancements

- The captions of columns in Excel now match the captions shown in the web client and are displayed in the user's current language.
- When using **Open in Excel** or **Edit in Excel** features, the name of the exported file has been simplified to match the name of the page.
- The Excel add-in now includes more detailed error messages to help troubleshoot issues faster (for Business Central online only).

Update to minimum requirements

In 2021 release wave 2, the Excel add-in supports Excel clients that are version 2012 or later. Users of Excel clients that don't meet the minimum requirements may still be able to sign in to the add-in after their Business Central environment is upgraded to version 19, but Microsoft cannot guarantee that this will remain possible in the future.

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.

See also

Viewing and Editing in Excel From Business Central (docs)

AL access to viewing and sharing files in OneDrive

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 6, 2021	✔ Oct 1, 2021

Business value

Bring the best of Microsoft's business and productivity suites together to view and edit files, or initiate collaborative, review, and sharing activities directly from Business Central. Users benefit from a familiar file viewing and sharing experience, and reduce the need to download files to their device.

Feature details

Business application features that store, manage, or present files can now be enhanced with actions to view a file in the browser, or share the file with others, by integrating with **OneDrive for Business**.

Available with version 19.0

- New AL objects in the system and base application that integrate with OneDrive. Developers have to write only minimal code when they need to open a Business Central file in the browser. This copies the file from Business Central to OneDrive, then opens the file using the native web applications for Excel, Word, and PowerPoint, or with OneDrive's file viewer for all other files such as PDFs. This functionality is intended for interactive scenarios where users initiate the action during their session, and not for automating file transfer.
- A documented AL code pattern and guidelines that developers can apply to any page or process used to represent files. This pattern consists of a **Download** action and **Open in OneDrive** action that developers can apply consistently across their extensions. For an example of this pattern applied in the business application, see the **Attachments** FactBox.

Available later this wave

- Developers will be able to implement a third action, **Share**, that displays the standard Microsoft 365 file sharing window, directly within Business Central. The Share window allows users to share a link with others, email a link, or attach a copy of the file to an email.
- Improvements to the end-user sign-in experience when using OneDrive from Business Central, reducing the number of windows required to handle identity and consent.
- Variations to the AL methods will be made available that give more granular control over where and how the file is copied to OneDrive before it is opened or shared.

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

[Sharing Business Central Records and Page Links in Microsoft Teams]() (docs)

Share a record link to Microsoft Teams

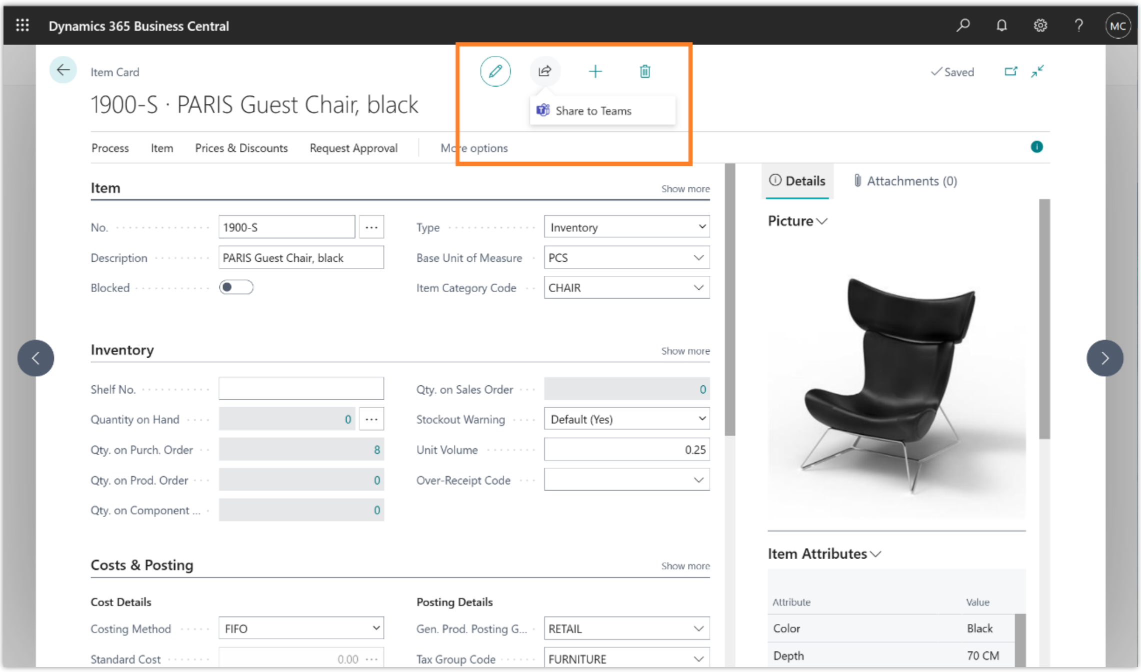
Enabled for	Public preview	General availability
Users, automatically	✓ Sep 6, 2021	✓ Oct 1, 2021

Business value

Users save time and benefit from reduced app switching when they can initiate collaborative tasks directly from Business Central.

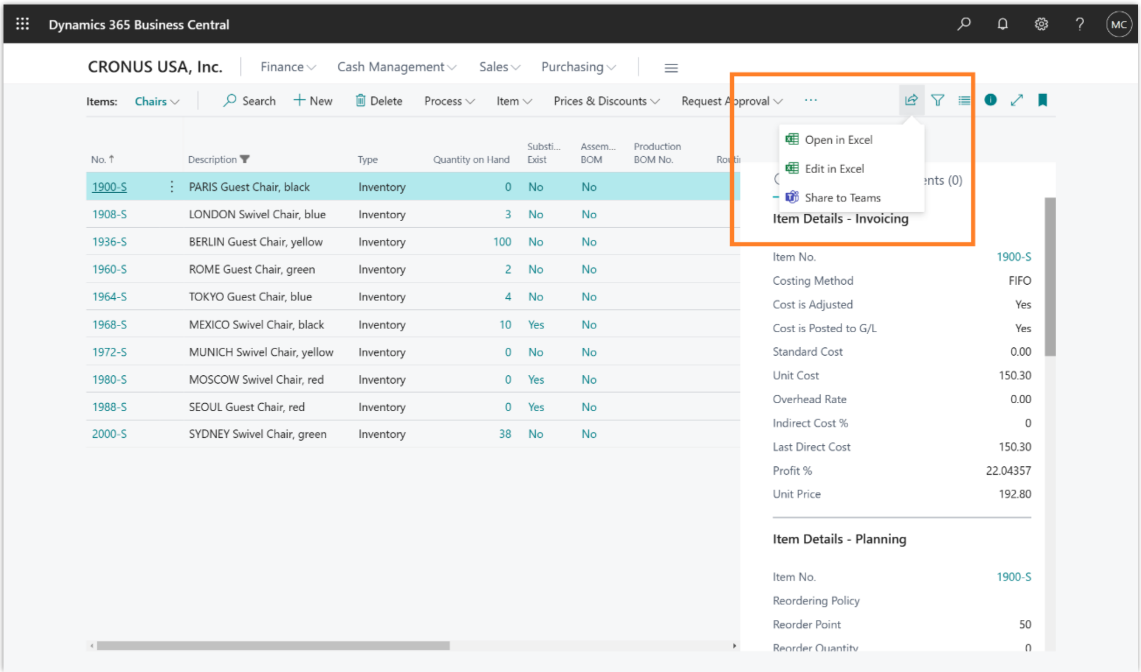
Feature details

The Business Central web client includes a new action to share to Microsoft Teams. This action allows users to type a message, choose recipients such as team members, groups or channels, and send their message with a link to the Business Central record.

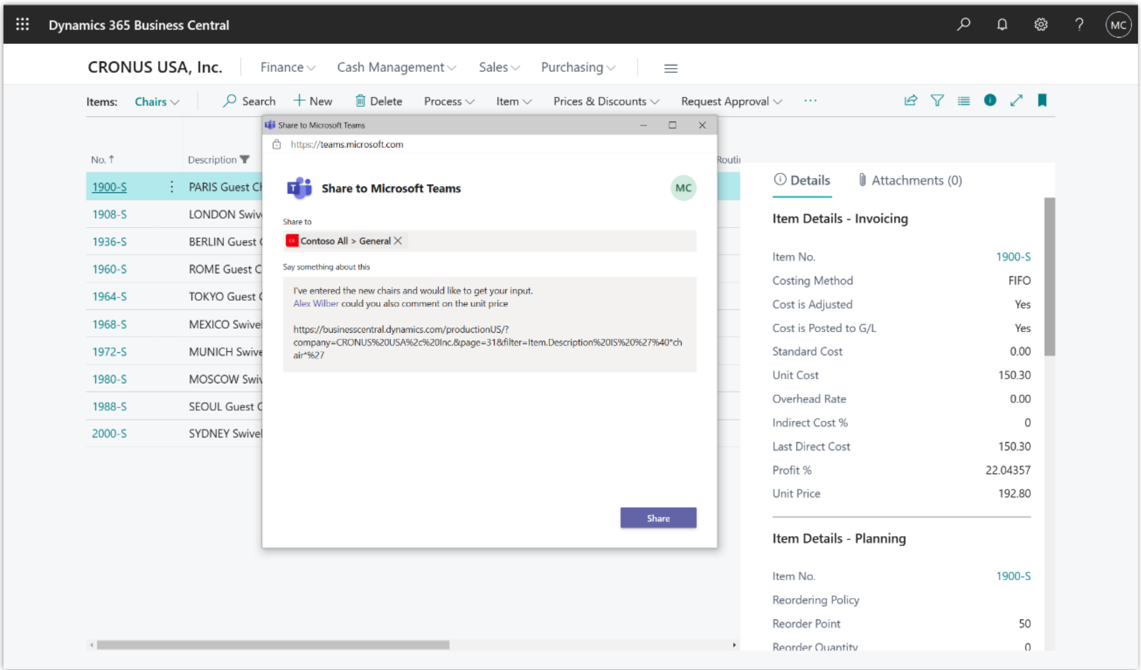


The Share menu displayed on a card.

Users can share to Teams from most collection or details pages in Business Central. For example, you can share a link to a filtered view of your records.



The Share menu on a list page, displaying the action to Share to Teams.



The Share to Teams window where users can annotate and send the link.

Similar to the Business Central app for Teams, the Share to Teams action in the web client is only available to Business Central online users.

Try it out

To experience sharing your favorite product or service with your coworkers, sign in to your online Business Central environment and go to an Item card, then use the Share icon at the top of the page.

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

Sharing Business Central Records and Page links in Microsoft Teams (docs)

Country and regional

Overview

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more. Expansion to more countries and regions is achieved through partner-led localization. Our partners create the relevant localization apps that are published to AppSource. In combination with the built-in language offerings, Dynamics 365 Business Central is then available to serve customers in 50-plus countries and regions worldwide.

Country and regional expansion – Argentina

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 15, 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Argentina is achieved through partner-led localization. Our partners create the relevant localization apps that are then published to AppSource. In combination with the built-in language offerings, Dynamics 365 Business Central is then available to serve customers in Argentina.

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.

Country and regional expansion – Bulgaria

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 15, 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Bulgaria is achieved through partner-led localization. Our partners create the relevant localization apps that are then published to AppSource. In combination with the built-in language offerings, Dynamics 365 Business Central is then available to serve customers in Bulgaria.

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.

Country and regional expansion – Chile

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 15, 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Chile is achieved through partner-led localization. Our partners create the relevant localization apps that are then published to AppSource. In combination with the built-in language offerings, Dynamics 365 Business Central is then available to serve customers in Chile.

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.

Country and regional expansion – Puerto Rico

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 15, 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Puerto Rico is achieved through partner-led localization. Our partners create the relevant localization apps that are then published to AppSource. In combination with the built-in language offerings, Dynamics 365 Business Central is then available to serve customers in Puerto Rico.

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.

Country and regional expansion – Slovakia

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 15, 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Slovakia is achieved through partner-led localization. Our partners create the relevant localization apps that are then published to AppSource. In combination with the built-in language offerings, Dynamics 365 Business Central is then available to serve customers in Slovakia.

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.

Country and regional expansion – Ukraine

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 15, 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Ukraine is achieved through partner-led localization. Our partners create the relevant localization apps that are then published to AppSource. In combination with the built-in language offerings, Dynamics 365 Business Central is then available to serve customers in Ukraine.

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.

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.

Extend general ledger posting aggregations (Invoice Post. Buffer refactoring)

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 1, 2021	-

Business value

Regulations in different countries and industries, and customer business practices can cause a need to change the way in which general ledger entries are aggregated during posting.

Feature details

The Invoice Post. Buffer table has been at the center of localizations and partner customizations when changes to G/L posting are needed, or when G/L entries need to be aggregated in a different way when they're posted to the general ledger. The previous design is not extensible because the primary key in that table cannot be changed without introducing breaking change across partner solutions and localizations. There are significant differences in this table across localizations, in particular for APAC, BE, ES, IT, NA, and RU, and this has made it difficult to extract localizations to extensions.

This refactoring makes the posting process for sales, purchase, and service transactions extensible, and enables partners to change the way the posting algorithm aggregates G/L entries—for example, by specific document lines, posting groups, or the tax setup required by local legislation. Partners can replace customizations by using the interface for G/L invoice posting, resolve legacy issues for the Invoice Post. Buffer table, and use their own implementation of G/L invoice posting.

We have removed the dependencies from the Invoice Posting Buffer table in the Base Application and built an Invoice Posting component with an interface and an extensible enum for the implementation setup.

NOTE This feature currently is available in sandbox environments only and can't be turned on in production environments yet.

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.

Generated documentation for AL language

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Oct 1, 2021

Business value

Reference documentation is an important part of a programming language. In this release we have increased coverage of auto-generated documentation for the AL language, ensuring that this reflects the latest changes and additions. Specifically, we are adding triggers and method attributes.

Feature details

AL reference documentation is used to look up documentation of types, method, and properties in the programming language. For many releases, this documentation has been handcrafted, which can lead to inconsistencies with the actual language. To ensure that the documentation reflects the language, entries will be auto-generated, and any additional content will be added manually afterward. This ensures full coverage and that the documentation better reflects the AL language as it evolves.

Profiling AL performance with snapshot debugger

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓Aug 1, 2021	✓Oct 1, 2021

Business value

Performance is top of mind for most customers, especially in the world of online business. Until now, apart from selected, reactive telemetry allowing monitoring of customer tenants, there has not been a proactive way to measure execution performance during development nor when troubleshooting specific customer support cases with performance issues. To address this, we are introducing the ability to capture execution timing as part of a snapshot, and investigate this in Visual Studio Code when replaying the snapshot.

Feature details

Snapshot captures now include a performance profile of the executed code that is captured in the snapshot. Using a new performance profiling editor view in the AL Visual Studio Code extension, developers can then investigate the time spent on execution, either using top-down or bottom-up call stack views.

See also

AL Profiler Overview (docs)

Transactional installation and sync of extensions on-premises

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓Aug 1, 2021	✓Oct 1, 2021

Business value

Usually, installing and synchronizing extensions are performed as two distinct operations. To enable force synchronization in online environments, install and sync can now also be performed as one transactional operation per database, available for PowerShell scripts on-premises.

Feature details

As a prerequisite for force sync support of extensions in online environments, the ability to install and sync extensions as one transaction per database has been added. This capability is also available on-premises so that you can choose to only install extensions that can also synchronize, for example.

See also

Administration of Business Central On-Premises (docs)

Richer access control for extension source in cloud environments

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓Sep 1, 2021	✓Oct 1, 2021

Business value

Currently it's possible to control access to an extension source in the cloud through the app.json property ShowMyCode. If enabling this, an extension source will be available both for debug, download (PTEs), and in symbols. Because of this, many partners choose not to share the source, thereby also prohibiting debug, leading to longer times to mitigate customer issues, and challenges with providing alternatives for debugging a source.

Feature details

For better control of source access, more granular and static app.json settings for IP access are available flags in the new "resourceExposurePolicy" setting:

- **allowDebugging**: Control source access during debug. Note that it would be possible to mine IP across debug sessions.
- **allowDownloadingSource**: Control access to downloading .app with source from tenant.
- **includeSourceInSymbolFile**: Control whether symbols contain source when downloading from server during development.

In addition, there's an ability to dynamically set the flags mentioned above per Azure Active Directory (Azure AD) tenant by placing a .json configuration file on the KeyVault resource defined in app.json file. This allows locking down the app in various of the above dimensions and temporarily unlock these options for specific Azure AD tenants.

Finally, the existing showMyCode app.json property has been marked obsolete, resulting in a warning if it's used, and an error if both the showMyCode and resourceExposurePolicy properties are used at the same time.

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.

See also

Resource Exposure Policy Setting (docs)

Componentization of Image module

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 2, 2021	✔ Oct 1, 2021

Business value

This new module deprecates the DotNetImage wrappers from BaseApp and componentizes the existing code. In addition, the new module implements resize and crop functionality.

Feature details

The Image module is a componentization of the existing DotNetImage wrappers. It provides an API for AL that lets developers use images on the Business Central platform, and functionality for resizing, cropping, and loading and storing images to stream.

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.

Module to integrate Azure Blob service REST API

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 2, 2021	✔ Oct 1, 2021

Business value

This module provides a set of AL functionality and Helper libraries to make use of Azure Blob Storage.

Feature details

This new module provides functionality to work with storage accounts, containers, and blobs from Azure Blob Storage. It works as a wrapper of the Azure Blob service REST API. An AL developer can use the module to do the following:

- Create, delete, and list containers in storage accounts.

- Build a tool for uploading and downloading BLOBs to and from Azure Blob Storage.
- Manipulate data stored in Azure Blob Storage.

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.

Change publisher or extension name

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 1, 2021	✔ Oct 1, 2021

Business value

Currently the publisher and name information is part of the identity of an extension, and this information therefore can't be changed in AppSource. Over time, however, both product name and publisher name might change due to rebranding or acquisitions, so being able to change the name or publisher of an extension is valuable.

Feature details

The app identity has been changed to only include app ID and version, leaving publisher and app name optional, mainly for human readability purposes, such as in dependencies or telemetry. This allows changing the app name or publisher, for example, due to rebranding. Note that when doing so, the version must be updated as well because a change like that is still seen as a revision of the extension. Also, workspaces with project dependencies still resolve by name and publisher and will have to be updated if the identity information of the project is changed.

See also

App Identity (docs)

Collectable errors in AL

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 1, 2021	✔ Oct 1, 2021

Business value

Allow AL developers to write AL code that returns more than one error. The feature can be used to simplify validation scenarios where users can be presented with a list of things to fix.

Feature details

To support collectable errors, the following features are now included in AL code:

- New properties on the ErrorInfo data type so that a call to the Error method can state whether the error is collectable.
- New method attribute called ErrorBehavior that lets the AL developer choose to collect and handle errors that have been classified as collectable.
- New methods that let the AL developer handle errors collected in the current method scope.

See also

Using ErrorBehavior.Collect (docs)

Error dialogs with detailed messages for better troubleshooting

Enabled for	Public preview	General availability
Users, automatically	✓Oct 1, 2021	✓Oct 1, 2021

Business value

AL developers can communicate technical details in a collapsed section of the error dialog. If users need to share information to a support representative, they can now copy technical details to the clipboard.

Feature details

Prior to this release, error messages were a mix of information that can be understood by end users and technical details for the troubleshooter.

Now, AL developers can communicate technical details in a collapsed section of the error dialog. If users need to share information to a supporter, they can now copy technical details to the clipboard. This can include:

- Detailed error description
- Session ID
- AL call stack

See also

ErrorInfo.DetailedMessage(String) Method (docs)

Force sync of customer-specific extensions in online environments

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 1, 2021	✔ Oct 1, 2021

Business value

Whenever the table schema is changed in a destructive way in an extension, it can have a downstream impact for any depending extension and potentially block updates until the breaking changes have been fully resolved. Until now, the process for handling destructive changes has been to implement them, and then obsolete them in due time to allow a more seamless process.

There can, however, sometimes be a need for making breaking changes. This can occur, for example, in cases where there is no downstream impact of the change, if dependencies are under full control (for example, for per-tenant extensions), or to make changes that are forced by new, clashing object identities introduced upstream.

To help with these scenarios, we are introducing the ability to deploy per-tenant extensions (PTEs) with force schema sync mode, which will allow destructive changes to the table schema in the new extension version.

Feature details

When deploying a new customer-specific (per-tenant) extension to Business Central online, either through the **Extension Management** page or the admin center, it will now be possible to force any destructive table schema changes and circumvent the usual error when such changes are detected. This will allow the removal of specific tables or fields from the database.

NOTE This operation means you will lose any data that is stored in the removed tables and fields. You will still have the option to restore the database. Thus, before a force sync in a production environment, this should be thoroughly tested in a matching sandbox environment, container, or on-premises installation.

See also

Uploading a Per-Tenant Extension (PTE) (docs)

Performance – support for included columns in keys

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 1, 2021	✔ Oct 1, 2021

Business value

With the introduction of the partial record loading feature, a developer can now tailor indexes to include exactly the data needed for certain queries, so that all data needed for a specific query could be loaded just with the index pages.

Feature details

AL developers can now create fully covering indexes that perform well. Just use the new keyword IncludedColumns in the key definition to create indexes with included columns on the leaf nodes.

Benefits of indexes with included columns are:

- Included columns do not count against the 16 fields in an index definition.
- An index with included columns requires less I/O on the database.
- An index with included columns is smaller and more likely to be cached in the database cache.

See also

Secondary keys with included fields (docs)

Performance – support for non-clustered column store indexes

Enabled for	Public preview	General availability
Users, automatically	✔Oct 1, 2021	✔Oct 1, 2021

Business value

Using a non-clustered column store index (NCCI) instead of SIFT indexes can have multiple performance benefits, such as reduced locking due to maintenance of SIFT indexes (SQL indexed views), faster posting, and reduced storage cost (NCCIs are highly compressed).

Feature details

AL developers can now create NCCIs instead of SIFT indexes. Just use the new keyword Columnstore in the table definition.

A migration path from tables with SIFT indexes to NCCIs could be:

- Add all SIFT fields to the NCCI.
- Remove the SIFT index.
- If the SIFT indexes are really needed, add them again using a per-tenant extension.

Using NCCIs can give you better performance, especially in situations where developers forget to add one or more SIFT indexes.

See also

ColumnStoreIndex Property (docs)

Use two-dimensional barcodes in reports (Business Central online)

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Dec 1, 2021

Business value

Customers can now add two-dimensional barcodes to reports.

Feature details

This release wave adds fonts to generate two-dimensional barcodes in Business Central production and sandbox environments. This means that any custom layouts using the fonts will work.

We have licensed the font packages provided by IDAutomation Inc.

We also have added a new AL module to make it easy for developers to encode strings in the different barcode symbologies that the fonts support.

See also

Barcode Fonts with Business Central Online (docs)

AL compiler diagnostic messages includes URLs

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Dec 7, 2021	✔ Dec 7, 2021

Business value

When you compile or run code analyzers, diagnostic messages can appear in the form of error, warning, or informational messages. To help resolve such diagnostic issues, these now contain a URL for additional documentation on what is causing the issue and options for how to resolve the issue.

Feature details

Having links in diagnostic messages from compilation or code analyzers will support linking to additional, relevant documentation about the cause of the issue as well as options for how to resolve it.

Note that in this first release, there are now documentation pages on Docs for all diagnostic issues and URL links from compiler output diagnostics. Still, in the beginning, the documentation will be very shallow and mainly contain the message. We ask partners to help with feedback on Docs on which topics to prioritize more documentation on and share feedback on what content would be useful to help resolve issues. Based on this, the documentation will hopefully grow over the coming releases, and the knowledge among partners will be shared through tips and tricks on causes and fixes, lowering the time spent on each diagnostic.

See also

AL Compiler Diagnostics (docs)

Governance and administration

Overview

The 2021 release wave 2 delivers a set of admin and governance capabilities designed to help admins and IT pros set up, secure, manage, govern, and monitor customer environments.

Automatic installation and update of dependencies when updating apps in the Business Central admin center

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Oct 1, 2021

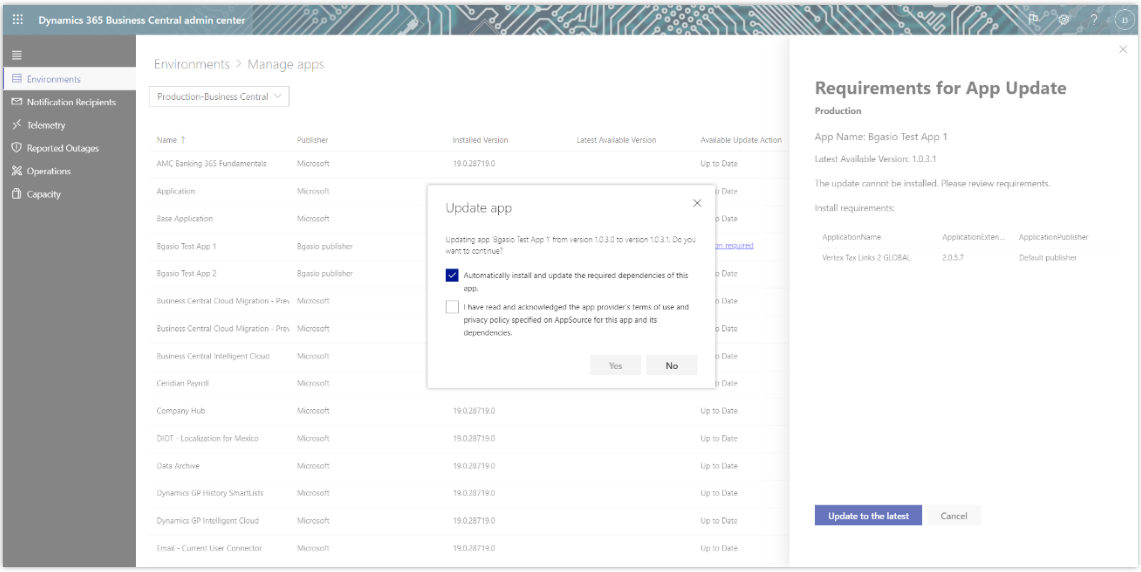
Business value

Simplify and streamline the process of updating apps in the Business Central admin center by allowing the service to automatically install and update app dependencies.

Feature details

The Business Central admin center provides administrators with an overview of the apps that are installed for each Business Central environment, and can help them identify which apps have updates (newer versions) available and install the updates at a convenient time.

In some scenarios, however, updating an app might require updating or installing other apps that it depends on. In such cases, the update of the main app will probably stop until the dependencies are updated or installed, which adds steps that can slow the update process. In this release, we're introducing an option that lets admins review dependencies before updating, and automate any steps that are needed.



Install and update dependency apps automatically from the Business Central admin center.

See also

[Managing Updates in the Business Central Admin Center](#) (docs)

Manage access to environments using Azure Active Directory groups

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔Oct 1, 2021

Business value

Use Azure Active Directory groups to manage access to Dynamics 365 Business Central environments.

Feature details

To manage access at the environment level, it's now possible to add an Azure Active Directory (Azure AD) group to the environment in the Business Central admin center. By assigning an Azure AD group to an environment, members of that Azure AD group will be synchronized to Business Central and granted access to that environment.

The use of Azure AD groups brings the following main benefits:

- Central management of access in general through Azure AD groups.
- Only the users in the relevant Azure AD group are imported into the environment.

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.

See also

Manage access using Azure Active Directory groups (docs)

Admins can handle scheduled tasks after a point-in-time restore

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 2, 2021	✔ Oct 1, 2021

Business value

After a point-in-time restore, the tenant admin can sign in and decide which restored scheduled tasks to re-enable or cancel if no longer relevant.

Feature details

After a point-in-time restore, or copy to a sandbox, all restored scheduled tasks in the tenant are paused. With this new feature, the internal admin can sign in and see which scheduled tasks are paused and make a decision about re-enabling or canceling them depending on the purpose of each task.

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

Use Job Queues to Schedule Tasks (docs)

Data archive extension and archiving entries before deleting in Date Compress batch jobs

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 2, 2021	✔ Oct 1, 2021

Business value

Over time, your business will accumulate a substantial amount of data, and as an administrator, it's a good idea to have a strategy for compressing and archiving data. Having lots of data can slow things down and, additionally, large amounts of data can lead to increased storage costs. By archiving the entries before compressing, you can keep a record of the historical data.

Feature details

An application administrator must regularly deal with the amount of data stored in a Business Central database. This can be done by deleting or compressing some of the historical documents and data.

When using date compression functionality, related entries are consolidated into a single entry, and the originals are deleted. However, there might be value in keeping that data, so rather than deleting it, you can archive it for later use. To manage this archiving, we are delivering a Data Archive extension so you can archive the data and explore it afterward using Microsoft Excel or as a CSV file.

The extension is preinstalled and available on the Extension Management page, so you don't need to do anything to get started. The extension is also available on Microsoft AppSource in case you want to reinstall it.

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

The Data Archive Extension (docs)

Copying environments of different types

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 15, 2021

Business value

Improved flexibility in how you manage the environments.

Feature details

At the different stages of implementation, testing, support, and maintenance of a Business Central tenant, Business Central online now provides admins with more flexibility when they work with multiple environments.

In earlier versions, you could copy a production environment to a sandbox environment in the Business Central admin center.

This release wave adds support for copying the environments within and across different environment types as shown in this list:

- Production to production
- Sandbox to sandbox
- Sandbox to production

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.

See also

Copy an environment (docs)

Operations log enhancements

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 15, 2021

Business value

Better traceability of the admin operations.

Feature details

The Operations log in the Business Central admin center provides an overview of the admin operations in the relevant Business Central online environments, such as restoring, renaming, installing, and uninstalling apps, exporting databases, and moving environments between different Azure Active Directory (Azure AD) tenants.

In this release wave, we're adding more operation logs to this view. Administrators will be able to see the following new operations:

- Environment was created
- Environment was deleted
- Environment was copied
- Environment properties were updated

The administrators will also be able to truncate the log to remove old operations that are no longer relevant.

Restart environments

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 15, 2021

Business value

Additional flexibility in how you administer environments.

Feature details

In some circumstances, as a troubleshooting step, administrators might have to restart a particular Business Central environment to resume its normal operation. In this release wave, we're adding the option to restart an environment on the Manage sessions page in the Business Central admin center.

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.

See also

Managing Sessions in the Admin Center (docs)

New license file format to support larger licenses

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 16, 2021

Business value

The new BCLicense file format serves as an alternate to the existing FLF license file format. The new format resolves the constrictions that the FLF format caused for large license files.

Feature details

Effective November 12, 2021, customers can choose between two license file formats:

- The familiar FLF format
- A new BCLicense format

The BCLicense format removes the resolution issues of large license files in the FLF format. The BCLicense file will also offer an alternative if a license of type FLF cannot be imported.

Both license files are included in a .zip file and contain the same permissions to unlock features and data.

Customers must be on the most current cumulative update to use licenses of type BCLicense. The BCLicense format is supported on versions 17 and later.

There's no change to the process of importing the license file into the product.

Contact your company's IT support team in the event of issues downloading the files.

See also

Uploading the License File for Business Central On-Premises (docs)

Manage access to environments using Azure Active Directory Conditional Access

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Dec 14, 2021

Business value

Use Azure Active Directory Conditional Access to enforce policies specific to access Dynamics 365 Business Central after first-factor authentication.

Feature details

Admins can set policies in Azure Active Directory specific to accessing Business Central. Policies can be created to change authentication rules based on certain conditions after the user completes the first-factor authentication. For example, you can use policies to require users who are part of certain groups to use multi-factor authentication or to restrict access to certain IP addresses and locations specifically for Business Central.

To learn more about Azure Active Directory Conditional Access, see What is Conditional Access? and Block access by location with Azure AD Conditional Access.

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.

See also

Block access by location with Azure AD Conditional Access (docs)

Microsoft Power Platform

Overview

With Business Central 2021 release wave 2, we improve the integration with Microsoft Dataverse. We also enhance the integration with Microsoft Power Platform with support for workspaces in Power BI.

Enhanced security in synchronizing data between Business Central and Dataverse

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Oct 1, 2021

Business value

When it comes to security, businesses make no compromises. Migration from secure to more secure connections and data synchronization is always welcome and creates trust in Microsoft online services.

Feature details

Until now, the components that are used to connect and synchronize data between Business Central and Microsoft Dataverse and Dynamics 365 Sales used Azure Active Directory Authentication Library (ADAL). In this release, we've increased security even more by migrating those components to use Microsoft Authentication Library (MSAL).

You can read more about the benefits of migration from ADAL to MSAL at [Migrate applications to the Microsoft Authentication Library (MSAL)].

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.

Show reports from named and shared Power BI workspaces in Business Central

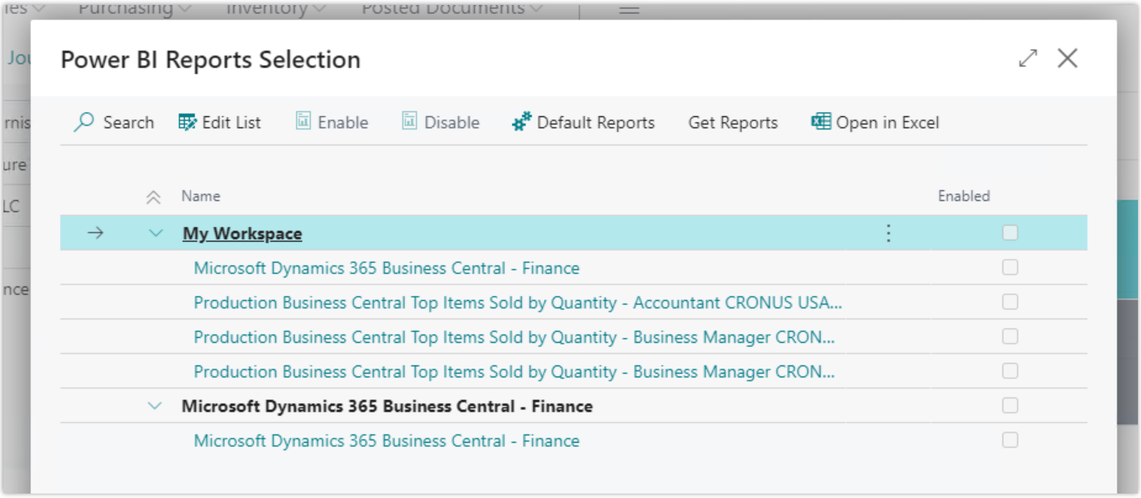
Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

Flexibility in your work and your workspace is essential and this also applies to data analysis and business intelligence. With that in mind, Power BI had introduced named and shared workspaces, but in Business Central, you were only able to use the default workspace and the ones provided by Business Central. Now you can embed reports from any of your personal or shared Power BI workspaces into Business Central.

Feature details

With this feature, when selecting which Power BI reports to show in Business Central, Power BI returns the list of workspaces you have access to and the reports in the workspaces. (The permissions you have in Business Central still apply.) You can then choose one of the reports and have it embedded in Business Central.



Business Central and Power BI workspaces.

If you have a report in a shared team or organization-wide workspace, it can now also be embedded in 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.

See also

[Working with Power BI Reports in Business Central]() (docs)

Enhance Power Automate and Power Apps connector to support filter and search

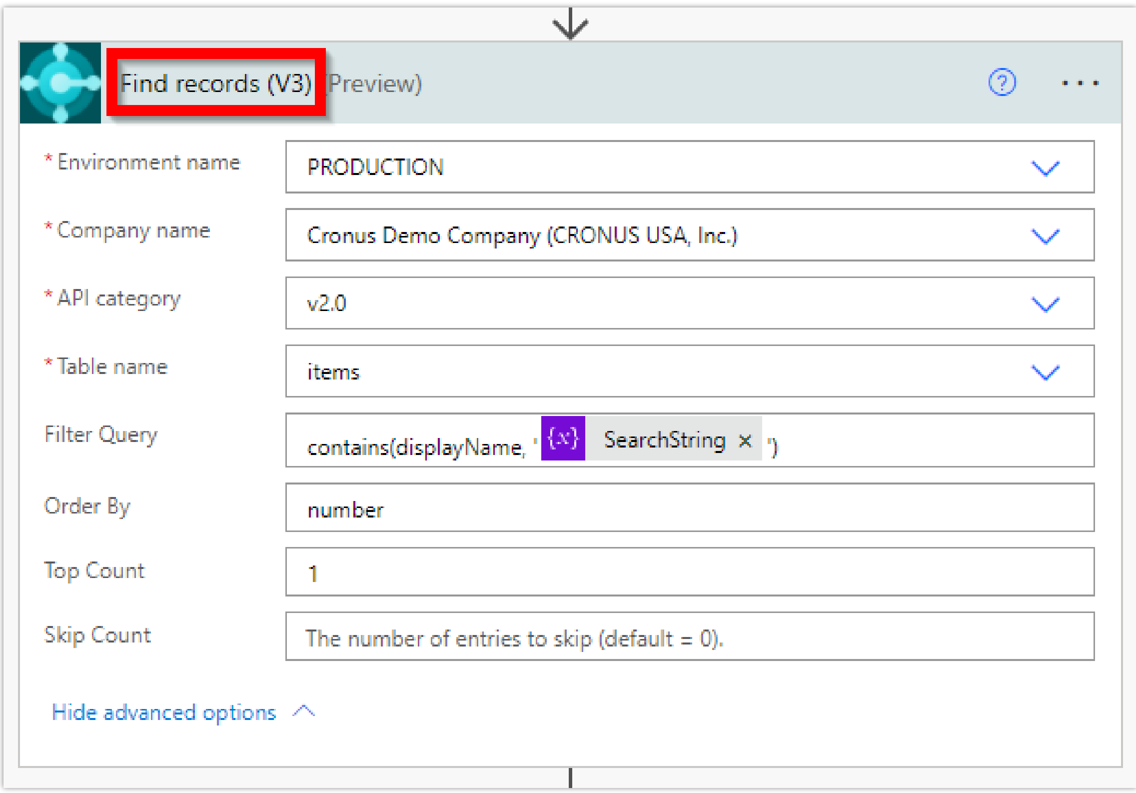
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Nov 21, 2021	✔ Nov 26, 2021

Business value

Enable partners and customers to build Power Automate flows and Power Apps that can search and filter Business Central data. This added capability will provide more flexibility when creating flows and apps, and it opens new scenarios for no code or citizen developers.

Feature details

This feature enables a new action in the Business Central connector for Power Platform called **Find Records**. When building Power Automate flows for processing any input (from the user, from external systems, or from different flow logic), it's now easy to get data that matches a query by using the **Find Records** action. Query syntax is based on the supported OData filter syntax, which you can read about at [Using Filter Expressions in OData URIs](#).



Find Records in Power Automate.

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

Using Business Central in an Automated Workflow (docs)

Use secondary read-only database for Power BI reporting

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jan 4, 2022	Feb 2022

Business value

Performance of the whole system is crucial, even when complex business reports created in Power BI are being refreshed. This feature allows Business Central to perform better because the Power BI reports are being refreshed from a read-only replica.

Feature details

Power BI reports can be now sourced from a secondary, read-only database. This leaves the main database ready for transactions, which enhances performance of the system. This feature is part of the Power BI connector for Business Central. It's enabled by default for all new reports but turned off for existing reports.

This feature complements the read-only support in OData feature delivered earlier in the release. It's available for Business Central online only.

See also

Business Central and Power BI (docs)

Modern clients

Overview

Business Central offers an extensive portfolio of clients so that users can achieve more at their desks, at home, or on the go. With users across a diverse range of business roles and proficiency levels, and with local and accessibility needs, we are committed to make sure that the user interface is both intuitive to start with and powerful when needed.

Your voice matters: We assess feedback across numerous community channels at a regular cadence, and we run user studies. Based on this research, we have identified client enhancements for 2021 release wave 2.

Unhindered data entry across rows

Enabled for	Public preview	General availability
Users, automatically	✓Aug 9, 2021	✓Oct 1, 2021

Business value

Accelerate repetitive data entry through a reliable and predictable editing experience. Never lose a keystroke when correcting data across cells or when filling out data column by column, but still benefit from business rules that validate your input.

Feature details

Efficient typing experience

When you type data in any editable list, the Business Central web client no longer pauses while it processes the previously modified rows. By removing these boundaries, users enjoy a more lightweight and agile typing experience, similar to working in Excel.

Pages continue to validate all entered fields and rows in the sequence they were entered.

Related improvements

While this feature already provides a highly responsive experience in itself, data entry becomes even more efficient when combined with other features such as Quick Entry, focus mode on list parts, and various keyboard shortcuts. The 2021 release wave 2 also includes improvements to some related features that further enhance the typing experience:

- Using the F8 key to copy the value of the cell above now works more reliably due to data entry optimizations. The F8 key now also supports copying a true or false Boolean value from the cell above.
- With support for localized decimal separators on numeric keypads, typing currency amounts and other decimal values can be done efficiently with one hand. For information about changes to decimal separators, see Decimal separator on numeric keypad matches region setting.
- Cells that require a value and display the mandatory indicator will now display the indicator on all rows, providing added clarity to which fields must be filled in.

Try it out

Experience the fluid, Excel-like typing experience in editable lists on a sales order. To try it out, sign in to your online Business Central environment and create a new sales order, then type into the Lines section of the page.

See also

Viewing and Editing in Excel From Business Central (docs)

Usability improvements to the Business Central web client

Enabled for	Public preview	General availability
Users, automatically	✓Aug 10, 2021	✓Oct 1, 2021

Business value

With a growing and diverse workforce learning to use the web client (and using it to complete business tasks quickly and reliably), we are continuing to optimize the client for improved usability.

Feature details

When vertical screen space is reduced, the header along the top of the client automatically resizes to a compact, 8-pixel height, freeing up more space for data on the screen. This improvement is available only for Business Central online.

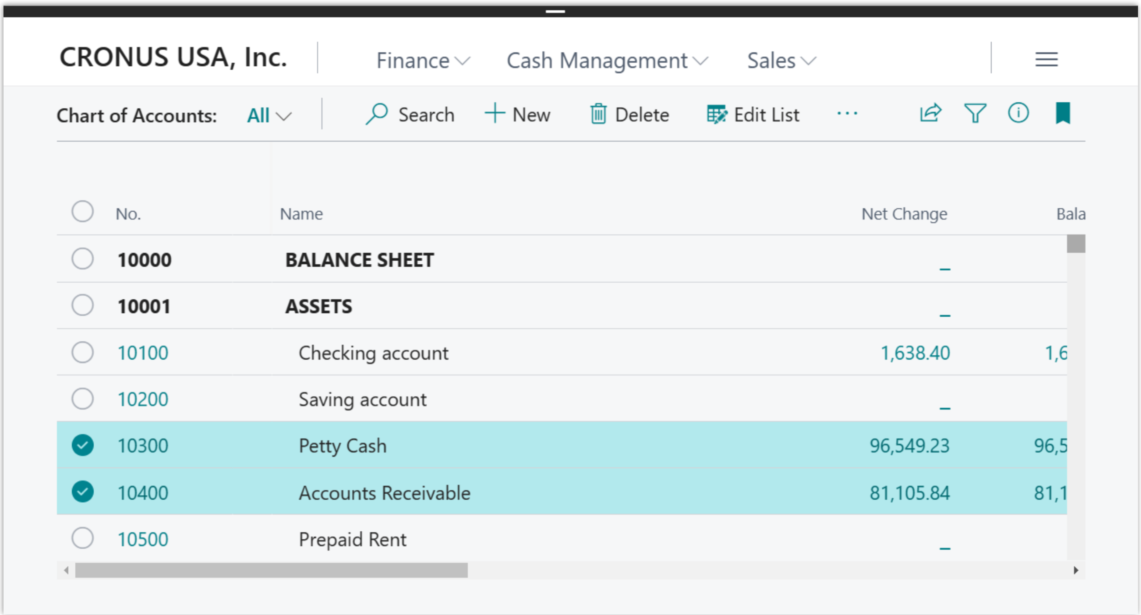


Illustration of the shy header.

When navigating submenus in the action and navigation bars, user interaction is more consistent and predictable in terms of hover and click behaviors.

When selecting multiple rows in a list, users can freely activate the context menu for any of the selected rows without losing row selection. Choosing any action from the row context menu continues to act upon that row, not the set of selected rows.

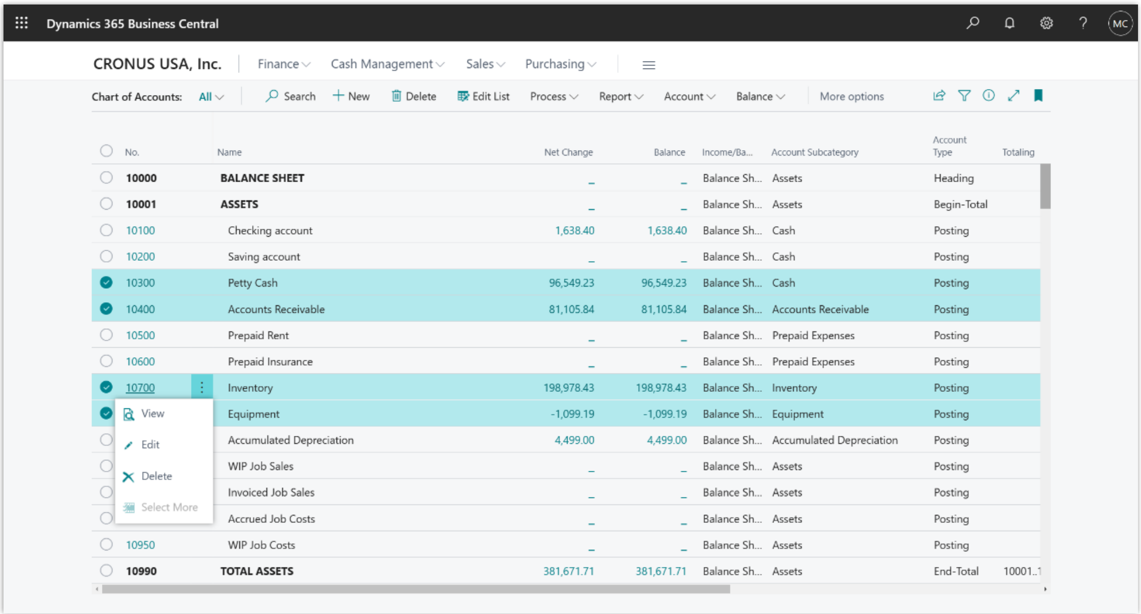


Illustration of a list showing multiple rows selected.

