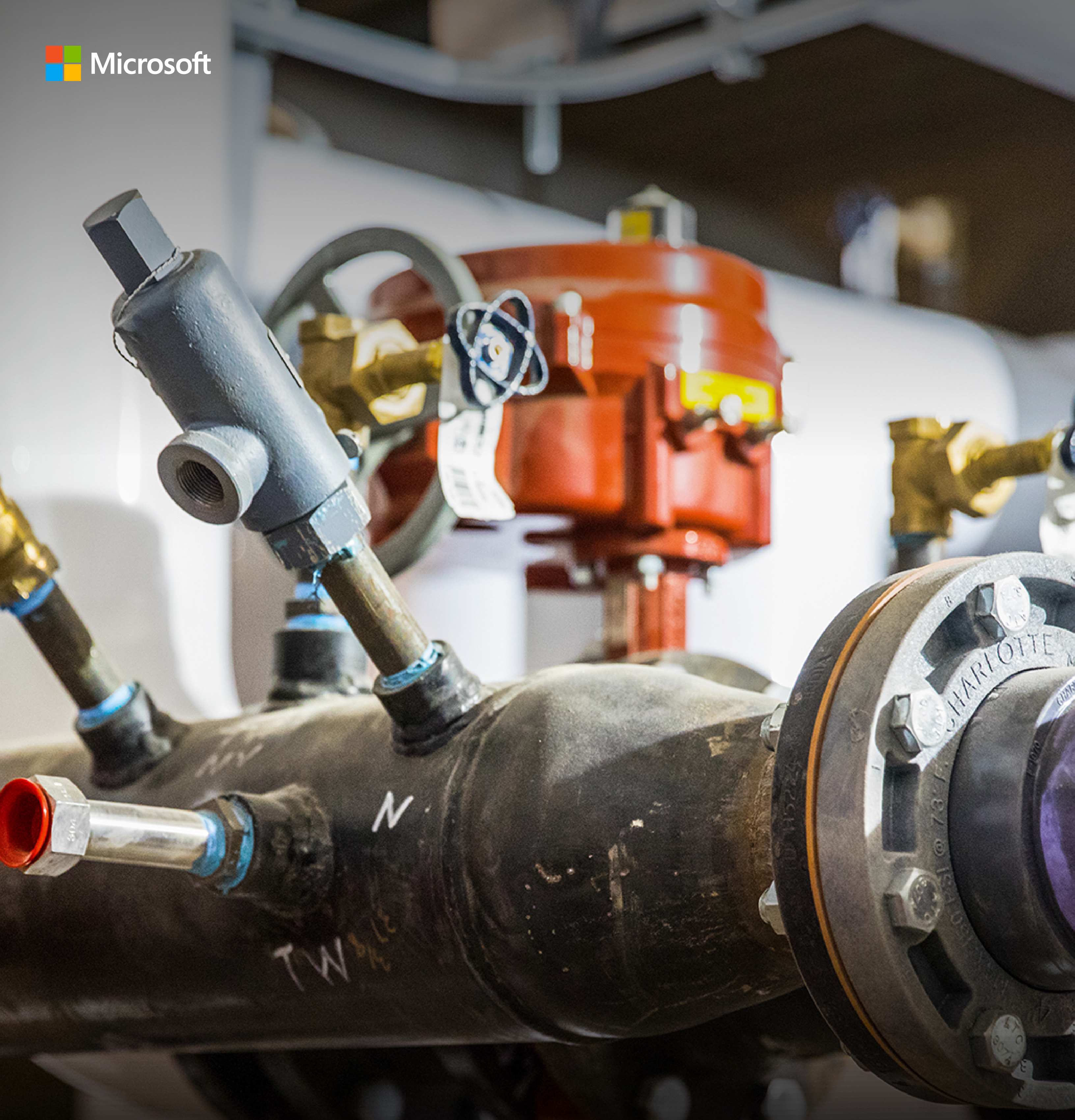
Microsoft



Microsoft Dynamics 365

2023 RELEASE WAVE 1 PLAN

Features releasing from April 2023 through September 2023

Contents

Dynamics 365, Viva Sales, and supply chain platform: 2023 release wave 1 plan

The Dynamics 365 release plan for the 2023 release wave 1 announces the latest updates to customers as features are prepared for release. You can browse the release plan here online, view it in the release planner, or download the document as a PDF file (updated monthly). The plan for 2023 release wave 1 covers new features for Dynamics 365, Viva Sales, and supply chain platform releasing from **April 2023** through **September 2023**.

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 2023 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

The Microsoft Cloud for Industry features coming in the 2023 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

2023 release wave 1 overview

The 2023 release wave 1 for Dynamics 365 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, Project Operations, Finance and Operations cross-app capabilities, Human Resources, Commerce, Fraud Protection, Business Central, Connected Spaces, Guides, Customer Insights, and Customer Voice, as well as Microsoft Viva Sales and Microsoft supply chain platform and its supporting products.

Marketing

Dynamics 365 Marketing delivers connected sales and marketing capabilities to enable marketers and sellers to act as a unified team and accelerate their pipelines. New features such as a new B2B analytics dashboard, frequency capping, multiple email recipient activation, emails timeline, customizable preference centers, and Urchin Tracking Module (UTM) marketing tagging will be released in this wave to allow businesses to increase their output, organizational efficiency, and analyze the impact of their campaigns to reach higher levels of marketing maturity.

Sales

Dynamics 365 Sales brings new features such as enhanced sequence capabilities supporting personalized and account-based engagement, actionable AI-powered suggestions within the seller workflow, an updated form layout, and new opportunity management workspace. Additionally, enhanced email templates, content suggestions and SMS capabilities, as well as various new abilities to create, loop, and optimize sales sequences will be released during this wave.

Microsoft Viva Sales continues to optimize the seller experience in Microsoft Teams and Outlook—using data and AI to help sellers remain in their flow of work. Viva Sales brings the system of record and productivity tools together to meet sellers where they are and surface in-context collaboration experiences that improve engagements and help sellers reclaim time to focus on customer connections.

Service

Dynamics 365 Customer Service empowers agents to work more efficiently with enhancements to voice features, unified routing, embedded Microsoft Teams collaboration, and elements of the agent workspace such as the case form, timeline, and conversation control. Throughout this wave, we will continue to invest in AI across the contact center with intelligent-suggested replies and robust real-time analytics with customization.