Additional accessibility improvements for mobile and tablet mode

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

Business Central works for everyone regardless of the device size, mode or conditions

Feature details

New improvements introduced in this release include font scaling, support of new and flexible screen sizes, non-text contrast improvements including new icons, and some general fixes.

This requires the updated version **3.4.xxxx** of the Business Central mobile app (iOS or Android) available in those respective app stores.

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.

Decimal separator on numeric keypad matches region setting

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

Business Central empowers users to work efficiently and save time when entering data in the web client. With support for different decimal separators on numeric keypads, a favorite among business accountants, currency amounts and other decimals can be typed quicker and more reliably.

Feature details

The 2021 release wave 2 adds support for the localization of the decimal and thousands separator key (typically a period or comma character) when entering numeric values in fields. Previously, on most non-US keyboards, using the "." or "," as a thousandths or decimal separator from the keyboard's numeric keypad didn't result in the correct separator in the Business Central web client. For example, a value of 123,456 got entered as 123.456.

With this release, this is no longer a problem: the decimal separator now matches that defined for your current region specified in the **My Settings** window in Business Central. Similar to working in Excel, the output of the decimal separator key is consistent across fields of any data type.

Enabling this feature ahead of time

This feature will be automatically enabled for all environments from *Update 20.0*, but administrators can enable it as early as *Update 19.0*. To enable features ahead of time, sign in to your online environment and open Feature Management.

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

Change Basic Settings (docs)

Discovering reports and administration areas in Role Explorer

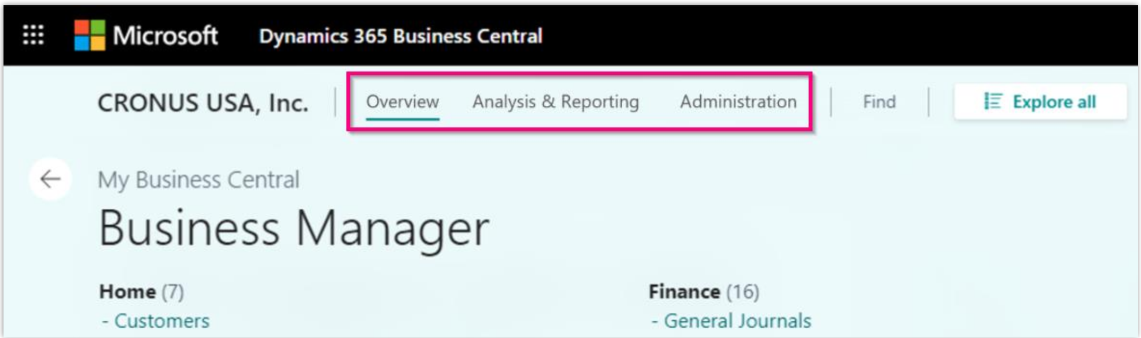
Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

With the addition of Role Explorer in a previous Business Central release wave, we made it extremely easy to browse, search, and simply explore pages within or outside of your role. Now, when exploring all roles, you can narrow your search to reports and data analysis areas only, which can help you discover information crucial for your business decisions. In the same way, you can narrow the exploration to just administrative tasks, which can help when you're setting up or configuring the system.

Feature details

The **Explore all** feature in Role Explore has been renamed to **Explore more roles** and enhanced with new, easy-to-discover controls that let you filter Role Explorer to show only reports or only administration areas. You can always switch back to get an overview of all pages again.



Shows the Analysis & Reporting and Administration actions in the Role Explorer for filtering.

This new feature works seamlessly, whether you're exploring all roles or diving deeper into one of them, using the Find option, expanding and collapsing content on the page, and so on. In short, it's smooth, easy, and ready to use.

See also

Finding Pages with the Role Explorer (docs)

Introduce updated desktop installable app

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

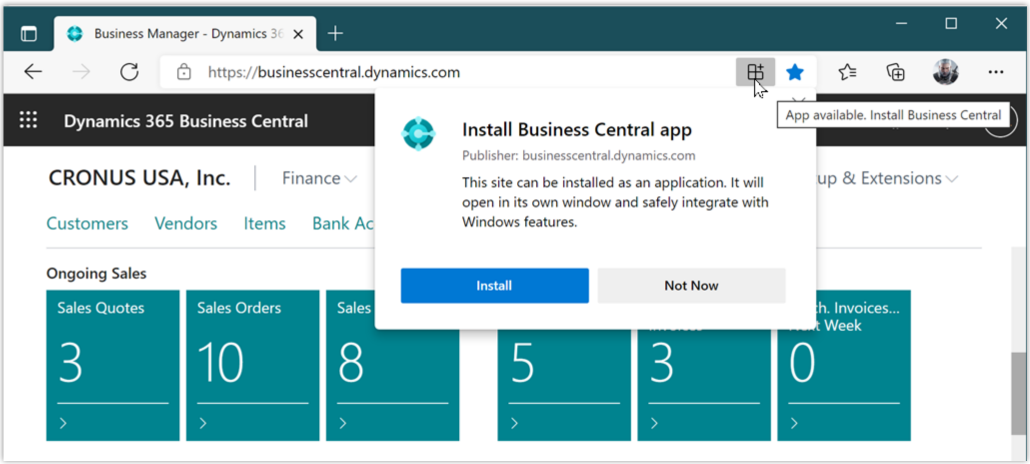
Business value

Accessing Business Central via the web browser is not always a fully desired option. Some customers prefer to have an installable app that can be pinned and opened with one simple click. Your organization may even want to limit access to the standard web browser and allow only certain applications to be run. While Business Central always had such an option on the desktop through an app from Microsoft Store (plus the technology discussed here has existed in preview for about a year), this version of the product delivers additional features and greater value. Consequently, it will be offered as a replacement of the legacy Windows app from Microsoft Store, which will require action to be taken at some point throughout this release wave.

Feature details

Modern browsers allow for installation of an app resembling a given website and Business Central is no exception here. This feature, based on the Progressive Web App technology, gives you an easy-to-access tile on your desktop that can be pinned to the Start menu or taskbar, or even launched as default when the system starts up.

To install Business Central as an app from the browser, select **Install** on the address bar or menu of your modern browser.



Install the Business Central app from your browser.

Note that certain browsers show the **Install** button in a slightly different way, and some may even start displaying a notification inviting you to install the app. When you are ready, just follow the easy steps and install the new app.

When the app is run, Business Central is launched in its own window, independent of any browser windows, making it easier to find when running many apps or browser tabs. If you're working across multiple Business Central windows or multitasking, each window is displayed separately. Also, when working with several named environments, the name is added to the window's title so it's easy to see which window is associated with an environment.

Additional notes

- This new way of using Business Central via an app has no specific known limitations from the legacy ("universal") Windows app from Microsoft Store. For instance, there's no limitation to printing, multitasking, multiple environments, zooming the screen or accessing the page URL for sharing. This new app also offers faster and smoother rendering on screen, with no performance differences from running Business Central in the modern browser.
- The app no longer requires you to run any local app updates because it updates automatically whenever your Business Central environment is updated. It is simply a seamless experience both to run and maintain the app.
- The app installation also works with the environment selection page for Business Central cloud installations, when you have multiple environments. In this case, you can choose to

either install the app from the environment selection page or after you've selected an environment.

- When you install the app from the environment selection page, launching the app later will always lead you to the environment selection page.
- When you install the app after selecting the environment, launching the app will open the selected environment directly. This option lets you install several apps, one for each environment (production or sandbox). The environment name is added to the app title in the Start menu.
- When running Microsoft Edge or Chrome browser on a Mac computer, you also have the option to install Business Central on your MacOS computer.
- Installing the app also works for on-premises deployments of Business Central that are upgraded to 2021 release wave 2 (version 19 or above). But in this case, you are always tied to a selected single tenant, so you can't install several apps from different tenants.

Path going forward

- Throughout the 2021 release wave 2, the new app experience will be offered to all customers. At the same time, the legacy Windows app in Microsoft Store will be replaced.
- Customers running earlier versions of Business Central on-premises will continue to be able to use the legacy Windows app, but only to connect to their on-premises Business Central installations.
- For Business Central cloud customers, we will offer a new listing in Microsoft Store that leads to the new app discussed in this article. This new offering will remove need for using a browser to install the app in the first place. You will be able to install the new app from Microsoft Store and connect to your cloud Business Central.
- Consequently, for some time there might be two versions of the Business Central app listed in Microsoft Store: the new app for cloud customers and the legacy app for on-premises. The legacy app will eventually be removed from the Microsoft Store listings in 2022. On-premises customers using 2021 release wave 2 or later will still have the option to install the app from their browser.
- The new experience we're launching in 2021 release wave 2 will eventually become the default installable app for Windows.

For more information about PWA technology, see [Progressive Web Apps overview](#).

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

[Get Business Central Desktop App](#) (docs)

Open a file in OneDrive to view and share reports from Report Inbox and Attachments

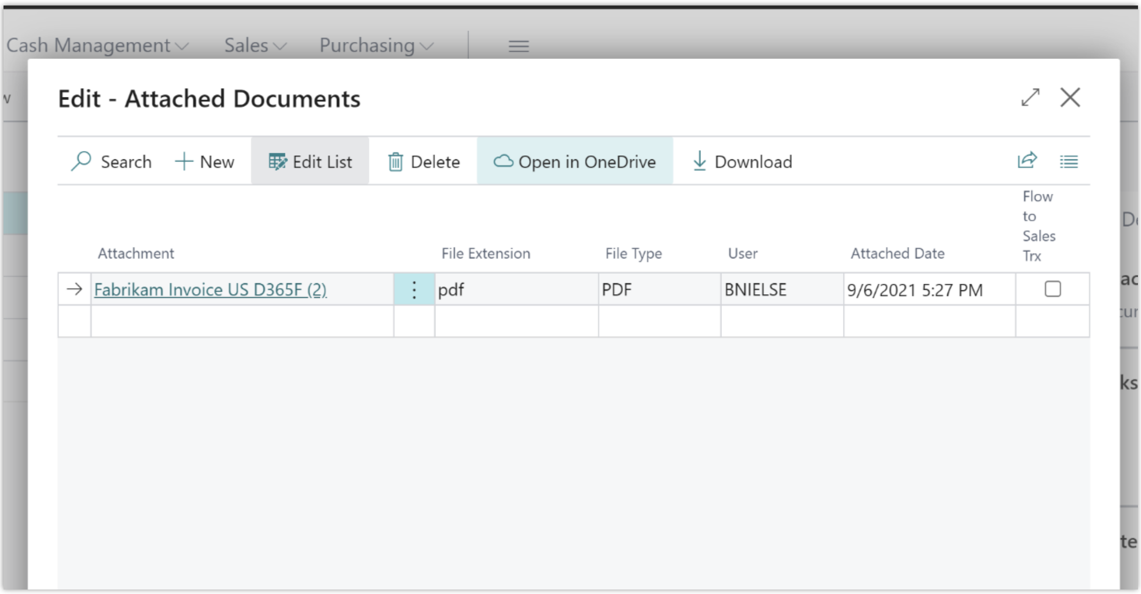
Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2021	✔ Oct 1, 2021

Business value

Businesses often need to send reports to multiple recipients. Business Central now makes it easy to share reports from the Report Inbox and document attachments through OneDrive for Business.

Feature details

To view either a report from the Report Inbox or to open an attachment in the browser, you can now choose the **Open In OneDrive** action. This action copies the file from Business Central to **OneDrive for Business**, then opens the file using the online applications for Excel, Word, and PowerPoint, or with OneDrive's file viewer for all other files, such as PDFs.



Open in OneDrive from Attachments.

Want to try it out now? To experience viewing an attachment in the browser, [sign in to your Business Central online, open a sales order](), and then choose **Attachments** from the **Order** menu.

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

Better together with Microsoft 365 and Dynamics 365 Business Central (video)

Business Central and OneDrive for Business Integration (docs)

Refreshed peek experience on related records

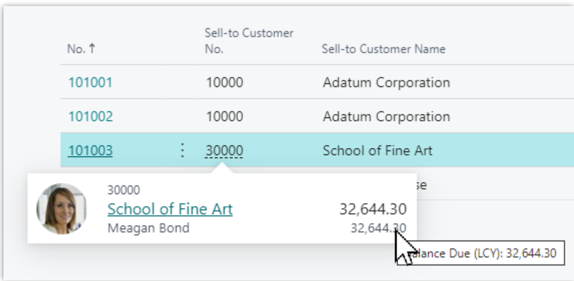
Enabled for	Public preview	General availability
Users, automatically	✓ Sep 1, 2021	✓ Oct 1, 2021

Business value

Access to essential information is key for every information worker and decision maker. With this change, you get a nice peek preview of a related record.

Feature details

The peek preview of a related record has been refreshed to use a less disruptive dotted underline indicator and a new layout taken from the tiles definition.



New peek user experience in Business Central.

When you open the peek preview of a record that has its own card page, you can open the card page by selecting the linked record name (in the example above, the link is on the customer name). You can also use the keyboard to navigate around and use the Enter key to open both the peek preview and the card page.

NOTE If a given record doesn't have a card page associated with it, you'll be given just the simple peek preview with a way to see all available details of the record at a glance.

This feature is based on the TableRelation property and the tiles definition. It also builds on top of the previous released feature as described in Show and go to related records from a list.

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

Working with Business Central (docs)

Search from the Help pane

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 6, 2021	✔ Oct 1, 2021

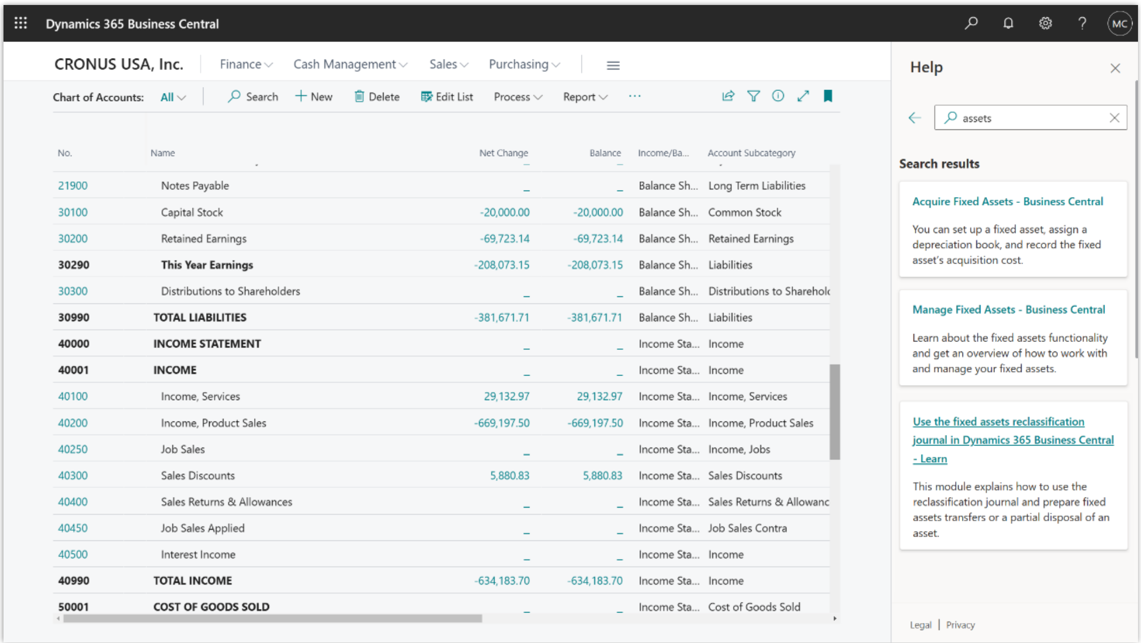
Business value

When users need that next level of assistance with Business Central, the Help pane provides a familiar in-app experience where users can discover useful links, troubleshooting guides, helpful documentation articles, and online learning material, right from within Business Central.

Users of all skill levels can now get quicker access to understanding key concepts, processes and functions, allowing them to get to productive usage faster.

Feature details

Refreshed help pane



A screenshot of the updated Help pane displaying search results for the Assets topic.

- Similar to many Office and Dynamics 365 applications, the Business Central Help pane now includes a search box that can help you find additional content.
- Search results include Business Central documentation articles from Microsoft, covering topics such as how to set up and use business functionality, work with Office

applications, tips for working efficiently, troubleshooting, frequently asked questions, and many more found at the Business Central documentation overview page.

- Search results also include content from our Microsoft Learn content library, offering self-paced, online learning paths that are tailored to various roles and skill levels. See all Microsoft Learn content for Business Central.
- The pane remains open even while you navigate through Business Central so that content you searched for remains visible.
- Contextual help documentation for the current page or report remains available from the Help and Support screen.

The Help pane is only available to Business Central online users.

Try it now

To experience the updated Help pane, sign in to your online Business Central environment, then choose the question mark icon in the header.

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

Resources for Help and Support (docs)

Share a Business Central report or attachment

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

Business value

Sharing reports or attachments is an integral part of doing business. You share content internally with colleagues to get tasks done or to review work. And you share with external parties to keep them informed, such as a set of financial reports that you share with the board of directors.

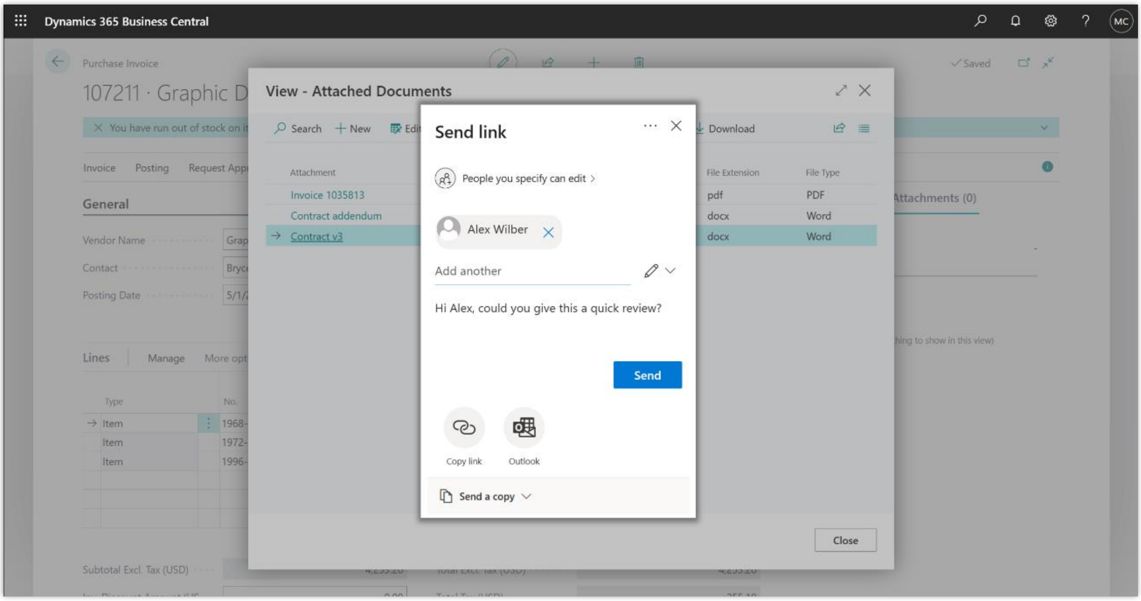
Feature details

Sharing can come in different formats depending on the content and the audience that you share with. Either you share a printout, send an email, or maybe you grant access to a shared report online.

The new **Share** option in Business Central allows you to do all of the above. By integrating with Microsoft 365 capabilities for file sharing, users benefit from a rich and familiar experience that is connected to the administrative controls in the Microsoft 365 admin center.

So now you can send a link to a report, print it from OneDrive, where you store it online for future reference, or even send an email to multiple recipients with a PDF report if that's needed.

In order to share a report from the Report Inbox, or to share an attachment, users can choose the new **Share** action. This copies the file from Business Central to their **OneDrive for Business**, then displays the standard Microsoft 365 file sharing window directly within Business Central. Users can now share a link with others, email a link, or attach a copy of the file to an email, and decide whether recipients get view or edit access.



Opening the Share page from Attachments.

Find the **Report Inbox** on your home page in Business Central, or by opening the page from the in-product search. Find the **Attachments** action on card pages such as *Customer*, *Vendor*, *Contact*, as well as on various documents. The **Incoming Documents** capability will also have this new action available.

Onboarding

Overview

Business Central 2021 release wave 2 brings continued improvements to the onboarding experience for Business Central. We add more teaching tips, building on the framework that was introduced in 2021 release wave 1. We improve the checklist experience to add support for business process tours, and we enhance the framework to add support for partners and ISVs to automate the onboarding for their specific solutions.

Expanded coverage of in-app tours to more controls

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Sep 1, 2021	✓ Oct 1, 2021

Business value

This allows partners to educate the customers about using Business Central, by using the enhanced capabilities for tour authoring.

Feature details

Starting in 2021 release wave 1, you can define in-app tours in AL code. In 2021 release wave 2, we're expanding the coverage of the AL-driven tours to cover more types of controls. Specifically, we add support for displaying teaching tips for controls in FactBoxes.

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.

OData callers can specify read-only intent in GET requests

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✓ Oct 1, 2021

Business value

Integrations that query data using OData can indicate a read-only intent to read data from a secondary database replica.

Feature details

Integrations that consume data through OData from Business Central can indicate a read-only intent to use a read-only database replica. Indicating read-only intent is done by setting a request header on the OData call.

This will offload read-only queries from the primary database and give more read capacity for integrations that read large amounts of data.

Replicas are always in the transactionally consistent state, but at different points in time there may be some small latency between different replicas.

See also

OData Services Settings (docs)

Job queue entries are more resilient toward failures

Enabled for	Public preview	General availability
Users, automatically	✓Oct 1, 2021	✓Oct 1, 2021

Business value

Users can schedule a job to run later and be sure that it will be run by Business Central.

If the job has an error, users will be notified about the error in telemetry, so they can take an action.

Feature details

A job queue task can be interrupted for many reasons, like a per-tenant extension upgrade, SQL connection instabilities, external service timeout, locks, and so on.

Before, when an exception occurred running a job queue entry, the failure codeunit would run immediately in the same session. But in some cases, this session could be unusable, so the failure codeunit couldn't run.

In this release, we have added the following features:

- New exception logic handling for the task scheduler/job queue.
- A failure code unit runs immediately in a different session. If it fails and the exception is retriable, it's scheduled to run again later. It will continue to be rerun until it succeeds or it reaches the maximum number of attempts allowed.
- Job queue uses the new task scheduler implementation.

See also

Job Queue (docs)

Performance – partial records on list pages

Enabled for	Public preview	General availability
Users, automatically	✓Oct 1, 2021	✓Oct 1, 2021

Business value

List pages now load faster.

Feature details

The Business Central server service now uses the performance feature *partial records* on list pages. This means the server will read only those fields that are shown in the list page from the database.

The performance improvements will depend on the following conditions:

- How much data exists in the table that's referenced in the lookup page and how that table is indexed.
- How many table extensions exist on the table that's referenced in the lookup page.

See also

Using Partial Records (docs)

Performance – partial records on TableRelation lookup pages

Enabled for	Public preview	General availability
Users, automatically	✔Oct 1, 2021	✔Oct 1, 2021

Business value

TableRelation lookup pages are now much faster.

Feature details

The Business Central server service now uses the performance feature *partial records* on TableRelation lookup pages. This means the server will read only those fields shown in the TableRelation lookup page from the database.

The performance improvements will depend on the following conditions:

- How much data exists in the table that's referenced in the lookup page and how that table is indexed.
- How many table extensions exist on the table that's referenced in the lookup page.

See also

Using Partial Records (docs)

Protect the Business Central Server against excessive background sessions for an environment

Enabled for	Public preview	General availability
Users, automatically	✔Oct 1, 2021	✔Oct 1, 2021

Business value

Having a system protection limit on the creation of sessions started from AL code will make the Business Central Server and service more stable. Cases where one environment starts a lot of sessions won't affect the stability of other environments running on the same server (or even the environment that started the sessions).

Feature details

The Business Central Server can process multiple background sessions simultaneously. Similar to child sessions, the Business Central Server is protected against an excessive number of background sessions for an environment. Excess background sessions can be sent to a queue for processing when a time slot becomes available. To control the background sessions, the Business Central Server now includes the following configuration settings, which are set on a per-environment basis:

- The maximum number of background sessions that the server instance can actively process at the same time.
- The maximum number of background sessions that can be waiting in the queue for processing.
- The maximum amount of time that background sessions will wait in the queue for processing.

See also

Asynchronous Processing Settings (docs)

Signal about the usage of read scale-out in reports added to Application Insights telemetry

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Nov 15, 2021

Business value

Tenant admins can use telemetry to verify if they are using the performance feature "Read scale-out" on their reports.

Feature details

The Business Central server will emit telemetry about the usage of read scale-out in reports.

For a report that doesn't use read scale-out, the tenant admin can decide to switch this signal on if they want better performance and fewer locks.

Internal and partner administrators can use this data to monitor performance improvements of relevant environments.

Connected Spaces

Overview of Dynamics 365 Connected Spaces 2021 release wave 2

Dynamics 365 Connected Spaces (previously Dynamics 365 Connected Store) is a turnkey software as a service (SaaS) solution that gathers and analyzes observational signals from physical spaces.

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 analytics 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.

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 an analytics dashboard.
- **Prebuilt AI models**: Out-of-the-box and ready to use AI models that apply computer vision and AI to a physical space.

What's new and planned for Dynamics 365 Connected Spaces

This topic lists features that are planned to release from October 2021 through March 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.

Redesigned and improved web experience

The Connected Spaces user interface has been updated to be a web-based experience. This provides an improved user experience for configuring and drawing business skills, viewing data and insights in the dashboards, and overall navigation and usage.

Feature	Enabled for	Public preview	General availability
Updated unified user interface across mobile and web	Users, automatically	✓ Dec 3, 2021	-

Store analytics

Provides insights and trend information about store analytics.

Feature	Enabled for	Public preview	General availability
Display effectiveness analytics	Users, automatically	✓ Dec 3, 2021	-
Queue management analytics	Users, automatically	✓ Dec 3, 2021	-
Shopper analytics	Users, automatically	✓ Dec 3, 2021	-

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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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.

Redesigned and improved web experience

Overview

The Connected Spaces user interface has been updated to be a web-based experience.

The improved experience provides the following benefits for store managers:

- **Configure cameras and draw camera skill zones**: You can use the web app on larger screens, which makes it easier to configure cameras and draw camera skill zones.
- **Dashboards**: Get just the data view that you need by filtering by date, skill type, or skill name.
- **Improved navigation**: The new left navigation provides access to cameras, camera skills, analytics, and settings with a single click.
- **Accessibility**: Improved accessibility makes Connected Spaces easier for all users across supported browsers.

Updated unified user interface across mobile and web

Enabled for	Public preview	General availability
Users, automatically	✓ Dec 3, 2021	-

Business value

The unified interface across mobile and web will provide a consistent user experience. Interface updates include improved accessibility, step-by-step wizards, and an improved dashboard interface (ability to filter by skill type and skill name).

Feature details

With the updated web app, users will be able to:

- Access, configure, and get insights for their Connected Spaces from almost any browser on any device.
- Use step-by-step wizards to connect cameras and set up camera skills. The wizards provide help and best-practice information.
- Filter by skill type and skill name in dashboards.

The updated web app also includes accessibility improvements.

See also

Overview of Dynamics 365 Connected Spaces (docs)

Store analytics

Overview

Connected Spaces provides store analytics and trend information for business decision makers and store supervisors. Store analytics includes:

- **Shopper analytics**: Understand foot traffic patterns for a particular store.
- **Display effectiveness**: Understand display effectiveness and engagement across all store displays.
- **Queue management**: Keep on top of cashier queue lengths and dwell times to make better real-time staffing decisions.

Display effectiveness analytics

Enabled for	Public preview	General availability
Users, automatically	✔ Dec 3, 2021	-

Business value

Enables business decision makers to:

- Determine and measure the effectiveness of displays and promotions within the store.
- Do A/B testing to find the best location to place products by measuring engagement.

Feature details

The display effectiveness analytics feature provides insights around the display/promotion effectiveness of various display zones (configured by the store manager) and their performance relative to each other.

This feature helps the store manager determine the effectiveness of displays by answering questions such as:

- How many people visited the display?
- How long, on average, did visitors dwell?
- From what direction (side of display zone) did visitors enter or exit the display zone?
- Which are the most and least busy displays?
- Which are the most and least engaging displays?
- What are display engagement trends?

See also

Use the Analytics page in Dynamics 365 Connected Spaces Preview to get insights on your store (docs)

Queue management analytics

Enabled for	Public preview	General availability
Users, automatically	✓ Dec 3, 2021	-

Business value

Enables business decision makers to:

- Determine cashier queue lengths and wait times.
- Make informed decisions on employee shift management.
- Help improve customer experience by reducing wait times.
- Improve revenues by minimizing queue abandonment.

Feature details

The queue management analytics feature includes insights around queue lengths and wait times (configured by the store manager) and their performance relative to each other.

Queue management includes insights that help you do the following:

- Identify the longest and shortest queue length.
- Identify the slowest and fastest queue times with respect to the average queue time for all queues.
- Visualize queue length and queue time trends for the longest and slowest queues.
- Sort through a list of all store queues configured for insights according to queue name, longest and shortest queue values, and fastest and slowest queue times for the selected time range.

See also

Use the Analytics page in Dynamics 365 Connected Spaces Preview to get insights on your store (docs)

Shopper analytics

Enabled for	Public preview	General availability
Users, automatically	✓ Dec 3, 2021	-

Business value

Enables business decision makers to plan for shift management and inventory based on foot traffic patterns.

Feature details

Shopper analytics (previously called "store traffic analytics") includes out-of-the box AI models and insights related to entry trends, patterns, changes, anomalies at store entries and exits, and over-capacity determined by configurable thresholds. The easy-to-use dashboards also enable you to explore how many people visited the store during a given timeframe, categorized by entrance with drill-down capabilities. Using these features, business decision makers will be able to plan for shift management and inventory based on foot traffic patterns at various locations in a store.

The following are some of the key insights provided by this feature:

- Store entries
- Busiest day
- Least-busy day
- Busiest entrance
- Least-busy entrance
- Over-capacity indicators
- Foot traffic trends

See also

Use the Analytics page in Dynamics 365 Connected Spaces Preview to get insights on your store (docs)

Guides

Overview of Dynamics 365 Guides 2021 release wave 2

Microsoft Dynamics 365 Guides is a mixed-reality application that displays step-by-step holographic instructions right where the work happens, enabling employees to quickly learn and execute complex tasks.

Dynamics 365 Guides:

- Helps reduce errors and increase safety.
- Closes knowledge gaps and strengthens skills.
- Adapts to your work in real time.
- Improves training and processes.

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 October 2021 through March 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
Make calls directly from the Dynamics 365 Guides HoloLens app	Admins, makers, marketers, or analysts, automatically	✔ Nov 9, 2021	
Ability to create very long guides	Users, automatically	-	✔ Nov 9, 2021

Feature	Enabled for	Public preview	General availability
Touch menu for moving between activities and navigating lists of information	Admins, makers, marketers, or analysts, automatically	-	✓ Nov 9, 2021

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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Make calls directly from the Dynamics 365 Guides HoloLens app

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓ Nov 9, 2021	-

Business value

The ability to make calls and collaborate with a remote expert while using a guide makes shared-view collaboration scenarios possible. New scenarios include:

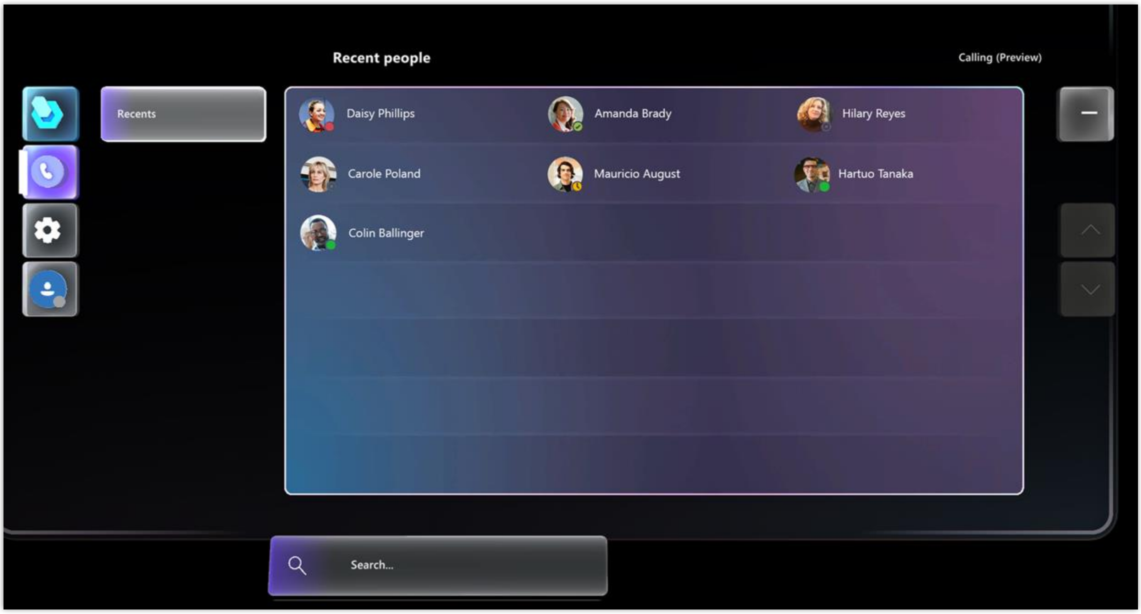
- **Live guide demos**: Guide a new hire through their job process.
- **Inspections**: Get approval from a remote expert for the task at hand.
- **Collaborative authoring**: Call an expert to discuss creating steps in 3D in real time.
- **Support calls and collaboration**: Share perspective and troubleshoot issues.

Feature details

To start a call, users simply raise their hand to access the new Main menu touch interface, select the **Call activity** button, and then select a recent contact. To call anyone in their active directory, they can select the **Search** button and enter a name or email address in the holographic keyboard. The new Main menu makes it very easy for users to start a call before or after starting a guide.

A Microsoft Teams license is required for the HoloLens user to make an outgoing call. For this release, only outgoing calls from the HoloLens user are supported and only one-to-one calling is supported.

Admins can disable calling if authors and operators don't need to make calls or if the organization wants to restrict sharing of HoloLens content.



Making a call from the Dynamics 365 Guides HoloLens app.

See also

Make calls directly with Dynamics 365 Guides (video)

Make a call (Preview) from the Dynamics 365 Guides HoloLens app (docs)

Ability to create very long guides

Enabled for	Public preview	General availability
Users, automatically	-	✔ Nov 9, 2021

Business value

In previous versions of Dynamics 365 Guides, there was a limit to the overall complexity of a guide, which prevented content from being displayed in later steps of a long guide. This feature removes the overall guide complexity limit. As long as each step fits within the step memory limits, there's no restriction on the total length of the guide.

Feature details

In previous versions of Dynamics 365 Guides, if a guide had many complex steps (steps that included many 3D models, for example), content in subsequent steps of the guide wouldn't be displayed. This feature changes the complexity limit from "per guide" to "per step" so that content for later steps in a long guide is always displayed. The correct step content is also displayed regardless of the step order that the user follows. For example, if the user goes to a complex step, and then goes back to an earlier step, all step content is displayed correctly.

When authoring a guide, the author sees a warning if the step that they're editing is too complex and will likely cause a degraded experience for operators. If the author continues to add 3D models and the step reaches its memory limit, the author sees a "content failed to load" message. Any 3D models placed at that point will be displayed as an error icon so that the author can take corrective action.

See also

Memory constraints when adding 3D models (docs)

Touch menu for moving between activities and navigating lists of information

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 9, 2021

Business value

Instinctual touch interactions in the HoloLens app make it much easier and more intuitive to use the HoloLens app. For example, users can find and open a guide very quickly. They can use the same intuitive touch interface to start a call and consult with a remote collaborator while working with a guide.

Feature details

When a user raises their hand and looks at their palm, a new touch menu (Main menu) appears that expedites opening a guide or starting a call. The Main menu doesn't follow users around in their environment, which helps avoid holographic clutter, but users can summon the Main menu very quickly by looking at the palm of their hand again.

Other touch-first screens include:

- Sign in
- Select an instance
- Select a guide or a contact
- Select a guide mode (Author or Operate)

- Start or end a call
- Active call window
- Settings
- Profile (sign out)

Main menu with buttons for opening a guide, starting a call, changing a setting, or signing out.

See also

Use the Main menu in Dynamics 365 Guides to start an activity (docs)

Remote Assist

Overview of Dynamics 365 Remote Assist 2021 release wave 2

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 focused on these three key scenarios for 2021 release wave 2:

- **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 October 2021 through March 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
Accuracy improvements for mixed-reality annotations on mobile	Users, automatically	-	✔ Oct 4, 2021

Feature	Enabled for	Public preview	General availability
One-time-call users can open files shared with them	Admins, makers, marketers, or analysts, automatically	-	✔ Oct 4, 2021
Support for a subset of Microsoft Teams policies	Admins, makers, marketers, or analysts, automatically	-	✔ Oct 4, 2021
Support for spotlight and pinning for Dynamics 365 Remote Assist video feed on Microsoft Teams desktop	Users, automatically	-	✔ Oct 4, 2021
Improvement to incoming call notifications on Android	Admins, makers, marketers, or analysts, automatically	-	Mar 2022

Description of **Enabled for** column values:

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Accuracy improvements for mixed-reality annotations on mobile

Enabled for	Public preview	General availability
Users, automatically	-	✔ Oct 4, 2021

Business value

Annotations are a core piece of the Dynamics 365 Remote Assist functionality because they enable technicians and remote collaborators to easily specify an area or particular asset to look at or manipulate, rather than trying to verbally convey this information to an inexperienced technician. Improved annotation accuracy will allow users to better communicate through the Dynamics 365 Remote Assist mobile experience.

Feature details

Dynamics 365 Remote Assist on mobile will take advantage of the new Depth API on Android as well as the LiDAR sensor available on certain iOS devices. This will result in significantly improved location accuracy for annotations.

One-time-call users can open files shared with them

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Oct 4, 2021

Business value

This feature enables file sharing with one-time-call users. Having the ability to share access to critical information reduces friction and enables quicker problem resolution.

Feature details

This feature enables a Dynamics 365 Remote Assist user to share files with a user who doesn't have a Dynamics 365 Remote Assist license.

To share a file with a one-time-call user, the Dynamics 365 Remote Assist user must select the "Anyone" option when sharing the file with SharePoint and OneDrive. Learn how to manage organization-level sharing.

See also

Invite a user to join a one-time call in Dynamics 365 Remote Assist (docs)

Support for a subset of Microsoft Teams policies

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Oct 4, 2021

Business value

Dynamics 365 Remote Assist users participating in a Microsoft Teams meeting or call will be subject to the same policies as any other Teams user, which will make it easier to set up policies and to ensure compliance for customer meetings.

Feature details

When Microsoft Teams admins set up certain policies, the policies will automatically cascade to Dynamics 365 Remote Assist. This applies to policies about the following features:

- Ability to start a meeting recording
- Ability to send a text chat
- Ability to enable the video camera

For example, if the ability to start a meeting recording has been disabled through the associated policy for a Teams user, that feature will also be disabled for that user in Dynamics 365 Remote Assist.

See also

Microsoft Teams policies supported by Dynamics 365 Remote Assist (docs)

Support for spotlight and pinning for Dynamics 365 Remote Assist video feed on Microsoft Teams desktop

Enabled for	Public preview	General availability
Users, automatically	-	✔ Oct 4, 2021

Business value

Customers can use these features to ensure that the Dynamics 365 Remote Assist video feed is on the biggest part of the screen during meetings or calls. This makes it easier to watch videos and record details for the remote collaboration session.

Feature details

When a user of Dynamics 365 Remote Assist joins a meeting or participates in a call, Microsoft Teams desktop users can take advantage of the spotlight and pinning features to keep the Dynamics 365 Remote Assist user video feed on the main stage. To access these features, users right-click the video feed of the meeting or call participant.

Improvement to incoming call notifications on Android

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

Business value

Customers using Android devices can now manage Microsoft Teams mobile and Dynamics 365 Remote Assist mobile notifications so they do not conflict with each other, which improves the user experience.

Feature details

Customers using Android devices that have both Microsoft Teams mobile and Dynamics 365 Remote Assist mobile installed can adjust their settings to ensure only the appropriate application sends incoming call notifications.

When both Microsoft Teams mobile and Dynamics 365 Remote Assist mobile notifications are enabled, Microsoft Teams mobile will take priority; no Dynamics 365 Remote Assist incoming call notifications will appear. When Microsoft Teams mobile notifications are disabled, Dynamics 365 Remote Assist will send incoming call notifications if enabled in the app settings.

Customer Insights

Overview of audience insights 2021 release wave 2

Audience insights in Dynamics 365 Customer Insights enables every organization to unify and understand its B2C and B2B customer data to harness it for intelligent insights and actions.

Eliminate data silos and unify customer data

- Use connectors to ingest and unify data, bringing in transactional, observational, and behavioral data from various data sources.
- Transform customer data to build a unified customer profile conforming to Common Data Model.

Enrich customer profiles

- Create richer customer profiles by incorporating aggregated audience intelligence from first-party and third-party enrichments.

Enable powerful AI and insights

- Derive insights about your business using capabilities like segments and measures that are built on top of unified profiles.
- Accelerate business processes with out-of-the-box AI models or custom algorithms using Azure Machine Learning.

Extend business processes and personalize customer experiences

- Enable marketing, sales, and service professionals to drive personalized engagements across channels.
- Work with contextual customer insights and tailored customer profile cards that integrate with Microsoft and non-Microsoft business applications.
- Build on existing connectors, a variety of APIs, and Microsoft Power Platform to enable and extend line-of-business experiences.

What's new and planned for audience insights

This topic lists features that are planned to release from October 2021 through March 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.

Activities

This section lists changes to activities in Customer Insights.

Feature	Enabled for	Public preview	General availability
Intelligent mapping for semantic activity types	Users by admins, makers, or analysts	Jan 2022	

B2B

This section covers capabilities around account records and organization profiles.

Feature	Enabled for	Public preview	General availability
Predict churn in B2B scenarios	Users by admins, makers, or analysts	✔Oct 1, 2021	
Segments in B2B scenarios	Users by admins, makers, or analysts	✔Oct 1, 2021	-
Shared environment for B2B and B2C customer profiles	Users by admins, makers, or analysts	✔Oct 1, 2021	
Support existing account hierarchies	Users by admins, makers, or analysts	✔Oct 1, 2021	
Company name normalization	Users by admins, makers, or analysts	✔Nov 30, 2021	-
Insights and unified profiles for accounts and contacts	Users by admins, makers, or analysts	Mar 2022	-
Measures in B2B scenarios	Users by admins, makers, or analysts	✔Oct 1, 2021	✔Oct 1, 2021
Relationships between account and contact entities	Users by admins, makers, or analysts	✔Oct 18, 2021	✔Nov 30, 2021
Activities for accounts and contacts	Users by admins, makers, or analysts	✔Oct 1, 2021	Mar 2022

Data ingestion

This section lists updates to the data ingestion capabilities in audience insights.

Feature	Enabled for	Public preview	General availability
Additional Power Query connectors	Users by admins, makers, or analysts	Jan 2022	
Support in-lake transforms on attached entities	Users by admins, makers, or analysts	Jan 2022	

Data unification

This section lists updates to the data unification scenarios in audience insights.

Feature	Enabled for	Public preview	General availability
Conflict resolution policies for attributes	Users by admins, makers, or analysts	Dec 2021	
Match rules extension	Users by admins, makers, or analysts	Dec 2021	
Custom normalizations	Users by admins, makers, or analysts	Jan 2022	

Enrichment

This section lists updates to the data enrichment enhancements in audience insights.

Feature	Enabled for	Public preview	General availability
B2B scenarios for enrichments and exports	Users by admins, makers, or analysts	✔ Oct 31, 2021	
Share of voice for brands and interests	Users by admins, makers, or analysts	✔ Nov 30, 2021	
Enrich addresses in your data sources	Users by admins, makers, or analysts	Jan 2022	

Extensibility

This section lists updates to the extensibility scenarios in audience insights.

Feature	Enabled for	Public preview	General availability
Extend and improve activations into third-party systems	Users by admins, makers, or analysts	Mar 2022	
Improve activation scenarios for Microsoft services	Users by admins, makers, or analysts	Mar 2022	
More activation options with Microsoft services	Users by admins, makers, or analysts	Mar 2022	
More integrations with third-party services	Users by admins, makers, or analysts	Mar 2022	

Intelligence

This section lists updates to the intelligence scenarios in audience insights.

Feature	Enabled for	Public preview	General availability
Semantic mapping of contact data	Users by admins, makers, or analysts	✓Oct 31, 2021	
Consent data in audience insights	Users by admins, makers, or analysts	✓Nov 1, 2021	-
Consent rules in audience insights	Users by admins, makers, or analysts	✓Nov 1, 2021	-
Seamless application of consent data to business processes in audience insights	Users by admins, makers, or analysts	✓Nov 1, 2021	-
AI model for customer satisfaction	Users by admins, makers, or analysts	Dec 2021	
Improvements to prediction models	Users by admins, makers, or analysts	Feb 2022	

Feature	Enabled for	Public preview	General availability
Allow customer profile data as an input to out-of-box AI models	Users by admins, makers, or analysts	Mar 2022	

System administration

This section lists planned changes to the admin area.

Feature	Enabled for	Public preview	General availability
Environment management updates	Users by admins, makers, or analysts	✔ Nov 30, 2021	

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Activities

Overview

Activity enhancement includes improvements such as additional semantic types and intelligent semantic mapping.

Intelligent mapping for semantic activity types

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

Business value

Speed up the process of configuring semantic activity types with AI-based mapping suggestions. Reduce the time needed to generate insights for your business in other areas of audience insights.

Feature details

After selecting a semantic activity type, AI helps to automatically map activity data attributes to predefined schemas. This feature enables you to create semantic activities that can be used in other areas, such as segments, measures, and predictions.

B2B

Overview

Get more actionable insights for organizations and accounts from Dynamics 365 model-driven apps.

Predict churn in B2B scenarios

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 1, 2021	-

Business value

Proactively analyze customers to prevent potential churn and eliminate related customer acquisition cost.

Feature details

In B2B scenarios, customers are business organizations and organized as accounts with individual organization reps as related contacts. In addition to churn predictions for individual customer records, audience insights predicts the likelihood of churn for accounts and provides the same straightforward guided experience.

See also

Transaction churn prediction (docs)

Segments in B2B scenarios

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 1, 2021	-

Business value

Create custom segments to generate insights and make well-informed business decisions.

Feature details

As part of enabling B2B customers, the segmentation capability in audience insights supports the B2B scenarios of accounts and contacts for these business accounts. It also respects any existing hierarchical relationships between accounts and contacts. This feature includes changes to the segment builder and the general workflows to create, manage, and schedule segments in audience insights.

See also

[Create segments](#) (docs)

Shared environment for B2B and B2C customer profiles

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 1, 2021	-

Business value

Ingest and work with B2B profiles (accounts and contacts) and B2C profiles (individual customers) in the same logical environment of audience insights.

Feature details

B2B and B2C data still have separate areas to store data. Users can easily go back and forth between their primary target audiences for their B2B and B2C scenarios.

See also

[Work with business accounts in audience insights](#) (docs)

Support existing account hierarchies

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 1, 2021	-

Business value

Consolidate insights based on an existing account hierarchy.

Feature details

This feature enables users to consolidate insights based on an existing account hierarchy. Use an existing account hierarchy from other business apps to generate additional insights—for example, through segments and measures based on unified account profiles.

See also

Set up account hierarchies (docs)

Company name normalization

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Nov 30, 2021	-

Business value

Increase the quality of generated insights by improving the quality of account unification.

Feature details

Audience insights lets you use algorithms to normalize company names. The normalization uses models based on machine learning and AI to improve qualitative data unification capabilities. Normalized company names are also used by other system processes in B2B scenarios.

See also

Enrichment of company profiles with enhanced company data (docs)

Insights and unified profiles for accounts and contacts

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

Business value

Complement unified account profiles with unified contact profiles to get a full 360-degree customer view spanning both accounts and their contacts.

Feature details

Create unified profiles and insights for organizations and individuals and switch between them to get a holistic view of accounts and contacts. The combined view shows segments, measures, activities, and more.

Measures in B2B scenarios

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Oct 1, 2021	✓ Oct 1, 2021

Business value

You can easily aggregate data of subaccounts—revenue, for example—into that on the top of the selected hierarchy when calculating a measure.

Feature details

This is available for environments focused on business accounts. It enables users in B2B scenarios to select an account hierarchy that reflects the desired account structure. Based on the hierarchy, you can choose to roll up the subaccounts into the main root account when creating the aggregated calculation for new measures.

See also

Define and manage measures (docs)

Relationships between account and contact entities

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Oct 18, 2021	✓ Nov 30, 2021

Business value

Link business accounts with associated contacts for a complete view of an account.

Feature details

If your organization has already configured existing relationships between fields in account data to related contacts in a Dynamics 365 model-driven app like Sales or Customer Service, the information is persisted when ingesting the data to audience insights.

See also

Relationships between entities (docs)

Activities for accounts and contacts

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Oct 1, 2021	Mar 2022

Business value

Rich activities insights powering well-informed business decisions.

Feature details

Users now have the ability to display activities from different profile types in the same timeline simultaneously. For example, activities that are related to accounts and activities that are related to contacts of those accounts can be viewed in the timeline widget of a Customer card.

See also

Customer activities (docs)

Data ingestion

Overview

Data ingestion enhancements in Customer Insights include additional Power Query connectors and improvements to the data ingestion process.

Additional Power Query connectors

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

Feature details

Ingested data is the foundation for data unification and subsequent data processing. More Power Query connectors provide additional options for ingesting data in audience insights in a variety of formats.

Newly added Power Query connectors include:

- Azure Synapse Analytics
- Dataverse Data Lake
- Adobe Analytics v2 APIs
- Google Analytics v4 APIs

Support in-lake transforms on attached entities

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

Feature details

Initiate, author, and refresh data transformation settings using technology similar to Power Query for data connected from a Common Data Model folder in your Azure Data Lake Storage account before ingesting the data to audience insights.

Data unification

Overview

Updates and improvements in this area include advanced configuration options for the data unification process, including:

- Improved match rules
- Improved normalization

Conflict resolution policies for attributes

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2021	-

Business value

Select and apply conflict resolution policies and refine the level at which they are assigned.

Feature details

You can define and configure groups of attributes and apply conflict resolution policies for attribute groups. These attribute groups can contain attributes from both single as well as multiple entities. The feature also includes recency-based resolution policies.

Match rules extension

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2021	-

Business value

More flexibility to configure the match phase in the data unification process.

Feature details

This feature lets you define an exception and *not conflate* conditions for the matching phase of the data unification process. It gives you increased flexibility to specify exceptions of otherwise conflatable match pairs.

Custom normalizations

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

Feature details

This feature provides the ability to normalize anonymous values and name aliases before matching them. Users can specify their own list of name variations and anonymous values to be normalized before matching to improve the matching process configuration and adapt it to the user's need.

Enrichment

Overview

Data enrichment capabilities in Customer Insights for this release include brand share of voice.

B2B scenarios for enrichments and exports

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 31, 2021	-

Business value

Users can enrich their B2B data and leverage export scenarios for these B2B profiles.

Feature details

Audience insights extends integrations with Microsoft services to support B2B scenarios. These capabilities create a seamless experience when working with Dynamics 365 Customer Insights and other first-party services. The integrations with third-party systems and services also support the B2B scenarios and provide you with the required flexibility to activate and export accounts and their related contacts.

Existing enrichments from Microsoft adapt to enable B2B scenarios for our customers. Integrations of third-party data enrichment providers enable B2B enrichment scenarios, too.

See also

Work with business accounts (docs)

Share of voice for brands and interests

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 30, 2021	-

Business value

With the score provided for share of voice (SoV), users can compare brands and interests for a given customer's demographic.

Feature details

Audience insights extends brand and interest enrichments with the addition of a new comparative share of voice (SoV) score.

You can use this new score to understand how a specific brand or interest compares to other brands and interests for a given customer's demographic. For example, you can find out if a customer's demographic segment (35- to 49-year-old females from Seattle, USA) has a higher SoV for brand X as compared to the brands Y or Z.

See also

Share of voice (SoV) (docs)

Enrich addresses in your data sources

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

Business value

Improve potential match rates before data unification.

Feature details

Addresses in your data sources that are not normalized into a standard format can result in lower match rates during the unification process.

This feature extends the address enrichment capability to be applied to data sources before they go through the data unification process.

Extensibility

Overview

Updates to the extensibility scenarios in audience insights in Dynamics 365 Customer Insights include additional integrations with first-party and third-party services.

Extend and improve activations into third-party systems

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

Business value

Easily transfer your data from Customer Insights to your preferred third-party system to unfold the value of your data in your daily business context.

Feature details

Additional usage scenarios enable more flexibility to activate your data with additional connections to third-party systems. We also plan for more functionality and further improvements on selected activation scenarios that already exist.

Improve activation scenarios for Microsoft services

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

Business value

Have a smooth experience with seamless integration and performant usage of first-party services.

Feature details

Existing integrations with first-party services get improved to a more seamless experience. Additionally, you get improved performance when using Dynamics 365 Customer Insights with other Microsoft services, which helps boost your daily business interactions.

More activation options with Microsoft services

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

Feature details

Improve existing integrations with other Microsoft services to provide a more seamless experience when using Dynamics 365 Customer Insights and other first-party services. Additionally, we're extending the number of available integrations to more Microsoft services to enable further activation scenarios.

More integrations with third-party services

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

Feature details

Audience insights provides additional integrations with third-party systems and services to enable additional usage scenarios and provide you with increased flexibility on how to use your customer data. Also, we're extending functionality and providing improvements to various existing activation scenarios.

Intelligence

Overview

Let the system generate predictions based on unified profiles and other data ingested to Dynamics 365 Customer Insights to get a better understanding of customer patterns.

Semantic mapping of contact data

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 31, 2021	-

Business value

Use contact data to drive insights and to better understand your business customers.

Feature details

Users can map contact data to a predefined schema. It allows them to create meaningful relationships between account data and contact data, which can be used to display contacts in customer cards for accounts. Additionally, it enables contact attributes to be used in other areas of audience insights, such as measures and segments.

See also

Define semantic mappings (docs)

Consent data in audience insights

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 1, 2021	-

Business value

This feature enables a low-friction experience for integrating and harmonizing consent data across several sources. It leverages dataflows, which are Microsoft's self-service data preparation service.

Feature details

Consent management helps companies maintain compliance, trust, and customer satisfaction around the use of customer profiles. To respect privacy regulations, such as the General Data Protection Regulation and the California Consumer Privacy Act, our customers consider consent management as a natural aspect of unified profile management.

This feature unifies and harmonizes customer consent data from sources across an enterprise, and enables consent application across existing Customer Insights capabilities such as segmentation, AI models, and activation scenarios. For example, Customer Insights users can integrate consent data captured with external consent services into audience insights as a native consent entity.

See also

Feature exploration (video)

Activate consent rules in audience insights (docs)

Consent rules in audience insights

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 1, 2021	-

Business value

Create rules to ensure that customer consent is recognized.

Feature details

Configure and apply global consent rules across audience insights to govern and manage adherence to your organization's privacy policies.

Enable the application of consent signals within scenarios in audience insights like segment and subsequent exports.

For example, Customer Insights users can create rules to enforce customers’ consent where they agreed to let their data be used to personalize experiences, but not share it with third-party services.

See also

Disable or change default consent rules (docs)

Seamless application of consent data to business processes in audience insights

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 1, 2021	-

Business value

Enable global consent guardrails in segmentation to automatically filter profiles based on a customer's consent and preferences.

Feature details

Process data only for customers who have provided their consent to do so and build a better relationship with your customers by establishing trust. Implement the control and application of consent data in a variety of business processes in audience insights.

You can create segments of customers based on their consent. Optimize the reach of your segments by focusing only on customers who consented. Save unnecessary cost and resources by engaging only with customers who have consented to the processing of their data.

Audience insights users can use consent data as a filter while creating a segment and preview the impact on the segment size.

See also

[Get started with consent management](#) (docs)

AI model for customer satisfaction

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2021	-

Business value

As a new type of out-of-the-box model analysis in Customer Insights powered by natural language processing, the feature enables easy analysis of your customers' feedback in text format. Using sources such as customer service or surveys, it gives you the sentiment scores and specific business aspects mentioned in their feedback. This allows you to take informed business actions to better engage and delight customers without requiring manual data parsing or complex machine-learning model development.

Feature details

This feature introduces a new AI-powered analysis that provides insights on a customer's overall sentiment level. Additionally, it analyzes the mentioned business areas (for example, shipping, pricing or customer service) in feedback to the business. The analysis uses two natural language processing models to generate the score and identify business areas respectively.

Improvements to prediction models

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

Feature details

Out-of-the-box prediction models, including **subscription churn**, **transactional churn**, and **customer lifetime value (CLV)** become generally available as a part of Customer Insights. The planned improvements include more data flexibility, more detailed explanations in the product, and additional model management capabilities.

Allow customer profile data as an input to out-of-box AI models

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

Business value

Use any customer profile data element in out-of-the-box models for more relevant results.

Feature details

This feature allows the addition of customer profile data in audience insights as an input to out-of-the-box AI models. Using data from customer profiles improves the relevancy of results and makes them more actionable. It enables users to apply any customer profile attribute out-of-the-box prediction models.

System administration

Overview

Administration and settings enhancements include improvements to admin scenarios such as environment management and handling of sensitive data.

Environment management updates

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 30, 2021	-

Business value

This feature provides the end user with greater flexibility to copy from environment to environment with an additional option to add a description to know what was copied.

Feature details

This feature will provide additional options to manage multiple environments:

- Copy configuration for intelligence capabilities such as predictions between environments.
- Create descriptions for environments to better distinguish them in the environment picker.

See also

Copy the environment configuration (docs)

Overview of engagement insights 2021 release wave 2

Engagement insights (preview) is now fully integrated with Dynamics 365 Customer Insights. Its value accrues toward event-driven behavioral analytics supporting near real-time personalization and activation scenarios as an integral part of the Microsoft customer data platform offering.

Customer Voice

Overview of Dynamics 365 Customer Voice 2021 release wave 2

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 you can close the loop in the moments that matter.

For more information about Dynamics 365 Customer Voice, go to the product documentation and tech community forum.

Microsoft Cloud for Industry

Overview of Microsoft Cloud for Healthcare 2021 release wave 2

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 October 2021 through March 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.

Connected patient experiences

Healthcare solutions to help with connected patient experiences.

Feature	Enabled for	Public preview	General availability
View the full context of the patient	Users by admins, makers, or analysts	✔ Dec 6, 2021	-

Data interoperability

Healthcare data model and data ingestion provide the foundation for healthcare customers to be successful on Dynamics 365 and Microsoft Power Platform.

Feature	Enabled for	Public preview	General availability
Improved ingestion of data into Dataverse	Users by admins, makers, or analysts	✔ Dec 6, 2021	
Improved modeling of healthcare data in Dataverse	Users by admins, makers, or analysts	✔ Jun 30, 2021	✔ Oct 1, 2021
Improved linking of patients	Users, automatically	✔ Aug 3, 2021	✔ Oct 1, 2021

Health team productivity

Provider solutions by Dynamics 365 and Microsoft Power Platform enable healthcare providers to coordinate safe and effective care.

Feature	Enabled for	Public preview	General availability
Faster care with care management	Users by admins, makers, or analysts	Feb 2022	-

Security, compliance, privacy, and availability

Microsoft Cloud for Healthcare helps healthcare customers with safer solutions broadly.

Feature	Enabled for	Public preview	General availability
Expansion to more regions	Users by admins, makers, or analysts	-	✔ Oct 1, 2021
Automatic updates available	Admins, makers, marketers, or analysts, automatically	-	✔ Oct 22, 2021

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.

Connected patient experiences

Overview

As part of Microsoft Cloud for Healthcare, Dynamics 365 and Microsoft Power Platform support the following healthcare solutions for healthcare providers to help with connected patient experiences:

- **Patient 360**: Get a full picture of a patient (powered by Power Apps).
- **Patient access**: Provide access to personalized care (powered by Power Apps portals).
- **Patient outreach**: Reach out to patients for personalized care (powered by Dynamics 365 Marketing).
- **Patient service center**: Support patients with patient insights (powered by Dynamics 365 Customer Service).
- **Health assistant**: Surface next best actions in context of a patient (powered by Dynamics 365 Sales).

The 2021 release wave 2 updates improve these solutions through engaging and improved usability of all solutions, enabling customers to focus on providing care.

View the full context of the patient

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 6, 2021	-

Business value

The patient view is more user friendly.

Feature details

To provide good care, a provider needs to understand the full patient view.

With this release we provide a solution where the provider can see:

- Unified patient profiles.
- Unified patient activity timelines with an opportunity to enrich it through Customer Insights.

Data interoperability

Overview

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 2021 release wave 2, we're extending the data model and improving the data ingestion pipeline.

Improved ingestion of data into Dataverse

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 6, 2021	-

Business value

Better manage storage and data from FHIR services.

Feature details

Healthcare organizations have a lot of information in their system. Not all of that data is needed when leveraging solutions based on Dynamics 365 and Power Apps. With this release we provide more options on how the data is synchronized between the solutions.

Improved modeling of healthcare data in Dataverse

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jun 30, 2021	✔ Oct 1, 2021

Business value

Provide a healthcare data model as a downloadable component to start initial creation of solutions.

Feature details

This release improves the data interoperability and ingestion of data into Dynamics 365 and Microsoft Power Platform solutions. Customers and partners will receive access to a generally available solution focused on the underlying data model of Microsoft Cloud for Healthcare to build their own solutions faster.

See also

[Healthcare data model overview](#) (docs)

Improved linking of patients

Enabled for	Public preview	General availability
Users, automatically	✓ Aug 3, 2021	✓ Oct 1, 2021

Business value

Information from all patient records is easily available.

Feature details

According to the FHIR standard, patient links "link to another patient resource that concerns the same actual patient." In Microsoft Cloud for Healthcare, a record's links display in the **Linked Records** tab on the patient form. A number also displays in the tab header that indicates how many links the record has.

See also

Patient links (docs)

Health team productivity

Overview

As part of Microsoft Cloud for Healthcare, Dynamics 365 and Microsoft Power Platform will 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 updates in 2021 release wave 2 improve these solutions through engaging and improved usability of all solutions, enabling customers to focus on providing care.

Faster care with care management

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

Business value

Learning how to use care management will be faster.

Feature details

Within care management, we offer easy-to-use and intuitive tools to provide care more effectively.

This release focuses on giving healthcare providers support to quickly find the tasks they need to accomplish first, such as easy access to their patient information and creating supportive care plans.

Security, compliance, privacy, and availability

Overview

Microsoft Cloud for Healthcare powered by Dynamics 365 helps customers provide care faster and safer and build on top of the trusted Microsoft cloud platforms.

Expansion to more regions

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 1, 2021

Feature details

Customers in more regions gain access to Cloud for Healthcare solutions powered by Dynamics 365. The focus in this release is to release the Dynamics- and Power Platform-based solutions in select European and Asian countries.

See also

International availability of Microsoft Cloud for Healthcare (docs)

Automatic updates available

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Oct 22, 2021

Business value

Customers stay on the most recent solutions, without manual intervention.

Feature details

Updates to the healthcare solution are coming automatically to the users during our release rollouts. Cloud for Healthcare will follow the Dynamics 365 and Microsoft Power Platform rollout procedure, which includes releasing user-impacting features only during major update cycles.

See also

Update Microsoft Cloud for Healthcare solutions powered by Dynamics 365 (docs)

Overview of Microsoft Cloud for Financial Services 2021 release wave 2

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.

What's new and planned for Microsoft Cloud for Financial Services

This topic lists features that are planned to release from October 2021 through March 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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Banking customer engagement

Banking customer engagement personalizes every customer interaction with financial context to engage with customers on their preferred channel in a meaningful way, to reduce churn and time to resolution.

Feature	Enabled for	Public preview	General availability
Retail banking omnichannel hub	Users by admins, makers, or analysts	✔Nov 1, 2021	-

Collaboration Manager

With Collaboration Manager, you can easily incorporate your favorite Microsoft 365 products like Bookings, Planner, and Outlook into your existing model-driven apps with Microsoft Teams.

Feature	Enabled for	Public preview	General availability
Collaboration Manager for Loans	Users by admins, makers, or analysts	✓ May 1, 2021	✓ Nov 1, 2021

Customer intelligence

Customer intelligence unifies important, relevant, and accurate customer information across multiple sources through Dynamics 365 Customer Insights.

Feature	Enabled for	Public preview	General availability
Segment customers by engagement and relationship strength	Users by admins, makers, or analysts	✓ Apr 1, 2021	Nov 2021
View customer churn risk	Users by admins, makers, or analysts	✓ Apr 1, 2021	✓ Nov 1, 2021

Customer onboarding

Support for applicant onboarding, ensuring the application details are available in CRM for easy follow-up and validation.

Feature	Enabled for	Public preview	General availability
Track loan applications	Users by admins, makers, or analysts	✓ Sep 1, 2021	✓ Nov 1, 2021

Retail banking data model

Dedicated banking data model hosted in Microsoft Dataverse.

Feature	Enabled for	Public preview	General availability
Branch schema in retail banking data model	Users by admins, makers, or analysts	✓ Apr 1, 2021	✓ Nov 1, 2021
Customer schema in retail banking data model	Users by admins, makers, or analysts	✓ Apr 1, 2021	✓ Nov 1, 2021

Feature	Enabled for	Public preview	General availability
Financial holdings schema in retail banking data model	Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021
Groups and relationships schema in retail banking data model	Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021
Life events schema in retail banking data model	Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021
Loan application schema in retail banking data model	Users by admins, makers, or analysts	✔ Sep 1, 2021	✔ Nov 1, 2021

Unified customer profile

The unified customer profile helps tailor customer experiences through a 360-degree view of the customer, bringing together financial, behavioral, and demographic data from inside and outside the walls of the bank.

Feature	Enabled for	Public preview	General availability
See a customer's groups and relationships with other customers	Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021
Track a customer's life events	Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021
View a customer's financial holdings	Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021
View a snapshot of customer information	Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021

Description of **Enabled for** column values:

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Banking customer engagement

Overview

The solution, designed specifically for retail banking, enables agents at the bank to instantly connect and engage with customers with a customer 360-degree view. This view offers relevant financial information, banking segmentation, and likelihood to churn. It's powered by purpose-built AI models for banking, via Dynamics 365 Customer Insights. Contextual information empowers customer service representatives (CSRs) to quickly resolve issues and drive toward better outcomes, increasing customer satisfaction and agent productivity.

Retail banking omnichannel hub

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 1, 2021	-

Business value

With customers contacting the bank through various channels, customer service representatives (CSRs) are required to serve many customers, over multiple channels, to gain understanding of each customer's unique journey, and to resolve issues quickly and efficiently within the bank's SLA.

This feature enables CSRs to facilitate a continuous and personalized service experience across channels, quickly obtaining financial context and driving faster toward more relevant resolutions and higher customer satisfaction.

Feature details

The retail banking dedicated hub consolidates the most relevant financial information about the customer, including financial holdings, cards, and churn risk. The unified view consists of reusable features from the Unified customer profile capability.

CSRs can leverage this to provide personal service, solve problems quickly, reveal important opportunities, prevent potential loss or churn, and improve customer satisfaction.

See also

Banking customer engagement (preview) (docs)

Collaboration Manager

Overview

Collaboration Manager for Loans in Microsoft Teams helps your team accelerate the lending process with automation and collaboration tools to reduce time from application to signing. The app lets you collaborate with meetings, customer bookings, notes, files, and approvals, all of which are attached to loan records.

Collaboration Manager for Loans can help your organization with:

- **Lending automation**: Streamline your business processes.
- **Cross-team collaboration**: Empower your team.
- **Communications**: Schedule and manage virtual or in-person appointments and message internal teams.

Collaboration Manager for Loans

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ May 1, 2021	✓ Nov 1, 2021

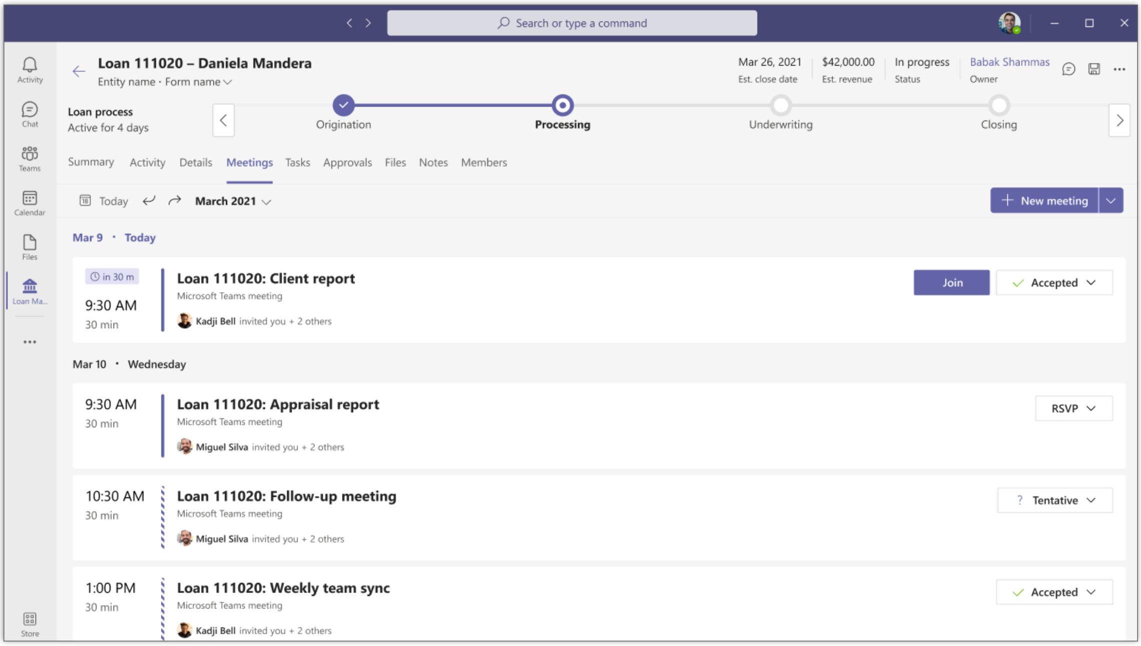
Business value

Collaboration Manager for Loans is a Microsoft Teams app in Cloud for Financial Services that powers automation of loan applications, internal collaboration among loan teams, and external communication with customers. Drive automation and internal collaboration with Teams to accelerate lending cycles and enhance customer experience.

Feature details

Collaboration Manager for Loans includes:

- **Dashboard**: See an overview of all loan applications and how your team is progressing them through different workflow stages.
- **Meetings and customer appointments**: Seamlessly schedule internal meetings and customer appointments.
- **Loan application stage tracker**: A business process flow to track the stage of application from origination to closure.
- **Tasks**: Create, manage, and assign tasks to team members and keep track of all actions that need to be taken in relation to individual loan applications.
- **Chats**: Send messages and files to team members and customers while collaborating on a loan.



Meetings in Collaboration Manager for Loans inside of Microsoft Teams.

Geographic areas

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

- United States
- United Kingdom

See also

[What is Collaboration Manager for Loans?](#) (docs)

Customer intelligence

Overview

In the current banking world, bank agents provide services to many customers. They're required to communicate, advise, and provide information based on a deep understanding of the customer's financial strength via holdings, assets, and liabilities, including the customer's actions, life moments, and an overview of their personal and business relationships with other people connected to the bank. This information about the customer is stored in the bank across multiple separate modules: sales, services, marketing, and operational systems. To access all this information, the bank agent must search several systems that often contain data that is incomplete, inaccurate, and isolated.

Customer intelligence unifies important, relevant, and accurate customer information across multiple sources via Dynamics 365 Customer Insights. This empowers the agent to engage with customers with relevant insights that combine demographic information, financial measures, and attitudes to form financial segments and AI models. Combined, these insights help agents to quickly understand the customer.

Segment customers by engagement and relationship strength

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2021	Nov 2021

Business value

In the current banking world, bank agents provide services to many customers. They must communicate, advise, and provide information based on a deep understanding of the customer's financial strength through holdings, assets and liabilities, including the customer's actions, life moments and an overview of their personal and business relationships with other people connected to the bank.

This information about the customer is stored in the bank across multiple separate modules: sales, services, marketing, and operational systems. To access all this information, the bank agent must search several systems, with data that is oftentimes incomplete, inaccurate, and isolated.

Customer intelligence unifies important, relevant, and accurate customer information across multiple sources through Dynamics 365 Customer Insights. This empowers the agent to engage with customers by using relevant insights that combine demographic information, financial measures, and attitudes to form financial segments and AI models, altogether helping to quickly understand the customer.

In addition, customer intelligence offers the agent a view of important indicators regarding the relationship between the bank and the customer while also informing any proactive outreach from the bank. Insights can help to anticipate certain behaviors based on customers who are similar in engagement or financial situation. Deeper understanding can reduce unnecessary friction and replicate best practices through data-driven insights that help to optimize the customer journey with the bank.

Feature details

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 bank so you know to give them exceptional care with a high-touch relationship.

Customer segmentation is based on engagement and strength of relationship with the bank.

See also

Retail banking segments in Microsoft Cloud for Financial Services (docs)

View customer churn risk

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021

Business value

In the current banking world, bank agents provide services to many customers. They must communicate, advise, and provide information based on a deep understanding of the customer's financial strength through holdings, assets, and liabilities, including the customer's actions, life moments, and an overview of their personal and business relationships with other people connected to the bank.

This information about the customer is stored in the bank across multiple separate modules: sales, services, marketing, and operational systems, so for the bank agent to access all this information, the bank agent must search several systems, with data that is often incomplete, inaccurate, and isolated.

Customer intelligence provides a quick and easy view of customer's churn risk level.

Feature details

Customer intelligence unifies important, relevant, and accurate customer information across multiple sources through Dynamics 365 Customer Insights. This empowers the agent to engage with customers with relevant insights that combine demographic information, financial measures, and attitudes to form financial segments and AI models, altogether helping to quickly understand the customer.

In addition, customer intelligence offers the agent a view of important indicators regarding the relationship between the bank and the customer while also informing any proactive outreach from the bank. Insights can help to anticipate certain behaviors based on customers who are similar in engagement or financial situation. Deeper understanding can reduce unnecessary friction and replicate best practices through data-driven insights that help to optimize the customer journey with the bank.

Customer onboarding

Overview

In today's digitized world, banks are offering their applicants the use of online channels to receive information on their accounts and keep track of their finances.

When applying for a loan, 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. Tailoring the right loan quickly and easily can make the difference between an engaged customer and one who turns to another lender. Allowing the applicant to start the loan application journey online, providing initial information to the bank, creates an opportunity to offer relevant information and capture the applicant interest in real time. However, in some cases this process is abandoned midway, leaving the application information incomplete. To ensure such opportunities aren't left unaddressed, banks need to connect the online experience with CRM to ensure follow-through.

Track loan applications

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 1, 2021	✔ Nov 1, 2021

Business value

Loan managers engage with multiple applicants who are interested in loans. The current engagement process requires manual data collection during customer interactions, such as in calls, chats, and meetings. In addition, when reviewing new loan applications and looking up the application status, the loan manager needs to understand the full picture of the loan process, which currently requires gathering information from various tools and resources.

Loan application management and tracking offers loan managers a quick view of the loan application details and status. This information helps them to engage with customers more meaningfully and to provide relevant information in these interactions.

Feature details

The application queue allows loan managers to get a quick view of the pipeline, across new applications, in-process applications and an archive of applications that were completed.

Detail sections provide information related to personal, collateral, and financial information relevant to the loan application. A dedicated documents section enables loan managers to review and manage the documents uploaded by the applicant during the loan application process.

Loan application tracking helps you:

- Keep track of applications.
- Validate information provided by applicants.
- Ask for additional information as needed.
- Capture where the applicant is in the flow.

See also

Loan tracking in Microsoft Cloud for Financial Services (docs)

Retail banking data model

Overview

A dedicated banking data model hosted in Microsoft Dataverse captures new dimensions, such as financial information, groups and relationships, and life moments.

To help banks take advantage of the benefits of CRM quickly, with their business model supported out of the box, we're introducing extensions to Common Data Model that are customized for retail banking scenarios.

These changes will accelerate adoption of Dynamics 365 solutions, while also ensuring that processes and measures available out of the box are consistent and relevant for their business processes.

Branch schema in retail banking data model

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021

Business value

To help banks take advantage of the benefits of CRM quickly, with their business model supported out of the box, we are introducing extensions to Common Data Model that are custom made for retail banking scenarios. These changes will accelerate adoption of Dynamics 365 solutions, while also ensuring that processes and measures available out of the box are consistent and relevant for their business processes.

Feature details

The new branch schema in the retail banking data model will support branches in the bank, including:

- Branch number
- Name
- Manager
- Address
- Connection to the customer table to capture customer's primary branch

Customer schema in retail banking data model

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021

Business value

To help banks take advantage of the benefits of CRM quickly, with their business model supported out of the box, we are introducing extensions to Common Data Model that are custom made for retail banking scenarios. These changes will accelerate adoption of Dynamics 365 solutions, while also ensuring that processes and measures available out of the box are consistent and relevant for their business processes.

Feature details

The new customer schema in the retail banking data model will support people and small or medium companies as customers of the bank. The schema includes:

- Contact and Account tables that include financial details related to know your customer (KYC) and know your business (KYB).
- Flags indicating whether data is controlled by an external system.
- Tables locked for updates from external systems only.

Financial holdings schema in retail banking data model

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Apr 1, 2021	✓ Nov 1, 2021

Business value

To help banks take advantage of the benefits of CRM quickly, with their business model supported out of the box, we are introducing extensions to Common Data Model that are custom made for retail banking scenarios. These changes will accelerate adoption of Dynamics 365 solutions, while also ensuring that processes and measures available out of the box are consistent and relevant for their business processes.

Feature details

The new financial holdings schema in the retail banking data model supports the financial holdings of bank customers.

Financial holdings are categorized as one of the following:

- Account: Either checking or savings accounts.
- Credit line: Credit limit that was approved by the bank.
- Loan: Secured, unsecured, or mortgage loans.
- Investment: Investment accounts including portfolios of funds, stocks, bonds, and other assets.
- Long-term saving: Deposits that are often locked for an extended period of time, like provident funds.

Each category defines the details associated with the financial holding, as well as possible financial instruments that can be connected to it, including:

- Credit and debit cards, which can be associated with an account or a credit line.
- Standing order or direct debit/deposit, which can be associated with an account.
- Overdraft, which can be associated with an account.

Relevant alerts for financial holdings are predetermined based on the category and instruments defined in the data model.

Customers have a many-to-many relationship with financial holdings, with each connection further classified by the role of the customer toward the holding, such as owner or co-signer.

Groups and relationships schema in retail banking data model

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021

Business value

To help banks take advantage of the benefits of CRM quickly, with their business model supported out of the box, we're introducing extensions to Common Data Model that are tailor made for retail banking scenarios. These changes will accelerate adoption of Dynamics 365 solutions, while also ensuring that processes and measures available out of the box are consistent and relevant for their business processes.

Feature details

The new groups and relationships schema in the retail banking data model supports groups, such as households and partnerships. Features and capabilities include:

- A new table that represents groups, including types (for households and partnerships).
- Groups can be associated with all/some/none of the financial holdings owned by its members, which then defines the financial strength of the group, through total income, assets, and liabilities.
- Each group can have a primary member. For any member a main group of household type can be set.

Life events schema in retail banking data model

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021

Business value

To help banks take advantage of the benefits of CRM quickly, with their business model supported out of the box, we are introducing extensions to Common Data Model that are custom made for retail banking scenarios. These changes will accelerate adoption of Dynamics 365 solutions, while also ensuring that processes and measures available out of the box are consistent and relevant for their business processes.

Feature details

To help keep track of key moments of the customer, the retail banking data model will include a life moment table. Moments will capture a wide range of life event types:

- Birthday: Date of birth, which is managed via the Contact table
- Personal status: The Contact's marital status
- Family: Represents the birth or adoption of children in the family
- Education: Any education events including graduation from high school or college
- Home: Purchase or sale of a home
- Car: Purchase or sale of a car
- Health: Significant medical event, such as surgery, which may require lending or sale of investment

Relevant alerts for life moments are predetermined based on the event type and are defined in the data model.

Loan application schema in retail banking data model

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 1, 2021	✔ Nov 1, 2021

Business value

To help banks take advantage of the benefits of CRM quickly, with their business model supported out of the box, we are introducing extensions to Common Data Model that are custom made for retail banking scenarios. These changes will accelerate adoption of Dynamics 365 solutions, while also ensuring that processes and measures available out of the box are consistent and relevant for their business processes.

Feature details

The new loan application schema in the retail banking data model supports loan applications. The schema provides the following capabilities:

- Enable bank to manage the application more seamlessly
- Reflect latest status in CRM

Unified customer profile

Overview

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.

Because of data silos in the bank, relationship managers lack consolidated visibility into customer information, characteristics, financial history, and intelligent insights. This limits their ability to provide personalized experiences, and they're likely to miss growth opportunities.

With a unified customer profile, relationship managers 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.

See a customer’s groups and relationships with other customers

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021

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.

Because of data silos in the bank, relationship managers lack consolidated visibility into customer information, characteristics, financial history, and intelligent insights, hence are limited in their ability to provide personalized experiences and are likely to miss growth opportunities. With Unified Customer Profile, relationship managers 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.

Feature details

Context about connections can help you:

- Develop targeted, data-driven marketing campaigns.
- Surface next best actions and next best product recommendations based on the relationship between customers’ accounts.
- Power more personalized messaging to enhance the customer experience.

Many customers have their entire household or family at the same bank. This understanding can help prevent customers within the same group from receiving multiple offers that are the same, repeatable communications, and most importantly the spread of lack of satisfaction, when one member has an unsuccessful interaction with the bank.

The groups and relationship view provides:

- Main snapshot: Shows the customer's primary group that represents a household in the summary tab, providing a high-level understanding of the customer's financial support and value.
- Group and relationship details: Provides an elaborate view of the customer's groups and relationships. Shows their primary group and role within their group, plus other groups and relationships the customer is a part of and their role there. For each group, there's a detailed view of all members, along with the aggregated financial holdings that derive the group's value to the bank.

Track a customer's life events

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021

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.

Because of data silos in the bank, relationship managers lack consolidated visibility into customer information, characteristics, financial history, and intelligent insights, hence are limited in their ability to provide personalized experiences and are likely to miss growth opportunities. With Unified Customer Profile, relationship managers 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.

Feature details

Life event journey offers the bank agent an at-a-glance view of the customer and his or her personal life milestones. Life events allows bank agents to add new life moments, as well as edit or remove existing life moments as they learn new information about the customer. This helps agents benefit from each other, as information gained is easily shared across the team.

View a customer's financial holdings

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021

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.

Because of data silos in the bank, relationship managers lack consolidated visibility into customer information, characteristics, financial history, and intelligent insights, and hence are limited in their ability to provide personalized experiences and are likely to miss growth opportunities. With Unified Customer Profile, relationship managers 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.

Feature details

Help bank agents quickly understand customer wallet share, total assets, and liabilities, and key flags related to holdings. In addition, provide a whitespace view to quickly surface opportunities to deepen the relationship.

The summary view offers an at-a-glance perspective as part of the summary tab.

- Financial summary: Provides an at-a-glance perspective, including:
  - Customer wallet share
  - Total assets and liabilities
  - Key flags related to holdings
  - Whitespace view
- Financial details: Allows the bank agent to drill into the granular details of the customer's financial situation, showing detailed information of accounts, loans, investments, credit lines and long-term savings. Details include owned financial holdings and customers at the bank related to them, as well as holdings where the featured customer plays a role but is not the owner. Key flags related to the holdings are also highlighted to ensure follow up as needed.
- Cards: Displays the bank agent customer's card information, providing an at-a-glance view on the summary tab, revealing credit or debit cards used by the customer, including key flags when those are about to expire, not activated, lost, or reported stolen. The agent can get a drilldown view on the financial details tab (see previous point), showing cards within the associated holding (account, credit line), whether within the owned list of holdings or the other tab that features holdings held by other customers at the bank.

View a snapshot of customer information

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2021	✔ Nov 1, 2021

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.

Because of data silos in the bank, relationship managers lack consolidated visibility into customer information, characteristics, financial history, and intelligent insights. This limits their ability to provide personalized experiences, so they're likely to miss growth opportunities.

With Unified Customer Profile, relationship managers 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.

Feature details

The customer snapshot provides the bank agent with a quick, 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 banking segments, and churn risk (built on Customer Insights).

The at-a-glance customer view includes:

- Name
- Demographics
- Regular income
- Preferred channel of communication

Customer view can be enriched with the following Customer Intelligence-driven information:

- Banking segments
- Churn risk

Overview of Microsoft Cloud for Nonprofit 2021 release wave 2

Microsoft Cloud for Nonprofit empowers scalable and transformative mission impact by helping nonprofits to engage with their donors and supporters, deliver effective programs, and accelerate mission outcomes.

By combining the power of fundraising and engagement with Dynamics 365 Marketing, nonprofit organizations and UN agencies can cultivate valuable donor relationships through a guided journey to campaign segmentation and analysis. Our volunteer management app combined with a Power Apps portal app enables nonprofits to perform all their key functions in one seamless experience, including program execution, project management, program design, and volunteer management. Finally, Microsoft Cloud for Nonprofit helps organizations to bring data into view from disparate systems and applications, including CRM data.

What's new and planned for Microsoft Cloud for Nonprofit

This topic lists features that are planned to release from October 2021 through March 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
Manage volunteers with Teams template	Users, automatically	-	✔ Nov 1, 2021
Volunteer Engagement	Users, automatically	-	✔ Nov 1, 2021
Volunteer Management	Users, automatically	-	✔ Nov 1, 2021

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
Constituent marketing journeys	Users, automatically	-	✓ Nov 1, 2021
Security and compliance enhancements	Users, automatically	-	✓ Nov 1, 2021

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

Nonprofit and UN program staff wear many hats: program execution, project management, program design, and volunteer management, for example. In 2021 release wave 2, we'll launch two volunteering applications:

- A volunteer management model-driven Power App for nonprofit staff to manage engagement opportunities. Volunteer management enables volunteer coordinators and volunteers to collaborate and match skills with needs.
- A Microsoft Power Apps portal app that integrates with nonprofit websites to ensure that volunteer recruitment efforts span far and wide, and that the most diverse and committed audience members possible commit their time and talents. Volunteer management staff who leverage Microsoft Teams will be able to manage engagement opportunities and streamline volunteer onboarding without ever leaving Teams.

Manage volunteers with Teams template

Enabled for	Public preview	General availability
Users, automatically	-	✓Nov 1, 2021

Business value

Use Microsoft Teams to improve volunteer management throughout the recruiting and onboarding cycle, and improve volunteer retainment.

Feature details

Volunteer managers can save time and improve their strategic approach to recruiting, onboarding, and retaining volunteers through this purpose-built Microsoft Teams template for volunteering. Managers and coordinators can:

- Track and manage engagement opportunities.
- Monitor volunteers throughout each stage of the onboarding process with greater ease.

See also

Use nonprofit team templates (docs)

Volunteer Engagement

Enabled for	Public preview	General availability
Users, automatically	-	✓Nov 1, 2021

Business value

Empower volunteers to discover, register for, and participate in nonprofit engagement opportunities.

Feature details

Built on the Microsoft Power Platform, the Volunteer Engagement Power Apps portal application enables volunteers to easily engage and support your organization's mission.

- Discover opportunities: prospective volunteers learn about opportunities that match their interest, qualifications, and schedule.
- Create a profile: prospective volunteers create and update profiles to highlight their experience, skills, and interests.
- Communicate seamlessly: Volunteers and nonprofit staff exchange messages and communicate with ease.

- Promote engagement opportunities: Volunteer staff publish opportunities to their website to cast the widest net possible to attract engaged constituents.

See also

Use Volunteer Engagement (docs)

Volunteer Management

Enabled for	Public preview	General availability
Users, automatically	-	✔ Nov 1, 2021

Business value

We're equipping volunteer managers with the tools they need to simplify volunteer recruiting, onboarding, retention, and reporting.

Feature details

Volunteer Management is a Power Apps app that enables the management of day-to-day processes to recruit, onboard, and retain volunteers.

- **Publish engagement opportunities**: Design the opportunity and define qualifications, skills, and shifts needed.
- **Approve volunteers**: Review volunteer profiles and qualifications and approve individuals to participate in engagement opportunities.
- **Track volunteer onboarding**: Quickly and easily understand what stage of the onboarding process the volunteer is in.
- **Manage day-of activities**: Track attendance and balance shift volumes.
- **Communicate with ease**: Define automated messaging to ensure your volunteers receive timely logistics, training, and gratitude for their time.
- **Gain volunteer insights**: Understand who is registering for, failing to show up to, and repeatedly contributing time to your organization.

See also

Use Volunteer Management (docs)

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 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.

Constituent marketing journeys

Enabled for	Public preview	General availability
Users, automatically	-	✔ Nov 1, 2021

Business value

The nonprofit marketing template helps you to enable constituent journeys and intelligent segmentation.

Feature details

Nonprofit organizations that leverage Microsoft Cloud for Nonprofit and Dynamics 365 Marketing will benefit from a new nonprofit marketing template that allows them to track performance and gain insight across their marketing campaigns, appeals, and packages to inform future communication and marketing investments.

See also

Use Constituent marketing journeys (docs)

Security and compliance enhancements

Enabled for	Public preview	General availability
Users, automatically	-	✔ Nov 1, 2021

Business value

We're delivering the highest standard of security, privacy, accessibility, and global readiness to our nonprofit customers.