Dynamics 365 Field Service is continuing to improve the new schedule board for dispatchers this wave. We are also supporting our frontline workers by allowing them to see their appointments in Outlook, find information faster through improved global search, and recognize improvements in performance and reliability on the mobile app.

Finance and operations

Dynamics 365 Finance is focused on enhancing organizations' visibility into their data, continuing finance automation, and expanding out-of-the-box country coverage in LATAM. Other enhancements such as further automation of complex tax scenarios, full end-to-end automation of accounts payable and ledger settlements to expedite the close and enable talented finance users to spend more time focusing on value-added activities will also be released.

Dynamics 365 Supply Chain Management continues to deliver increased agility and resilience across the supply chain with enhancements to omnichannel sales strategies with improved ways of managing attribute-based pricing, integrated soft reservations, and optimized end-to-end process integration across Dynamics 365 Sales and Supply Chain Management. Investments to improve agility and increase efficiency for discrete manufacturers, maintenance workers, and warehouse workers will also be a focus for this wave.

Dynamics 365 Project Operations is continuing to invest in capabilities to empower Project Managers and Project Teams with new features like expanding the Project Budgeting and Time-Phased Forecasting to resource/non-stocked deployment modes and completely lighting up the core experiences for expense management on the web and mobile form factors. Across-the-board investments in performance and usability with an uptake of modern and fluent controls in Sales, Billing and Pricing, and Subcontracting experiences are also targeted for this release wave.

Finance and Operations cross-app capabilities continues to invest in capabilities that apply to all Finance and Operations apps, including Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations. Further investments will be made to the One Dynamics One Platform workstream to enhance One Admin, One Developer, and One User experiences, which focus on enabling Finance and Operations applications on Power Platform for administrators, pro developers, and users.

Human Resources

Dynamics 365 Human Resources will continue to expand the Human Capital Management (HCM) ecosystem and further invest in expanding our payroll partner network to provide broader coverage for global organizations. We will also provide better experiences across Dynamics 365 applications by integrating employee skill, compensation, and leave information to resource managers in Project Operations while helping employees grow their careers by bringing project and experience information back into employee profiles.

Commerce

Dynamics 365 Commerce is enabling new and updated B2B experiences, including the modeling of distributors as sellers, introducing a distributor fulfillment dashboard, and improving the out-of-the-box B2B user sign-up flow. We are revising and improving our payment flows and enabling network health checks to diagnose network-related issues that can impact POS uptime for POS and Store Commerce users. We will also be investing in asynchronous payment capabilities to provide support for Klarna and other “buy now pay later” methods and ACH real-time banking.

Fraud Protection

Dynamics 365 Fraud Protection is introducing Assessments API in 2023 wave 1 that will allow customers to define their own fraud event (in addition to the default events covered by Fraud Protection such as Purchase Protection and Account Protection). This functionality will allow customers to configure Fraud Protection to protect against fraud events specific to their businesses.

SMB

Dynamics 365 Business Central will continue developing enhanced finance capabilities for intercompany transactions as well as several improvements to the warehouse management area to make customers’ processes more efficient. More default setup data will also be provided during this wave to expedite customers’ onboarding procedures. Furthermore, Power Platform and Microsoft 365, including Teams, capabilities will be improved, enabling better reporting, automation, and collaboration opportunities.

Connected Spaces

Dynamics 365 Connected Spaces delivers alerts and notifications via Teams or Outlook when business AI-skills detect actionable patterns within a space containing vehicles—stationary or mobile. Throughout this wave, improvements will be released enabling customers to leverage the Azure Stack HCI devices for configuring Connected Spaces to run AI models at the edge in addition to the existing Azure Stack Edge devices.

Guides

Dynamics 365 Guides will continue investing in capabilities to improve collaboration experiences for users on HoloLens 2. Key updates coming in this wave include improvements in handling incoming calls, join settings, and more accurate mixed reality annotations. We will also be adding new holographic workflows and features like the ability to manipulate a hologram as an operator and taking a photo while in a guide.

Customer Insights

Dynamics 365 Customer Insights will bring improvements such as improved data interoperability and governance features allowing the ability to control and restrict access to data, configurations, and actions, an increased maturity around application lifecycle management and enterprise lifecycle management, increased activation capabilities through tighter integration with Microsoft Dataverse, and will receive navigational guidance, AI-powered suggestions, and task assistance increasing the depth of insights obtained from the product with less time investment.

Customer Voice

Dynamics 365 Customer Voice is investing in functionalities to unblock key scenarios for customers and is focusing on improving the overall usage experience along with the architecture evolution and stability fixes for survey owners and responders. We will focus on delivering features such as the transfer ownership of an orphan project in case a project owner has left the organization as well as allowing survey responders to record partial survey responses.

Supply Chain Center

Microsoft Supply Chain Center delivers improvements to organizations' management of their supply chain by enhancing their end-to-end visibility of their supply chain, improve AI-based recommendations, and enable them to seamlessly collaborate with their teams and suppliers on the workflow, resulting in better orchestrated business processes.

Key dates for the 2023 release wave 1

These release plans describe 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 2023 release wave 1.

Milestone	Date	Description
Release plans available	January 25, 2023	Learn about the new capabilities coming in the 2023 release wave 1 (April 2023 - September 2023) across Dynamics 365, Microsoft Power Platform, and Microsoft Cloud for Industry.
Early access available	January 30, 2023	Test and validate new features and capabilities that will be part of 2023 release wave 1, coming in April, before they are enabled automatically for your users. You can view the Dynamics 365 2023 release wave 1 early access features **now**.
Release plans available in additional languages	February 21, 2023	The Microsoft Power Platform and Dynamics 365 release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish. Microsoft Cloud for Industry release plans are published in 4 additional languages: French, German, Dutch and Spanish.
General availability	April 1, 2023	Production deployment for the 2023 release wave 1 begins. Regional deployments will start on April 1, 2023.

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 in to the 2022 release wave 2 plans.

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

2023 release wave 1 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning **February 6, 2023**.

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

- Dynamics 365 Sales
- Dynamics 365 Customer Service
- Dynamics 365 Field Service
- Dynamics 365 Supply Chain Management
- Finance and Operations cross-app capabilities
- Dynamics 365 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, go to Opt in to 2023 release wave 1 updates.