Feature details

Microsoft Cloud for Nonprofit products powered by Dynamics 365, Microsoft Power Platform, Azure, and Modern Work are designed and engineered with the highest security, privacy, accessibility, localization, and global readiness standards in mind to help nonprofit organizations deliver more effective mission impact more safely and securely on top of the trusted Microsoft cloud platforms.

See also

Compliance in Microsoft Cloud for Nonprofit (docs)

Change history

This topic is updated when a feature's release date changes or when a feature is added or removed. You can see the full topic in the Microsoft Power Platform change history online.

2021 release wave 2 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning **August 2, 2021**. 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 2021 release wave 2 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 2021 release wave 2 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
Advanced lookup capabilities for all users in model-driven Power Apps	Users, automatically	✓ Jun 30, 2021	✓ Oct 1, 2021
Easily share a record in the new model-driven app experience	Users, automatically	✓ Aug 2, 2021	✓ Oct 3, 2021
Find all the relevant Power Apps on Office.com	Users, automatically	✓ Aug 2, 2021	Mar 2022
Model-driven app improvements	Users, automatically	✓ Aug 2, 2021	✓ Oct 7, 2021
Model-driven apps support multiple app side panes	Users, automatically	✓ Aug 2, 2021	Jan 2022
Modern search for all users in model-driven apps	Users, automatically	✓ Jul 29, 2021	✓ Oct 1, 2021

Feature	Enabled for	Early access	General availability
New column options in grid view page	Users, automatically	✓ Jul 29, 2021	✓ Oct 7, 2021
New model-driven app experience for editing multiple records	Users, automatically	✓ Aug 2, 2021	✓ Oct 3, 2021
Unified Interface browser support changes	Users, automatically	✓ Aug 2, 2021	✓ Oct 7, 2021

Power Apps

Overview of Power Apps 2021 release wave 2

Microsoft Power Apps is the industry-leading low-code application development platform that underpins Dynamics 365 extensibility, Microsoft 365 customization, and a 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.

The 2021 release wave 2 plan provides significant improvements for Power Apps developers of all skill levels, improving the sophistication and usability of apps that can be created across the web and mobile devices.

What's new and planned for Power Apps

This topic lists features that are planned to release from October 2021 through March 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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Build advanced apps on a modern, unified platform

Modern intelligent designers and controls enable you to quickly build modern apps your users will want to use.

Feature	Enabled for	Public preview	Early access*	General availability
Define sequential measurements for specific spaces and areas	Users by admins, makers, or analysts	✔Oct 7, 2021	-	
Visualize and plan routes using the Map component	Users by admins, makers, or analysts	✔Oct 24, 2021	-	-

Feature	Enabled for	Public preview	Early access*	General availability
Use mixed-reality components in no- or low-connectivity scenarios with caching and offline support	Users by admins, makers, or analysts	Mar 2022	-	
Simplified Dataverse search configuration for admins and model-driven app makers	Admins, makers, marketers, or analysts, automatically	-	-	✓Oct 3, 2021
Improved site map in model-driven apps	Users by admins, makers, or analysts	✓Jun 30, 2021	-	✓Oct 7, 2021
Intelligent authoring experience with Power Apps Studio	Admins, makers, marketers, or analysts, automatically	✓Aug 8, 2021	-	Feb 2022
Unified and modern Power Apps designer	Admins, makers, marketers, or analysts, automatically	✓May 26, 2021	-	Mar 2022
Reinvented maker experience for configuring model-driven apps for offline use	Admins, makers, marketers, or analysts, automatically	Jan 2022	-	To be announced
Organize business logic in your app with components	Admins, makers, marketers, or analysts, automatically	Mar 2022	-	To be announced

Collaborate with fusion teams

Fusion teams can take advantage of more ways to use Power Apps, in addition to opportunities to package their code for reuse.

Feature	Enabled for	Public preview	Early access*	General availability
Open source Power Fx empowers low code everywhere	Admins, makers, marketers, or analysts, automatically	✓Oct 31, 2021	-	

Feature	Enabled for	Public preview	Early access*	General availability
Collaborate easily with commenting across Microsoft Power Platform	Admins, makers, marketers, or analysts, automatically	✔ Oct 24, 2021	-	Feb 2022
Canvas component and component libraries	Admins, makers, marketers, or analysts, automatically	-	-	Feb 2022
Manage everything about solutions and tables in a modern way	Admins, makers, marketers, or analysts, automatically	✔ Sep 26, 2021	-	Mar 2022
Code component improvements	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	To be announced

Roll out world-class experiences for users

Enhancements allow you to deliver better and more modern experiences to users of apps created with Power Apps.

Feature	Enabled for	Public preview	Early access*	General availability
Ratings for model-driven apps	Admins, makers, marketers, or analysts, automatically	Mar 2022	-	
Enjoy smoother mixed-reality experiences with performance improvements for complex models	Users by admins, makers, or analysts	Mar 2022	-	
Advanced lookup capabilities for all users in model-driven Power Apps	Users, automatically	-	✔ Jun 30, 2021	✔ Oct 1, 2021
Modern search for all users in model-driven apps	Users, automatically	-	✔ Jul 29, 2021	✔ Oct 1, 2021
Easily share a record in the new model-driven app experience	Users, automatically	-	✔ Aug 2, 2021	✔ Oct 3, 2021

Feature	Enabled for	Public preview	Early access*	General availability
New model-driven app experience for editing multiple records	Users, automatically	-	✓Aug 2, 2021	✓Oct 3, 2021
New column options in grid view page	Users, automatically	-	✓Jul 29, 2021	✓Oct 7, 2021
Model-driven app improvements	Users, automatically	-	✓Aug 2, 2021	✓Oct 7, 2021
New Power Apps grid (read-only)	Users by admins, makers, or analysts	✓Aug 2, 2021	-	✓Oct 7, 2021
Unified Interface browser support changes	Users, automatically	-	✓Aug 2, 2021	✓Oct 7, 2021
Model-driven apps support multiple app side panes	Users, automatically	-	✓Aug 2, 2021	Jan 2022
Updates to Power Apps trial plan	Users by admins, makers, or analysts	-	-	Jan 2022
Pay-as-you-go business model for Power Apps	Users by admins, makers, or analysts	✓Sep 2, 2021	-	Feb 2022
Find all the relevant Power Apps on Office.com	Users, automatically	-	✓Aug 2, 2021	Mar 2022

* You are able to opt in to some features as part of early access on August 2, 2021, 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](#).

Build advanced apps on a modern, unified platform

Overview

Power Apps maker experiences enable you to create the applications you need to solve your business challenges. Modern intelligent designers and controls enable you to quickly build modern apps your users will want to use.

Define sequential measurements for specific spaces and areas

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Oct 7, 2021	-	-

Business value

Optimize inspections and audits by defining specific things that should be measured, such as heights, widths, distances, areas, and volumes.

Feature details

Makers can now define a specific set of things they want measured and run business logic on top of those measurements.

Some example scenarios include:

- Ensuring a building is up to code by requiring the measurement of room signs for accessible height, doorways for wheelchair access, and other room properties to guarantee proper installation.
- Calculating cost estimates by defining a set of measurements, such as the perimeter of a lawn for fence pricing or the area of a floor for tile costs.
- Auditing contracts with customers by measuring the physical aspects of the agreement, such as the amount of shelf space given to your products.

These measurements use the power of mixed reality to leverage the existing sensors on most modern phones and tablets to bring understanding of the physical space in the context of business workflows.

See also

Take measurements in mixed reality (docs)

Visualize and plan routes using the Map component

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Oct 24, 2021	-	-

Business value

Allow your users to plan the best way to get from one destination to another with the Map component in Power Apps.

Feature details

The Map component can now find and visualize optimal routes, potentially to multiple destinations at a time. These routes take into account factors such as traffic and typical road speeds to provide the shortest or fastest route available.

Information returned includes the optimal waypoint order, distance, estimated travel time, and a representation of the route geometry.

See also

Insert waypoint pins and draw routes between them (docs)

Use mixed-reality components in no- or low-connectivity scenarios with caching and offline support

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

Business value

Users of apps built with the View in 3D and View in MR components can keep using those apps to view mixed-reality content even if they have little or no internet connection. That way, if your app user is an area where internet is not available, they can still use mixed-reality components to view and analyze spaces and shapes without impacting their productivity.

Feature details

The View in 3D and View in MR components will now cache content used in the control on your device so that these components can be used in no- or low-connectivity scenarios. This caching will also improve the load time of content that's been previously loaded into mixed reality.

There will also be support for designating what content should be cached for offline support. This enables users to make sure all the content they need for their day will be available on their device regardless of connectivity.

Simplified Dataverse search configuration for admins and model-driven app makers

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 3, 2021

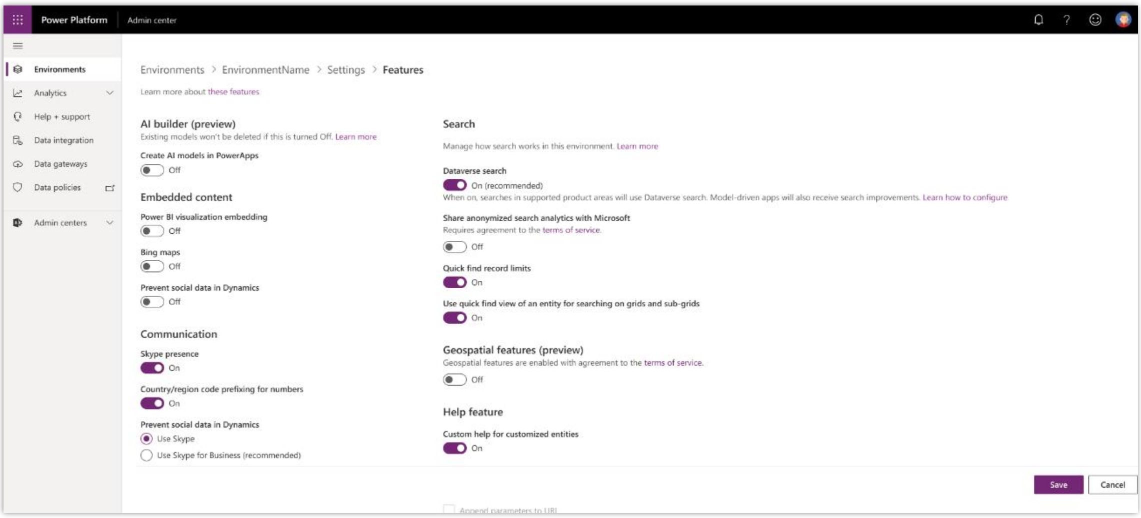
Business value

Administrators can enable Microsoft Dataverse search easily for their environments through the Power Platform admin center. Model-driven app makers can configure the global search experience within their apps.

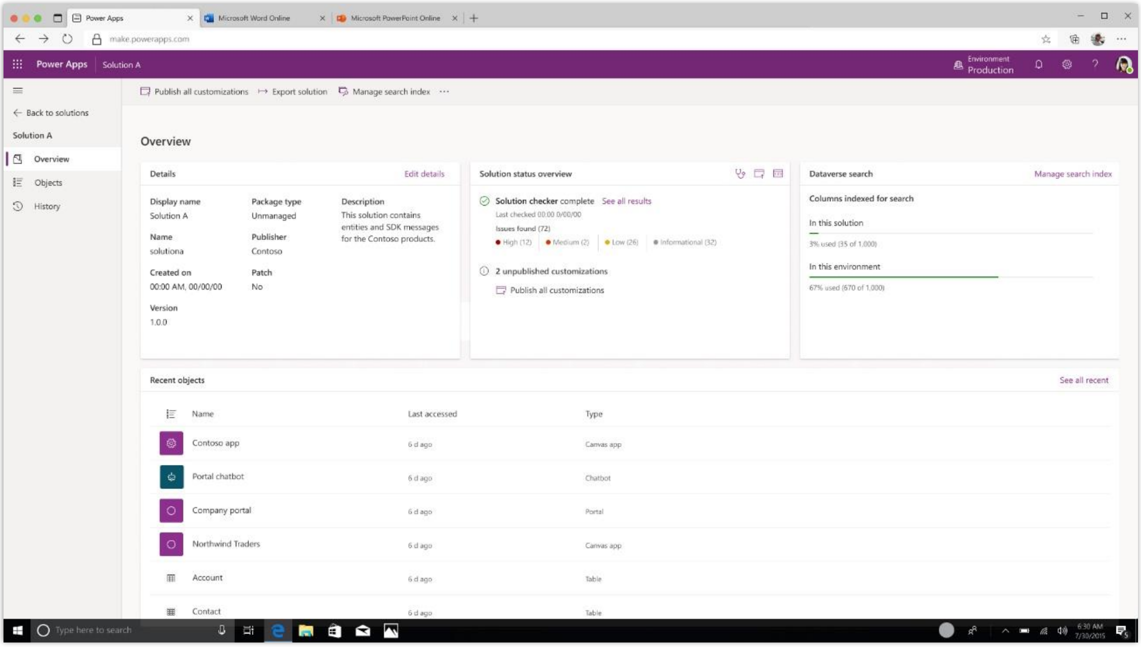
Feature details

Relevance search is now Dataverse search, enabled for the environment and used by global search in model-driven apps. Model-driven app makers can manage their users' global search experience by choosing the right tables to be a part of the search index.

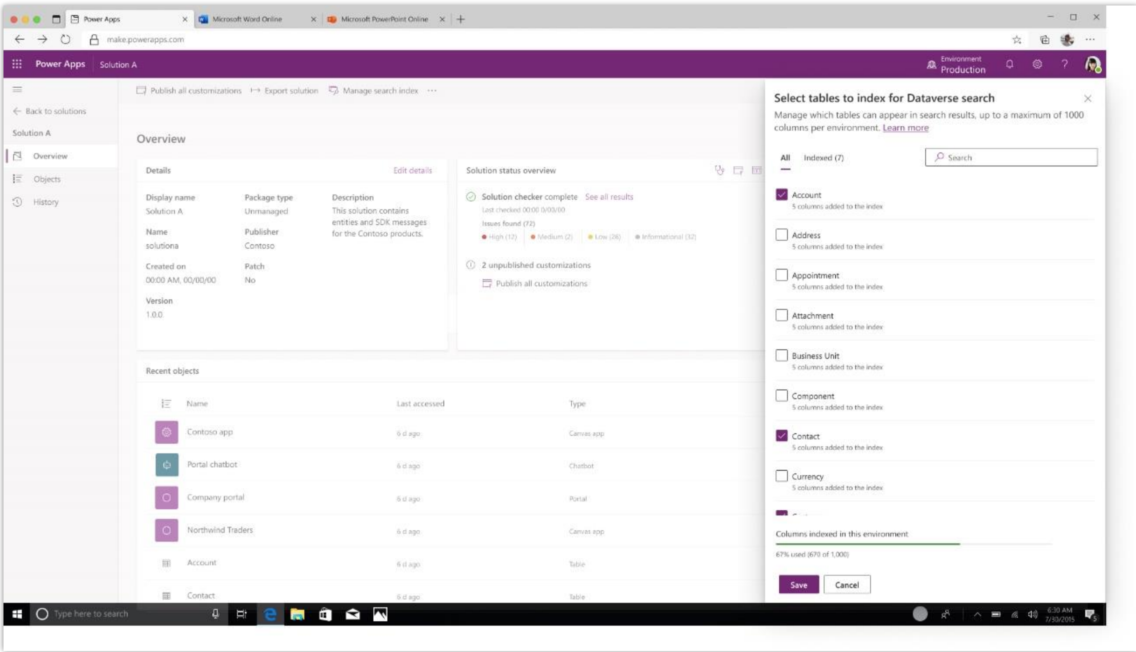
Configuring Dataverse search is an integral part of the modern solution explorer. Model-driven app makers can see what's in the search index in the context of a solution and add or remove tables to build the index so that users find their Dataverse information easily.



Enabling search for admins.



Configuring search for makers.



Configuring Dataverse search for makers.

See also

[What is Dataverse search?](docs) (docs)

Improved site map in model-driven apps

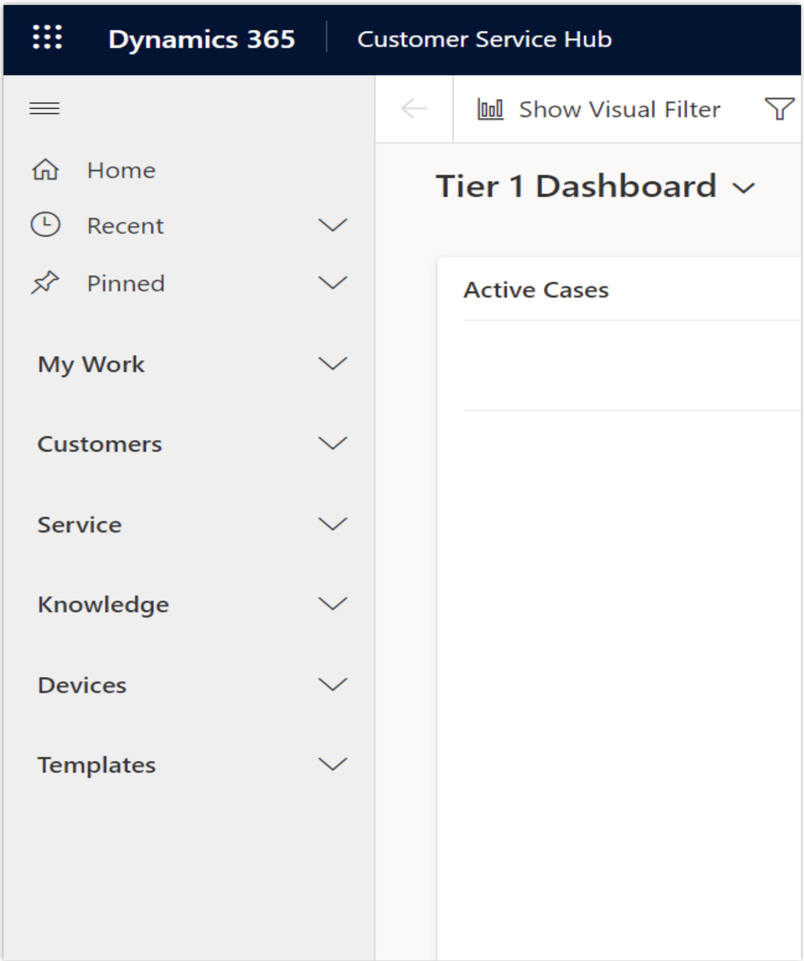
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔Jun 30, 2021	-	✔Oct 7, 2021

Business value

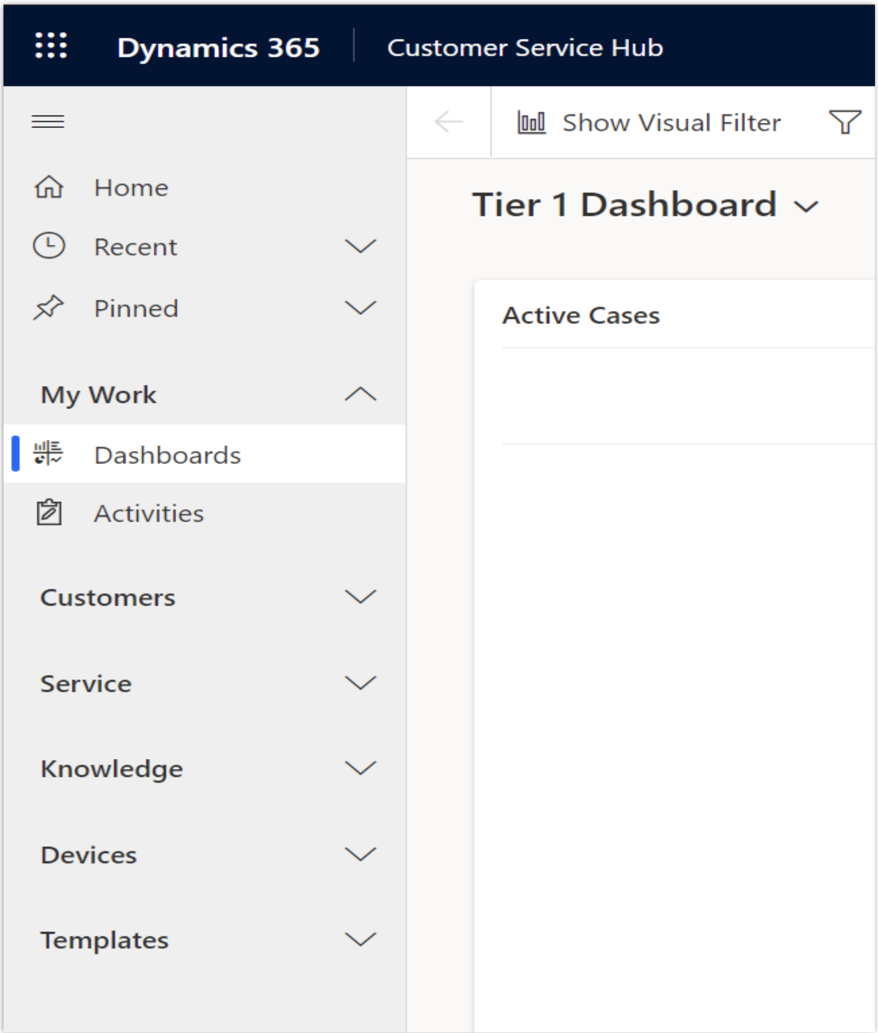
Makers can create a more streamlined app by using the improved model-driven app site map through collapsing groups and the option to hide **Home**, **Recent**, and **Pinned** items.

Feature details

Now users can more quickly get to items further down in the site map with less scrolling through collapsible groups. The user choice to collapse or expand per group is kept local in the browser.

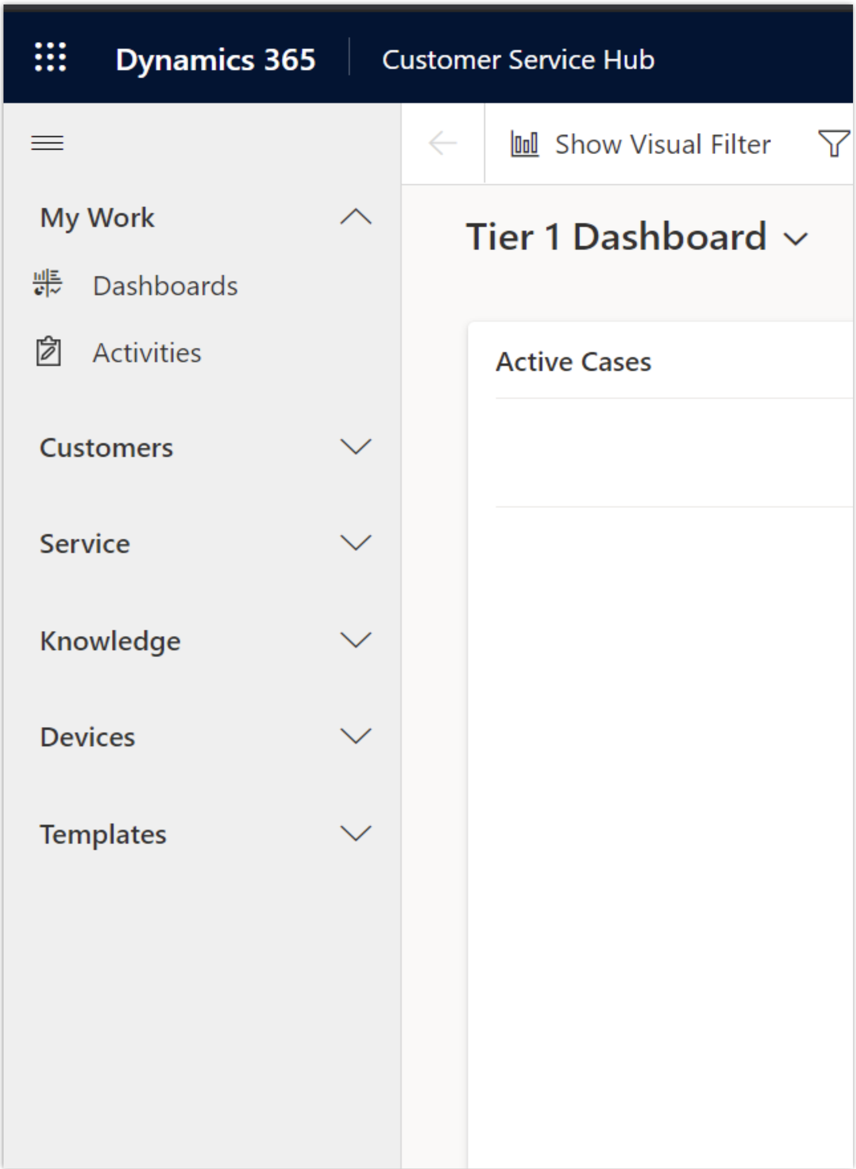


All groups collapsed.



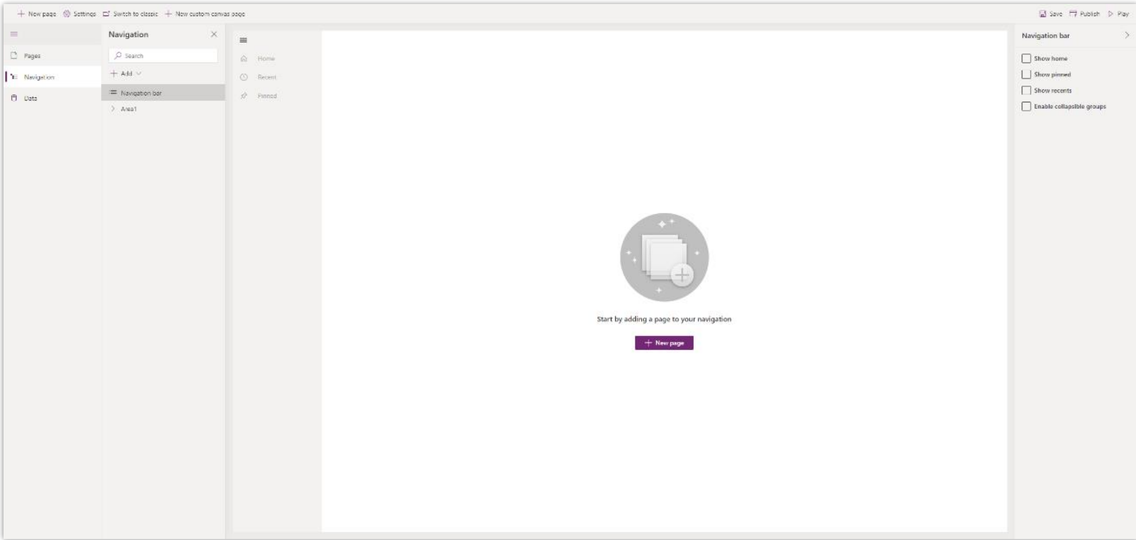
First group expanded.

In addition, makers can toggle the visibility of the **Home**, **Pin**, and **Recent** items to have them hidden to remove the fixed items at the top of the site map.



Home, Pinned, and Recent buttons hidden from the site map.

Makers can enable this behavior through the new modern app designer.



Configuring the site map in Power Apps Studio.

The improved site map is also supported on mobile devices.

See also

Navigation pane options (docs)

Intelligent authoring experience with Power Apps Studio

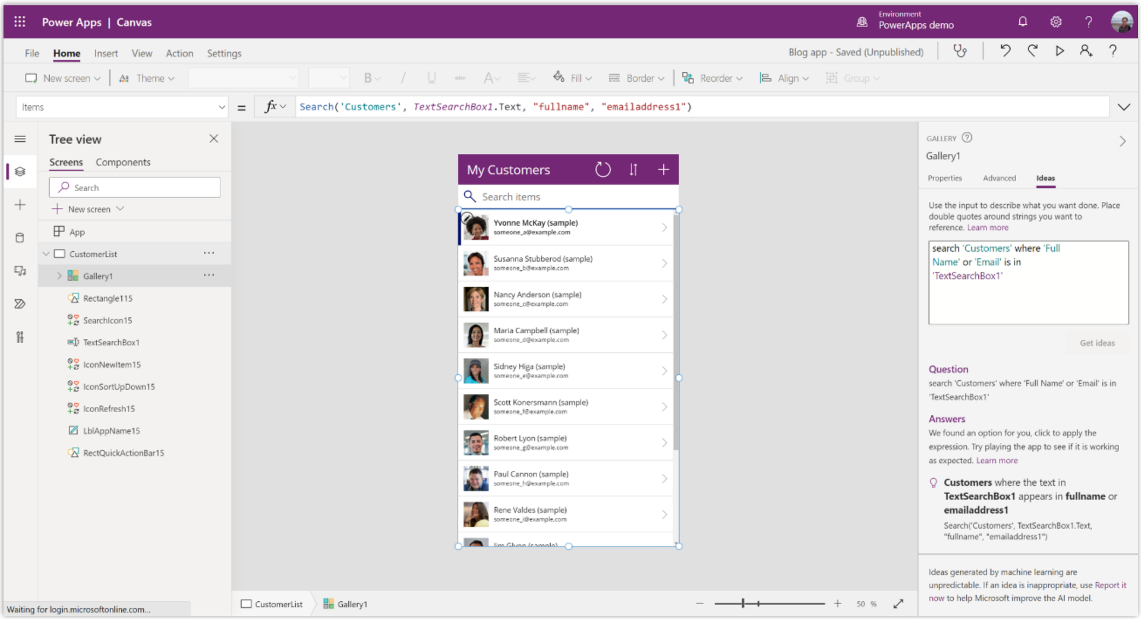
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 8, 2021	-	Feb 2022

Business value

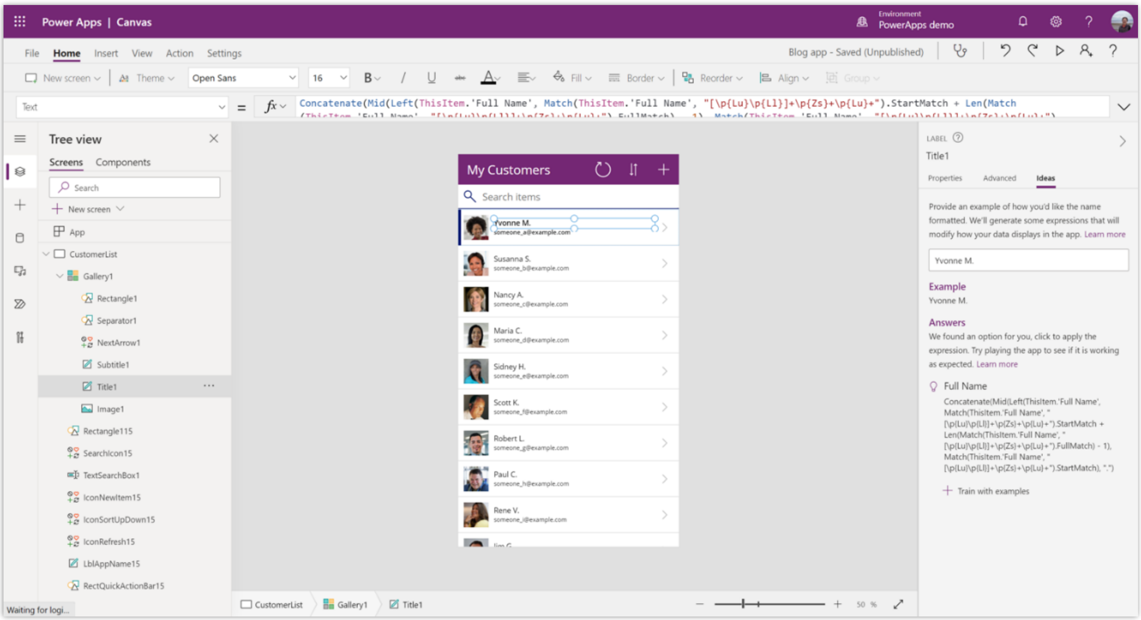
The use of AI will help simplify the app authoring experience.

Feature details

Microsoft Power Fx is a powerful capability for makers to connect app components, make the app respond to button clicks or data changes, and more. However, it will take some time for a citizen maker persona to learn to use the formula language and write the formulas correctly. To remove the hurdle for rapid app development, we're bringing in the power of AI to help. This feature will enable makers to use natural language to type in expected behavior or input a desired format, and Power Apps will automatically generate formulas for makers to apply.



Transforming natural language to Power Fx formula.



Use examples to generate Power Fx formula - programming by example using PROSE.

See also

[Feature exploration: Learn a new way to write formulas with AI powered assistance](#) (video)

[Power Apps Ideas](#) (docs)

Unified and modern Power Apps designer

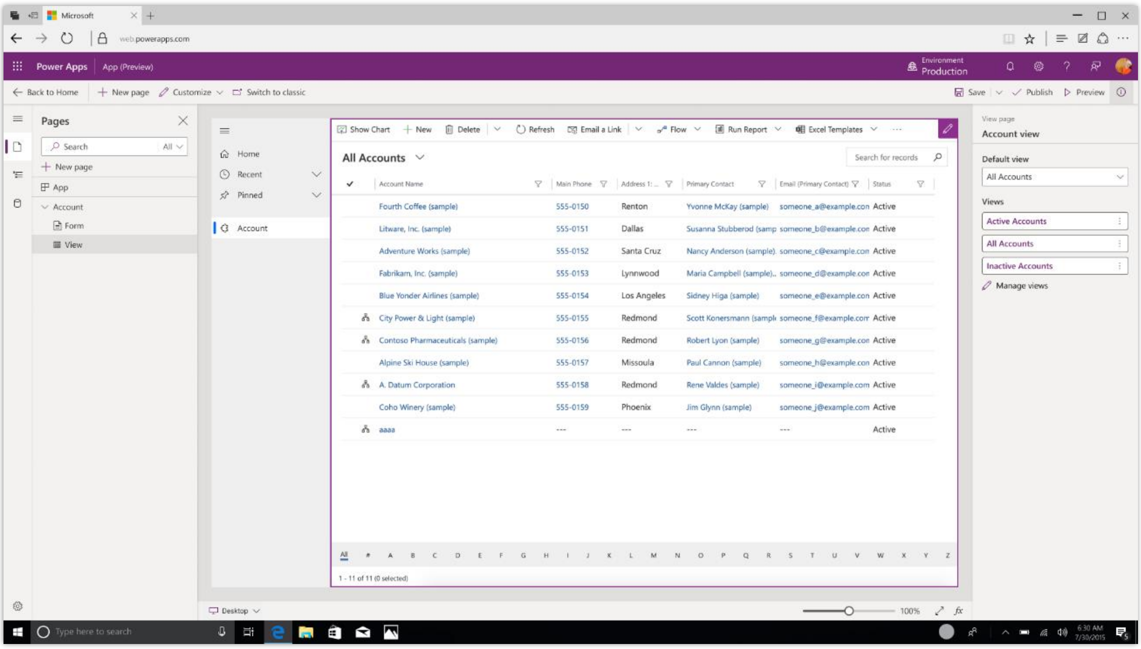
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ May 26, 2021	-	Mar 2022

Business value

The modern app designer will allow makers and admins to build apps faster, in a more intuitive way. Getting started has never been easier.

Feature details

In the new Power Apps app designer, you can easily build an app with forms, views, and dashboards, and take advantage of the capabilities of canvas apps. The app designer will be your hub for productive app creation in Power Apps. The capabilities provided have reached parity with the classic model-driven app designer. The new app designer has surpassed them with features like a live preview and better integration with the other authoring experiences in Power Apps.



App authoring experience showing a centered live preview with configuration.

See also

[Overview of the model-driven app designer](#) (docs)

Reinvented maker experience for configuring model-driven apps for offline use

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

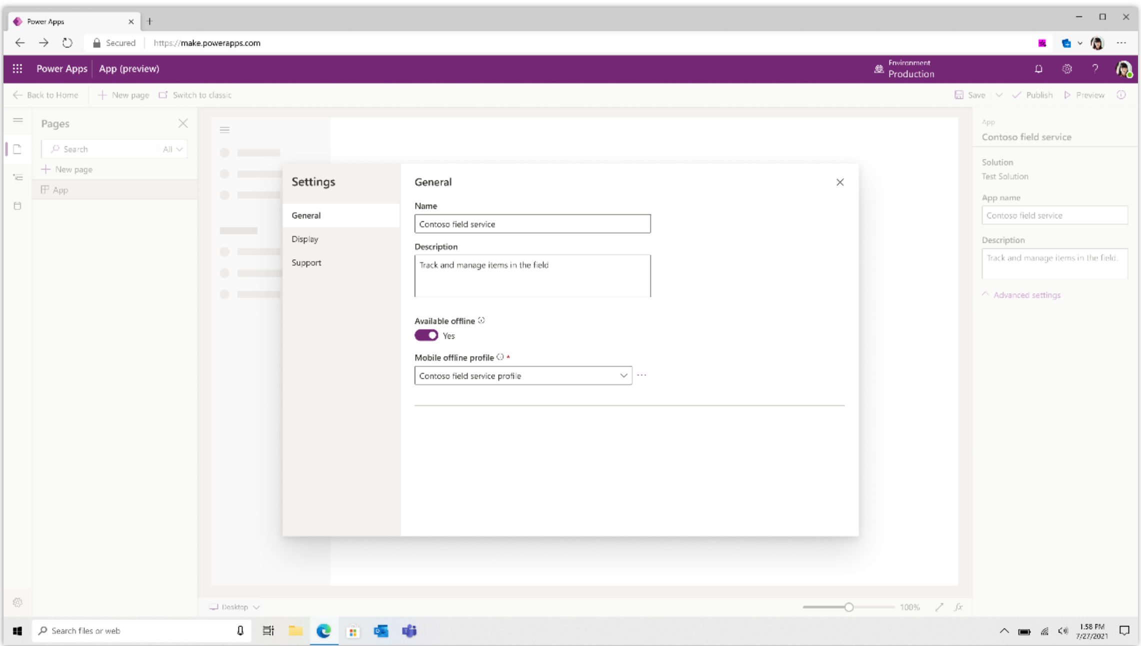
Business value

Setting up a model-driven app to use in offline mode is much easier, more intuitive, and accessible to all app makers.

Feature details

Through the modern app designer, makers can seamlessly configure their model-driven applications for offline use.

You don't need to figure out which tables to add and which filters to apply in your offline profile. Now, it's just one toggle switch to enable an app for offline and automatically generate a default offline profile. There's also no need to set users to offline profiles. If your user has access to the app (through security roles), they can also use the app in offline mode.



Offline configuration in the modern app designer.

Organize business logic in your app with components

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

Business value

Instead of having multiple copies of the same logic in an app, which can get out of sync and are hard to maintain, common logic can be placed into a component and shared within the app and across other apps with a component library.

Feature details

Raise your hand if you can name a computer language that doesn't have user-defined subroutines or functions. Stumped? Power Fx. Where does one put common logic that's to be reused across an app or between apps? Nowhere in Power Fx. In many apps, the same logic is replicated repeatedly in formulas, and that logic can get out of sync with its siblings if a maker changes one copy but doesn't realize there are others.

There's a better way. Early in 2021, we introduced component property parameters and enabled pure functions in Power Fx. A few months later, we added the ability for a component to access app scope, getting rid of the need for those pure functions to require everything to be passed in through parameters. The last piece of the puzzle is to introduce non-pure functions, which will fully enable code reuse. Any formula in an app can be hoisted out and placed in a function definition with parameters, immediately reused across the app, and abstracted for use across other apps.

Collaborate with fusion teams

Overview

Fusion teams can take advantage of more ways to use Power Apps for their user experiences, in addition to opportunities to package their code for reuse.

Open source Power Fx empowers low code everywhere

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 31, 2021	-	-

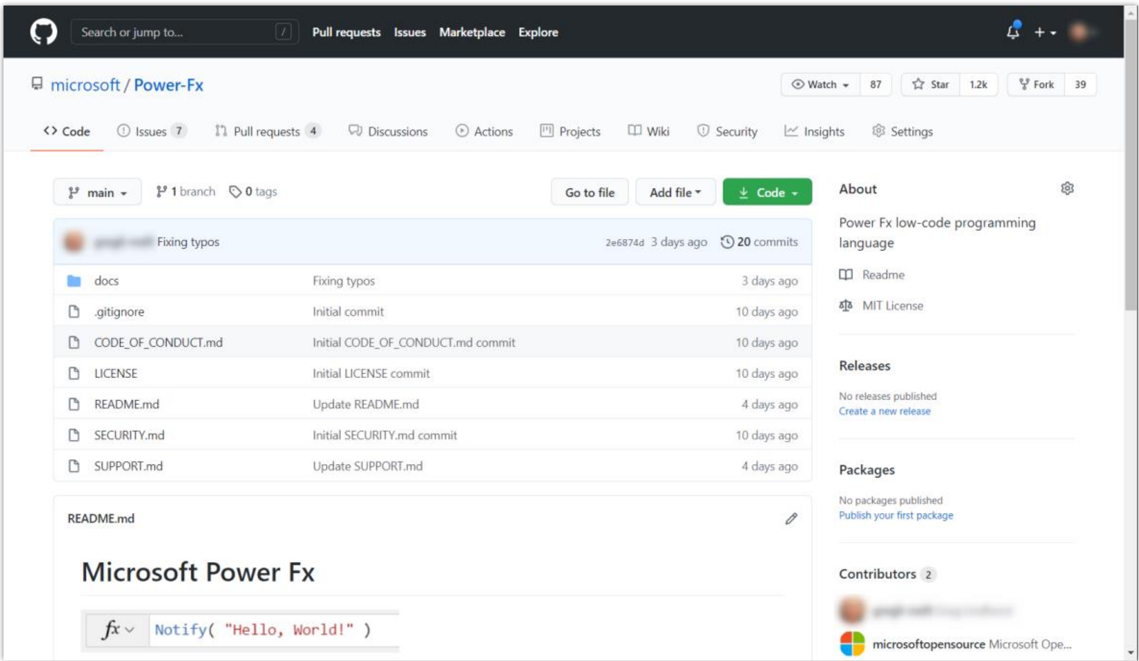
Business value

The same low-code Power Fx that supports Microsoft Power Platform products is available for anyone to use as open source. Like all other programming languages today, growth and adoption depend on a free exchange of ideas, issues, and enhancements in collaboration with the developer community.

Feature details

Power Fx is finding a home in Power Virtual Agents, Microsoft Dataverse, model-driven apps, and other products of Microsoft Power Platform. To further its adoption and engage more with our community of makers, we're taking a step that almost all programming languages do today—including Microsoft's own TypeScript and C#. We're making the language and implementation available as open source, so that anyone can integrate Power Fx in a wide spectrum of their own solutions. Anyone can view the code, raise bugs, discuss future directions, and help us grow and refine the language.

Source code and documentation will be available at https://github.com/microsoft/Power-Fx.



Open source home for Power Fx: https://github.com/microsoft/Power-Fx

See also

[Engage with Power Fx Open Source](#) (video)

[Microsoft Power Fx overview](#) (docs)

Collaborate easily with commenting across Microsoft Power Platform

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔Oct 24, 2021	-	Feb 2022

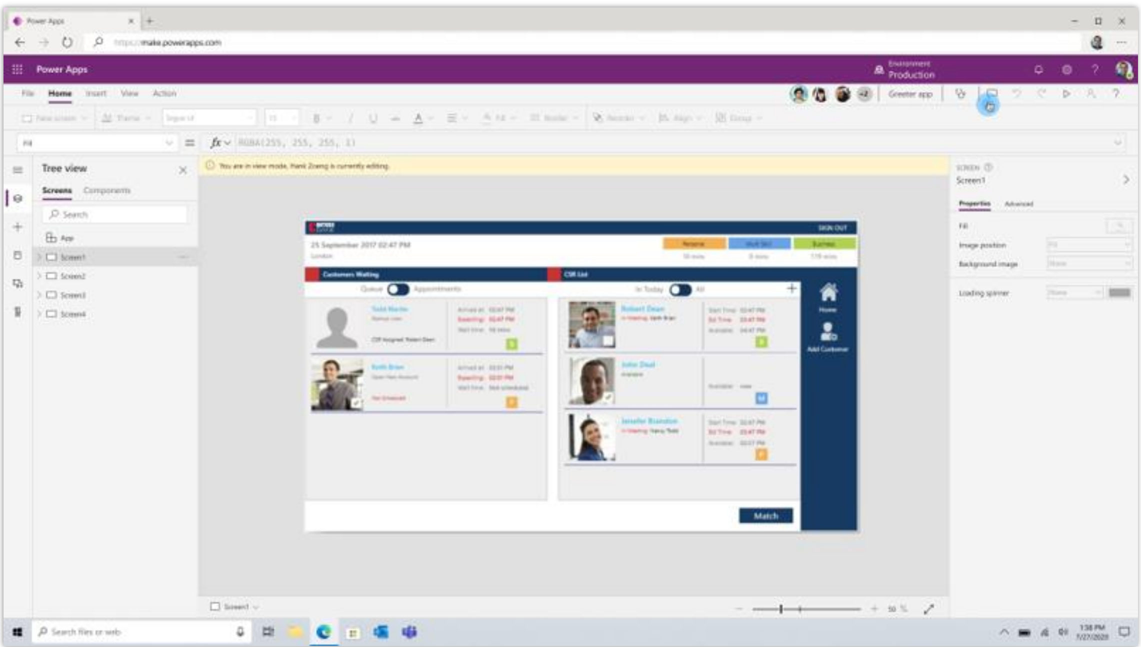
Business value

Enhance collaboration and productivity as fusion teams build new apps, flows, or solutions.

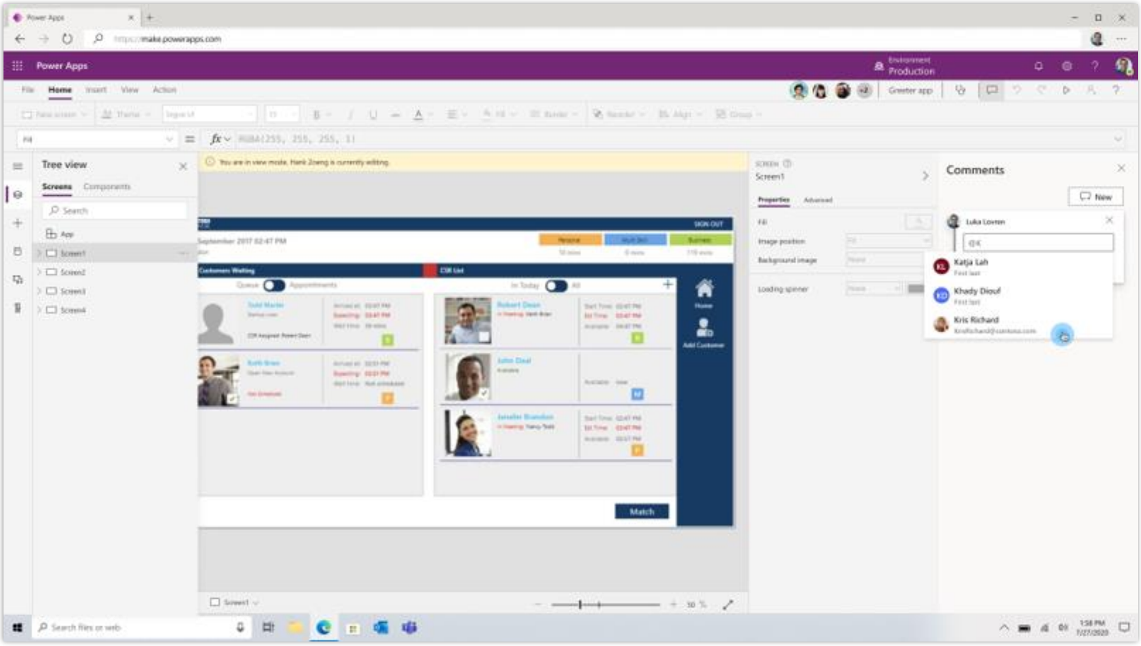
Feature details

In a typical work environment, team members look for an easy and effective way to collaborate, comment, and share tasks while building a new application or solution. Until now, Microsoft Power Platform has not offered a native solution for this type of collaboration. Instead, makers have needed to rely on external tools such as OneNote, email, and Microsoft Teams.

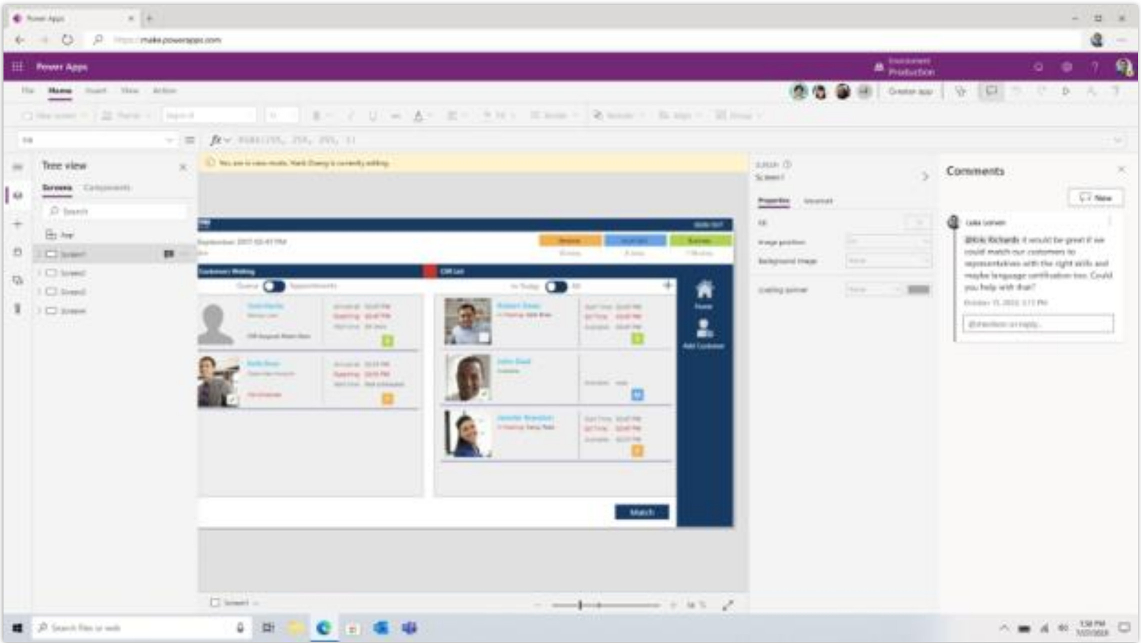
The introduction of commenting across Microsoft Power Platform will provide a new means of collaboration for team members who work together to build apps, flows, solutions, and chatbots. This is expected to boost engagement and enhance productivity among fusion teams who need to share feedback, request help, or ask for review.



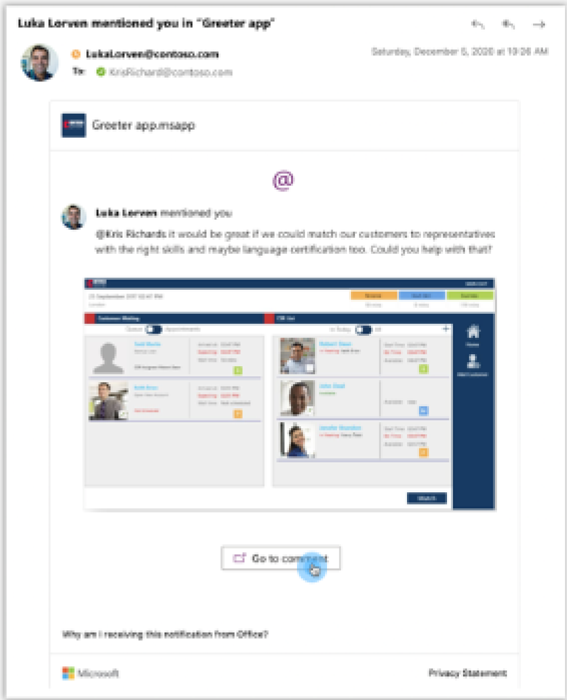
Commenting on an app.



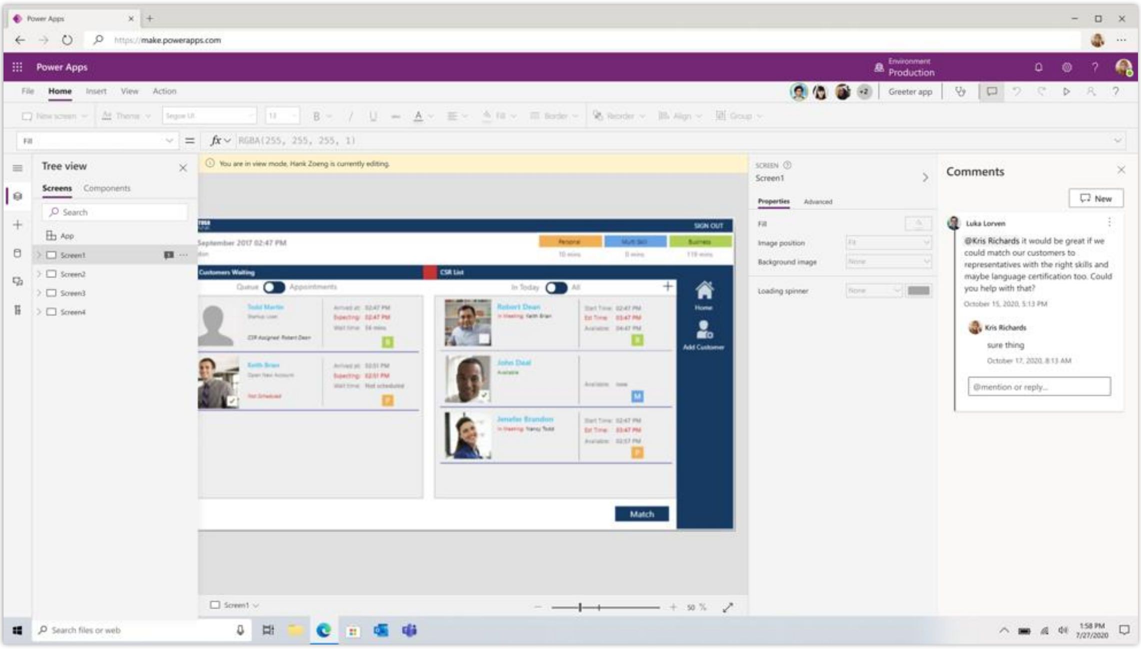
Mentions



View mode



Email notification



Response

See also

[Collaborate easily with commenting across Power Platform](#) (video)

[Add comments preview](#) (docs)

Canvas component and component libraries

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

Business value

App makers don't have to rely on code components for simple UX components to get the benefits of custom extensibility, application lifecycle management (ALM), and reuse. Components and component libraries feature in canvas apps provide a much faster and simpler way not only to build custom UX, but also to have centralized control on upgrade, update, and solution support with ALM capabilities.

Feature details

Components and component libraries feature in canvas apps can be used to build reusable and centrally managed low-code UX components. Besides investments in reliability and fundamentals, this release will add component ALM support. Users will have the ability to package and ship component libraries and applications using standard Microsoft Dataverse solutions. Component libraries will also add support for new Fluent controls and Power Apps component framework code components for custom pages.

Manage everything about solutions and tables in a modern way

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 26, 2021	-	Mar 2022

Business value

By having access to all the features from the portal, makers will enjoy an accessible and complete modern maker experience.

Feature details

Power Apps, also known as the maker portal, will include all the features present today in the classic experiences, allowing makers to stay in the portal to manage everything about their solutions and tables. This improves productivity because makers don't need to "switch to classic" to access some features. With this milestone, the classic solution list and solution explorer are deprecated because all features can be used from the portal.

See also

Solution view (docs)

Code component improvements

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

Business value

With Power Apps component framework already in general availability, we'll be adding more features that enable professional developers to build and extend Power Apps in a scalable manner with strong performance. Features being enabled for the next wave are geared toward enterprises that use some of the best practices and capabilities developed for the internal first-party components.

Feature details

In this release, code components for canvas apps will have the following improvements and new features:

- Virtual components and shared libraries support will enable code components to use system React and Fluent libraries. Developers can also create their own shared libraries that can be used across code components.
- Code components will have support for events in line with the canvas apps native components. This will enable developers to define custom events that can be raised by code components.
- For model-driven apps, code components can be created for the simple lookup and Multi-select option set (Choices) type, and properties of these new types can also be added. These are top community requests. Additional framework APIs on the canvas apps will be added, which approaches model-driven app parity.

Roll out world-class experiences for users

Overview

This release brings more modern experiences to users of apps created with Power Apps.

Ratings for model-driven apps

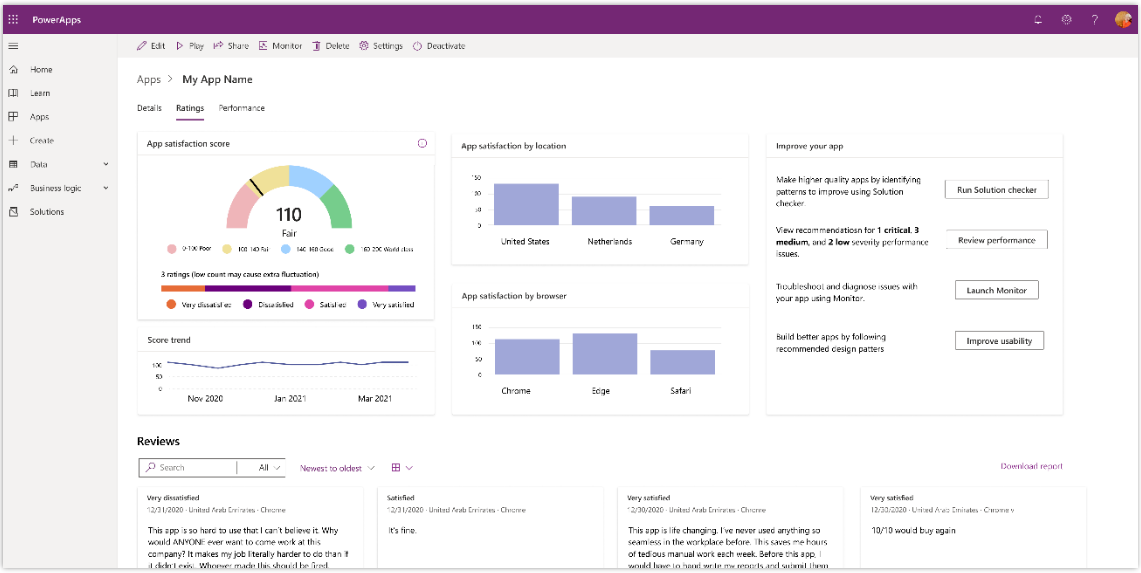
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2022	-	-

Business value

Ratings help makers build apps that users love. This feature closes the engagement gap between app makers and users by introducing a feedback loop. Enterprise makers can view app-level net satisfaction (NSAT) scores and reviews, and take action to improve their apps based on user feedback.

Feature details

Through the **Ratings** dashboard, makers can view app-level NSAT scores and user reviews for model-driven apps including Dynamics 365 customer engagement apps. Makers can dive into app ratings to understand what's working and where there's room for improvement. They can launch tools to help improve their app directly from the maker engagement hub, make enhancements to apps based on feedback, and track changes to their app satisfaction score over time.



Ratings dashboard in maker portal

Enjoy smoother mixed-reality experiences with performance improvements for complex models

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

Business value

Supporting more complex content in mixed-reality experiences means you can expand your scenarios for sales, inspection, guided training, product design, or anything else. Your customers will also see a faster, more-responsive app, and your mixed-reality models will look smoother and respond more quickly.

Feature details

Bring more complex models into mixed reality with performance improvements including:

- Support for models optimized with gltfPack
- Runtime optimization of models with multiple submeshes
- Higher frames per second (FPS) during mixed-reality experiences by moving more logic into the native layer

These improvements will create a more responsive app and make for a smoother mixed-reality experience.

Advanced lookup capabilities for all users in model-driven Power Apps

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓ Jun 30, 2021	✓ Oct 1, 2021

Business value

Lookups are a core component of model-driven apps because they help you access underlying data relationships in Microsoft Dataverse. Advanced lookup capabilities help users be more productive with data-entry tasks by providing a better way to search and look up records within a context, as an intuitive extension of the simple lookup control in model-driven apps.

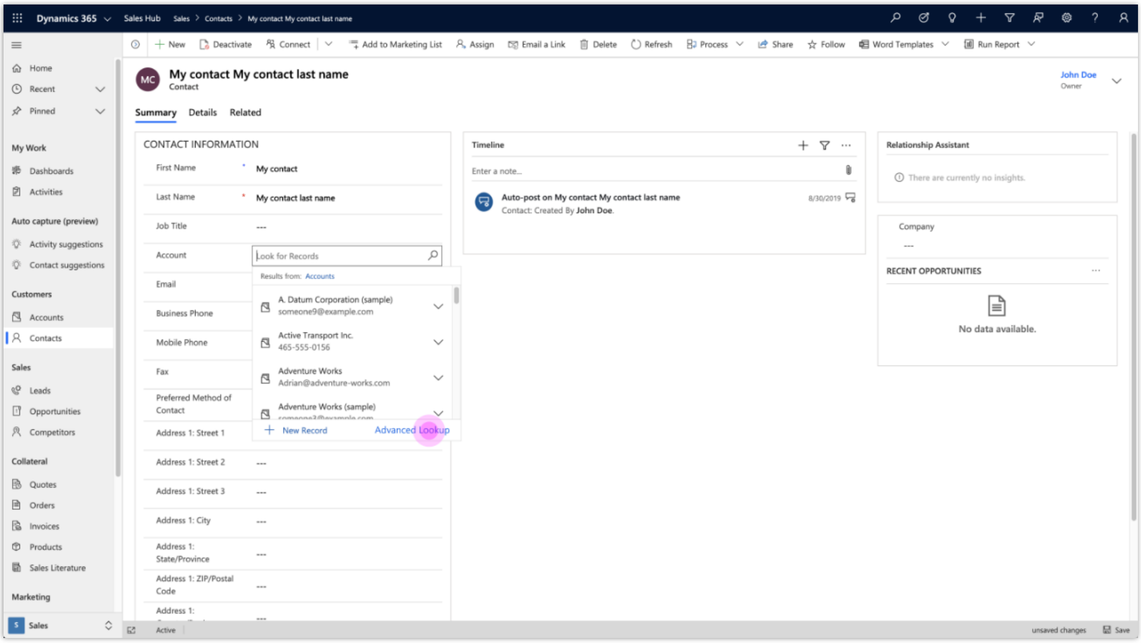
Feature details

Searching for and looking up rows in model-driven apps on the web is easier with advanced lookup. Use the advanced lookup capabilities to drill into a form and easily sort rows, and switch between tables or views in a lookup column.

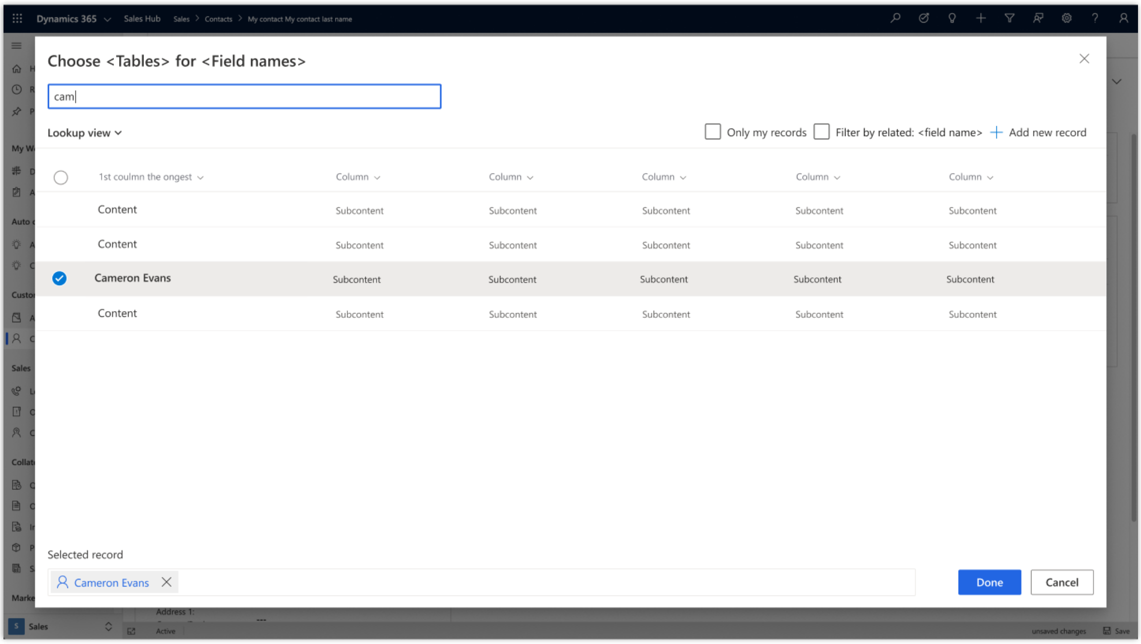
In addition to seeing results as you type, you can do the following:

- View more information per row to select the correct row easily.
- Switch views and sort on data to look up the correct row.
- Easily select multiple rows to a lookup field from the advanced lookup grid.
- Filter the rows to show only rows that you own.
- Explore data from advanced lookup without losing context.

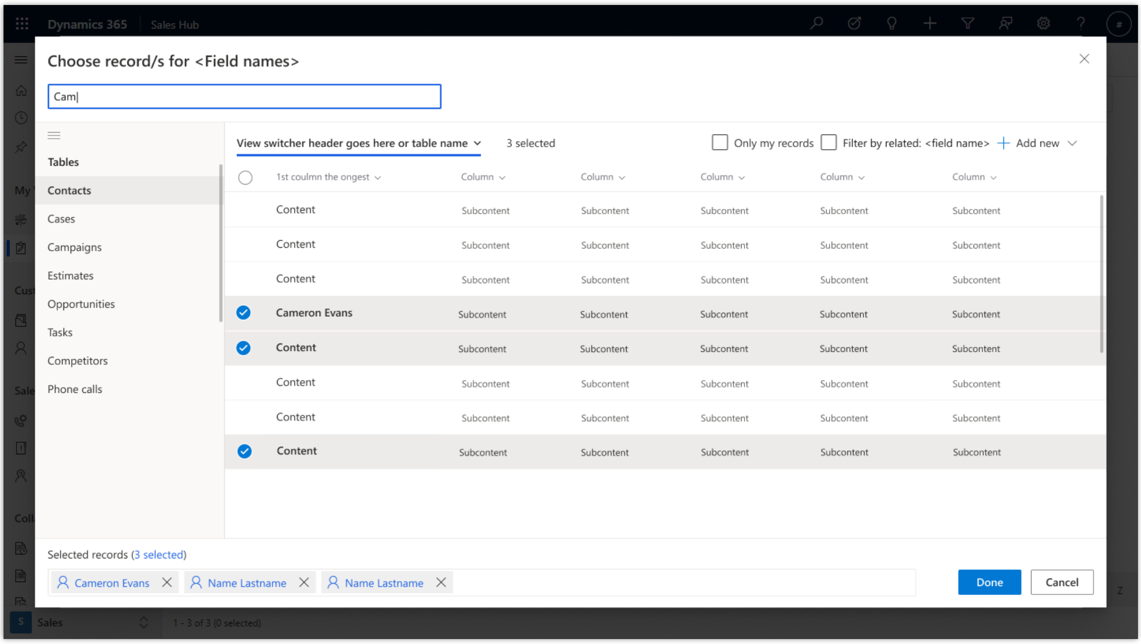
All these capabilities are available for an admin to opt-in under the **Advanced lookup** toggle in Power Platform admin center. In 2021 release wave 2, this will be enabled by default for all users.



Advanced Lookup entry point.



Advanced lookup single table single select.



Advanced lookup multi-table multi-select.

See also

[Manage behavior settings](#) (docs)

Modern search for all users in model-driven apps

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 29, 2021	✔ Oct 1, 2021

Business value

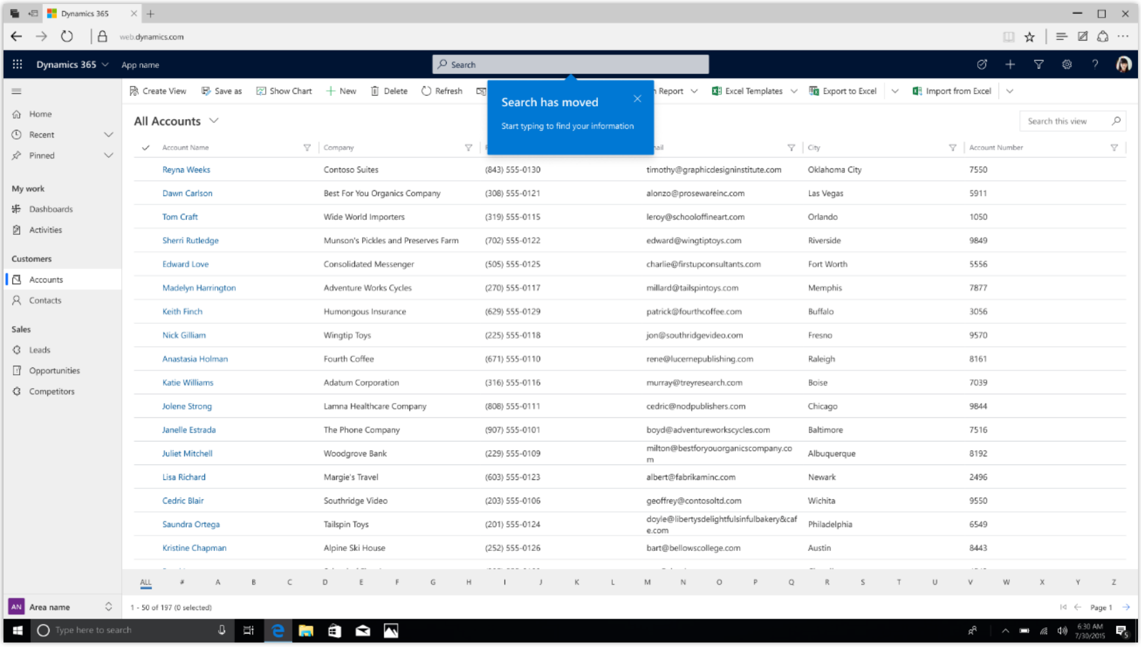
This capability introduces a modern global search experience, backed by Microsoft Dataverse search, for all model-driven Power Apps on all devices as the default—helping users find their information and navigate easily.

Feature details

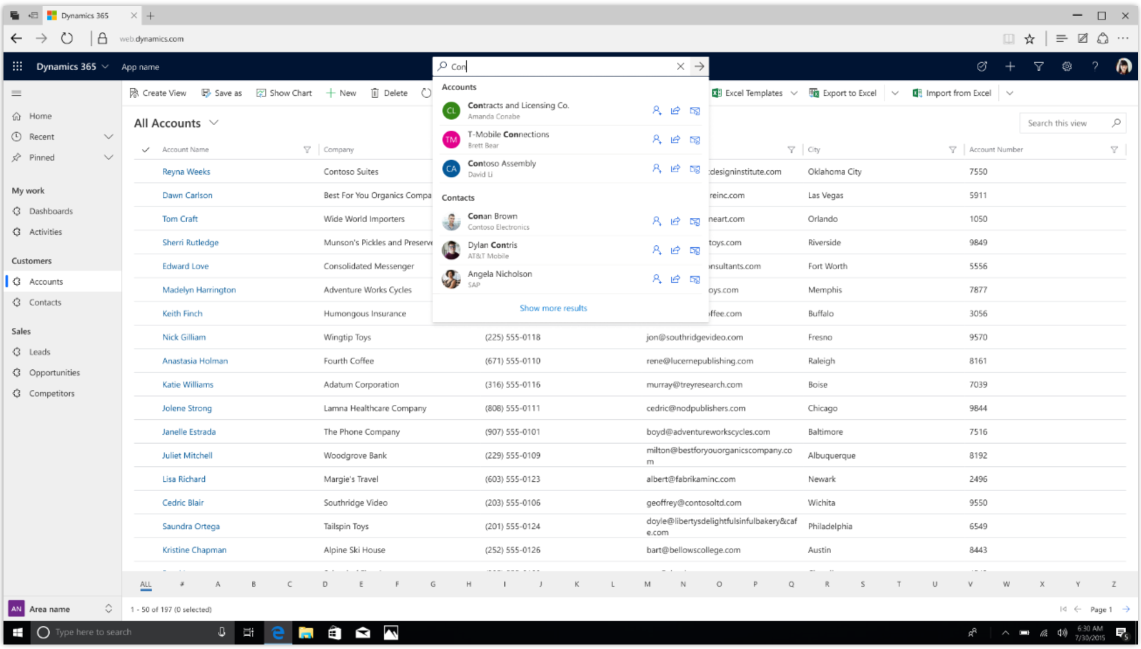
Relevance search is now Dataverse search and the only global search option for all users in model-driven apps in a production environment on any device. Global search is easy to use, fast, and intelligent. Relevance search delivers the following benefits:

- The search box is always available at the top of every page in your app. You can start a new search and quickly find the information that you're looking for.
- Personalized zero query experience of recent searches and rows, which helps you complete a search without a keystroke.
- Seeing suggested results as you type puts Dataverse information at your fingertips.
- High-quality results let you search and act on your information easily and quickly.
- Quick action commands that appear next to search results help you complete a task without losing context.

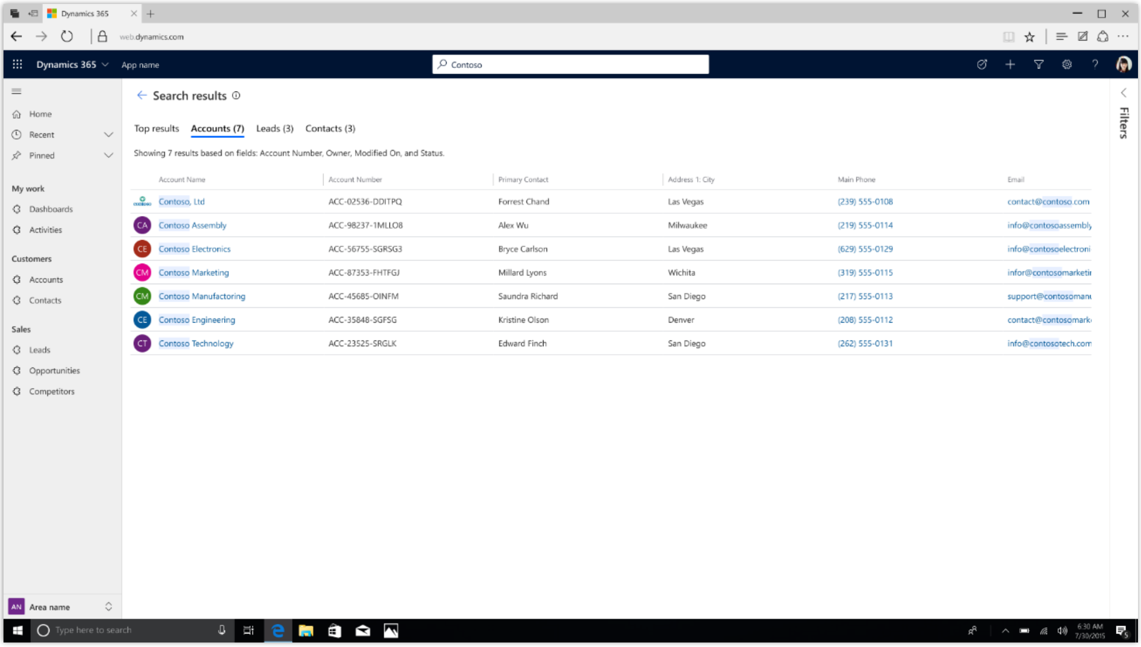
All these capabilities are available as an admin opt-in under the Dataverse search toggle in Power Platform admin center. With 2021 release wave 2, this will be enabled by default for all production environments. With this capability enabled by default, individual users won't have the ability to switch to categorized search.



Search bar



Suggestions



Results page

See also

Advanced lookup (docs)

Easily share a record in the new model-driven app experience

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Aug 2, 2021	✔ Oct 3, 2021

Business value

Removes the dependency on the previous web client hybrid experiences. Provides a Web Content Accessibility Guidelines (WCAG) 2.1 accessible experience by using modern dialogs and controls.

Feature details

User will be able to share a row quickly and easily with another user or team by using the Unified Interface dialog experience, which meets all WCAG 2.1 requirements and supports reflow across all viewport sizes. This capability is also fully supported in the mobile experience.

See also

Share rows with a user or team (docs)

New model-driven app experience for editing multiple records

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓Aug 2, 2021	✓Oct 3, 2021

Business value

Removes the dependency on web client hybrid experiences. Provides a Web Content Accessibility Guidelines (WCAG) 2.1 accessible experience by using modern dialogs and controls.

Feature details

Users will be able to edit multiple rows quickly by using the Unified Interface dialog experience, which meets all WCAG 2.1 requirements and supports reflow across all viewport sizes. It's also fully supported on the mobile experience.

See also

Edit multiple rows (docs)

New column options in grid view page

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓Jul 29, 2021	✓Oct 7, 2021

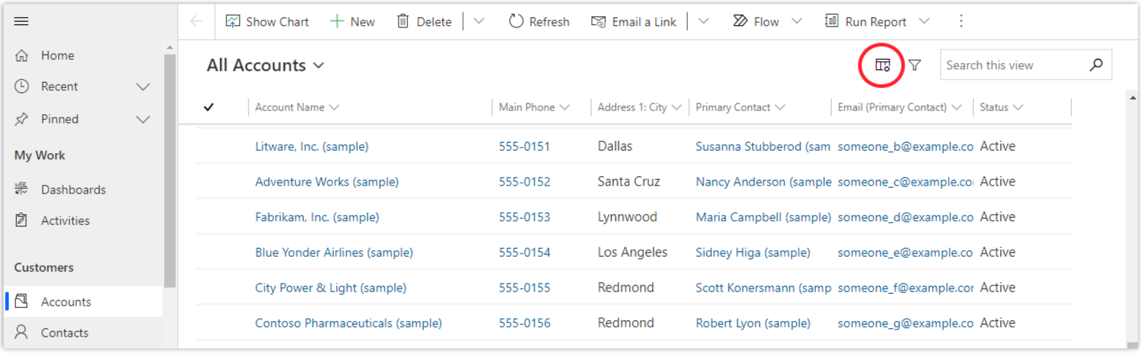
Business value

App makers can customize grid columns and the order in which they're shown directly from the grid view page.

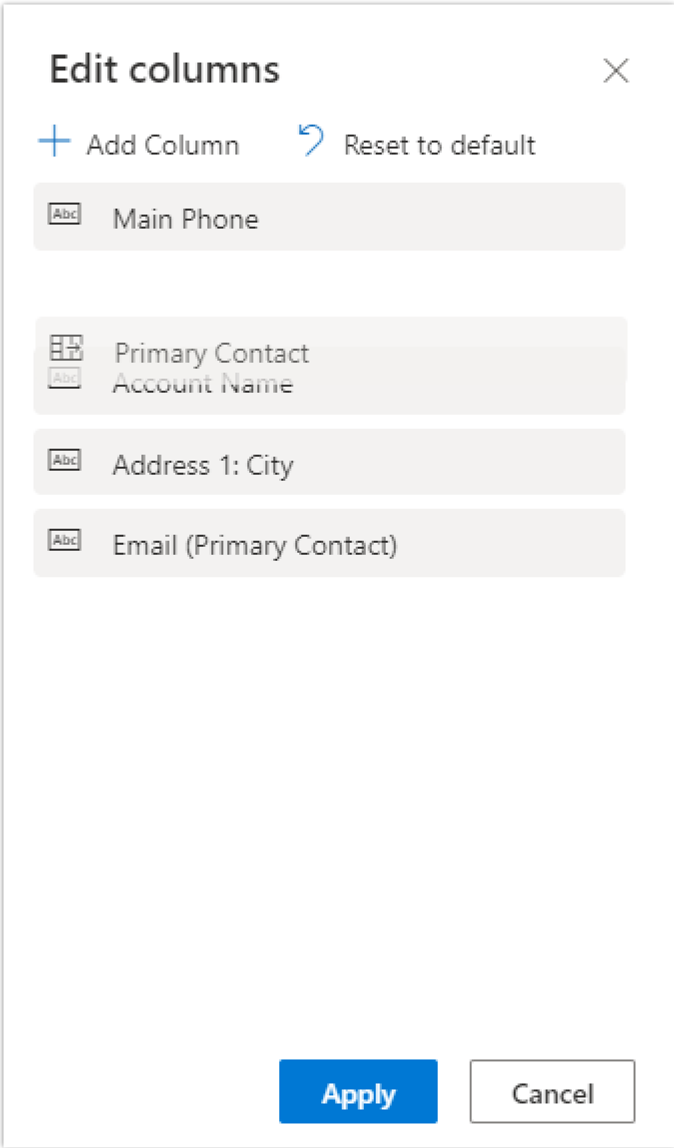
Feature details

The grid view page in model-driven apps now features column options settings that let app users customize which columns are shown in the grid. With this feature, users can:

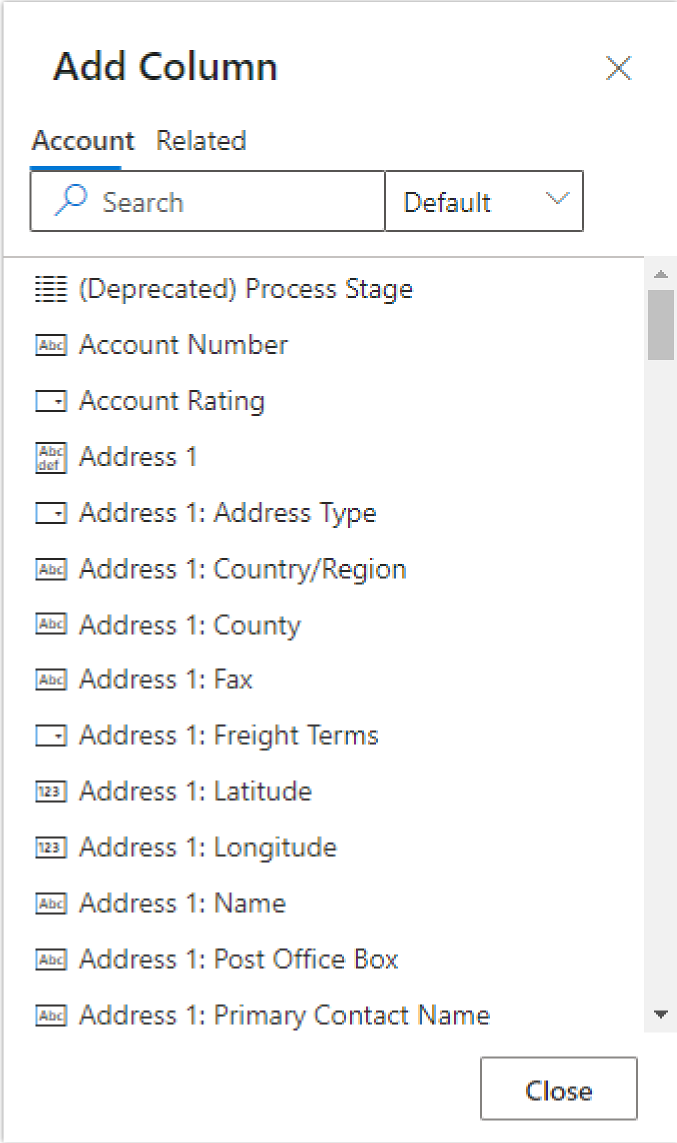
- Add new columns, from current or related tables
- Remove columns
- Change the order of columns in the grid



Column options button inside the grid view page.



Dragging columns to change their order.



Adding new columns

See also

[Use the column options in a view or grid](#) (docs)

Model-driven app improvements

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓Aug 2, 2021	✓Oct 7, 2021

Business value

Model-driven apps are more accessible, responsive, and keyboard-friendly. Some components have styling updates to align with other Microsoft products.

Feature details

Model-driven apps have a number of improvements in 2021 release wave 2.

With this release, several accessibility compliance updates have been done for Web Content Accessibility Guidelines (WCAG) 2.1, including core shell and page support for zoom up to 400%, improved progressive collapse, and keyboard support access.

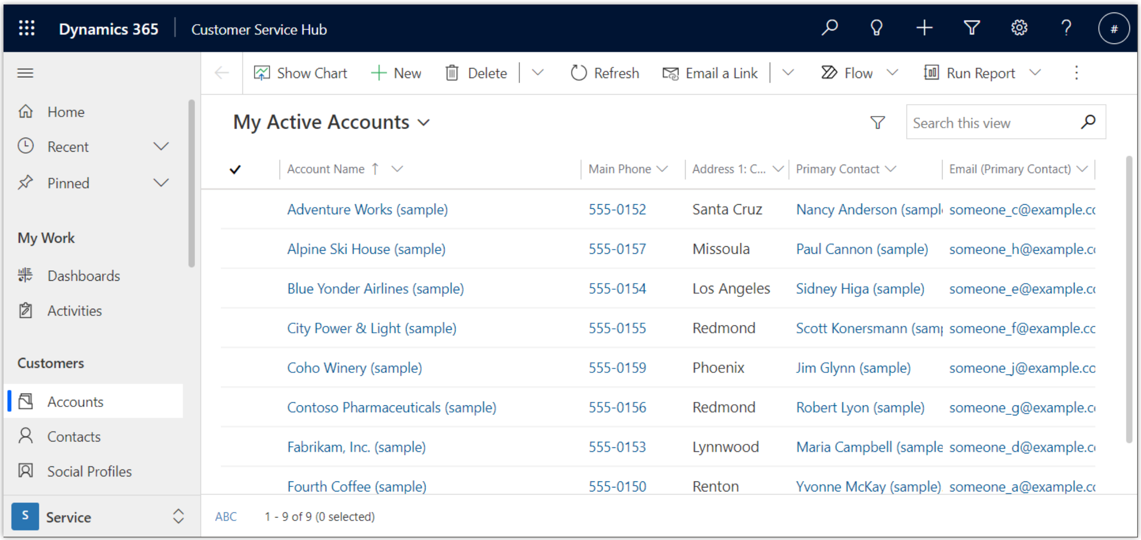
To be more effective in short viewports, large center dialogs will use the full screen. To be more effective with narrow viewports, the site map and side panes will move into a collapsed mode initially, and then move into an app menu in the header.

The improved app menu maintains the existing site map or session list, and it now has the app panes in addition to the current session app tabs.

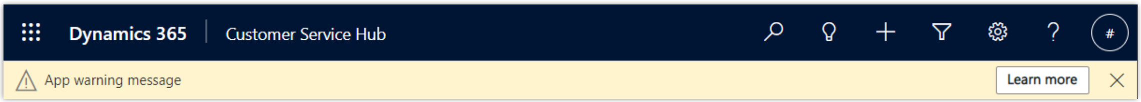
To improve keyboard access, this release adds landmark regions for five main regions: header, navigation, main, left side pane (when used), and right side pane (when used).

- A user can move to the first or last element by using **Ctrl+Home** or **Ctrl+End**, respectively.
- To switch to the next region, use **Ctrl+F6**.
- Use **Shift+Ctrl+F6** to switch to the previous region.
- To support keyboarding to pop-up and toast notifications, **F2** will set focus to the visible notification.

As part of improving visual consistency with other Microsoft products, we're updating the styling for scroll bars and the message bar. Scroll bars use a thin, rounded styling that's consistent with Microsoft 365 and Microsoft Teams. This works with browsers supporting scroll bar styling, such as Microsoft Edge (Chromium) and Chrome. The app and form message bars have updated colors for information and warnings background, in addition to the call to action button. These message bar changes are done to align with Microsoft Fluent styling.



Scroll bars have updated styling such as site map and grid



App message bar warning updated styling

App message bar information updated styling

New Power Apps grid (read-only)

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓Aug 2, 2021	-	✓Oct 7, 2021

Business value

With grids serving as the data display and navigational cornerstone of views, a new grid control brings compliance with Microsoft Accessibility Standards, as well as improved productivity with performance improvements and a modern UI. It will serve as the foundation for numerous upcoming improvements in this area.

Feature details

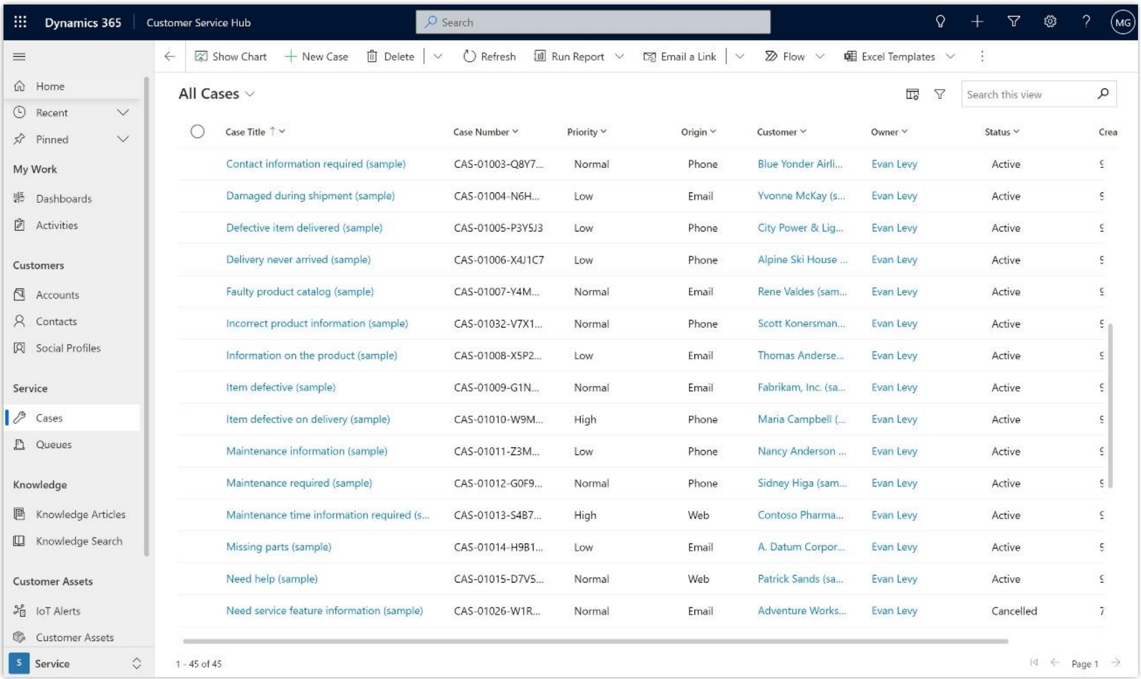
Model-driven apps now feature a new read-only grid control, both inside the view page and inside forms (sub-grids). The new grid control is in compliance with Microsoft Accessibility Standards and is the basis for numerous upcoming features.