IMPORTANT Other early access features may impact your users. To learn more about these features visit:

- Power Platform 2023 release wave 1 features available for early access

Dynamics 365 Sales

For a complete list of the Dynamics 365 Sales features, go to What's new and planned for Dynamics 365 Sales.

Feature	Enabled for	Early access	General availability
Get improved user experience with new and enhanced opportunity form	Users, automatically	✔ Feb 6, 2023	Apr 2023
Get basic relationship insights out-of-the-box	Users, automatically	Jan 30, 2023	Apr 2023
Guide sellers to favorable sales outcomes with next best step	Users, automatically	✔ Feb 6, 2023	Apr 2023

Feature	Enabled for	Early access	General availability
Manage opportunities more effectively using the new pipeline view	Users, automatically	✔Feb 6, 2023	Apr 2023
Prioritize engagement for any sales entity by working in focus mode	Users, automatically	✔Feb 6, 2023	Apr 2023
Work efficiently with enhanced Sales accelerator worklist items	Users, automatically	✔Feb 6, 2023	Apr 2023

Dynamics 365 Customer Service

For a complete list of the Dynamics 365 Customer Service features, go to What's new and planned for Dynamics 365 Customer Service.

Feature	Enabled for	Early access	General availability
Create email templates with new template designer	Users, automatically	Jan 30, 2023	Apr 2023
Dynamics 365 links are unfurled in Teams chats	Users, automatically	✔Aug 1, 2022	Apr 2023
Enhancements to simplify case management	Users, automatically	✔Feb 6, 2023	Apr 2023
Mark knowledge articles as favorite	Users, automatically	✔Feb 6, 2023	Apr 2023
Multitask efficiently with enhanced workspace layout	Users, automatically	✔Feb 6, 2023	Apr 2023

Dynamics 365 Field Service

For a complete list of the Dynamics 365 Field Service features, go to What's new and planned for Dynamics 365 Field Service.

Feature	Enabled for	Early access	General availability
Find Field Service information with enhanced search	Users, automatically	✔Feb 6, 2023	Apr 2023

Feature	Enabled for	Early access	General availability
Get information quickly with Field Service Mobile app enhancements	Users, automatically	✔ Feb 6, 2023	Sep 2023
Model location and asset hierarchies for large facilities	Users, automatically	✔ Feb 6, 2023	Apr 2023
Remove user option to switch to legacy schedule board	Users, automatically	Jan 30, 2023	Apr 2023
Track cost per work order to establish predictable cost trends	Users, automatically	Mar 15, 2023	Apr 2023

Dynamics 365 Supply Chain Management

For a complete list of the Dynamics 365 Supply Chain Management features, go to What's new and planned for Dynamics 365 Supply Chain Management.

Feature	Enabled for	Early access	General availability
Inventory and logistics feature state updates for 10.0.32	Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023
Manufacturing and asset management feature state updates for 10.0.32	Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023
Pack shipments with speed and resilience	Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023
Planning feature state updates for 10.0.32	Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023
Procurement and sourcing feature state updates for 10.0.32	Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023
Product information management feature state updates for 10.0.32	Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023
Run the Warehouse Management mobile app on iOS devices	Users, automatically	✔ Jan 30, 2023	Apr 2023

Feature	Enabled for	Early access	General availability
Warehouse management feature state updates for 10.0.32	Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023

Finance and Operations cross-app capabilities

For a complete list of the Finance and Operations cross-app capabilities features, go to What's new and planned for Finance and Operations cross-app capabilities.

Feature	Enabled for	Early access	General availability
Improvements to the grid control	Users, automatically	✔ Feb 6, 2023	Apr 2023
Incremental visual refresh of the Finance and Operations apps user experience	Users, automatically	✔ Feb 6, 2023	Apr 2023
New extension methods to improve handling of default queries with saved views	Admins, makers, marketers, or analysts, automatically	✔ Feb 6, 2023	Apr 2023
Updates to client feature states with version 10.0.32	Users, automatically	✔ Feb 6, 2023	Apr 2023

Dynamics 365 Business Central

For a complete list of the Dynamics 365 Business Central features, go to What's new and planned for Dynamics 365 Business Central.

Feature	Enabled for	Early access	General availability
AL Explorer and AL Home in Visual Studio Code AL extension	Admins, makers, marketers, or analysts, automatically	✔ Feb 1, 2023	Apr 2023
Drag and drop files onto the file upload dialog	Users, automatically	✔ Jan 19, 2023	Apr 2023
Improved alignment of headers in statistics pages	Users, automatically	✔ Feb 1, 2023	Apr 2023

Marketing

Plan and prepare for Dynamics 365 Marketing in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Marketing**.

Overview

Video: Learn about this product's new capabilities

Today, companies are looking to do more with less. Companies are faced with business uncertainty while they strive to meet higher expectations from their customers. To be successful, companies need to understand relevant, individualized, needs-driven interactions. At the same time, they need to continue their digital transformation so they can stop working in silos and eliminate execution gaps and redundancies. They must provide marketers with the tools to efficiently deliver seamless experiences to both new and existing customers while making the most of their resources and staying ahead of competitors.

We aspire to empower every organization to create amazing experiences for their customers that translate into business success. We do this by harnessing the power of data/AI, democratizing it for collaboration, and providing low-code tools for anyone to use. With this release, we are enriching the tools you use daily with artificial intelligence capabilities to help you reach new levels of productivity. Use our AI-powered features and save precious time while creating segments by simply describing them in natural language, get content ideas to kick-start your email creation, or receive deep analysis to identify high-performing activities and continuously improve them. In parallel, we are enabling you to optimize how your marketing and sales teams collaborate to efficiently drive more revenue together. You can break down silos between departments, create sales activities from customer journeys, improve the quality of your leads, and, ultimately, accelerate your pipeline.

Our guiding principles are to make your job as a marketer easier, make you more efficient, and enhance collaboration with other departments so you can deliver real-time, personalized experiences at scale and delight your customers in new ways and drive organizational success.

Our release revolves around four themes that lead to the transformation of customer experience:

- Engage your customers in **moments that matter** across all touchpoints to build end-to-end, holistic experiences.
- Enable **collaboration** across your organization, connect sales and marketing to transform customer experiences.

- Make faster and better decisions leveraging the **power of data and AI** and achieve higher levels of marketing maturity.
- Drive unique experiences through **personalized content**, images, and channels tailored to each customer.