In addition to improved performance, the new control supports:

- Remembering grid view settings across the session
- Ability to resize columns
- Ability to reorder columns (through column options UI)

With the vision of the Power Apps grid being the grid control for all of Power Apps, the alphabetical navigation at the bottom of the grid (the jumpbar) will be turned off by default but can be enabled by customizing the grid control properties for the view or the form.

An editable version of the control will be coming soon.



New read-only grid control in a view page.

See also

[Power Apps grid control](#) (docs)

Unified Interface browser support changes

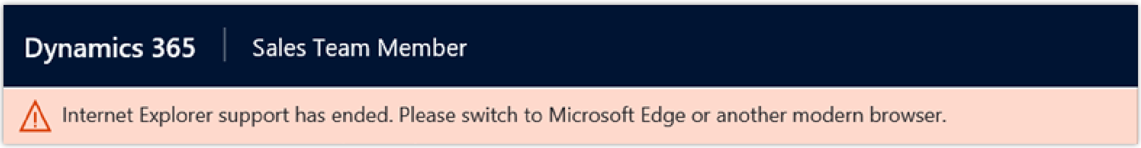
Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Aug 2, 2021	✔ Oct 7, 2021

Business value

Improve user experience and performance by supporting only modern browsers.

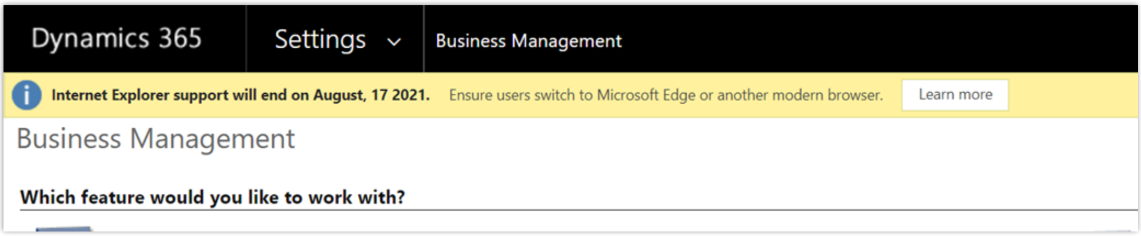
Feature details

With Internet Explorer support ending August 17, 2021, the Unified Interface web browser will start warning users who are running Internet Explorer by using the app message bar. The message will be shown each time the session starts and can be dismissed. Users who move to Microsoft Edge (Chromium) or another modern browser will see their performance improve as much as doubled compared to Internet Explorer, and they'll have a more consistent experience.



App message bar warning about the end of Internet Explorer support.

Administrators who open either the Power Platform admin center or the classic **Advanced Settings** and have users within the organization using Internet Explorer will see a warning message. After all users have stopped using Internet Explorer, we'll remove the message for those organizations.



Advanced Settings app message about the end of Internet Explorer support.

NOTE Starting in 2022 release wave 1, Internet Explorer and classic Microsoft Edge browsers will be blocked from opening Unified Interface. This will let us further improve the experience by adding browser enhancements that aren't possible on these deprecated browsers. Leading up to the blocked experience, an app error message will be shown to users of Internet Explorer.

To further improve user experience, 2021 release wave 2 will include user warnings for older browsers. Based on performance investigations, we see that use of older, unsupported browsers have performance issues not seen in the latest version of the same browser. For this release, we'll show users a warning message when they're using browser versions older than Microsoft Edge (Chromium) 83, Chrome 83, and Firefox 76. These browsers were all released in May 2020. Future twice-a-year releases will move up the version that shows warnings.

Warning app message shown when browser version is older than recommended.

See also

[Support end for Internet Explorer](#) (docs)

Model-driven apps support multiple app side panes

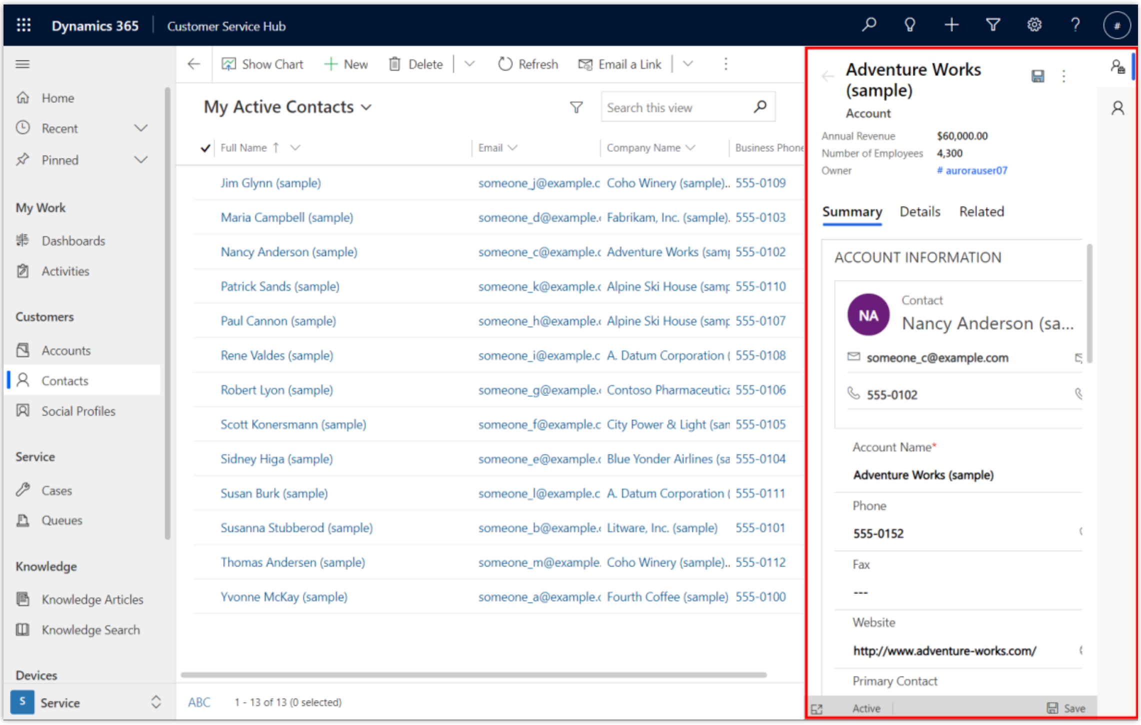
Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Aug 2, 2021	Jan 2022

Business value

Enable one or more productivity-enhancing panes to be opened to the side of the main content.

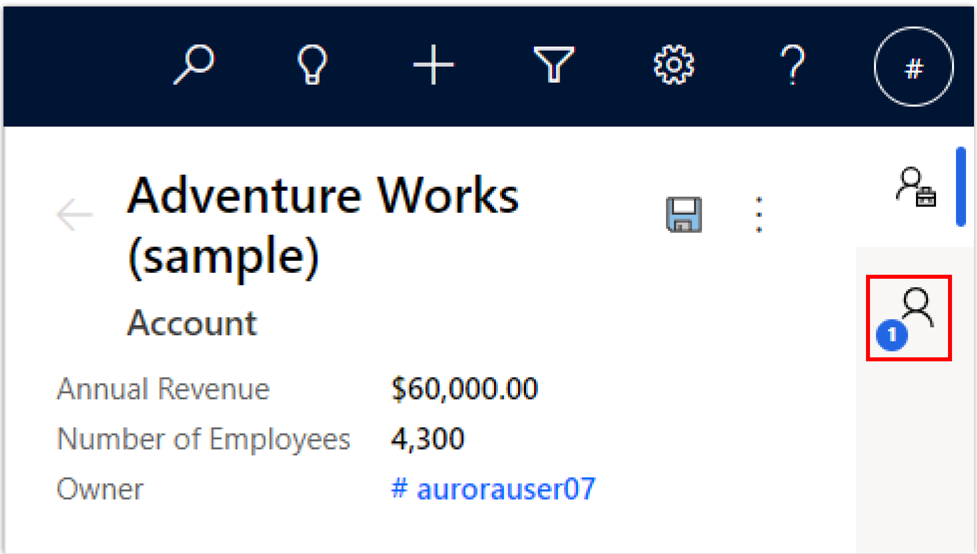
Feature details

Model-driven apps now support the ability to have multiple app-level side panes. The app side pane feature builds on the legacy `loadPanel` API, which was limited to a single side pane. This new feature creates a collection of tabs, each with a different pane. Omnichannel for Customer Service and Dynamics 365 Customer Service products have a similar experience of multiple tabs within the single pane. That experience is moving into the app side pane and allowing additional panes to be added.



Model-driven app with two panes in the app side pane

A set of new client APIs is used to create and manage multiple side panes. The pane can open pages in a way similar to how the `navigateTo` API works, and it allows either in-place navigation or opening in another part of the app. It's easy to open a view or form in the pane. The new custom page with out-of-the-box or custom components can create a more targeted experience. Each pane can have a badge over the tab icon to draw the user's attention.



App side pane tab has badge count overlay

To support the legacy `loadPanel` API along with the new multiple side panes, the `loadPanel` API will be placed in a tab in the side pane collection when 2021 release wave 2 is enabled. Before 2021 release wave 2, `loadPanel` will continue to work as it does now, but calls to the new API will replace the pane. For earlier opt-in to the combined behavior, a new app setting can be enabled for the model-driven app. In the future, the `loadPanel` API will be deprecated, with the exception that existing usage is moved to the app side pane. No changes are being made to the left side pane, which is used by Omnichannel for Customer Service and Dynamics 365 Customer Service products.

See also

Creating side panes by using a client API (docs)

Updates to Power Apps trial plan

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

Business value

Users without a Power Apps license can have access to the full capabilities of Power Apps through the 30-day trial plan, which can be extended two more times to continue using the app while you plan for the purchase of a license.

Feature details

The Power Apps 30-day trial plan allows users to renew the trial period two more times after the initial 30 days have ended, for a full trial period of up to 90 days. After that, a license will be required to use the app. This allows users to continue working with their apps without getting blocked and provides sufficient time to plan for and acquire the right licenses to access the app.

Pay-as-you-go business model for Power Apps

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Sep 2, 2021	-	Feb 2022

Business value

Only pay for what you use, after you use it. With pay-as-you-go, unlicensed users can use Power Apps without procuring a license or planning ahead.

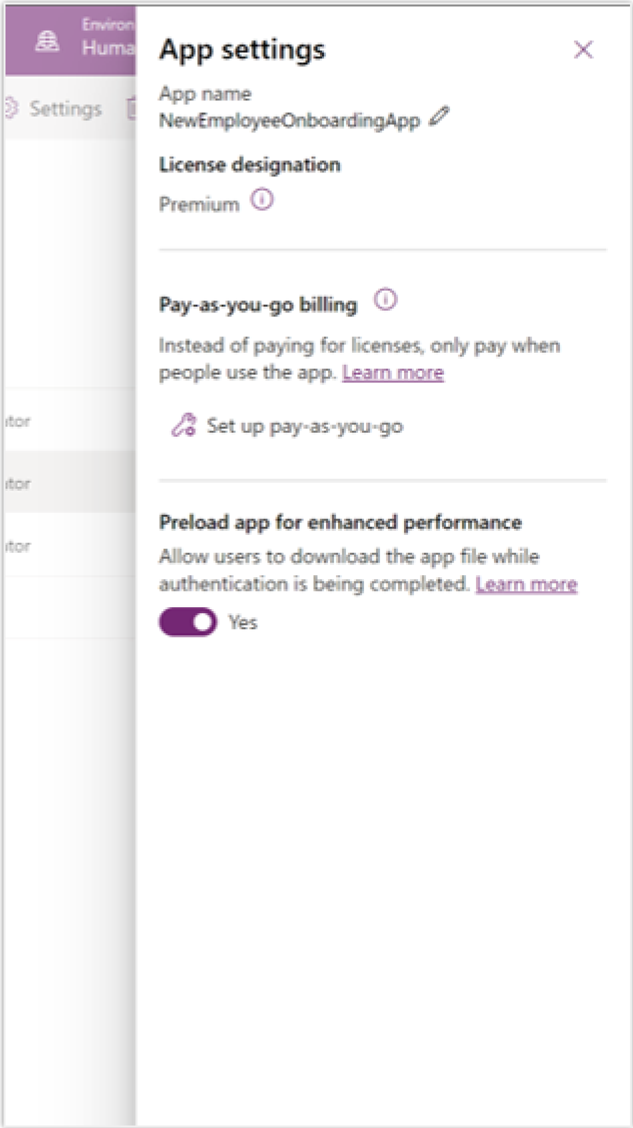
This creates a no-cliffs, seamless experience for professional developers to adopt Power Apps and pay using an Azure subscription. This model also provides new customers with flexibility to try out Power Apps without commitment. What's more, it offers existing customers the ability to enable additional usage in scenarios where subscription plans aren't economical, such as needing only occasional use of an app for a large user base.

Feature details

The pay-as-you-go billing model is enabled via three Azure meters: Power Apps per-app meter, Power Platform requests meter, and Microsoft Dataverse meter.

- The Power Apps per-app meter will allow active users to use the apps without any licenses. An active user is defined as a unique user who launched the app at least once in a month. Active app usage will be billed against the Azure subscription. People with existing user licenses will be excluded from billing.
- With the Dataverse meter and Power Platform requests meter, any overages beyond the entitlement will be charged against the Azure subscription.

pay-as-you-go setup can be done with a few simple clicks from within the Power Platform admin center or Power Apps. An itemized report will be available to view the charges.



Pay-as-you-go setup

See also

[Pay-as-you-go plan](#) (docs)

Find all the relevant Power Apps on Office.com

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔Aug 2, 2021	Mar 2022

Business value

Increase ROI from your digitization efforts by making it easier for users to find the right app at the right time from a single location where they can search for any digital asset: Office.com.

Feature details

Organizations are using Microsoft Power Platform to digitize multiple workloads in their line of business; however, finding the right app can sometimes be difficult. Users may fall back to asking their peers and sharing links, which isn't ideal.

With this feature, the right apps are surfaced in the **Business Applications** section on Office.com. The first thing a user will see is the most relevant apps that they use. They can also search for apps based on names, keywords, descriptions, and other metadata.

Power Automate

Overview of Power Automate 2021 release wave 2

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 digital and robotic process automation (RPA).

Power Automate is investing in several areas as a part of Microsoft Power Platform 2021 release wave 2, including the following:

- **Microsoft Teams**: With more than 100 million daily active users, Microsoft Teams is central to Microsoft's remote work strategy, and Power Automate is key to the Microsoft Teams extensibility strategy for providing automation for your collaboration scenarios. We will build more and easier entry points across the Microsoft Teams experience, such as in meetings/calendars and other types of conversations. It will also be possible for administrators to push solutions that contain flows across the teams in their organization.
- **Dynamics 365**, **Power Apps**, **Power BI**, and **Microsoft Dataverse**: With deeper integrations, we're making it easier for professional developers and users to collaborate and deploy solutions on Microsoft Power Platform.
- **Power Automate Desktop**: This component was released to general availability in 2020, and it enables makers to automate the diversity of applications on their desktops. Going forward, we'll provide migration for existing Softomotive and UI flows customers, secure credential management, and much more. We're building enterprise trust for desktop flows by providing what centers of excellence need in the cloud: centralized management, monitoring, and reporting that allow users to scale beyond the per-flow experience in the portal. These experiences will provide security, governance, and administration so that administrators can extend their control over desktop flow artifacts in the Power Platform admin center and Center of Excellence toolkit.
- **AI builder**: Effective automation in any organization relies heavily on AI to be reliable and scalable, so we're further investing in content intelligence – specifically, in document automation where we'll be adding better support for multiple layouts, extracting content from tables, working with checkboxes and radio buttons on forms, and support for more languages.
- **Process advisor**: Process advisor is the newest component in Power Automate. This component provides organizations with insights into their tasks via a process map that shows variations across different instances and analytics. With this knowledge, organizations can use the recommendations that process advisor provides to make more informed decisions on which areas to automate to optimize their processes.

What's new and planned for Power Automate

This topic lists features that are planned to release from October 2021 through March 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

Cloud flows are automations that run in the cloud and can be triggered automatically, instantly, or with a schedule.

Feature	Enabled for	Public preview	Early access*	General availability
Connection references panel on the flow details page shows unfilled references	Users, automatically	-	-	Dec 2021
Default connection reference names will be unique	Users, automatically	-	-	Dec 2021
Solution checker warns if flows don't meet ALM guidelines	Admins, makers, marketers, or analysts, automatically	-	-	Jan 2022
Integrations with team management in Microsoft Teams	Admins, makers, marketers, or analysts, automatically	-	-	Jan 2022
Access the connection reference edit panel from the flow details page	Users, automatically	-	-	Mar 2022
Updates for instant flows in canvas apps	Admins, makers, marketers, or analysts, automatically	-	-	Mar 2022

Feature	Enabled for	Public preview	Early access*	General availability
More collaborative comments in cloud flows	Admins, makers, marketers, or analysts, automatically	Nov 2021	-	Mar 2022

Desktop flows

Power Automate Desktop and desktop flows enable you to automate repetitive processes in desktop or web applications.

Feature	Enabled for	Public preview	Early access*	General availability
Power Automate availability in Windows	Admins, makers, marketers, or analysts, automatically	✓Mar 15, 2021	-	✓Oct 4, 2021
Save an Excel workbook as XML data	Admins, makers, marketers, or analysts, automatically	-	-	✓Oct 25, 2021
Sensitive variables in Power Automate Desktop	Admins, makers, marketers, or analysts, automatically	-	-	✓Oct 25, 2021
Clear last error in the Get last error action	Admins, makers, marketers, or analysts, automatically	-	-	✓Dec 13, 2021
Create a copy of a desktop flow from the Power Automate for desktop console	Admins, makers, marketers, or analysts, automatically	-	-	✓Dec 13, 2021
Display message windows are now scrollable	Admins, makers, marketers, or analysts, automatically	-	-	✓Dec 13, 2021
Import window element as a parameter in the Send keys action	Admins, makers, marketers, or analysts, automatically	-	-	✓Dec 13, 2021

Feature	Enabled for	Public preview	Early access*	General availability
On block error action offers more options for unhandled errors	Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 13, 2021
Save an Excel workbook as an XLSB file	Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 13, 2021
Syntax highlighting within the script editor in Power Automate for desktop designer	Admins, makers, marketers, or analysts, automatically	-	-	Dec 2021
The Recognize entities in text action is available in desktop flows	Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 13, 2021
Web recorder and desktop recorder are now unified	Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 13, 2021
Support Windows OCR engine in the OCR actions	Admins, makers, marketers, or analysts, automatically	-	-	Dec 2021
Restructure of Excel instance functionality to support multiple macros	Admins, makers, marketers, or analysts, automatically	-	-	Jan 2022
Scale unattended desktop flows with the Azure Virtual Desktop starter kit	Admins, makers, marketers, or analysts, automatically	✔ Oct 25, 2021	-	Feb 2022
Monitor desktop flows in Power BI through DirectQuery	Admins, makers, marketers, or analysts, automatically	-	-	Feb 2022
Power Automate to support tenant picker with UI	Admins, makers, marketers, or analysts, automatically	-	-	Feb 2022

Feature	Enabled for	Public preview	Early access*	General availability
Convert Base64 encoded text to and from file	Admins, makers, marketers, or analysts, automatically	-	-	Feb 2022
New action to Extract tables from PDF	Admins, makers, marketers, or analysts, automatically	-	-	Feb 2022
Option to include headers during table extraction	Admins, makers, marketers, or analysts, automatically	-	-	Feb 2022
Java automation in SWT framework applications	Admins, makers, marketers, or analysts, automatically	-	-	Mar 2022
More resilient UI automation in Citrix environments	Admins, makers, marketers, or analysts, automatically	-	-	Mar 2022
Power Automate for desktop supports IE mode in Edge browser	Admins, makers, marketers, or analysts, automatically	-	-	Mar 2022
Custom dialog action in Power Automate Desktop	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Mar 2022
Data loss prevention policies for desktop flows	Admins, makers, marketers, or analysts, automatically	✔ Oct 24, 2021	-	To be announced

Document automation

Document automation is an end-to-end solution allowing users to receive documents in emails, extract data from documents, and review and approve that data.

Feature	Enabled for	Public preview	Early access*	General availability
Document automation solution	Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 8, 2021

Process advisor

Process advisor quickly captures detailed steps for each process in your organization to help you better understand places to streamline workflows.

Feature	Enabled for	Public preview	Early access*	General availability
Process advisor support for custom attribute filtering	Admins, makers, marketers, or analysts, automatically	✔ Oct 24, 2021	-	-
Process advisor support for process mining using event log data	Admins, makers, marketers, or analysts, automatically	✔ Oct 24, 2021	-	-
Customize filters in process advisor	Admins, makers, marketers, or analysts, automatically	✔ Oct 31, 2021	-	-
Process advisor task mining support for the auto-grouping of recordings	Admins, makers, marketers, or analysts, automatically	Mar 2022	-	-
Share process mining analysis reports with others in process advisor	Admins, makers, marketers, or analysts, automatically	Mar 2022	-	-
Process advisor improved connector recommendations for automate activities	Admins, makers, marketers, or analysts, automatically	Mar 2022	-	-

* You are able to opt in to some features as part of early access on August 2, 2021, 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.

Cloud flows

Overview

Cloud flows are automations that run in the cloud using our 475+ connectors. They can be triggered automatically, instantly, or with a schedule.

Connection references panel on the flow details page shows unfilled references

Enabled for	Public preview	Early access	General availability
Users, automatically	-	-	Dec 2021

Business value

The connection references panel on the flow details page will now allow users to view the details of the connection references that are missing connections.

Feature details

Currently, if you import a flow into a solution that doesn't have a connection, those missing connection references aren't shown in the connection references panel on the flow details page.

With this feature, the connection references panel will display the details of the connection references that are missing connections.

Default connection reference names will be unique

Enabled for	Public preview	Early access	General availability
Users, automatically	-	-	Dec 2021

Business value

Default names of connection references will now be unique, eliminating the risk of connection references having the same name.

Feature details

Currently, when a connection reference is automatically created, its name defaults to the connector's name. This can result in many connection references having the same name.

With this feature, the default names of connection references will be unique and include the name of the solution in which they are created.

Solution checker warns if flows don't meet ALM guidelines

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

Business value

With the addition of solution checker rules for flows, users will be warned if flows don't meet the established guidelines for application lifecycle management (ALM).

Feature details

The application lifecycle management process may include a step where the solution checker reports whether resources are built based on established ALM guidelines and best practices. Currently, there aren't any solution checker rules for flows.

With this feature, solution checker rules will be added to ensure that solution flows use connection references instead of connections, and to check if solution flows use the SharePoint data source when possible.

Integrations with team management in Microsoft Teams

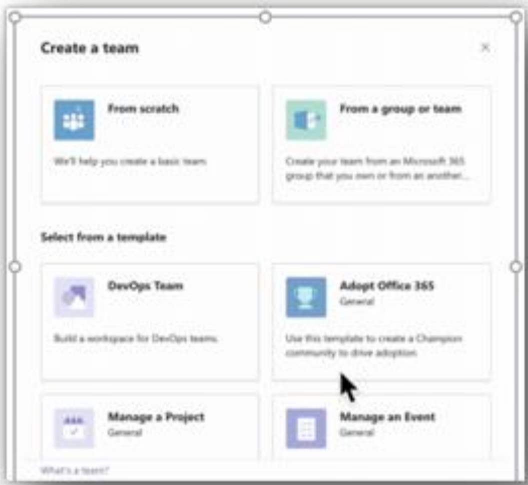
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Jan 2022

Business value

This feature adds Power Automate flow templates in Microsoft Teams templates. Team owners can now more easily add flows into new teams when they create a team from a Microsoft Teams template.

Feature details

Users who create and manage teams in Microsoft Teams can use Power Automate for several scenarios. For example, we'll pair Power Automate templates with Microsoft Teams templates to enable scenarios like posting a welcome message, automated channel notifications, and more.



Microsoft Teams templates

Access the connection reference edit panel from the flow details page

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

Business value

With the addition of a link to the connection reference edit panel on the flow details page, users will save time by opening the connection reference directly instead of having to navigate to the solution first.

Feature details

Currently, the connection references panel on the flow details page shows the name of a connection reference, but the user must first navigate to the solution and open it in order to edit the connection reference.

With this feature, the connection references panel on the flow details page will be updated with a link to the connection reference edit panel so that users can quickly view its details, change its name, or adjust its connection.

Updates for instant flows in canvas apps

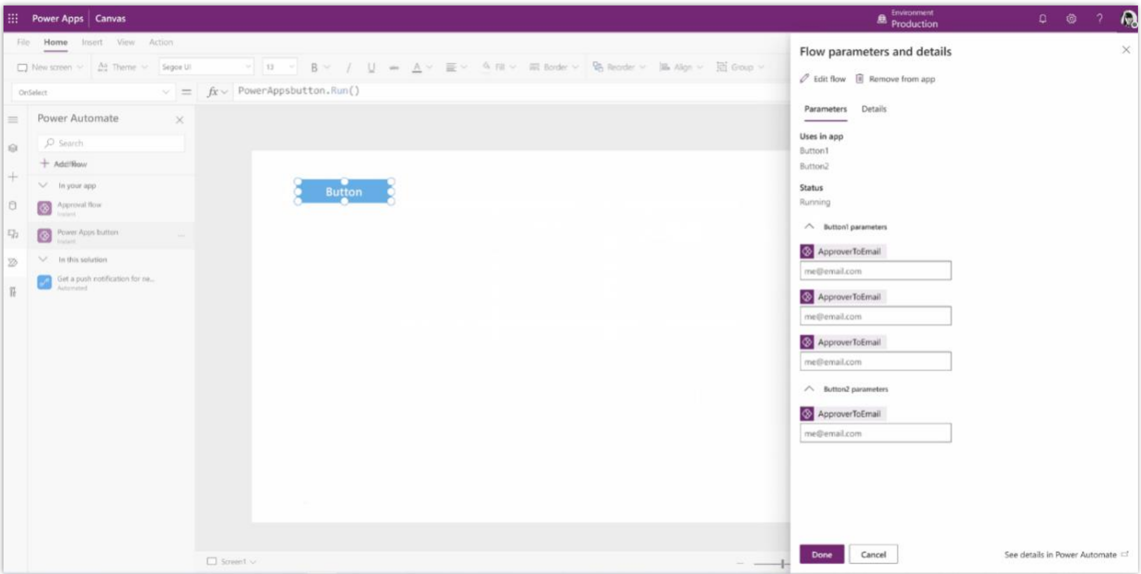
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Mar 2022

Business value

Enhancements to instant flows in canvas apps include a new **Flow parameters and details** pane, which makes it easier to pass a complex set of data to a flow.

Feature details

A common challenge in working with instant flows in canvas apps is that you need to modify the data that you send to the flow. Previously, you needed to work with the formula bar, which can be challenging when there's a complex set of data to pass to the flow. To make this easier, we're adding a **Flow parameters and details** pane that you can access while you're working on your canvas app.



New pane in canvas apps.

This new pane shows:

- Each place where an instant flow is called in the canvas app
- A view of the data that's passed to each flow input so you can quickly change the data passed to your flow
- A way to remove a flow from the canvas app entirely

More collaborative comments in cloud flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Nov 2021	-	Mar 2022

Business value

More functionality to commenting in cloud flows will bring collaborative authoring to business processes.

Feature details

Like comments in your favorite Microsoft 365 applications, such as Word and PowerPoint, you'll be able to *@mention* colleagues and even create tasks in Microsoft Planner for specific comments. You'll also receive email notifications when someone leaves a comment in your flows or mentions you in a comment.

See also

Engage with collaborative comments in cloud flows (video)

Desktop flows

Overview

Power Automate Desktop continues to get quicker and simpler to use, easier to deploy, more scalable, and easier to govern. In 2021 release wave 2, we'll make substantial improvements across the board to these capabilities.

Power Automate availability in Windows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✓ Mar 15, 2021	-	✓ Oct 4, 2021

Business value

Users of the new Windows 11 will have Power Automate for desktop in their machines by default.

Feature details

With the new Windows release, users will be able to automate core scenarios on their desktops. Power Automate will be available at no additional cost to users of Windows Home and above, and will be searchable from the **Start** menu. Once launched, users will be able to sign in to Power Automate with a Microsoft or school account and easily begin automating.

See also

Power Automate availability in Windows (docs)

Save an Excel workbook as XML data

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✓ Oct 25, 2021

Business value

Users will be able to save their Excel workbooks as XML data.

Feature details

Users will now be able to save their Excel workbooks as XML data (.xml), either through the **Save Excel** or **Close Excel** action. This feature will be present as an option in the **Document format** list of both actions. It will be called: XML Data (*.xml).

To use this feature, the user works on an existing file that contains the XML map(s) that are needed to save/export the workbook as XML data. The save operation produces an .xml file with the extracted data in the location the user selects.

See also

Desktop actions reference: Save Excel (docs)

Sensitive variables in Power Automate Desktop

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✓ Oct 25, 2021

Business value

For security purposes, users will be able to mask sensitive data and avoid persisting their values in the logs.

Feature details

With this feature, users can tag any variable as *sensitive*. Sensitive variables are not visible in the Power Automate Desktop designer during runtime and they're also not logged in the desktop flow logs.

See also

Manage variables and the variables pane: Sensitive variables (docs)

Clear last error in the Get last error action

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 13, 2021

Business value

The latest addition of the **Get last error** action will allow users to clear the error value stored in the memory.

Feature details

The **Get last error** action must be enhanced to include a toggle button that enables users to select whether its contents are cleared after it's invoked. If the action is called again, the variable should contain the "No error" message, as it currently does.

See also

Clear last error in the Get last error action (docs)

Create a copy of a desktop flow from the Power Automate for desktop console

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 13, 2021

Business value

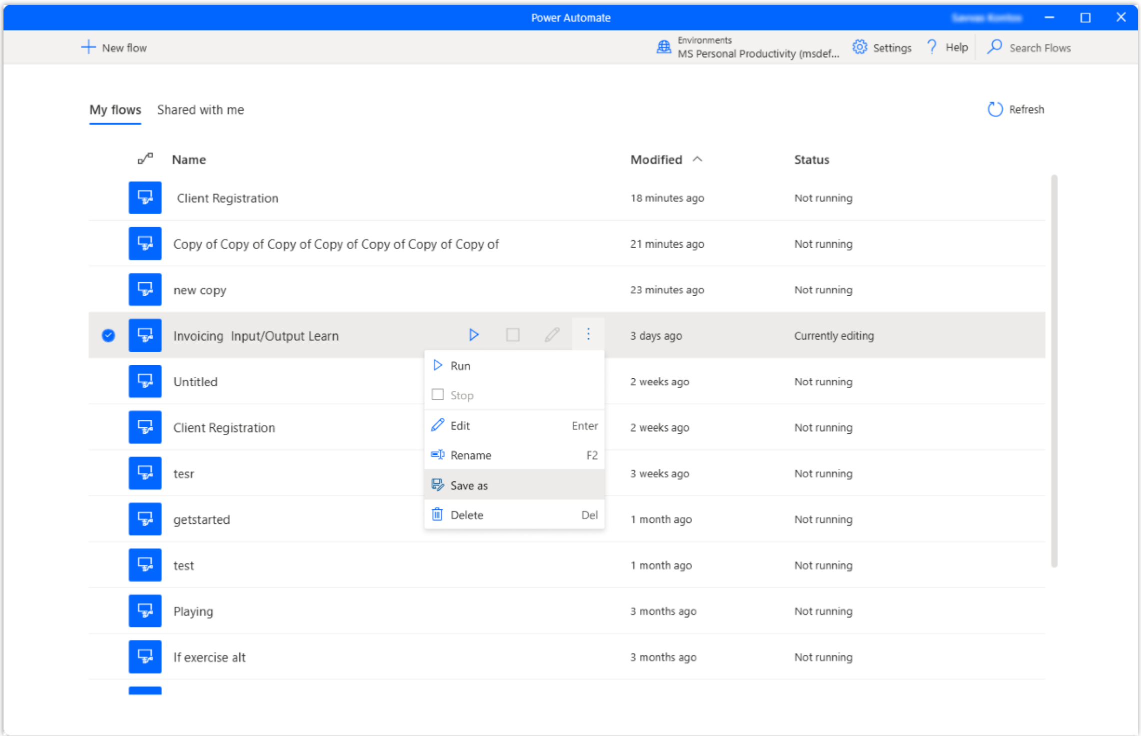
Users can duplicate a flow directly from the flow list in the Power Automate for desktop console.

Feature details

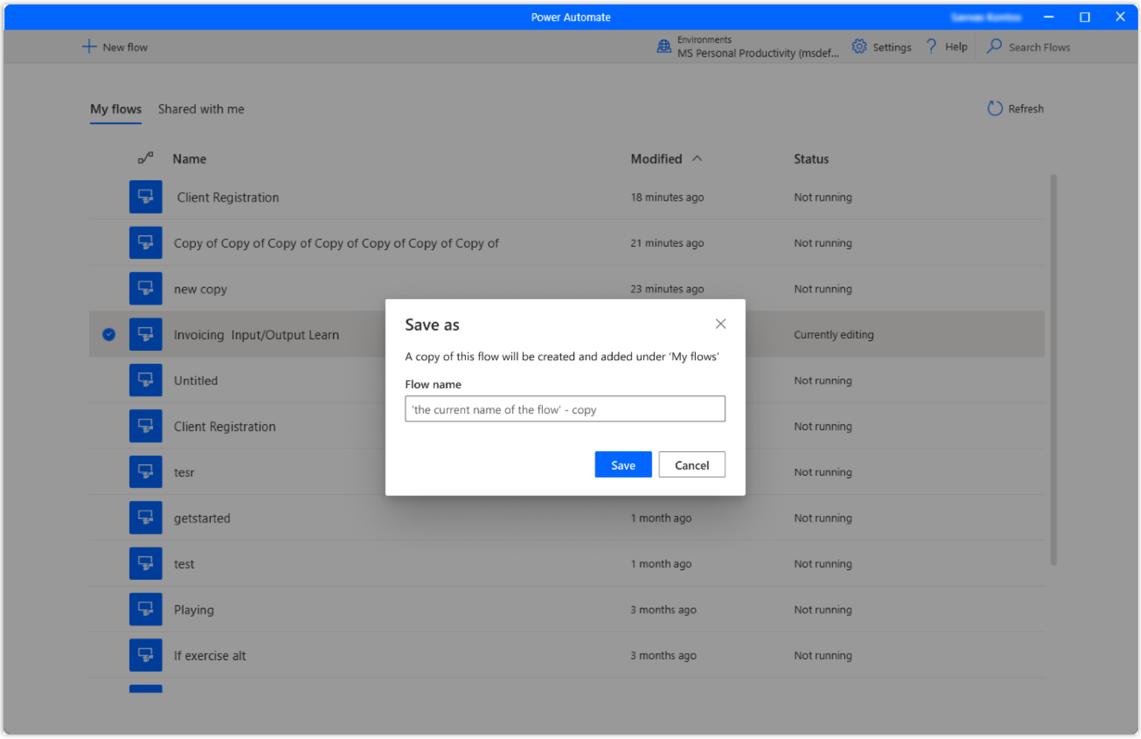
To create a copy of a desktop flow directly from the Power Automate for desktop console:

- Navigate to the console.
- Select the flow that you want to duplicate.
- Select **Save as** from the menu list.

After a few moments, the copy of your flow will appear under the **My flows** tab of the console.



The Save as flow menu option in Power Automate for desktop console.



The Save as dialog as it appears in Power Automate for desktop console.

See also

Create a copy of a desktop flow from the Power Automate for desktop console (docs)

Display message windows are now scrollable

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 13, 2021

Business value

Users have a more convenient way of interacting with pop-up dialogs generated by **Display message** actions.

Feature details

Display pop-ups are now more flexible and efficient to use, allowing users to scroll through the presented text. Users have a more convenient way of interacting with pop-up dialogs generated by **Display message** actions. A scrollbar appears, depending on the size of the provided text, making the whole interaction more user friendly.

Import window element as a parameter in the Send keys action

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✓Dec 13, 2021

Business value

The **Send keys** action of Power Automate for desktop is enhanced with a new parameter that allows users to specify the window to which keys should be sent. The action is more robust and the user is able to control its outcome fully.

Feature details

With the new "Find window mode" parameter, users can set the window to which inserted keys will be sent, even if the window is not in the foreground. Options for the parameter include:

- Foreground window
- By window UI element
- By window instance/handle
- By title and/or class

See also

Import window element as a parameter in the Send keys action (docs)

On block error action offers more options for unhandled errors

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✓Dec 13, 2021

Business value

Users will be able to handle more errors though the exception configuration modal.

Feature details

This feature will assist users/RPA developers in capturing and handling errors that stem from erroneous logic. Such errors include division by zero, index out of bounds cases when retrieving from a list, and more.

See also

On block error action offers more options for unhandled errors (docs)

Save an Excel workbook as an XLSB file

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 13, 2021

Business value

Users will be able to save their Excel workbooks as XLSB files.

Feature details

Excel workbooks can now be saved as XLSB files (.xlsb), either through the Save Excel or Close Excel action. This allows for more scenario coverage and elaborate flow creation.

More info on (.xlsb): This is a binary file format, which is a collection of records and structures that specify Excel workbook content. The content can include unstructured or semi-structured tables of numbers, text, formulas, external data connections, charts, and images.

See also

Save Excel (docs)

Syntax highlighting within the script editor in Power Automate for desktop designer

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Dec 2021

Business value

Support for syntax highlighting in the script editor provides citizen developers a better experience while embedding code in their flows.

Feature details

This feature brings support for syntax highlighting for all the actions that support script editors. These actions include:

- Run VB Script

- Run Powershell
- Execute SQL statement
- Run JavaScript
- Run Python
- Run JavaScript function in webpages

The Recognize entities in text action is available in desktop flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✓ Dec 13, 2021

Business value

Power Automate for desktop enables users to extract various entities from natural language text using the **Recognize entities in text** action.

Feature details

The **Recognize entities in text** action receives text expressed in natural language and returns a table containing the recognized entities, such as numbers, dates, measurement units, and more.

See also

Recognize entities in text (docs)

Web recorder and desktop recorder are now unified

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✓ Dec 13, 2021

Business value

Users can now record both their web- and desktop-related activities using the same recorder.

Feature details

The web recorder and desktop recorder are unified into a single Power Automate for desktop recorder. With the unified recorder, users can record both their web- and desktop-related activities during a single recording session.

See also

Record flows in Power Automate Desktop (docs)

Support Windows OCR engine in the OCR actions

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Dec 2021

Business value

Provide users an alternate OCR engine to choose in OCR related actions to improve results of finding and extracting texts in different cases. Windows OCR engine also has direct UX benefits, such as supporting more languages and robustness in finding text on screen when compared to Tesseract OCR engine.

Feature details

Apart from Tesseract OCR engine, we want to support the Windows OCR engine as a way to work with the following OCR related actions:

- If text on screen (OCR)
- Wait for text on screen (OCR)
- Move mouse to text on screen (OCR)
- Extract text with OCR

Restructure of Excel instance functionality to support multiple macros

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

Business value

Users will now have the ability to create Excel processes and have the ability to group Excel instances under a single Excel process.

Feature details

This new feature allows Excel instances to reference multiple macros. The ability to launch isolated instances will also remain available.

Scale unattended desktop flows with the Azure Virtual Desktop starter kit

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 25, 2021	-	Feb 2022

Business value

Scale automation without the need to provision machines by leveraging Azure Virtual Desktop (AVD) integration. This will reduce TCO and enable customers to adapt to their changing business needs by easily scaling up and down.

Feature details

With desktop automation, you must first provision and configure custom environments for you to manage. These additional steps slow adoption. This feature allows IT admins to register their Azure Virtual Desktop pools with Power Automate so they can be used to run desktop automations, providing elastic scale on demand.

See also

Introduction to the Power Automate Azure Virtual Desktop integration starter kit (docs)

Monitor desktop flows in Power BI through DirectQuery

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

Business value

This feature enables users to create custom Power BI reports with real-time desktop flows run data.

Feature details

Leverage DirectQuery in Power BI to connect to the desktop flows related tables from Microsoft Dataverse for real-time data retrieval while respecting the existing Dataverse security model. Build insightful dashboards from scratch for operational monitoring and reporting, or improve the performance of your existing dashboard solutions. For more information, go to [Desktop flow analytics dashboard starter template](#).

Power Automate to support tenant picker with UI

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

Business value

Users with accounts that belong to multiple tenants can now easily switch between tenants by using the in-app tenant picker.

Feature details

Users of the Power Automate app may often need to sign in to multiple tenants. With the tenant picker feature within Power Automate for desktop, users will be able to switch between tenants of the same organization or different ones, without taking extra steps through the Power Automate portal.

Convert Base64 encoded text to and from file

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

Business value

In 2021 release wave 2, you'll be able to convert Base64 encoded text to file and the other way around.

Feature details

Users will be able to leverage two new actions in Power Automate desktop:

- Convert Base64 encoded text to file
- Convert file to Base64 encoded text

New action to extract tables from PDF

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

Business value

With this new action, users will be able to automatically identify and extract all structured data tables from a PDF document, making it fast and easy to prepare and use tabular data from PDFs in your flow.

Feature details

With just the PDF document path as an input, this action will extract all the tables from the selected PDF page range and store each table in a list variable with the following additional information:

- Start page index
- End page index
- Table order number
- Table name

In advanced settings of the action, users will also have an option to select first row as column headers and another option to merge tables that match across page boundaries. Both will be true by default.

Option to include headers during table extraction

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

Business value

This will offer an easy way to include column headers, after extracting an entire HTML table in a variable, by using the new corresponding property.

Feature details

In every datatable type variable, there will be a new property of datarow type, which will hold the column names of the said table. This will enable writing these column headers in a row (for example, in Excel) in an easy and straightforward way, rather than relying on the existing **Columns** property, which returns the column headers in the form of a list.

Java automation in SWT framework applications

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

Business value

In 2021 release wave 2, Power Automate desktop supports Java automation scenarios related to Java apps that have the Standard Widget Toolkit (SWT) as underlying technology.

Feature details

Power Automate desktop capabilities for UI automation in Java apps and applets are now enhanced, as Power Automate for desktop now supports UI automation scenarios based on SWT Java apps.

The user experience for automation Java apps will be seamless, independently of the underlying technology used, and the user will be able to cover most of the Java automation cases.

More resilient UI automation in Citrix environments

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

Business value

Power Automate will improve the support for reliable UI automation with Citrix systems.

Feature details

Today, customers can automate Citrix systems using image recognition with desktop flows. Although image recognition is flexible and can work for any system, it's not as reliable as UI automation, which leverages the UI elements using accessibility APIs.

In this release, we'll improve our support for UI automation on Citrix environments by having a lightweight runtime inside the target Citrix environment. This runtime will be able to communicate with the Citrix session and thus directly access UI elements, bringing direct addressability to controls that bypasses the need for image-based lookup where possible.

Customers will have a choice to use either this lightweight runtime approach or existing image processing for performing their automation.

Power Automate for desktop supports IE mode in Edge browser

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

Business value

Web automation scenarios that are related to web pages opened in Internet Explorer (IE) mode in Edge browser can now be supported.

Feature details

Users may perform web automation actions on web pages that are being opened in IE mode in Edge browser. IE mode in Microsoft Edge is useful for cases that require Internet Explorer 11 for backward compatibility with existing websites but also need a modern browser. After the deprecation of the Internet Explorer browser, these pages will be opened in IE mode in Microsoft Edge.

Power Automate for desktop will support web actions that are being applied over a web page that is opened in IE mode in Edge browser. This new feature is a seamless experience for the user when performing web automation tasks in either default Edge mode or IE mode.

Custom dialog action in Power Automate Desktop

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

Business value

With this action, users will be able to create their own dialog, combining the controls and elements of their choice into a single dialog window.

Feature details

The custom dialog feature will be based on the adaptive cards technology. Makers can use an intuitive designer to configure this dialog in any way they'd like in order to meet their needs. For example, a maker can combine controls and elements into a single dialog. Makers can also provide input data in a flexible and dynamic way.

Data loss prevention policies for desktop flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 24, 2021	-	To be announced

Business value

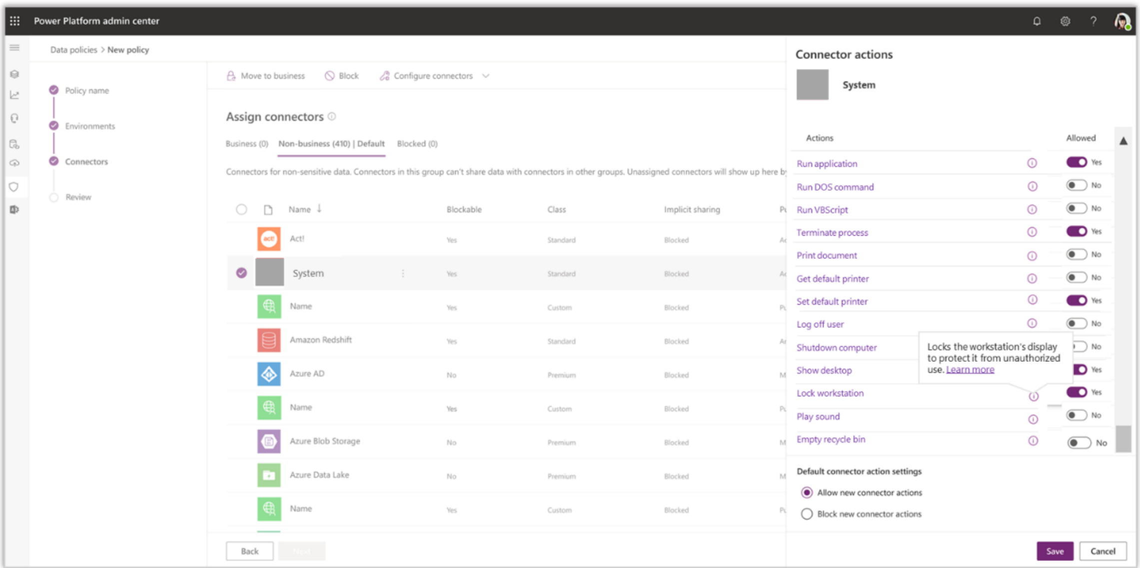
Data loss prevention policies in Microsoft Power Platform give additional control to administrators who wish to limit their users beyond the standard policies that govern access to their data.

Feature details

In 2021 release wave 2, admins will be able to create new policies to govern desktop flows. These policies will allow environment admins to perform the following actions:

- Classify Power Automate Desktop modules into either business, non-business, or blocked categories
- Block specific actions in modules
- Set the default rules for new actions and new modules

As with cloud flows, there will be some built-in actions that cannot be blocked by admins. If a desktop flow is in violation of one or more policies, it will not run.



Pane for configuring options for a module in data loss prevention for desktop flows.

See also

Data loss prevention (DLP) policies (docs)

Document automation

Overview

Document automation is a solution that allows you automate processing of your documents in an end-to-end process. It includes the following capabilities:

- Process documents received in emails orchestrated by Power Automate
- Extract data from documents using AI Builder models
- Process the data extracted and allow users to review and approve data through central manual validation Power Apps
- Export the processed data to external systems using Power Automate connectors
- Statistics on number of documents processed

Document automation solution

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔Oct 8, 2021

Business value

Document automation is reference implementation for automating documents such as invoices. It can be used out-of-the-box to save days of implementation or as inspiration to accelerate your implementation.

Feature details

Document automation is an end-to-end solution for processing documents at scale. It includes:

- A document queue
- A Power Apps validation station to allow for manual user validation of processed documents
- AI Builder preconfigured models to extract data from documents
- Many flows for importing documents and exporting data to external systems

Document automation offers a generic solution that's customizable for a broad range of document types and specialized solutions for specific types of documents.

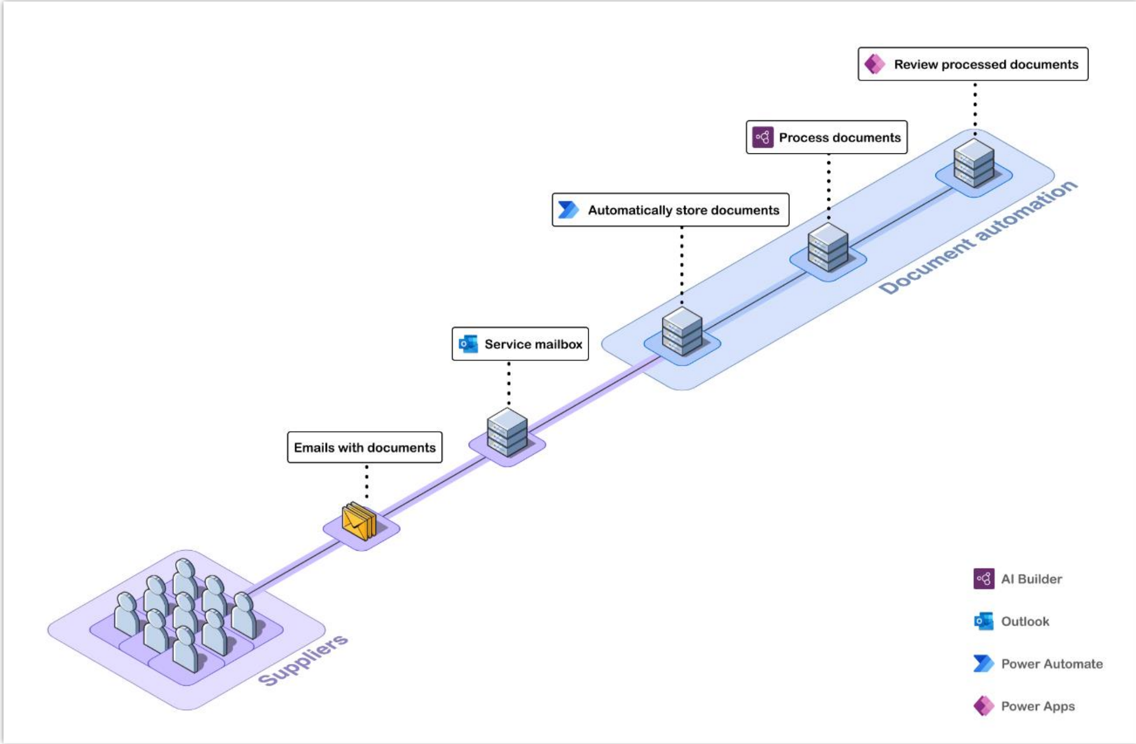


Diagram showing the stages of document automation.

New capabilities that are generally available in the toolkit include:

- Automatic data validation
- Confidence scores in the Power Apps validation application
- Exportation of extracted data to Dynamics 365 Finance and Operations
- Richer interactions with the manual validation application
- Prebuilt models like receipt processing and invoice processing

See also

[Document automation toolkit](#) (docs)

Process advisor

Overview

Process advisor quickly captures detailed steps for each process in your organization to help you better understand places to streamline workflows.

Process advisor support for custom attribute filtering

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✓Oct 24, 2021	-	-

Business value

Customers can now use different custom attributes as filters to derive deeper insights.

Feature details

Process advisor process mining now supports custom attribute filtering in analytics. This provides users with the ability to filter through multiple attributes specific to their data to acquire richer insights.

See also

Visualize and gain insights from processes in process advisor (docs)

Process advisor support for process mining using event log data

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✓Oct 24, 2021	-	-

Business value

Customers can now use event log data from systems of record to understand inefficiencies in the process.

Feature details

Process advisor now supports process mining using event log data. This allows users to leverage event log data from systems of record to produce process maps and analytics that can help them better understand and address inefficiencies.

See also

Prepare processes and data in process advisor (docs)

Customize filters in process advisor

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✓ Oct 31, 2021	-	-

Business value

With the ability to choose your specific custom attributes (such as Location, Vendor, Department, and more), you can filter and drill down into your process data to understand your processes accordingly.

Feature details

Every organization has unique needs when it comes to analyzing their tasks. Users now have the ability to see custom attributes as filters in their process advisor reports, so they can customize their reports according to what is important to their business.

See also

Visualize processes in process advisor (docs)

Process advisor task mining support for the auto-grouping of recordings

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

Business value

Users can more easily annotate their desktop recordings with recommended groupings.

Feature details

Process advisor will now provide recommended groupings for desktop recordings, making it easier for users to annotate the recordings. Users can choose to follow the recommendations or continue creating their own groupings.

Share process mining analysis reports with others in process advisor

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

Business value

Users of process advisor can share permissions with others to view their process mining analytics.

Feature details

Process advisor now supports the sharing of process mining analysis reports with others. Users who aren't owners of the process are able to view the analytics and gain meaningful insights into the process.

Process advisor improved connector recommendations for automate activities

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

Business value

Users of process advisor will be provided with improved connector recommendations for automate activities.

Feature details

These improvements to process advisor will enable richer automation recommendations by providing more connector recommendations based on desktop recordings.

Power Virtual Agents

Overview of Power Virtual Agents 2021 release wave 2

Power Virtual Agents enables 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 2021 release wave 2 brings improvements in the authoring experience with variable passing between topics, list variables, inline images and videos, regular expressions in custom entities, and commenting. We are also facilitating initial bot setup with bot creation from templates, sharing bots with security groups, and new AI capabilities to build your bots automatically from website content.

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 ultimately answer a user's questions.

With deep integration with Power Automate and the Microsoft Bot Framework, authors can extend their bots to integrate with API back ends, 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.

Use Power Virtual Agents documentation to get detailed information and answers to address your needs, from basic authoring tips all the way to complex bot configuration topics.

For official product documentation and training for Power Virtual Agents, go to:

- Power Virtual Agents documentation
- Power Virtual Agents training on Microsoft Learn
- Power Virtual Agents videos on YouTube

What's new and planned for Power Virtual Agents

This topic lists features that are planned to release from October 2021 through March 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.

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
Share bots with colleagues using security groups	Users by admins, makers, or analysts	-	✔ Oct 15, 2021
Connect bots to phone call interactions with Dynamics 365 Customer Service	Users by admins, makers, or analysts	-	✔ Nov 1, 2021
Mention and interact with bots directly in a team's channel in Microsoft Teams	Admins, makers, marketers, or analysts, automatically	-	Jan 2022
Use Power Virtual Agents bots as Bot Framework skills	Admins, makers, marketers, or analysts, automatically	-	Jan 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
Notify Microsoft Teams users about updates to their queries	Admins, makers, marketers, or analysts, automatically	✔ Oct 26, 2021	-
Use regular expressions (regex) in your bots	Admins, makers, marketers, or analysts, automatically	-	✔ Oct 1, 2021
Pass and return variables to subtopics	Admins, makers, marketers, or analysts, automatically	-	✔ Oct 28, 2021
Refresh Power Automate flows in topics without needing to remove them	Admins, makers, marketers, or analysts, automatically	-	Jan 2022

Feature	Enabled for	Public preview	General availability
Run flow connectors as the user	Users by admins, makers, or analysts	-	Jan 2022
Add comments to enable better collaboration	Admins, makers, marketers, or analysts, automatically	✔ Oct 31, 2021	Feb 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.

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.

Share bots with colleagues using security groups

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 15, 2021

Business value

By using security groups to share a bot, you can easily manage who should or shouldn't have access to your bot within your organization. This makes it easier for your business to target specific internal groups.

Feature details

In addition to only allowing teammates or the whole tenant to chat with the bot, you can share your bot with security groups. This means you can set a dynamic group of users to chat with the bot, which is helpful when creating bots that only apply to specific groups of types of users. For example, you might create a bot for HR employees that's specific to their role.

See also

Share bot with security groups (docs)

Connect bots to phone call interactions with Dynamics 365 Customer Service

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Nov 1, 2021

Business value

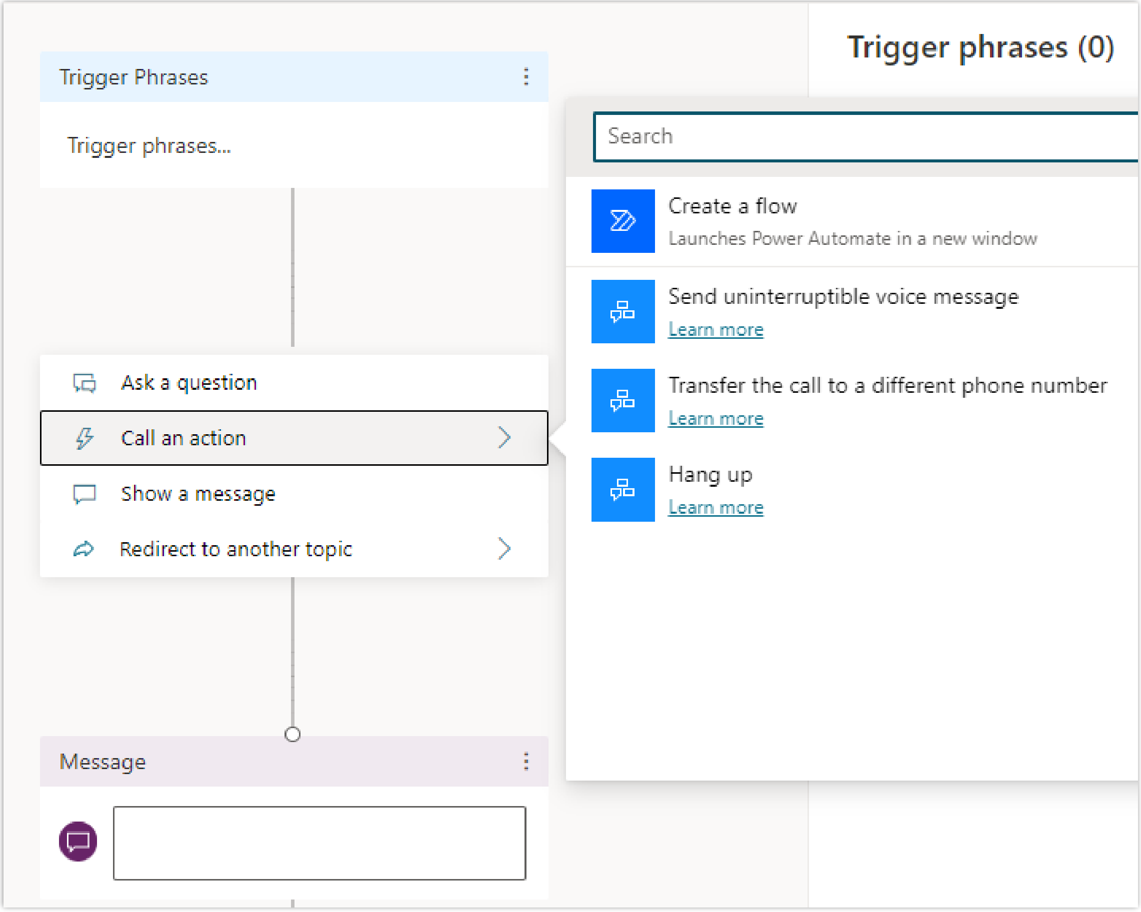
Expand the scope of your support offerings by allowing your customers to interact with bots using their voice. Integrate those chats with Dynamics 365 Customer Service for further escalation.

Feature details

With Power Virtual Agents, you can seamlessly and contextually hand off escalated Power Virtual Agents conversations to live (human) agents using the Chat Add-in for Dynamics 365 Customer Service.

You can connect both voice-based and text-based bot conversations by installing extension solutions that link your bot with Dynamics 365 Customer Service.

The Power Virtual Agents telephone extension adds a number of additional actions and variables that can be used by Power Virtual Agents chatbots to understand, reply to, and transfer voice calls to the bot.



List of voice-related actions that can be added to a node in Power Virtual Agents.

See also

[Configure hand-off for voice and text bot conversations to Dynamics 365 Customer Service](#) (docs)

Mention and interact with bots directly in a team's channel in Microsoft Teams

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

Business value

Interacting with bots directly in a Microsoft Teams channel helps team members solve issues on their own without having to navigate to a separate website or location to access the bot.

Feature details

Bot makers can create and add chatbots to a team's channel in Microsoft Teams. Team members can talk directly to a bot in a channel by typing the @ symbol followed by the bot's name. Anyone else in the channel will be able to see the bot's responses.

Use Power Virtual Agents bots as Bot Framework skills

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

Business value

Bot makers can extend the capabilities of their Power Virtual Agents bots by making them available as Microsoft Bot Framework skills.

Feature details

Power Virtual Agents bots aren't always used in isolation. Sometimes, you might want to include a bot as part of an existing bot system or other process.

Going forward, bot authors will be able to make their bots available as Microsoft Bot Framework skills. This means you can allow Bot Framework and other Power Virtual Agents bots to use the bot-turned-skill in dialogs to extend the original bot's capabilities.

See also

Use Power Virtual Agents bots as skills with Bot Framework bots feature exploration (video)

Core authoring

Overview

Creating a bot with Power Virtual Agents is easy to do with the no-code authoring canvas, and there are a number of 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.

Notify Microsoft Teams users about updates to their queries

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓ Oct 26, 2021	-

Business value

Microsoft Teams users can receive proactive messages when a change or update is made to a question they asked the bot. This increases the bot user's efficiency as they'll no longer need to constantly open and ask the bot the same question.

Feature details

We're adding the ability to send proactive messages from a bot to its users in a Microsoft 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.

See also

Send proactive messages and cards in Microsoft Teams (docs)

Use regular expressions (regex) in your bots

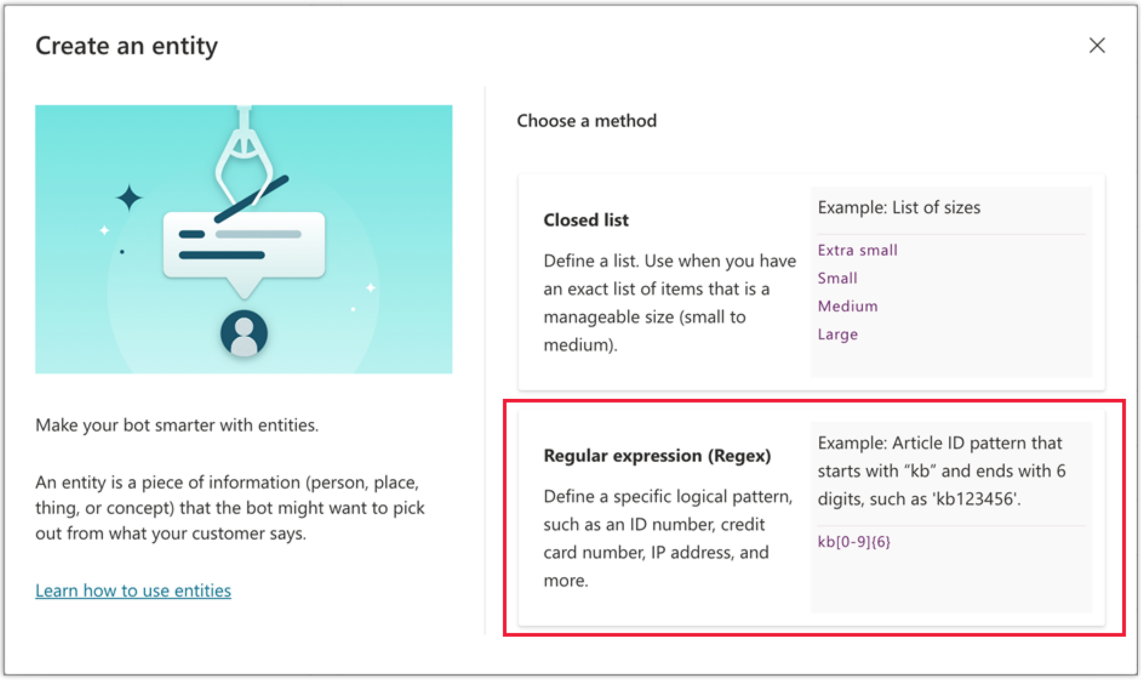
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✓ Oct 1, 2021

Business value

Regular expressions provide a powerful, flexible, and efficient method for processing text. The extensive pattern-matching notation of regular expressions enables you to quickly parse large amounts of text and ensure they match a predefined pattern.

Feature details

Power Virtual Agents now supports entity extraction based on regular expression patterns. Your bot will be able to identify patterns such as product IDs, serial numbers, email addresses, and other patterns from user responses.



Screenshot of the entity creation window, with the Regex option highlighted.

See also

[Use entities and slot filling in Power Virtual Agents bots: Regex entities](#) (docs)

Pass and return variables to subtopics

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Oct 28, 2021

Business value

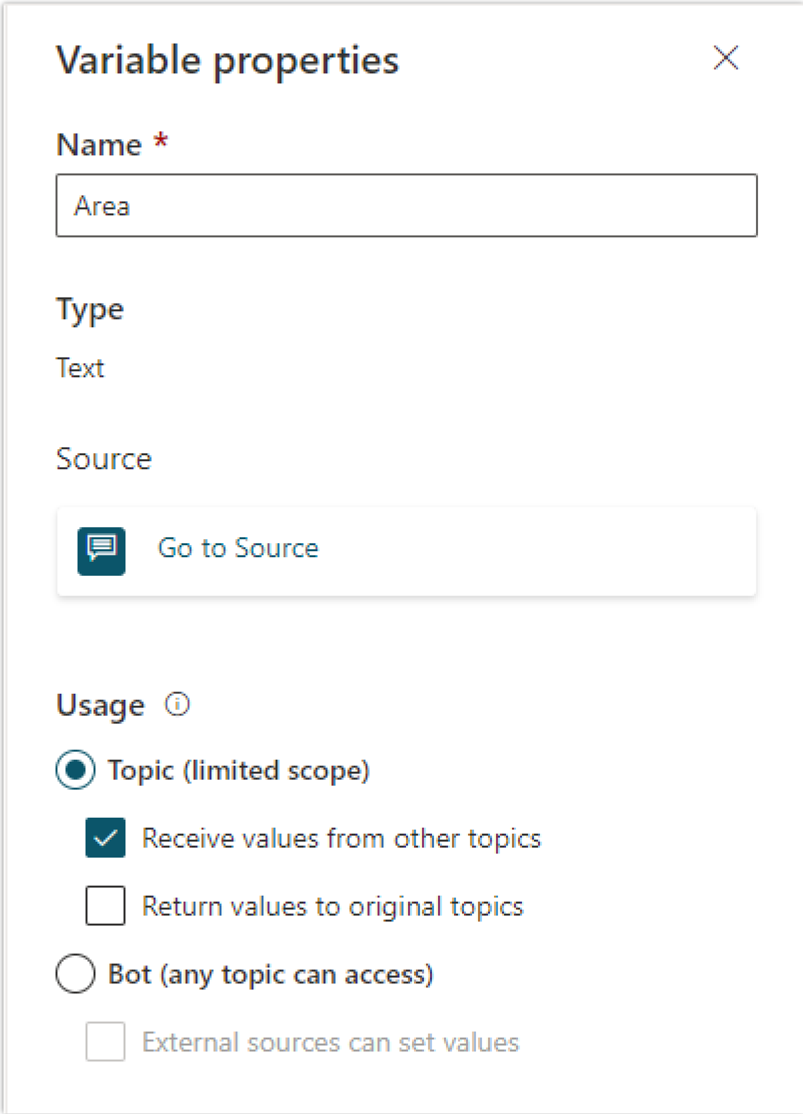
This feature enables authors to pass variables from the parent topic to subtopics, facilitating the creation and maintenance of large topics.

Feature details

Subtopics operate just like normal topics except they run within the context of that parent topic. With the addition of variable passing, variables from the parent topic can be referenced in the subtopics as well, making them even more powerful.

For example, say you had a topic that's provided as a response when a user asks for the best places to eat in a city. Within that topic, you might ask follow-up questions to determine the type of food they want, in which area of the city they want to eat, or their price range. You could design a conversation path that included all of these follow-up questions in one topic, but it could become long, convoluted, and hard to follow from an admin perspective.

Instead, you can have each follow-up question call a subtopic. Any variables you assign within the subtopic will be available within the parent topic, so you could branch off into a subtopic to determine what type of food they want, fill that as a variable, and then return to the original topic to continue asking other follow-up questions. You could then call the food type variable either in the parent topic or use it in the subtopic that asks where they want to eat. That way, you'll only return restaurants that serve the type of food the user wants.



Screenshot of the authoring canvas showing variable properties pane with receive values selected.

See also

Passing variables between topics (docs)

Refresh Power Automate flows in topics without needing to remove them

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

Business value

All of your flow management needs for Power Virtual Agents are now visible within the authoring canvas, meaning bot makers no longer need to open a new window to troubleshoot issues with flows.

Feature details

Use the **Call an action** node to refresh and replace Power Automate flows directly in a conversation without removing or replacing the flow. This allows makers to see changes made in Power Automate directly in the Power Virtual Agents authoring canvas.

For example, if updates are made to the variable names, input, and output of a flow, the changes will be reflected directly in the authoring canvas. You'll also receive notifications about these changes from within Power Virtual Agents.

Run flow connectors as the user

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

Business value

Allowing flows to run as the user lets your bot take action on a user's behalf using their own credentials instead of those of the bot maker.

Feature details

Add Power Automate flows containing connectors that run with the user's permission (referred to as a *run-only user* in Power Automate). This reduces the need to use authentication tokens and helps the chatbot act on your user's behalf. This can be useful for tasks such as sending an email from the user's address, adding a task to their To Do list, accessing files with their credentials, and other tasks where you don't want the bot maker's credentials to be used.

Add comments to enable better collaboration

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 31, 2021	Feb 2022

Business value

Allow everyone on your team to see and share ideas, comments, and questions in the bots they author. This helps speed up development time and reduces barriers to communication and collaboration.

Feature details

Bot makers, developers, and anyone who has access to author a bot can share ideas, concerns, and questions by leaving comments related to specific topics or even nodes within a topic. Other authors can respond to these comments and leave their own, allowing conversations to occur directly inside the authoring experience.

See also

Add comments to bots (docs)

Microsoft Dataverse

Overview of Microsoft Dataverse 2021 release wave 2

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 October 2021 through March 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

Azure Synapse Link for Dataverse is a comprehensive solution that enables seamless Dataverse integration with Azure Synapse Analytics.

Feature	Enabled for	Public preview	General availability
Link Dataverse to Azure Synapse Analytics workspace to bring in Dynamics 365 data	Admins, makers, marketers, or analysts, automatically	✔ May 25, 2021	Nov 2021
Azure Synapse Link for Dataverse - Government Cloud	Admins, makers, marketers, or analysts, automatically	✔ May 26, 2021	✔ Nov 15, 2021
Access Dataverse choice labels directly from Azure Synapse Link for Dataverse	Admins, makers, marketers, or analysts, automatically	Mar 2022	To be announced
Analyze incremental updates of your Dataverse data with Azure Synapse Link for Dataverse	Admins, makers, marketers, or analysts, automatically	Mar 2022	To be announced
Azure Synapse Link for Dataverse - China Cloud	Admins, makers, marketers, or analysts, automatically	Mar 2022	To be announced
Receive notifications regarding the state of your Azure Synapse Link for Dataverse	Users by admins, makers, or analysts	Mar 2022	To be announced

Microsoft Dataverse API

APIs are web services that apps use to interact with Microsoft Dataverse and are the glue that binds Microsoft Power Platform together.

Feature	Enabled for	Public preview	General availability
Microsoft Dataverse search API v2.0	Admins, makers, marketers, or analysts, automatically	-	✔ Dec 3, 2021

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
Delete and remove users with disabled status	Users by admins, makers, or analysts	Mar 2022	-
Microsoft Dataverse search enabled by default for production environments	Admins, makers, marketers, or analysts, automatically	-	✔ Oct 1, 2021
Publishers can update non-customizable table settings through solutions	Users, automatically	-	✔ Oct 12, 2021
Microsoft Dataverse search can search through file data type	Admins, makers, marketers, or analysts, automatically	-	✔ Oct 31, 2021
Lookup validation for solutions	Users, automatically	-	Jan 2022
Microsoft Dataverse auditing enhancements	Users by admins, makers, or analysts	✔ Mar 31, 2021	Jan 2022
Access integration with Microsoft Power Platform	Admins, makers, marketers, or analysts, automatically	✔ Nov 2, 2021	Feb 2022
Modernize business units	Users by admins, makers, or analysts	✔ Nov 12, 2021	Feb 2022
Patching the Basic User security role	Users by admins, makers, or analysts	-	Mar 2022
Support Azure Active Directory group with dynamic membership type	Users by admins, makers, or analysts	-	Mar 2022
Support merging of security role privileges for ALM solution import	Users by admins, makers, or analysts	-	Mar 2022

Microsoft Dataverse plug-ins

Developers can write plug-ins that respond to events raised by the Microsoft Dataverse framework. These plug-ins are the foundation of Dynamics 365 solutions.

Feature	Enabled for	Public preview	General availability
Dependent assemblies for plug-ins	Admins, makers, marketers, or analysts, automatically	Mar 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.

Bridge Microsoft Power Platform to Azure data

Overview

Customers have asked for a single, end-to-end way to work with data in Microsoft Dataverse, including running AI and machine learning, integrating with external datasets, and slicing and dicing large volumes of 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. This solution can help you deliver on your end-to-end goals, and is already built in and available out of the box.

Azure Synapse Link for Dataverse enables seamless Dataverse integration with Azure Synapse Analytics to empower users to analyze data in the lake. With just a few clicks, you can bring your Microsoft Dataverse data to Azure Synapse Analytics and visualize data in your Azure Synapse workspace. You can also quickly 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.

Enterprise customers are now able to use the familiarity of T-SQL to analyze big data and gain insights, while optimizing their data transformation pipeline to leverage the deep integration of Azure Synapse with other Azure services such as Power BI Embedded, Azure CosmosDB, and Azure Machine Learning.

Link Dataverse to Azure Synapse Analytics workspace to bring in Dynamics 365 data

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ May 25, 2021	Nov 2021

Business value

With this feature, you can bring Dynamics 365 data to Azure within a few clicks to enable several analytical scenarios using AI and ML.

Feature details

With this feature, you can use Synapse Link for Dataverse to link a Microsoft Dataverse environment to Azure Synapse Analytics workspace and bring external data or Dynamics 365 data that's stored in Microsoft Dataverse to Azure Synapse Analytics.

Synapse Link for Dataverse enables a seamless integration with Azure Synapse Analytics. With a few clicks, you can bring your Dataverse data to Azure Synapse, 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 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, Azure Machine Learning, and Azure Cognitive Services.

See also

Create an Azure Synapse Link for Dataverse with your Azure Synapse Workspace (docs)

Azure Synapse Link for Dataverse - Government Cloud

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ May 26, 2021	✔ Nov 15, 2021

Business value

Azure Synapse Link for Dataverse will be available for Government Cloud.

Feature details

Government Cloud customers are looking to analyze their Dataverse data in Azure Synapse Analytics in a manner that's compliant with government regulations. With just a few clicks, Government Cloud users can leverage Azure Synapse Link for Dataverse to quickly and continuously analyze their data securely.

Access Dataverse choice labels directly from Azure Synapse Link for Dataverse

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2022	To be announced

Business value

Users will have direct access to Dataverse choice text labels from Azure Synapse Link for Dataverse, eliminating the extra steps that were previously needed to access the integer-to-text label mapping.

Feature details

Previously, Azure Synapse Link for Dataverse wrote an integer label rather than the text label for columns that use Microsoft Dataverse choices (option sets) to maintain consistency during edits. This approach required users to take extra steps to access the integer-to-text label mapping that's stored in the Microsoft.Athena.TrickleFeedService/table-EntityMetadata.json file to make it available with their Dataverse data.

Now, Azure Synapse Link for Dataverse customers have access to a separate table containing their Dataverse choices integer-to-text label mapping, which can be joined with the raw Dataverse data to expose the text label for each Dataverse choice column. This helps both citizen developers and data engineers to easily read the user-friendly version of their Dataverse data.

Analyze incremental updates of your Dataverse data with Azure Synapse Link for Dataverse

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2022	To be announced

Business value

Users will be able to query and analyze the incremental updates made to Microsoft Dataverse data during a specified time period.

Feature details

Data is rapidly changing, and businesses have a requirement to continuously ingest these changes into their pipelines in Azure Synapse. To enable these scenarios, Azure Synapse Link for Dataverse now provides separate timestamped Incremental folders with changes that occurred during a user-specified time period.

After every specified time interval (in minutes), the user is provided a new timestamped folder that contains only the changes to the Dataverse data that occurred within that period. This empowers users to analyze and report on the changes to their data as well as incrementally load updates into their ingestion pipelines.

Azure Synapse Link for Dataverse - China Cloud

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2022	To be announced

Business value

Azure Synapse Link for Dataverse will be available for China Cloud.

Feature details

Companies in China are looking to analyze their Dataverse data in Azure Synapse Analytics in a manner that's compliant with government regulations. With just a few clicks, China Cloud users can leverage Azure Synapse Link for Dataverse to quickly and continuously analyze their data securely.

Receive notifications regarding the state of your Azure Synapse Link for Dataverse

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

Business value

Users can subscribe to notifications to stay on top of the state of their Azure Synapse Link for Dataverse, instead of manually checking the monitoring page.

Feature details

Azure Synapse Link for Dataverse has a detailed monitoring page describing link status and health. This includes synchronization status of each Microsoft Dataverse table, the number of records or changes, and details about link configuration strategy. Previously, users had to manually open the monitoring page and check the state of their link. With this feature, users can subscribe to customized notifications and easily stay informed about the health of their Azure Synapse Link.

Microsoft Dataverse API

Overview

Microsoft Dataverse APIs are the glue that binds Microsoft Power Platform together.

- The data APIs provide capabilities to work with data in your Microsoft Dataverse tables and perform specialized operations.
- The relevance search API makes it possible to easily find relevant information that can span multiple tables.

Microsoft Power Platform depends on APIs exposed by Microsoft Dataverse APIs. Canvas apps, model-driven apps, and Microsoft Power Automate depend on Dataverse APIs. ISVs and customers use our APIs to create integrations and custom applications.

Microsoft Dataverse search API v2.0

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✓ Dec 3, 2021

Business value

This capability makes searching over data in Microsoft Dataverse more flexible to meet the diverse requirements makers may have while building search experiences.

Feature details

Microsoft Dataverse search API enables programmatic access to search capabilities over your data in Dataverse. With the new API v2.0, we're adding the following two capabilities:

1. Define a more granular search scope. This includes the ability to specify which tables and columns to search, which filters to apply at a column level, and which columns to include in the search response.
2. Use Microsoft Dataverse search from plug-ins.

See also

Search across table data using Dataverse search (docs)

Microsoft Dataverse data

Overview

Microsoft Dataverse is the default data store for Microsoft Power Platform. Microsoft 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. Microsoft Dataverse provides extensive security, filtering, and search capabilities within environment bounds. Microsoft Dataverse API and logic capabilities are used to build and maintain workflows for your application needs.

Delete and remove users with disabled status

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

Business value

Remove users who are no longer active in the system to free up storage space and allow for historical records to be purged.

Feature details

When users have been disabled or deleted from Azure Active Directory or Microsoft 365 admin, they are set to **disabled** status in Microsoft Dataverse. Disabled users residing in the system not only take up storage space but also inhibit the ability to purge historical records. This feature provides the capability to delete and remove users who have a disabled status while maintaining data integrity.

Microsoft Dataverse search enabled by default for production environments

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Oct 1, 2021

Business value

Microsoft Dataverse search enabled by default for production environments makes it easier for users to find information and makers to build intelligent apps, bots, and flows over data in Microsoft Dataverse.

Feature details

Microsoft Dataverse search is now enabled by default for production environments. It is easy to use, fast, and intelligent, and it helps users find their information easily in experiences like global search in model-driven apps in Power Apps. It also enables makers to build apps, bots, and flows that intelligently search over data in Microsoft Dataverse.

See also

Enable Dataverse search (docs)

Publishers can update non-customizable table settings through solutions

Enabled for	Public preview	General availability
Users, automatically	-	✔ Oct 12, 2021

Business value

This feature reduces the steps needed for publishers to manage their solutions and make updates that are critical to their users.

Feature details

Today, publishing a new version of a solution to **Enable Auditing = On** on the account table would be ignored because **Allow Customizations = Off**. There are workarounds that would need to be done involving multiple steps to allow customizations on the table, make the changes, and then reinstate the customization lock afterwards.

For example, a customer has their account table set to **Enable Auditing = Off** and **Allow Customizations = Off**.

This new feature will allow a publisher to update **Account to Enable Auditing = On** in a new version of their solution without having to change the customization setting. Because the change is submitted by the publisher, the table setting change is enforced. If a table change was submitted through a different publisher, the **Allow Customization = Off** would be honored, and the change will not be allowed.

For more information about this feature, go to Publishers can modify table properties for non-customizable solutions.

Microsoft Dataverse search can search through file data type

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Oct 31, 2021

Business value

Searching the file data type makes it easier for users to search through their textual information stored in files in Microsoft Dataverse.

Feature details

Microsoft Dataverse search can now search through the file data type, enabling search over text in files like Word docs and PDFs. Microsoft Dataverse search is easy to use, fast, and intelligent, and it helps users find their information easily in experiences like global search in model-driven apps in Power Apps. It also enables makers to build apps, bots, and flows that intelligently search over data in Microsoft Dataverse.

Lookup validation for solutions

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

Business value

Performing a validation for all required relationships reduces problems post publishing and helps customers be more successful when distributing solutions.

Feature details

With this new feature, solutions will automatically check for all required lookup relationships prior to export.

Before this feature, it was possible to create a solution, select your solution components, and then export even if you didn't include the lookup relationships necessary for your solution to successfully be imported.

Now, at the time of export, a check will automatically be made on every table of a solution to find lookup fields. Once found, the check will validate that the relationship necessary for the lookup to work properly was included in the solution. If it's not present, an error message will provide details of what table is involved and which relationship is missing.

For more information about this feature, go to [Important New Feature: Relationship Validation for Solutions].

Microsoft Dataverse auditing enhancements

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 31, 2021	Jan 2022

Business value

Auditing enhancements will provide unlimited log capacity and more granular ways to manage audit logs based on an organization's individual needs for retention of audit data.

Feature details

The following changes have been made to Microsoft Dataverse auditing:

- Audit data is stored in log storage
- Administrators can set a retention period for audit data
- Expired data will automatically be removed from the system per the retention period
- Joining tables from the database storage and the log storage will no longer be possible

See also

Audit data and user activity for security and compliance (docs)

Access integration with Microsoft Power Platform

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Nov 2, 2021	Feb 2022

Business value

Microsoft Access users can now choose to migrate their databases to Microsoft Dataverse. This will provide rich data possibilities through the use of Microsoft Power Platform while allowing users to continue managing their data using existing Access forms.

Feature details

The Microsoft Access migration tool will simplify and automate the process of moving data to Microsoft Dataverse or Microsoft Dataverse for Teams, using a few simple steps.

- Users can migrate data, tables, and relationships into Microsoft Dataverse or Dataverse for Teams.
- Migrated data and schema can be used with Power Apps, Power Automate, Power Virtual Agents, and Power BI.
- Access users will be able to continue using their desktop client to manage their data, in addition to using the Microsoft Power Platform clients.
- Preview will support 80 percent of available Access types for migration, and provide support for 1:M and self-referential relationships, with more data types and relationships coming in the future.

See also

Learn about Access integration with Microsoft Power Platform (video)

Migrate Microsoft Access data to Microsoft Dataverse (docs)

Modernize business units

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 12, 2021	Feb 2022

Business value

We're extending the functionality of the business unit security model by expanding it to allow security roles from different business units to be assigned to a user. This allows a user to access data from different business units based on their security roles.

Feature details

By decoupling a user's business unit from their security role's business unit, security roles from different business units can be assigned to a user. This allows the user to access data from the respective business units without the need to create and join an owner team of the unit. In addition, a user who has security roles from different business units can set the owning business unit for the record when it's created or updated.

See also

Feature exploration: Modernize business units (video)

Create or edit business units (docs)

Patching the Basic User security role

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

Business value

In order to provide a consistent user experience, a patch will be made to an older version of the Basic User security role to update its global Read/Write privileges to the basic level.

Feature details

Environments that were provisioned between July and September of 2018 may contain an older version of the Basic User security role. This older version has global Read and Write privileges for the following tables:

- Account
- Activity
- Contact
- Customer Relationship

- Feedback
- SLA
- SLAKPI Instance
- Social Profile

A patch will be rolled out to update these global Read/Write privileges to the default basic-level privileges. Users who have been assigned the Basic User security role may be impacted.

Support Azure Active Directory group with dynamic membership type

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

Business value

Large enterprises heavily use the dynamic membership type in Azure Active Directory groups to simplify the group membership management. Supporting the dynamic membership type in Microsoft Dataverse will unblock these enterprises.

Feature details

Microsoft Dataverse supports Azure Active Directory (Azure AD) security and office groups including the ability to differentiate Owners, Members, and Guests. To complete the full Azure AD group functionality, we're extending the support of the dynamic membership type. The dynamic membership type leverages business rules to manage the group membership dynamically. Microsoft Dataverse authentication and authorization will be extended to support this membership type.

Support merging of security role privileges for ALM solution import

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

Business value

Support the application lifecycle management (ALM) process where security role/privilege updates are honored in managed solutions.

Feature details

Today, when the custom security role and privileges are shipped in upgraded managed partner solutions, the updated security role and privileges are ignored during solution updates. The security role and privileges are replaced with the original ones. When we implement this feature, the custom security role and privileges shall be merged with the original ones thereby honoring any customizations that are released in subsequent solution upgrades.

Microsoft Dataverse plug-ins

Overview

Microsoft Power Platform depends on compute capabilities included in Microsoft Dataverse. Developers can write plug-ins that respond to events raised by the Microsoft Dataverse event framework. These plug-ins are the foundation of the capabilities of Dynamics 365 solutions.

Dependent assemblies for plug-ins

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

Business value

Support for dependent assemblies with Microsoft Dataverse plug-ins allows developers to be more productive by leveraging capabilities provided by additional assemblies.

Feature details

Microsoft Dataverse plug-in developers have long used an unsupported capability provided by the ILMerge utility to combine a plug-in assembly plus any needed dependent assemblies together into a single .NET assembly. The resulting assembly can be registered with the web service to extend the Dataverse business logic.

The **dependent assemblies** capability provides a supported way for developers to include additional dependent assemblies along with the plug-in assembly when registering a plug-in with Microsoft Dataverse.

Governance and administration

Overview of Microsoft Power Platform governance and administration 2021 release wave 2

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-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 October 2021 through March 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.

An enhanced, unified Power Platform admin center

Enhancements to the Power Platform admin center and Dynamics 365 offer a unified experience for managing environments, deployments, capacity, and usage.

Feature	Enabled for	Public preview	General availability
Granular admin privilege management	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Intuitive, modern UI experiences for user, teams, and role management	Admins, makers, marketers, or analysts, automatically	Mar 2022	

Feature	Enabled for	Public preview	General availability
Project Operations-based trials (with ERP) in the Power Platform admin center	Admins, makers, marketers, or analysts, automatically	✔ Sep 30, 2021	✔ Oct 1, 2021
Pay as you go for Power Apps and related Power Platform products using Azure subscription	Users by admins, makers, or analysts	✔ Nov 1, 2021	Feb 2022

Automation and tooling for administrators

Rich tooling experiences are available for administrators and IT professionals managing Microsoft Power Platform.

Feature	Enabled for	Public preview	General availability
Power Platform admin center analytics on Dynamics 365 license usage	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Power Platform admin center hygiene analytics for Power Apps	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Power Platform admin center tenant-level analytics for Power Automate	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Search audit logs for Power Apps and Power Automate using Microsoft 365 Defender	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Modernized user interface for advanced settings	Admins, makers, marketers, or analysts, automatically	-	✔ Oct 8, 2021
Unified Microsoft Power Platform API	Admins, makers, marketers, or analysts, automatically	Dec 2021	Mar 2022

Feature	Enabled for	Public preview	General availability
Microsoft Power Platform tenant isolation support and allowed list of tenants	Admins, makers, marketers, or analysts, automatically	Jan 2022	Mar 2022
New connectors disabled by default in GCC High and DoD	Admins, makers, marketers, or analysts, automatically	Jan 2022	Mar 2022
Reporting for Finance and Operations storage	Admins, makers, marketers, or analysts, automatically	Mar 2022	Mar 2022
Lockbox for Microsoft Power Platform	Users by admins, makers, or analysts	Mar 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.

An enhanced, unified Power Platform admin center

Overview

The unification of the Power Platform admin center continues towards delivering a single admin experience, not only for Microsoft Power Platform, but also for Dynamics 365. The admin center is offering a unified experience for managing environments, deployments, users, capacity, and usage. Powerful analytics empowers admins to gain visibility into creation and usage, and to investigate and diagnose issues with their deployments. The integrated help and support experience is enhanced with live chat and virtual agent experiences, which optimizes the self-service experience and reduces the time spent contacting Microsoft Support.

Granular admin privilege management

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

Business value

Empower organizations to define a variety of security roles at the tenant and environment levels, supporting the ability to assign different fine grained admin privileges.

Feature details

Currently, Microsoft Power Platform supports centralized admin roles at the tenant and environment levels. In large enterprises where an admin team is comprised of specialized roles, there's a need to enable fine grained custom admin role definition at the tenant and environment levels, allowing different admin personas to perform distinct privileged operations in the enterprise.

With this feature, admin roles can be managed in a decentralized manner, attributing different admin privileges to different security roles/personas. For example, dedicated roles can be defined to enable security admins to manage data loss prevention policies, business owners to view analytics reports, and operations admins to perform environment lifecycle actions.

Intuitive, modern UI experiences for user, teams, and role management

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

Business value

Modern, intuitive portal experiences will be available in the Power Platform admin center replacing the legacy web client UI. Not only does this feature ensure a consistent user experience for the administrator, but it also streamlines the navigation patterns, allowing for better discovery and faster job completion.

Feature details

We'll provide a modern, intuitive UI experience within the Power Platform admin center instead of the legacy web client UI for user, group teams, and role management. This will enable admins to seamlessly manage users and permissions by leveraging the modern admin center interface without going back and forth between the modern and legacy Dynamics 365 UI.

Admins will be able to use the modern UI to perform tasks like edit user details, create or edit security roles, and add/remove users to/from security roles. Admins will also be able to manage all aspects of Microsoft Dataverse for Teams from the modern UI as a means to leverage Microsoft Azure Active Directory groups to manage security role assignment in Microsoft Power Platform environments.

Project Operations-based trials (with ERP) in the Power Platform admin center

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 30, 2021	✔ Oct 1, 2021

Business value

Today, customers who want to do a trial of Project Operations apps need to do so in either the Lifecycle Services (LCS) portal when enterprise resource planning (ERP) functionality is required or the Power Platform admin center when CRM functionality is required. In some cases, customers need to use both admin portals to manage their trial. This is very time consuming and has a disconnected experience. The new single admin portal approach resolves these issues.