Investment areas

Investment areas

Data and AI
Bring maturity to your marketing activities by making it easy to scale real-time interactions, drive efficiency, and optimize your marketing activities based on performance analytics.

Moments-based
Define the best channels and identify relevant touchpoints to trigger interactions that will successfully engage customers in the moments that matter.

Personalization
Leverage your customer data and past interactions to transform your customer experience by delivering personalized messages, content, and images through the best channel.

Collaborate
Empower your teams to break down silos and deliver 1:1 personalized customer experiences by enabling marketers and sellers to identify, target, and nurture leads and to collaborate to accelerate the pipeline.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Marketing** below:

[Check out the release plan]

For application administrators

User-impacting features to the user experience enabled automatically
User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released

to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

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

Get the most out of Marketing

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Marketing.
Product documentation	Find documentation for Marketing.
User community	Engage with Marketing experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Marketing.

What's new and planned for Dynamics 365 Marketing

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

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.

Collaborate

Enable collaboration across your organization and connect sales and marketing to transform customer experiences.

Feature	Enabled for	Public preview	Early access*	General availability
Prioritize the best leads and empower sellers with the new lead scoring builder	Admins, makers, marketers, or analysts, automatically	May 2023	-	
Keep stakeholders in the loop by seamlessly copying them on email campaigns	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023
Optimize your lead management process by engaging your sellers right away	Admins, makers, marketers, or analysts, automatically	Apr 2023	-	May 2023

Data and AI

Make faster and better decisions leveraging the power of data and AI and achieve higher levels of marketing maturity.

Feature	Enabled for	Public preview	Early access*	General availability
Easily create engaging content using AI-powered content ideas	Admins, makers, marketers, or analysts, automatically	Apr 2023	-	

Feature	Enabled for	Public preview	Early access*	General availability
Understand how marketing activities contribute to defined milestones using AI	Admins, makers, marketers, or analysts, automatically	Apr 2023	-	
Optimize B2B marketing and accelerate your pipeline with out-of-the-box analytics dashboards	Admins, makers, marketers, or analysts, automatically	Jul 2023	-	
Save time by easily moving triggers between environments	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023
Measure marketing activity, web traffic, and conversion goals using automatic UTM tagging	Admins, makers, marketers, or analysts, automatically	✔ Feb 1, 2023	-	Apr 2023
Scale your business effortlessly and define access to marketing assets	Users by admins, makers, or analysts	Mar 2023	-	Apr 2023
Accurately target customers using improved AI-powered natural language segments	Admins, makers, marketers, or analysts, automatically	Apr 2023	-	May 2023
Scale your business with confidence with 300M maximum monthly interactions	Admins, makers, marketers, or analysts, automatically	Apr 2023	-	Jul 2023

Moments-based

Engage your customers in moments that matter across all customer touchpoints to build holistic experiences.

Feature	Enabled for	Public preview	Early access*	General availability
Easily create modern forms using the new intuitive form experience	Admins, makers, marketers, or analysts, automatically	✔ Dec 1, 2022	-	Apr 2023

Feature	Enabled for	Public preview	Early access*	General availability
Prevent message fatigue by limiting the messages sent to a customer in a specific period	Admins, makers, marketers, or analysts, automatically	Mar 2023	-	Apr 2023
Send emails quickly without building a journey	Users by admins, makers, or analysts	Mar 2023	-	Apr 2023
Boost your productivity with enhanced journey reminders	Admins, makers, marketers, or analysts, automatically	Apr 2023	-	Jun 2023

Personalization

Drive unique experiences through personalized content, images, and channels tailored to each customer.

Feature	Enabled for	Public preview	Early access*	General availability
Further personalize journeys using custom events with entity references	Admins, makers, marketers, or analysts, automatically	-	-	May 2023
Use interaction data to improve targeting in the redesigned segment builder	Admins, makers, marketers, or analysts, automatically	Apr 2023	-	May 2023
Match your business needs with multi-brand consent and customizable preference centers	Admins, makers, marketers, or analysts, automatically	Apr 2023	-	Jul 2023
Easily reference a copy of previously sent emails in the interaction timeline	Users by admins, makers, or analysts	-	-	Sep 2023
Tailor communications to the topics customers want to receive	Admins, makers, marketers, or analysts, automatically	Jul 2023	-	Sep 2023

* You are able to opt into some features as part of early access on February 6, 2023, 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.

Collaborate

Overview

Empower your teams to break down silos and deliver 1:1 personalized customer experiences by enabling marketers and sellers to identify, target, and nurture leads and to collaborate to accelerate the pipeline.

Prioritize the best leads and empower sellers with the new lead scoring builder

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	May 2023	-	-

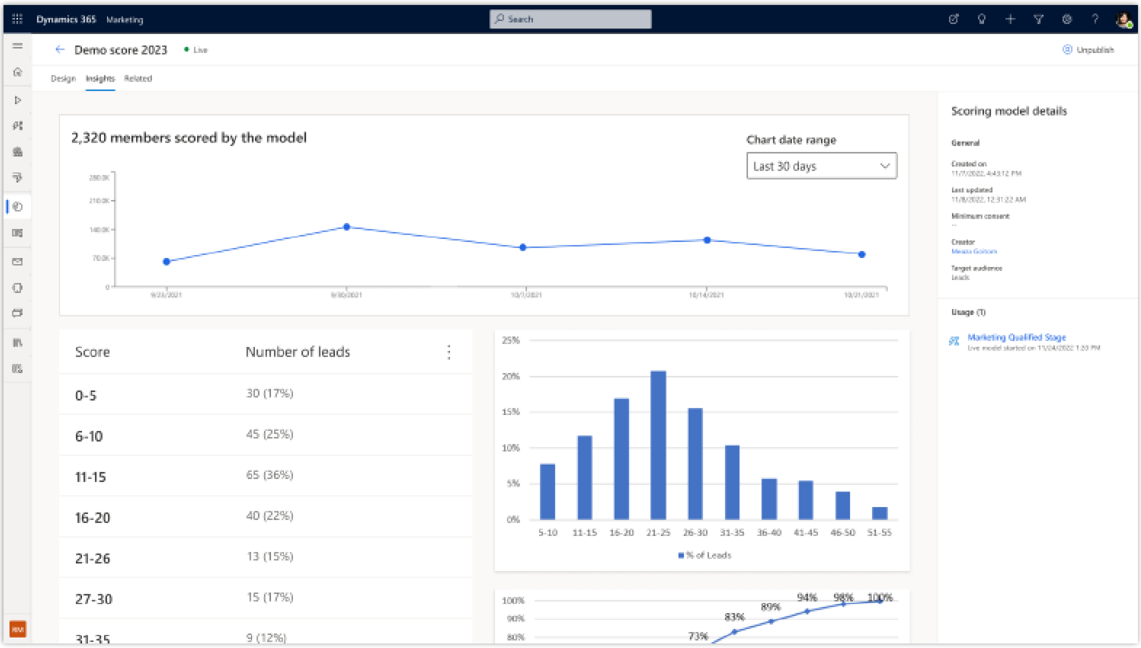
Business value

To maximize return on investment from marketing activities, it is essential to identify the best prospects at the right moment when they're ready to engage with your sales team. With real-time marketing, you can use a new simple but powerful lead scoring builder to define your scoring criteria and model more efficiently.

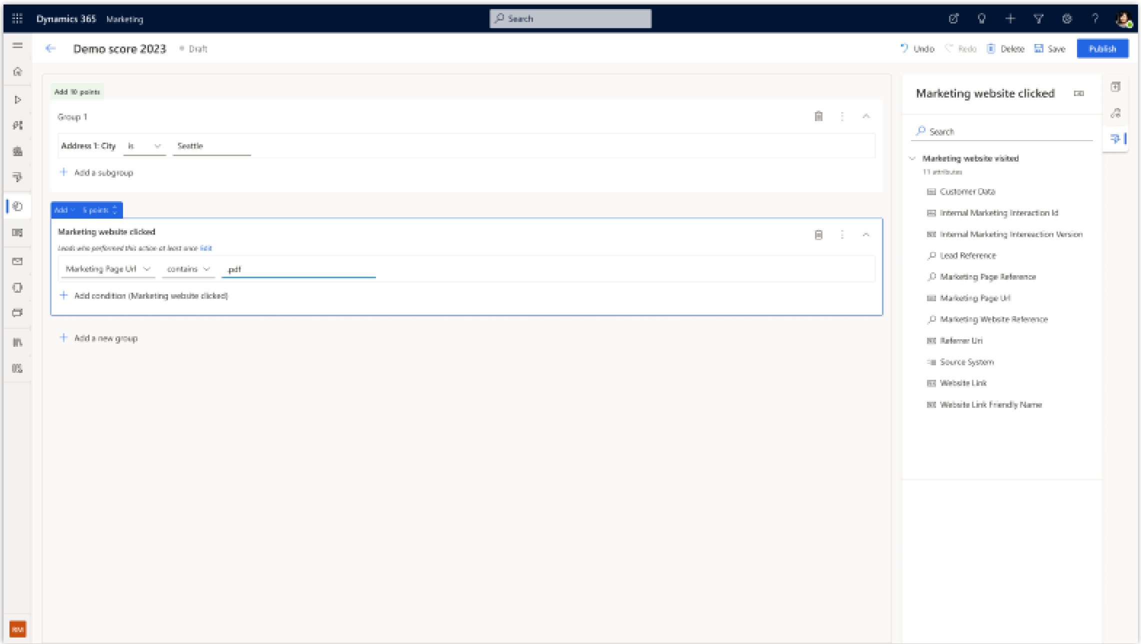
Prioritize the most engaged leads from companies that match your ideal customer profile using engagement and profile-based scoring. Define qualification criteria and post-qualification actions to grow your pipeline while ensuring that each qualified lead receives attention from your sales teams. With proper scoring and qualification criteria, you can prioritize the best leads and empower the sales team to spend more time winning deals and less time chasing lukewarm opportunities.

Feature details

- Use the easy-to-use lead score builder to start quickly and update or optimize the model continuously.
- Create lead scoring models with not only behavioral but also demographic or firmographic conditions.
- Evaluate your scoring model outputs and performance using a new set of enhanced insights.
- Define lead qualification criteria and post-qualification actions.



Screenshot of new lead scoring builder



Builder experience

Keep stakeholders in the loop by seamlessly copying them on email campaigns

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Business value

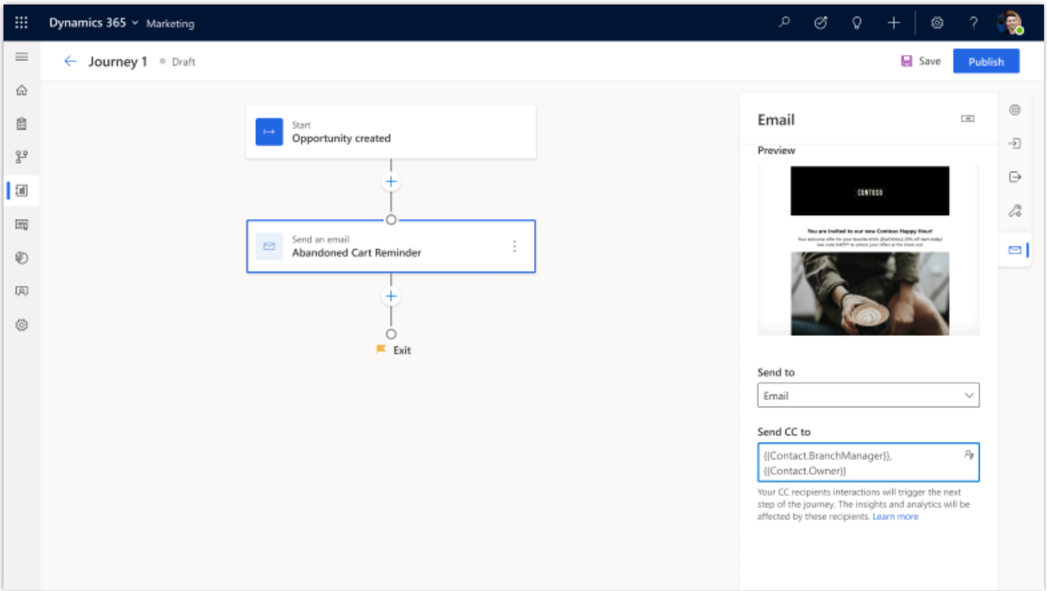
Improve your customer experience by keeping your sales, customer service, and finance teams in the loop by copying key recipients on email campaigns. Enable other teams to follow up on hot leads or rapidly answer customers' inquiries, speeding up your pipeline and increasing customer satisfaction.