Feature details

Project Operations, inclusive of scenarios that require the deployment of Dynamics 365 Finance and Operations apps, will now be fully managed in the Power Platform admin center. Historically, Finance and Operations apps have only been deployable through the Lifecycle Services (LCS) admin portal. This has now been reimagined to better align with the rest of the Dynamics 365 apps, and now Finance and Operations will appear as another app installed on top of Microsoft Dataverse.

Behind the scenes, all of the infrastructure and databases that today's Finance and Operations customers are used to provisioning will still get deployed, but those technical details will be hidden away in the Power Platform admin center. New customers with a trial of the Project Operations suite will get a Microsoft Dataverse and an X++ ERP runtime simultaneously.

For trial scenarios, this now means that customers who need ERP and CRM combined functionality can get a single environment that contains the full stack of capabilities, and it'll all be in a single admin center experience.

Pay as you go for Power Apps and related Power Platform products using Azure subscription

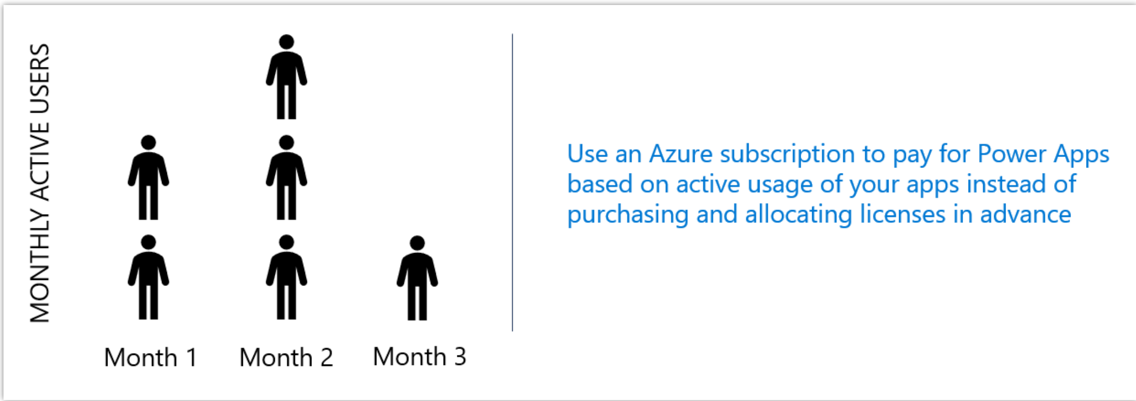
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 1, 2021	Feb 2022

Business value

By enabling organizations to use their Azure subscription to purchase a subset of Microsoft Power Platform products as pay-as-you-go meters, customers will have the flexibility to address dynamic business needs.

Feature details

This feature will enable customers to use their Azure subscription to purchase selected Microsoft Power Platform products. The initial wave of products will include Power Apps per app, Dataverse (database, file, log), and Power Platform requests (API calls). Customers will be able to link environments to an Azure subscription, at which point all usage of the aforementioned products will be billed against that subscription using newly created pay-as-you-go meters. For more information, go to [Announcing pay-as-you-go for Power Apps]() or read the [Pay-as-you-go plan overview]().



Graphic showing a graph with usage of a Power App growing and shrinking over time.

Tell us what you think

Help us improve Microsoft Power Platform governance and administration by discussing ideas, providing suggestions, and giving feedback. Use the [forum]().

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.

See also

[Announcing pay-as-you-go for Power Apps]() (blog)

[Pay-as-you-go plan]() (docs)

Automation and tooling for administrators

Overview

Rich tooling experiences like PowerShell cmdlets are available for administrators and IT professionals to provide additional management capabilities for use outside the out-of-the-box portal experiences. A unified API surface for administrating all services across Microsoft Power Platform will help optimize a fully automatable management experience.

Power Platform admin center analytics on Dynamics 365 license usage

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

Business value

These solutions are designed for admins responsible for optimizing Dynamics 365 licenses used across their organization. The embedded analytics in the Power Platform admin center provide visual representations of the usage of Power Apps by users assigned to roles that require a Dynamics 365 license. Quickly identify underutilized license assignments and pinpoint opportunities to improve resource allocations.

Admins struggle with the responsibility of ensuring users have the Dynamics 365 license assignments they need to perform their unique business functions. Oftentimes, admins account for this by purchasing more licenses than necessary to ensure users are granted access to everything they could possibly need. This ultimately creates bloat in license allocations and results in heavy costs for a business. As individuals change roles, license assignments must be frequently revisited to avoid paying for unused licenses. Each instance of an unused license represents an opportunity for savings. Power Platform admin center analytics make it easy to identify instances where Dynamics 365 licenses are assigned but aren't being used.

Feature details

Microsoft Power Platform service admins, Dynamics 365 admins, and Microsoft 365 global admins will be able to opt in to use embedded analytics to help manage the efficiency of Dynamics 365 license allocations for their entire organization. These analytics are used to surface monthly average usage (MAU) broken down by license types to help admins optimize Dynamics 365 license assignments. These solutions will quickly become essential by empowering admins to get a clear sense of which applications are being used to support particular business functions.

Dynamics 365 license information for users of Power Platform apps is presented in this view alongside usage information for apps, bots, and services logged throughout the business day. Using this information, admins are able to better articulate how users are taking advantage of Power Platform resources to help digitally transform their business.

This view is designed to help answer basic questions on licensing such as:

- How many Dynamics 365 licenses are assigned but not being used?
- Which Dynamics 365 license is required to perform a particular business function?
- How many active users in this environment have Dynamics 365 licenses assigned?
- Which environment has the most/least active users with Dynamics 365 licenses?

Power Platform admin center hygiene analytics for Power Apps

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

Business value

Take advantage of actionable insights embedded in the Power Platform admin center designed to help admins identify unused and orphaned Power Apps deployed across the organization. Need to manage the rapid growth of Power Apps across the organization? Use these solutions to help reduce service COGS for your business by maximizing investments on those applications that are being used most often across active environments.

Admins often struggle with the responsibility of ensuring the organization's app portfolio continuously promotes the most effective solutions. This can be even more difficult when tasked with supporting a bloat of unused applications. At best, orphaned solutions offer a distraction to members of your organization. More often, they present the opportunity to elevate privileges by performing operations that function using shared credentials. Hygiene analytics for Power Apps are essential in managing costs attributed with the expansion of apps to supplement or replace transactions which were historically paper-based.

Feature details

Microsoft Power Platform service admins, Dynamics 365 admins, and Microsoft 365 global admins will be able to opt in to out-of-box, tenant-level reports designed to help identify unused and orphaned applications. For environment-level admins, views are automatically filtered to only include the environments they manage. These analytics are derived from telemetry events produced when users open and interact with Power Apps.

Unlike the Usage report, this view surfaces those applications that are not being used by members of your organization. Use built-in filters to view applications which haven't been used in the last month, two months, three months, or over a year. Admins are responsible for maintaining good environment hygiene by ensuring outdated solutions are frequently purged from the organization's app portfolio.

Power Platform admin center tenant-level analytics for Power Automate

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

Business value

Out-of-box tenant-level reports improve the ability of Microsoft Power Platform service admins to keep track of key metrics like monthly active users (MAU) and monitor the distribution of cloud flow events by environment. Admins can use these solutions to identify underutilized cloud flows and evaluate how broadly service connectors are being used to support automated events. Easily identify the most active and widely distributed flow operations to ensure they receive the right level of investments.

If you're interested in tracking the most successful flow event makers or surfacing environments most reliant on a specific connector, use purpose-driven solutions to monitor the application lifecycle management of automated flow events across the organization. Get trend analysis on creation and management of flow events by active makers. Stay on top of Microsoft Power Platform investments as you transform your business with a complete inventory view of flow events.

Feature details

Microsoft Power Platform service admins, Dynamics 365 admins, and Microsoft 365 global admins will be able to opt in to out-of-box tenant-level reports for Power Automate with options to drill down to the environment level. For environment-level admins, views are automatically filtered to only include the environments they manage.

Usage reports will provide insights into MAU sessions, new and returning users, and a list of apps in use with filters for app type, connector tier, country, device platform, and player version.

The **Inventory** report lists all flows with their owner, environment they belong to, published date, last launched date, and the type of flow (cloud or desktop). There will be filters for flow type, connector tier, and country.

Search audit logs for Power Apps and Power Automate using Microsoft 365 Defender

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

Business value

Organizations depend heavily on the availability of detailed activity logs as a means of protecting intellectual property. Audited Power Platform events can be used by admins to complete investigative tasks like replaying the actions of a specific employee. Activity logs stored in Microsoft 365 Defender include details on create, read, write, and delete operations performed against Dataverse tables, as well as Power Automate-related activities such as when a cloud flow was last executed. Admins can also search for details on environment patching and deployment operations performed by Microsoft Support.

Service activity logging and the ability to track user actions are critical in detecting and preventing the impact of a data compromise. Detailed logs produced by the Power Platform service can be evaluated to determine the cause of an event. Use the Microsoft 365 Defender audit log search tool to identify all activities that occurred in Power Platform or target specific events that occurred within a given timeframe.

Feature details

Use Microsoft 365 Defender to manage activity logs produced by Power Platform apps, bots, and services with ease. When an audited activity is performed by a user or an admin, an audit record is generated and stored in the audit log for your organization. The length of time that an audit record is retained and searchable in the log depends on your Office 365 or Microsoft 365 Enterprise subscription, and specifically the type of the license that's assigned to specific users.

System administrators can start or stop auditing services for an organization. Logging takes place at the SDK layer, which means a single user action can trigger the creation of multiple logged events. The types of events logged include but aren't limited to:

- When a specific user accesses the system
- Every time an app gets launched
- When apps and flows are created or deleted
- When Dataverse tables are created or deleted

Modernized user interface for advanced settings

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Oct 8, 2021

Business value

This feature provides a modern user experience when configuring advanced settings using the web client.

Feature details

As part of the web client removal, some admin settings in the web client/legacy user interface have been moved to a modern experience. Organization admins will have a new option in the Microsoft Power Platform environment settings to configure this behavior.

From environment settings, select **Product** > **Behavior** > **Use updated experience for classic setting where possible**.

The default is **Off** for the existing environments and **On** for environments created after October 2021. When this option is turned **On**, you'll be redirected to the modern experience when accessing some settings from the legacy experience.

Please note that not all legacy settings have a modernized user interface, but for the ones that have modernized parity available, turning on this option enables redirection.

See also

Manage behavior settings (docs)

Unified Microsoft Power Platform API

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Dec 2021	Mar 2022

Business value

The Microsoft Power Platform API will provide customers with a single unified API for all admin management scenarios across environments, tenant settings, capacity, licensing, and resources.

Feature details

Today, customers have a myriad of programmability options from PowerShell to Management Connectors to REST APIs. The REST APIs are disparate across different endpoints depending on the resource in question, and they provide a challenging experience. This delays documentation and reduces parity between PowerShell and the APIs.

Unification of the various APIs into a single Microsoft Power Platform API will be done in phases. First, we'll start by enabling tenant settings, capacity, and licensing APIs on a single endpoint. Then, we'll enable environment management capabilities like environment creation, adding Microsoft Dataverse to an existing environment, backup, copy, restore, and so forth. Next, we'll start to enable the endpoints for various resources that an environment can contain like Power Apps, Power Automate flows, Power Virtual Agents, and more.

Most notably, this will have no impact to the Dataverse APIs which remain separate. This Microsoft Power Platform API will be a unified API surface for all other admin management actions.

Microsoft Power Platform tenant isolation support and allowed list of tenants

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jan 2022	Mar 2022

Business value

Admins can manage data exfiltration or infiltration risks for Azure AD-based connectors in their tenant by turning on tenant isolation for Microsoft Power Platform connections. This will prohibit connections from your tenant to external tenants and block other tenants from establishing Microsoft Power Platform connections to your tenant. For legitimate business use cases where such cross-tenant connections are required to be enabled, admins can specify an allowed list of tenants that are exempt from tenant isolation, along with specifying the direction of permitted cross-tenant connections (inbound from external tenant, outbound from your tenant, or both).

Feature details

Enable/disable tenant isolation using self-serve capability through the Power Platform admin center: When tenant isolation is turned on, all Azure AD-based connectors can no longer be used to create cross-tenant connections to or from your tenant. Previously, customers had to create a support ticket to enable tenant isolation. Now, we're allowing you to manage your tenant's tenant isolation settings directly through the Power Platform admin center.

Choose an allowed list of tenants that are exempt from tenant isolation: This is a new capability within tenant isolation to allow legitimate business scenarios to continue connecting to explicitly identified tenants, even as everything else is disallowed. Wildcard * is also supported if all tenants need to be enabled in an inbound or outbound direction instead of identifying specific tenants.

New connectors disabled by default in GCC High and DoD

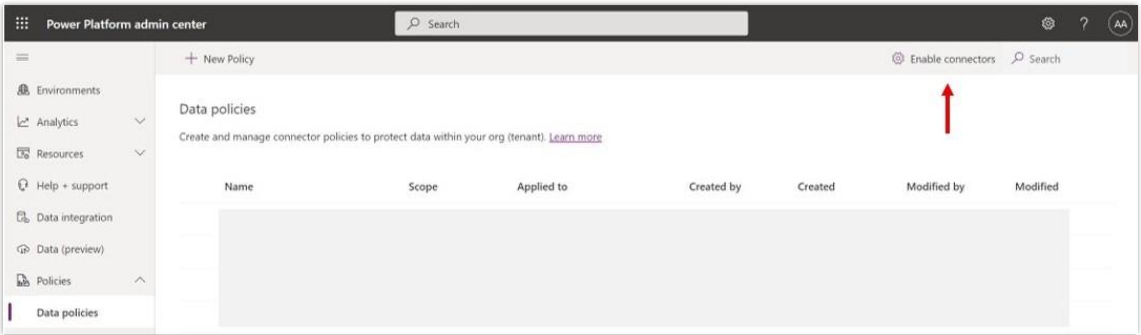
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jan 2022	Mar 2022

Business value

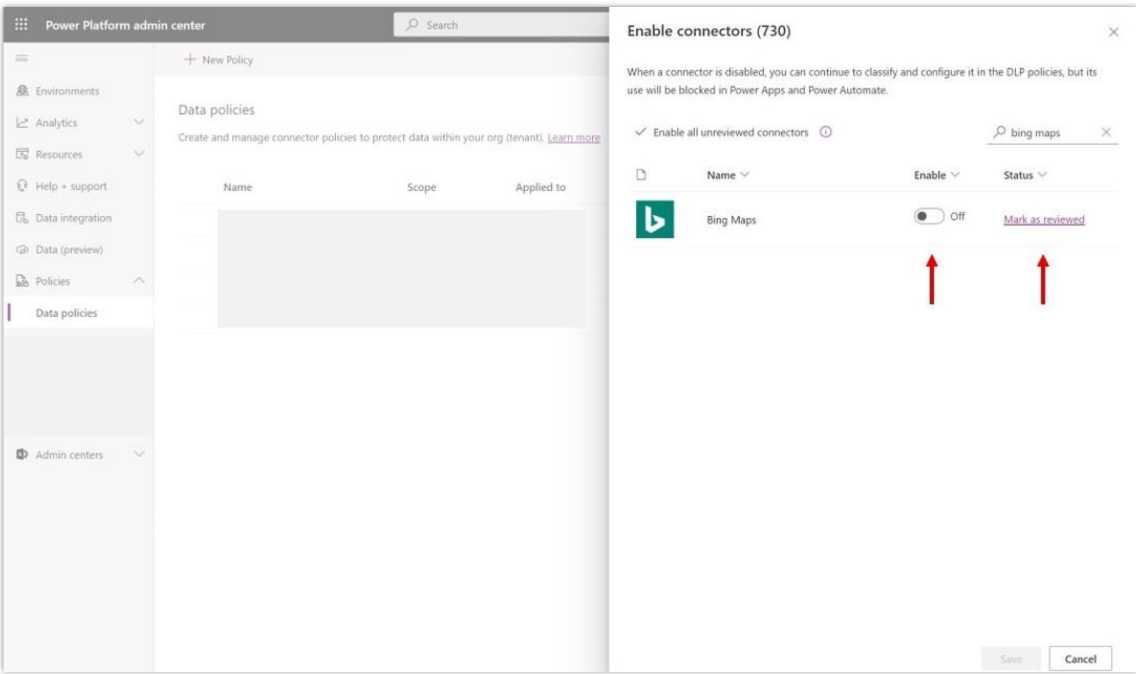
When new connectors are introduced to Microsoft Power Platform, they can be used immediately by all makers. This requires admins to constantly monitor the connector ecosystem and reactively update the organization's data loss prevention (DLP) policies to prevent makers from inadvertently exfiltrating data. Such occurrences must be avoided at all costs in US government clouds where strict federal compliance is mandated. Administrators can now rely on this safeguard mechanism in GCC High and DoD to better control the use of connectors.

Feature details

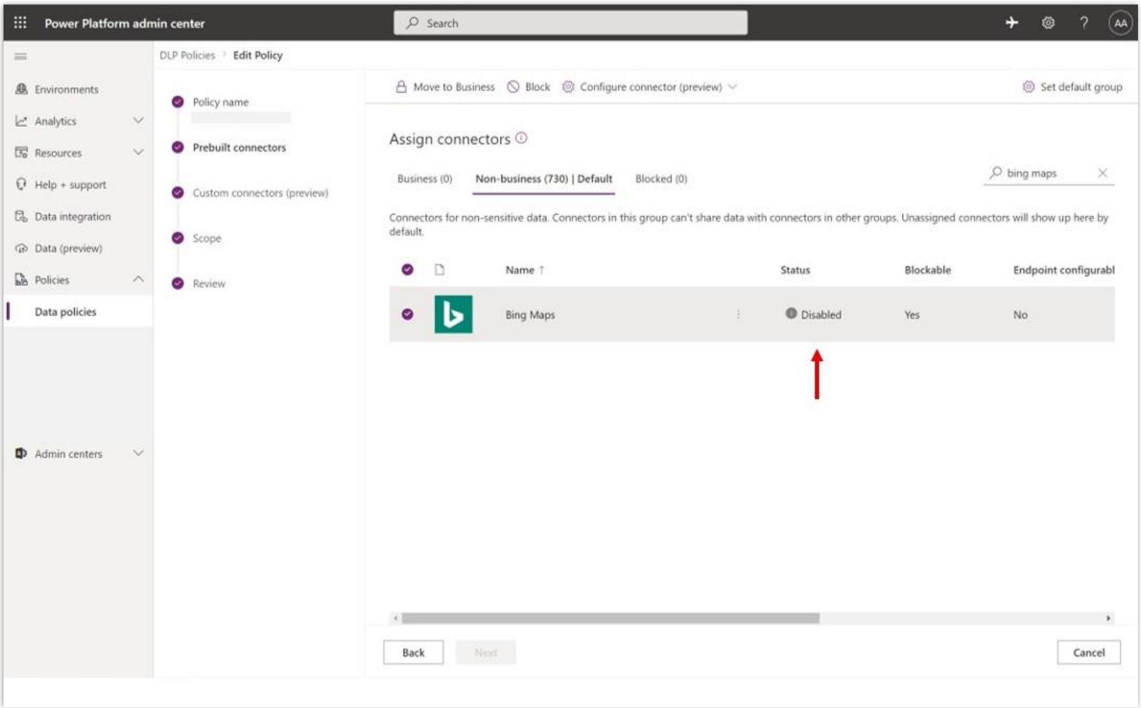
New connectors that are introduced by Microsoft and partners to Microsoft Power Platform will be disabled by default for customers operating in the following US government clouds: GCC High and DoD. Administrators will be able to review these new connectors before explicitly authorizing their use across the organization. Connectors currently available in GCC High and DoD will remain enabled, but admins can still leverage the new tenant-level setting to disable them. This setting will be located in the "Data policies" section of the Power Platform admin center.



The new setting available on the Data policies page of the Power Platform admin center



Example where a new connector, Bing Maps, has been disabled by default



Connector status reflected in the DLP policy wizard experience

Reporting for Finance and Operations storage

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

Business value

Admins will have access to Finance and Operations storage reporting directly in the Power Platform admin center. These reports will offer clarity on how much storage has been used and allow admins to take timely action if entitlement limits are exceeded.

Feature details

Within the Power Platform admin center, storage reporting will show how much storage a customer has used against their entitlement limit. (For this release, the scope will cover database storage only.) Admins will be able to download the report in a Microsoft Excel format. Eventually, we'll enhance the experience with more visualized analytics, similar to what Microsoft Dataverse has in the Power Platform admin center today.

Lockbox for Microsoft Power Platform

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

Business value

Lockbox for Microsoft Power Platform allows organizations to control temporary just-in-time access to their environments for Microsoft engineers to help solve critical support requests.

Feature details

There are three core capabilities included with lockbox for Microsoft Power Platform:

1. Administrators can choose which Microsoft Dataverse databases need to be protected by lockbox.
2. On the rare occasion that Microsoft needs to temporarily access data in those lockbox-protected databases to resolve a critical issue, administrators will be notified and can visit the Power Platform admin center to approve or reject the data access request.
3. After access is granted to Microsoft, any action taking place in the lockbox-protected database during the temporary access period is recorded and made available to your organization as SQL audit logs. These logs can be exported to an Azure data lake for further analysis.

Data integration

Overview of data integration 2021 release wave 2

The data integration team's vision is to democratize data for business users so it's seamless to extract, transform, and load into Microsoft Dataverse and Azure Data Lake Storage from any data source and to allow other Microsoft products to leverage this data.

We are investing in a few key pillars:

- Microsoft Power Platform dataflows. Power Query is the industry-leading smart data prep tool and evolves by infusing artificial intelligence and machine learning (AI/ML) into data transformations and by extending dataflows to all of Microsoft Power Platform. In 2021 release wave 1, we're enabling the dataflows experience in Dataverse in Teams so that customers can easily populate data and build better applications.
- Enhanced data integration by enabling analytics on Dataverse data through the Export to Data Lake in Common Data Model form, new and enhanced connectors, and improvements in the connectivity platform. Other enhancements include Office data integration to enable new insights, extending dual-write for more entities, improving Data Export Service, and enhancing the gateway for enterprises and Robotics Process Automation (RPA).
- End-to-end diagnostics so that customers can better diagnose and fix issues in queries or the gateway.
- The Common Data Model establishment of industry-wide structure and semantics of underlying data so that customers can reason about that data through various business application solutions, analytics, and machine learning (ML) algorithms.

What's new and planned for data integration

This topic lists features that are planned to release from October 2021 through March 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.

Microsoft Power Platform connectors

The connector platform provides a rich set of connectors for customers and allows partners and customers to develop connectors efficiently.

Feature	Enabled for	Public preview	General availability
Add existing custom connector to a solution	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Environment variable support in custom connectors	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Moving 100 connectors from preview to production	Users, automatically	-	Mar 2022

Microsoft Power Platform dataflows

Microsoft Power Platform dataflows provide a no-code experience based on Power Query Online for non-technical users to connect, transform, and enrich data.

Feature	Enabled for	Public preview	General availability
Azure Synapse-based compute for Microsoft Dataverse tables in Dynamics 365 Customer Insights	Admins, makers, marketers, or analysts, automatically	Feb 2022	-
Azure Synapse-based compute for dataflow tables in Dynamics 365 Customer Insights	Admins, makers, marketers, or analysts, automatically	Mar 2022	-
Entity mapping UX enhancements	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Export dataflow as Power Query template	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Improved experience to update a dataflow's M query parameters	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Improved refresh history and diagnostics for dataflows	Admins, makers, marketers, or analysts, automatically	Mar 2022	

Feature	Enabled for	Public preview	General availability
Duplicate dataflows in Microsoft Power Platform environments	Admins, makers, marketers, or analysts, automatically	-	✔ Oct 15, 2021
New capabilities to support relational database integration with Microsoft Dataverse tables	Admins, makers, marketers, or analysts, automatically	-	Feb 2022

On-premises data gateway

The on-premises data gateway will continue to be an enterprise-grade product with features such as enhancements to load balancing, monitoring, and integration.

Feature	Enabled for	Public preview	General availability
On-premises data gateway security roles	Admins, makers, marketers, or analysts, automatically	Feb 2022	
Gateway diagnosability	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Improved gateway and data source management in Power BI	Admins, makers, marketers, or analysts, automatically	Mar 2022	

Power Query connectors

Power Query connectors enable connectivity to hundreds of applications, websites, databases, online services, and systems of record, with no code experience.

Feature	Enabled for	Public preview	General availability
New Google Sheets connector	Admins, makers, marketers, or analysts, automatically	✔ Nov 15, 2021	
Amazon Redshift support for native queries in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	Mar 2022	-
Browse support for the Dataverse connector in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	Mar 2022	-

Feature	Enabled for	Public preview	General availability
Common Data Model folder view feature in Azure Data Lake Storage Gen 2 connector	Admins, makers, marketers, or analysts, automatically	Mar 2022	-
Dataverse connector availability in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	Mar 2022	-
Dataverse connector available in Excel	Admins, makers, marketers, or analysts, automatically	Mar 2022	-
Dataverse support for native queries in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	Mar 2022	-
Google BigQuery support for native queries in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	Mar 2022	-
Navigator performance improvements for Google BigQuery connector	Admins, makers, marketers, or analysts, automatically	Mar 2022	-
SharePoint list V2 connector improvements	Admins, makers, marketers, or analysts, automatically	Mar 2022	-
Support for native queries in import and DirectQuery mode in the Power Query SDK	Admins, makers, marketers, or analysts, automatically	Mar 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
Get Data experience improvements	Admins, makers, marketers, or analysts, automatically	Mar 2022	-

Feature	Enabled for	Public preview	General availability
Global search	Admins, makers, marketers, or analysts, automatically	Mar 2022	-
New transform – Percentiles	Admins, makers, marketers, or analysts, automatically	Mar 2022	
New transform – Rank	Admins, makers, marketers, or analysts, automatically	Mar 2022	
New transform - Time-based binning	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Power BI Online quick create - Modify manually entered data used in quick reports	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Power BI Online quick create - Use data from a CSV file when creating quick reports	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Power BI Online quick create - Use data from a PDF file when creating quick reports	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Power BI Online quick create - Use data from an Excel file when creating quick reports	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Power BI Online quick create - Use Microsoft Dataverse data when creating quick reports	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Power Query support for paginated reports in Power BI	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Support for multi-value parameters	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Browse support for the SharePoint list connector in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Mar 2022

Feature	Enabled for	Public preview	General availability
Date picker for entering dates	Admins, makers, marketers, or analysts, automatically	-	Mar 2022
New Group By aggregate function - Count distinct values	Admins, makers, marketers, or analysts, automatically	-	Mar 2022

VNet data gateways

Enterprises that subscribe to VNet connectivity for their data services in Azure can seamlessly connect to Microsoft Power Platform using VNet data gateways.

Feature	Enabled for	Public preview	General availability
VNet data gateway connectivity improvements	Admins, makers, marketers, or analysts, automatically	✔ Nov 30, 2021	
VNet data gateway troubleshooting	Admins, makers, marketers, or analysts, automatically	Mar 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.

Microsoft Power Platform connectors

Overview

A critical part of data integration and the suite of products it supports—Power Apps, Power Automate, Power BI, and Power Query—is connectivity to external data sources. The connector platform has two key objectives: providing a platform that allows partners and customers to develop connectors efficiently and providing a rich set of connectors for customers.

As part of platform investments, we provide a rich set of tools, samples, and documentation to help partners and customers build connectors. We also invest in our certification processes and tools for connectors so that partners can get their connectors certified and make them available on the platform. A key investment here is also geared towards leveraging the larger community by open-sourcing connectors.

Along with strengthening the ISV community's ability to create their own connectors, we plan to continue to invest in enterprise-grade data connectors such as SQL Server, SAP, Oracle Database, and Outlook.

Add existing custom connector to a solution

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

Business value

Connectors created outside of a solution in your Microsoft Power Platform environment can now be imported to a solution, enabling existing custom connectors to be ALM-ready.

Feature details

Custom connectors must be packaged inside a solution for it to be fully ALM-ready. This allows the custom connector to be packaged and deployed through the various ALM tooling we provide for Microsoft Power Platform, as well as leverage features such as environment variable support.

Until now, customers couldn't import or add existing custom connectors to a solution, and instead had to create new custom connectors. Not only has this been inconvenient for users but has impacted existing apps and flows.

With this release, an existing custom connector can be added to a solution via API or through the maker portal, enabling the connector to be fully solution-aware and ALM-ready.

Environment variable support in custom connectors

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

Business value

Custom connectors can now leverage environment variables in the configuration, allowing for seamless development, testing, and deployment of apps and flows using custom connectors.

Feature details

Many enterprises provide app developers access to data sources using APIs. These APIs are often behind an API management product where different versions of the APIs (Dev, Test/UAT, Prod) are maintained. They're also secured by Azure AD or an OAuth server. Until now, customers have had to create different custom connectors, or update custom connectors after deployment, with different API endpoints and application ID/secrets.

With this release, customers can now use an environment variable inside their custom connectors. A custom connector can reference an environment variable for the host/base URL, as well as for other properties like OAuth client ID and client secrets. This allows the same custom connector to be packaged and deployed to different environments where those settings may be different.

For example, in the development environment, the custom connector can target a development API endpoint with a development OAuth/AAD application. The same custom connector in a production environment can target the production API endpoint using a production OAuth/AAD application. This allows for seamless development, testing, and deployment of apps and flows using a custom connector.

Moving 100 connectors from preview to production

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

Business value

Moving more connectors from preview to production, or general availability, will allow enterprise customers to have access to more connectors.

Feature details

To learn about the criteria we're using to determine the connectors that are ready to move from preview to production, go to [Move your connector from preview to general availability (GA)]https://docs.microsoft.com/connectors/custom-connectors/certification-to-ga/).

Microsoft Power Platform dataflows

Overview

Microsoft Power Platform dataflows provide a no-code experience based on Power Query Online for non-technical users to connect, transform, and enrich data from a wide variety of sources into Microsoft Dataverse and Azure Data Lake Storage in the Common Data Model format.

Dataflows provide the building blocks that allow Microsoft to enable out-of-box analytics and AI insights—such as those provided by AI Builder and Dynamics 365 Customer Insights—making them a huge differentiator for Dynamics 365 offerings.

Azure Synapse-based compute for Microsoft Dataverse tables in Dynamics 365 Customer Insights

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

Business value

Dynamics 365 Customer Insights users can leverage a new data lake connector powered by Azure Synapse and Microsoft Dataverse to discover and transform Dataverse data exported to a data lake, enabling preparation for hundreds of millions of records.

Feature details

Users of Dynamics 365 Customer Insights often need to import data from Dataverse. When data volumes are large, a multi-step and product approach is needed to extract, transform, and load Dataverse data into Customer Insights. With this new functionality, customers can save time and reduce the complexity of this process by leveraging the new Synapse-enabled connector that can transform larger data volumes from within Customer Insights—saving you time and the need for external data transformation tools.

Azure Synapse-based compute for dataflow tables in Dynamics 365 Customer Insights

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

Business value

Users of Dynamics 365 Customer Insights will have enhanced performance powered by Azure Synapse to transform data from other dataflows.

Feature details

By leveraging Azure Synapse Analytics, Dynamics 365 Customer Insights will improve the scale of dataflow authoring and refresh of computed tables, enabling data preparation for hundreds of millions of records.

Entity mapping UX enhancements

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

Business value

UX improvements will make it easier for users to map their data to Microsoft Dataverse.

Feature details

Enhancements to the mapping entity screen in Microsoft Power Platform dataflows will make it easier for users to map their data and turn on the right settings for loading data into Microsoft Dataverse.

Export dataflow as Power Query template

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

Business value

With Power Query templates, queries and dataflows are now portable. You can easily re-create your dataflows in other Microsoft Power Platform environments or share them to be leveraged in other solutions that require dataflows.

Feature details

We've been working on making Power Query queries reusable and portable across the products in which Power Query is available. Today, you can already create a dataflow from queries exported from Excel desktop. With this feature, you'll also be able to export dataflows as Power Query templates and reuse or share your work.

For example, you can:

- Export a dataflow as a Power Query template to duplicate a dataflow from one Microsoft Power Platform environment to another.
- Create templates of dataflows and share them with customers or other people in your organization to accelerate reuse and further customize the dataflow you created.

Improved experience to update a dataflow's M query parameters

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

Business value

Customers can update M query parameters without editing the dataflow, allowing for faster and easier customization of the dataflow's queries.

Feature details

M query parameters have been instrumental to Power Query and dataflow customers in making their queries more dynamic and customizable. With this feature, customers will be able to update the M query parameters without editing the dataflow directly, allowing for faster and more frictionless customization of queries.

For example, a single dataflow can transform data from a company's different departments or regions, while parameters can be created to control which department or region data should be filtered for. By updating the M query parameters, it would be possible to change or add more departments or regions without the need to edit the dataflow.

Another example of M query parameters improving performance would be leveraging different query parameter values during development and production scenarios. If data volumes are very large while authoring a dataflow, it may be advisable to work with a smaller dataset to improve authoring performance. Leveraging parameters to filter a smaller working set of data—for example, the top 1,000 rows of the dataset—would make authoring much faster. Once dataflow authoring is complete, changing the working set to the full dataset is desired. By configuring a parameter to control the workset size, customers can easily change the working set size without editing the dataflow, improving the overall experience of handling large volumes of data.

Improved refresh history and diagnostics for dataflows

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

Feature details

We're improving inline refresh history and error messaging with enhanced diagnostics so users can easily analyze and troubleshoot dataflows.

Duplicate dataflows in Microsoft Power Platform environments

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✓ Oct 15, 2021

Business value

Dataflow creators can duplicate an existing dataflow as a way to jumpstart a new dataflow that requires only slight modifications.

Feature details

The **Duplicate dataflow** action will be added to the dataflows management experience in Power Apps, allowing dataflow creators to copy an existing dataflow in order to save time and effort when creating a new dataflow that only requires minor changes.

New capabilities to support relational database integration with Microsoft Dataverse tables

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

Business value

Customers will be able to load relational data containing multiple and composite keys into Microsoft Dataverse tables.

Feature details

New dataflow capabilities will support the integration of relational data sources into Microsoft Dataverse tables. Customers will be able to load relational data containing multiple and composite keys.

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 the on-premises data gateway an enterprise-grade product with features such as enhancements to load balancing, monitoring, and integration with additional services in the current milestone.

On-premises data gateway security roles

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

Business value

Administrators will have improved flexibility when assigning security roles, allowing more non-admin users to create data sources on the gateway.

Feature details

We're planning on adding extra security roles to the on-premises data gateway in Power BI. With these new roles, non-admin users can create data sources on the gateway and share the data source with others when they have the right permissions.

Gateway diagnosability

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

Business value

The gateway diagnostics dashboard in the Power Platform admin center will help admins troubleshoot gateway issues and help with capacity planning.

Feature details

In May 2019, we released a performance monitoring feature that provided insights to gateway admins about gateway utilization. However, this information is saved in log files.

In this release, we plan to create a gateway diagnostics dashboard in the Power Platform admin center. The dashboard will assist admins in troubleshooting gateway issues and help with capacity planning. The dashboard will also provide insights into the queries that run on the gateway.

Improved gateway and data source management in Power BI

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

Business value

This feature will provide an improved experience with standardized and more efficient gateway and data source management.

Feature details

We've been working on centralizing gateway and data source management in the Power Platform admin center. In the upcoming release, we'll be enhancing this experience with features such the ability to add service principals as gateway/data source users and installers via the gateway management experience in Power Platform admin center. Additionally, we also plan on replacing the existing gateway management experience in Power BI with this improved experience.

Power Query connectors

Overview

Power Query connectors enable connectivity to hundreds of applications, websites, databases, online services, and systems of record, quickly and easily with no code experience. Every connector is built following Microsoft's best practices for seamless integration and use.

New Google Sheets connector

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Nov 15, 2021	-

Business value

The release of the Google Sheets connector for Power Query Desktop will allow you to connect to and load your business data from Google Sheets.

Feature details

Google Sheets connectivity is the second-most upvoted ask on the Power BI Ideas forum. We're planning to release and support a Google Sheets connector in Power Query Desktop to address this user feedback and connectivity gap.

See also

Google Sheets (docs)

Amazon Redshift support for native queries in Power Query Online and dataflows

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

Business value

Customers will be able to use native queries to access Amazon Redshift data.

Feature details

You can use native queries to access your Amazon Redshift data in the Power Query Online and dataflows experiences, leveraging another query option for various business scenarios. More information on native queries can be found in [Import data from a database using native database query].

Browse support for the Dataverse connector in Power Query Online and dataflows

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

Business value

Browse support for the Dataverse connector will create a simpler, friendlier browse experience when selecting an environment.

Feature details

When using the Dataverse connector in Power Query Online and dataflows, users can choose to browse environments in a picker instead of being required to specify an environment URL in order to connect.

Common Data Model folder view feature in Azure Data Lake Storage Gen 2 connector

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

Business value

You'll be able to use the Common Data Model folder view feature in the Azure Data Lake Storage Gen 2 connector as a generally available feature.

Feature details

The Common Data Model folder view feature in the Azure Data Lake Storage Gen 2 connector will be generally available for use. Support will be provided at a generally available level.

Dataverse connector availability in Power Query Online and dataflows

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

Business value

Customers can connect to and load their business data from Microsoft Dataverse for use in Power Query Online and dataflows.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you'll be able to use the Dataverse connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

Dataverse connector available in Excel

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

Business value

Customers can connect to and load their business data from Microsoft Dataverse for use in Excel.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you'll be able to use the Dataverse connector in Excel, along with its availability in Power Query Desktop today.

Dataverse support for native queries in Power Query Online and dataflows

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

Business value

Users will be able to use native queries to access their Microsoft Dataverse data.

Feature details

You can use native queries to access your Dataverse data in the Power Query Online and dataflows experiences, leveraging another query option for various business scenarios. More information on native queries can be found in [Import data from a database using native database query](#).

Google BigQuery support for native queries in Power Query Online and dataflows

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

Business value

Users will be able to use native queries to access their Google BigQuery data.

Feature details

You can use native queries to access your Google BigQuery data in the Power Query Online and dataflows experiences, leveraging another query option for various business scenarios. More information about native queries: [Import data from a database using native database query](#).

Navigator performance improvements for Google BigQuery connector

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

Business value

Performance improvements to Google BigQuery navigation will allow users to connect to data quicker and work with larger data warehouses.

Feature details

Performance will be improved for initial connection and navigation design-time experiences for the Google BigQuery connector. Report builders will be able to connect to data quicker and work with larger data warehouses with ease.

SharePoint list V2 connector improvements

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

Business value

Users can leverage additional features such as support for data types preservation and folding improvements to the SharePoint list V2 connector.

Feature details

Additional features will be added to the SharePoint list V2 connector to unblock key connectivity scenarios. This includes support for data types preservation and folding improvements. The connector is also generally available.

Support for native queries in import and DirectQuery mode in the Power Query SDK

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

Business value

Connector developers will be able to implement native query support for their connectors in both import and DirectQuery modes using the Power Query SDK. This will allow users to query their data using this functionality in Power Query experiences.

Feature details

A common user ask is the ability to use native queries (custom SQL) in various connectors on our platform. This feature empowers custom and certified connector developers to implement native query support in their connectors for users to leverage.

Power Query Online

Overview

Power Query is the data connectivity and data preparation experience for users across a wide variety of Microsoft products and services, including Power BI, Excel, Dynamics 365 Customer Insights, and more. For more information, go to Power Query.

Get Data experience improvements

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

Business value

Improvements to the Power Query **Get Data** experience will allow makers to connect to their data more easily.

Feature details

Connecting to data is key for using Power Query, so we're making several changes to the **Get Data** experience to enhance and simplify the process of connecting to your data sources. Improvements will include:

- The ability to manage data source and connection settings
- Improved messaging to help guide users through addressing errors
- Data source settings UX simplification
- Consistent styling
- Cleaner flow stage names and instructions

Global search

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

Business value

The global search capability will allow makers to easily find results that match their search criteria.

Feature details

Makers will have the ability to easily find what they need by using the Power Query Online global search capability. They'll be able to find commands, queries, and steps that match their search criteria.

New transform – Percentiles

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

Business value

A transformation to create percentiles will give users more statistical information about their data.

Feature details

We're planning to add percentiles as a transformation to the data profiling capabilities in Power Query Online. Users will get more statistical information on their data profile that will help by better preparing the data.

New transform – Rank

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

Business value

A transformation to add ranking will help users analyze their data in a different way.

Feature details

We're planning to add rank as a transformation to the data profiling capabilities in Power Query Online. This will help by better preparing the data to allow users to look at their data profile in a different way.

New transform - Time-based binning

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

Business value

A transformation to add time-based binning will help users analyze their data in a different way.

Feature details

We're planning to add time-based binning as a transformation to the data profiling capabilities in Power Query Online. This will help by better preparing the data to allow users to look at their data profile in a different way.

Power BI Online quick create - Modify manually entered data used in quick reports

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

Business value

Users will be able to edit data after it's been manually entered and used in the Power BI Online quick create experience.

Feature details

We recently released the ability to quickly create new reports by manually entering data directly into Power BI. Building on top of that scenario, we're enabling users to modify the data once it's already been used in a report.

Power BI Online quick create - Use data from a CSV file when creating quick reports

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

Business value

Users will be able to create reports on top of Text/CSV data when working within the Power BI Online quick create experience.

Feature details

We recently released the ability to quickly create new reports by entering data directly into Power BI. Building on top of this scenario, we're enabling users to pull data from a CSV file as an alternative to manually entering data.

Power BI Online quick create - Use data from a PDF file when creating quick reports

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

Business value

Users will be able to create reports on top of data from a PDF file when working within the Power BI Online quick create experience.

Feature details

We recently released the ability to quickly create new reports by entering data directly into Power BI. Building on top of this scenario, we're enabling users to pull data from a PDF file as an alternative to manually entering data.

Power BI Online quick create - Use data from an Excel file when creating quick reports

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

Business value

Users will be able to create reports on top of Excel data when working within the Power BI Online quick create experience.

Feature details

We recently released the ability to quickly create new reports by entering data directly into Power BI. Building on top of this scenario, we're enabling users to pull data from an Excel file as an alternative to manually entering data.

Power BI Online quick create - Use Microsoft Dataverse data when creating quick reports

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

Business value

Users will be able to create reports on top of Microsoft Dataverse data when working within the Power BI Online quick create experience.

Feature details

We recently released the ability to quickly create new reports by entering data directly into Power BI. Building on top of this scenario, we're enabling users to pull data from Microsoft Dataverse as an alternative to manually entering data.

Power Query support for paginated reports in Power BI

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

Business value

Creators will be able to leverage Power Query Online to ingest and transform data to be used in their paginated reports.

Feature details

When working in the Power BI service, creators will be able to use Power Query Online to connect to all supported data sources. They'll then be able to author paginated reports using this data in their Power BI service authoring environment.

Support for multi-value parameters

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

Feature details

Query parameters allow Power Query users to easily parameterize parts of their queries like filter values and easily update those parameter values in a centralized way (for example, when used across multiple queries).

Query parameters provide capabilities to restrict allowed parameter values that can be picked from a list of values, either static or dynamic (for instance, the result of another query); however, a current limitation is that users can only pick a single value (for example, *shoes*) for the parameter. An area of recurring customer feedback is the need to support the selection of more than one value. For example, a **Product Category** parameter could have *Shoes*, *Shirts*, and *Accessories* as allowed values. This improvement would allow selecting both *Shoes* and *Shirts* through the Query Parameters UX and downstream binding of those parameters (for example, "Column1 in/not-in ProductCategory" instead of the current "Column1 = ProductCategory").

Browse support for the SharePoint list connector in Power Query Online and dataflows

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

Business value

Browse support for the SharePoint list connector will create a simpler, friendlier browse experience when selecting a list.

Feature details

When using the SharePoint list connector in Power Query Online and dataflows, users can choose to browse in a site picker instead of being required to specify a site URL.

Date picker for entering dates

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

Business value

The date picker makes it easier for users to select a particular date and lowers the risk of data being entered incorrectly.

Feature details

Manually inputting dates can be tedious and lead to incorrectly entered data, especially as users need to account for differences in location. To address this issue, we're introducing a date picker for date fields, making it easier to select a particular date that takes locale into account.

New 'Group By' aggregate function - Count distinct values

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

Business value

Makers will have the ability to count the number of distinct values within a group.

Feature details

When grouping rows, makers currently have the ability to count the total number of values within each group; however, one of the most frequently asked-for capabilities is the power to count the number of distinct values. We're adding this capability as an aggregate function in the **Group By** transform.

VNet data gateways

Overview

This feature allows enterprises that subscribe to VNet connectivity for their data services in Azure to seamlessly connect to Microsoft Power Platform using VNet data gateways.

VNet data gateway connectivity improvements

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Nov 30, 2021	-

Business value

Customers will be able to connect to additional data sources using VNet data gateways.

Feature details

We plan to enable connectivity for Snowflake and Azure Databricks using VNet data gateways. Azure AD single sign-on (SSO) for these services will also be enabled when connecting through VNet data gateways.

See also

Supported Azure data services (docs)

VNet data gateway troubleshooting

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

Business value

Enterprises will be able to troubleshoot network issues with VNet data gateways using a self-diagnostic tool.

Feature details

Since VNet data gateways are Microsoft managed, enterprises don't have the ability to troubleshoot connectivity from VNet data gateways to the data source like they do with on-premises data gateways. This feature will help reduce that gap by providing enterprises with a self-diagnostic tool.

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.