Feature details

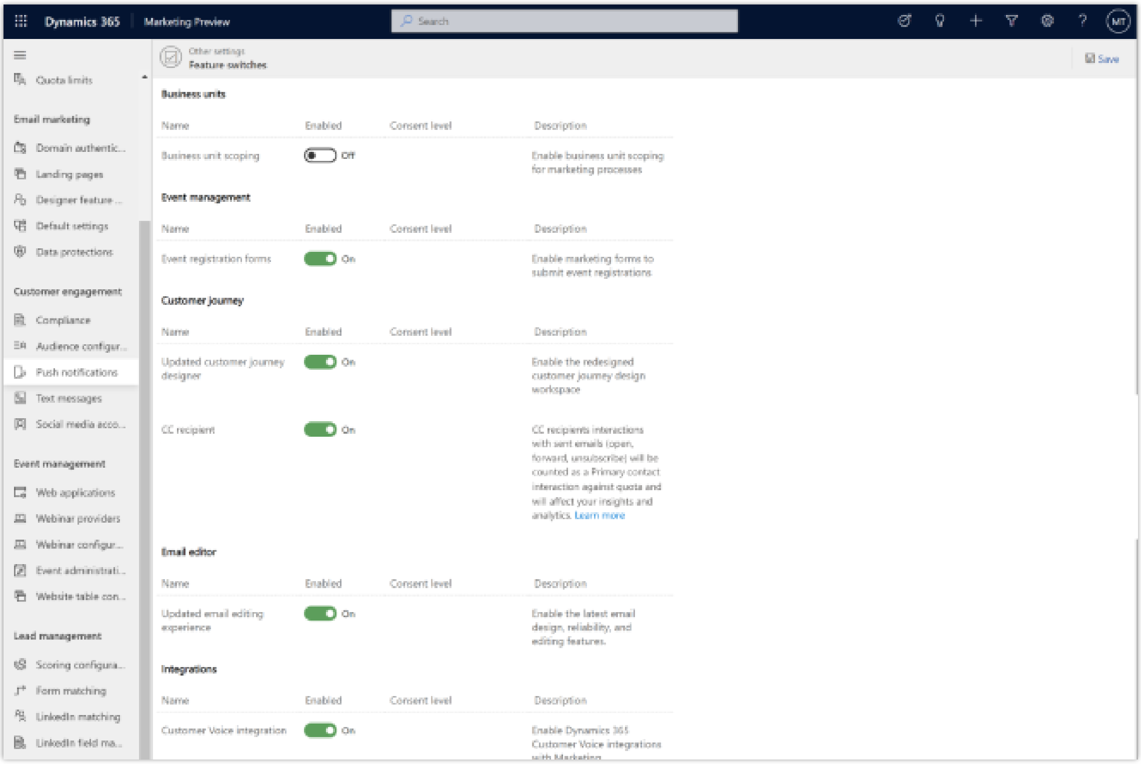
- Add up to five additional recipients to emails in the cc field.
- Copy people whenever you use the “Send Email” tile. You can add cc recipients at any phase of your journey.
- Dynamically select cc recipients using personalization by choosing parameters such as Contact > Business Owner.

Use case examples:

- Copy account managers to personally follow up with clients so they can increase their marketing/sales campaign success rates.
- Include support teams to provide more efficient (1:1) support and increase customer satisfaction.
- Add key stakeholders to email communications to raise awareness in your enterprise and collaborate effectively.



CC in Customer Journey



Settings

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.

Optimize your lead management process by engaging your sellers right away

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-	May 2023

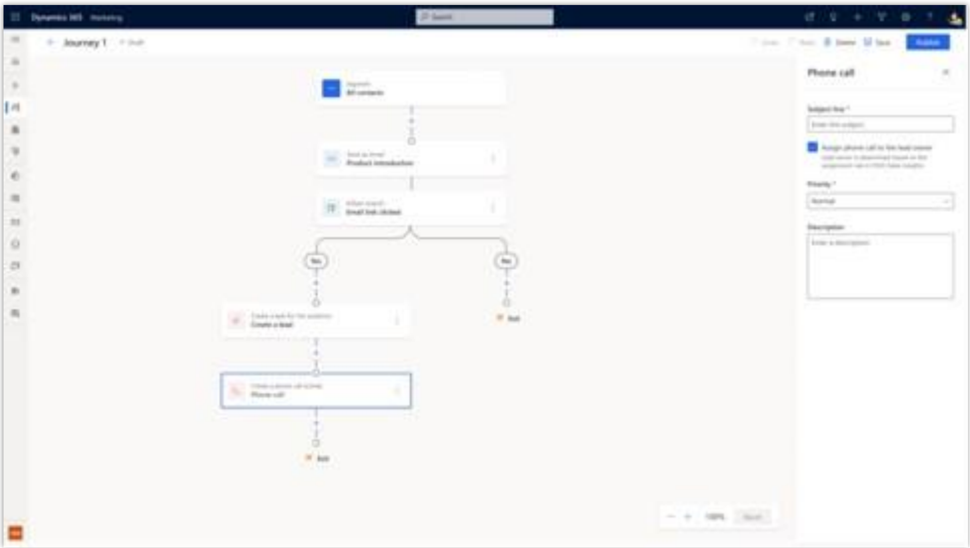
Business value

Activate a sales sequence or create sales activities, inviting the sales team to engage with leads at the right time and stage of their journey.

As you nurture leads and opportunities with real-time journeys, the leads' signals might indicate an urgency to engage with your sales teams. With Dynamics 365 Marketing, you can now create sales activities such as tasks and phone calls directly from journeys, so that leads get individualized attention at the right time when they’re most likely to engage. You can also activate a sales sequence to accelerate the deal, ensuring that sellers receive automated recommendations based on the sales playbook associated with the campaign.

Feature details

- Respond quickly to incoming leads by routing them directly to sales agents.
- Add sales activities such as phone calls and tasks to your nurture journeys.
- Trigger a sales sequence in Dynamics 365 Sales to surface contextual recommendations for the seller picking up the lead.



Handoff leads

Data and AI

Overview

Bring maturity to your marketing activities by making it easy to scale real-time interactions, drive efficiency, and optimize your marketing activities based on performance analytics.

Easily create engaging content using AI-powered content ideas

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-	-

Business value

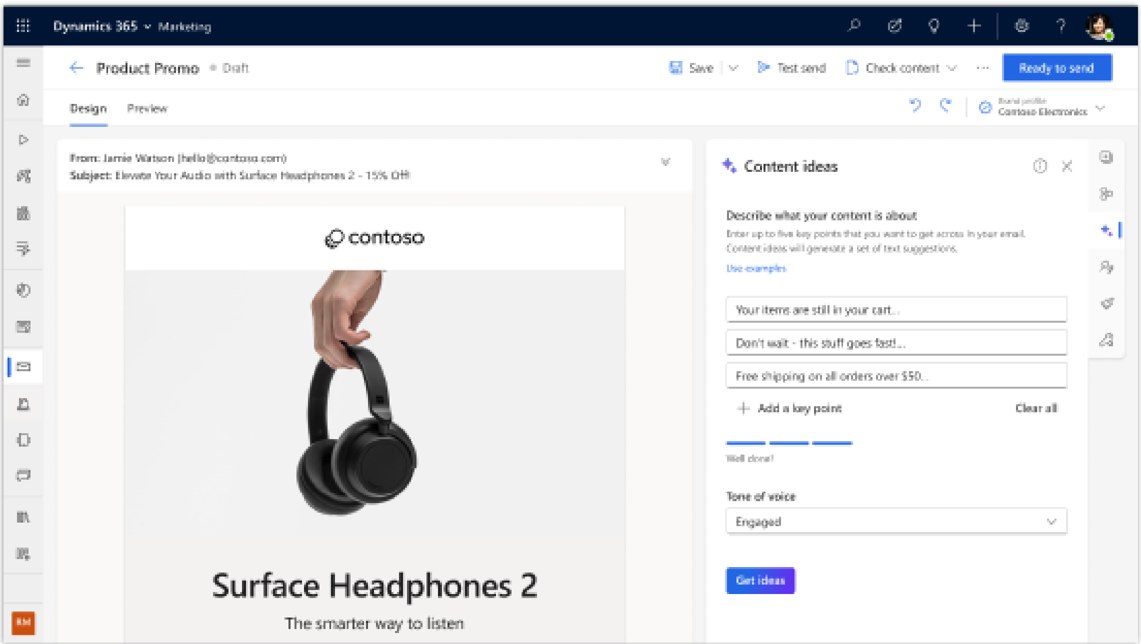
How great would it be if your email editor could suggest relevant and engaging content? AI-powered content ideas do just that. Content ideas help you find inspiration and can be used as a starting point when composing emails for your audience. It’s like asking a group of colleagues to brainstorm with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

Use our sample key points by email type to get inspired and start generating content. Select from different tones of voice such as engaged, adventurous, casual, luxurious, or formal. Use the tone that best fits your brand and your audience.

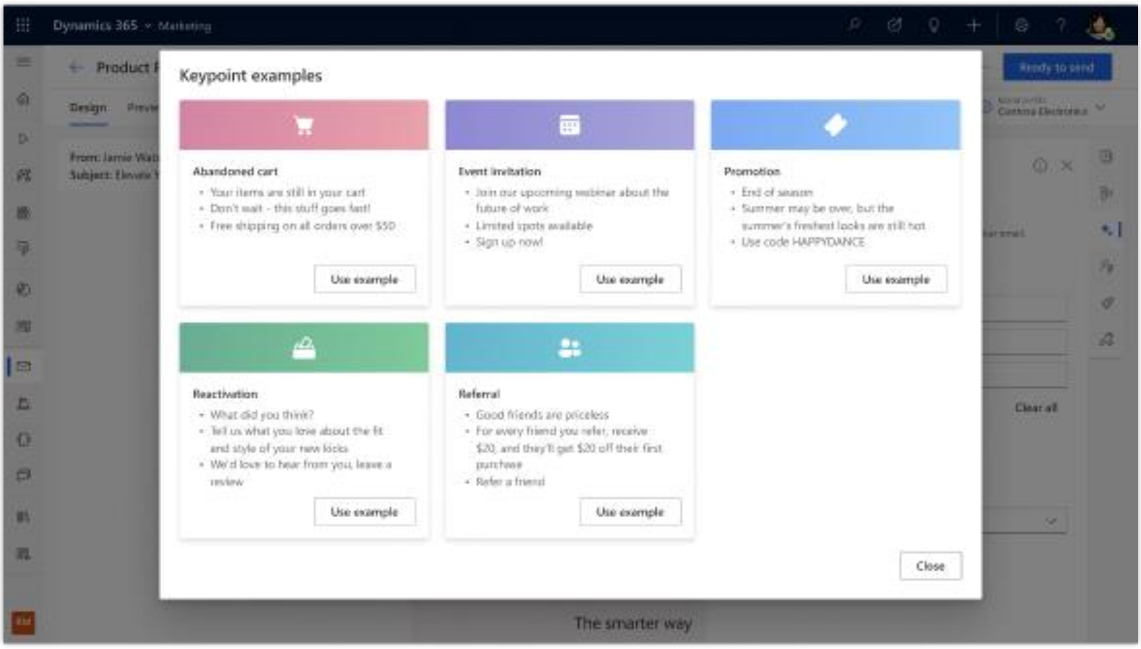
Feature details

- Enjoy improved quality of generated content thanks to AI and a refreshed look and feel.
- Select from different tones of voice to generate content ideas such as engaged, adventurous, casual, luxurious, or formal.
- Use examples of key points for typical email types such as an abandoned cart, a referral, or an event invitation to easily kick off the creation process.
- Generate engaging text snippets out of a few short key points.
- Easily access and get inspired by generative AI when adding or editing text.

NOTE This feature will be available in the United States and in English language environments only. Availability in other geographies and for other languages will be communicated later.



Content ideas pane



Keypoint examples

See also

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

Understand how marketing activities contribute to defined milestones using AI

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-	-

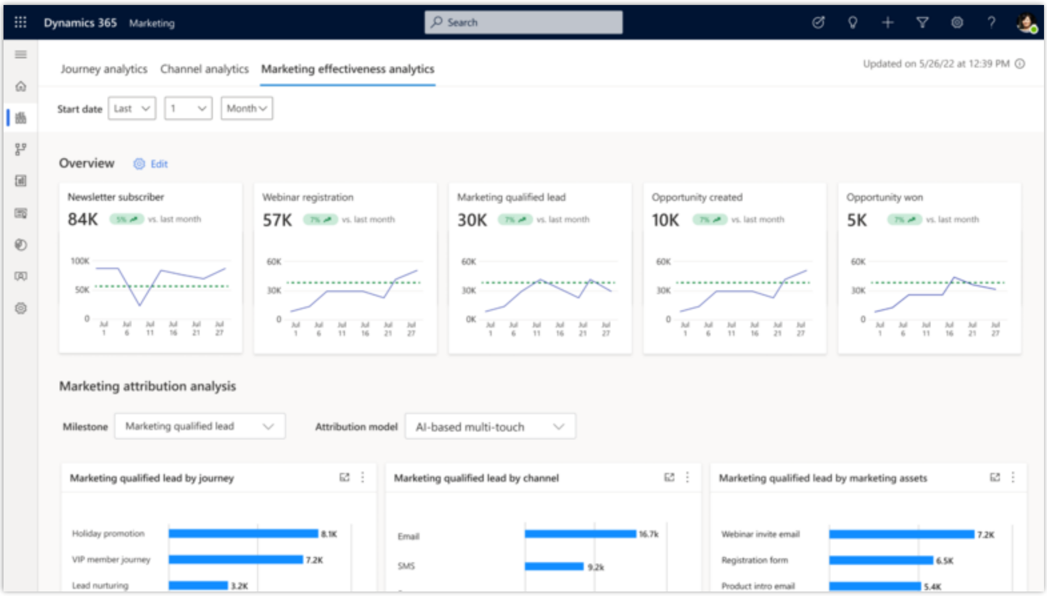
Business value

Dynamics 365 Marketing enables you to create highly personalized experiences to nudge customers toward important milestones in the buyer's journey. Milestones are journey-agnostic. Milestone examples include completing a purchase, becoming a loyalty program member, or becoming a qualified sales opportunity.

Now, you can define milestones, measure them over time, and even assess the effectiveness of your journeys and messages toward achieving your milestones by leveraging AI-powered and rules-based attribution models. AI-powered milestones enable you to identify and optimize marketing activities or drop poorly performing parts of your marketing mix and gain a comprehensive view of the tactics that are working well. Milestones create a feedback loop, allowing you to continuously improve your marketing efforts and drive more customers toward the next step of the journey.

Feature details

- Define milestones based on key customer moments in your buyer's journey. For example, lead qualification and opportunity creation in B2B businesses, or e-commerce purchase and loyalty program enrollment in B2C businesses.
- Track the number of customers that reach milestones over time.
- Analyze the contribution of your journeys and messages in driving your customers to milestones through AI-powered and rules-based attribution models.



Journey effectiveness visual

Optimize B2B marketing and accelerate your pipeline with out-of-the-box analytics dashboards

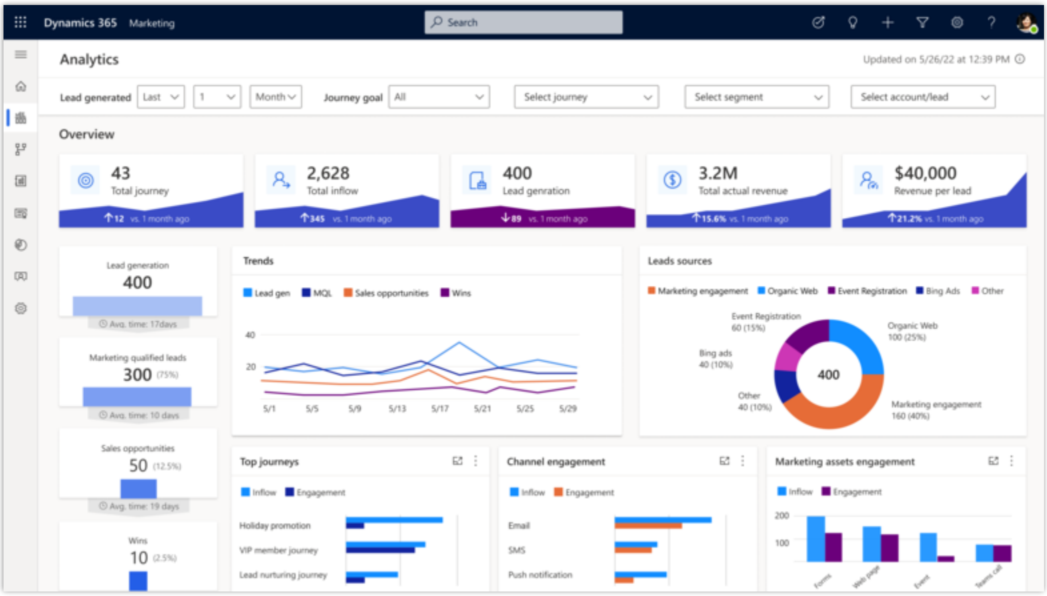
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2023	-	-

Business value

Use out-of-the-box dashboards to track your pipeline development and analyze the impact and contribution of journeys, marketing messages, and content at different stages of your business process. When using Dynamics 365 Marketing and Sales, further optimize your pipeline velocity by aligning marketing and sales teams on common goals using a shared view of the pipeline.

Feature details

- Seamless integration with Dynamics 365 Sales gives a comprehensive view to track accounts moving through the pipeline (from prospects and leads to won opportunities).
- Understand the main drivers for lead generation and qualification.
- Learn about your most effective sources that produce high-quality leads.



Business-to-business marketing analytics dashboard.

Save time by easily moving triggers between environments

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Business value

With Dynamics 365 Marketing, you can create custom triggers in development or pre-production environments to securely test the intended behavior before you use them in production for live marketing journeys and campaigns. You can then move the triggers to a production environment, so long as they are in a draft state.

With this release, you can now use the concept of managed solutions in Dynamics 365 to simplify and automate moving triggers between environments, even when they're in a published state. The ability to move published triggers enables you to align your testing workflow with your application lifecycle management process. Dynamics 365 Marketing automatically takes care of packaging the triggers and any related metadata when you export and import the solutions.

Feature details

This feature allows you to:

- Move triggers between environments quickly and easily using solutions.
- Migrate triggers between all your environments in any state.
- Manage version control and do cross-environment trigger updates to ensure that the right triggers are being used in your journeys.

Measure marketing activity, web traffic, and conversion goals using automatic UTM tagging

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Feb 1, 2023	-	Apr 2023

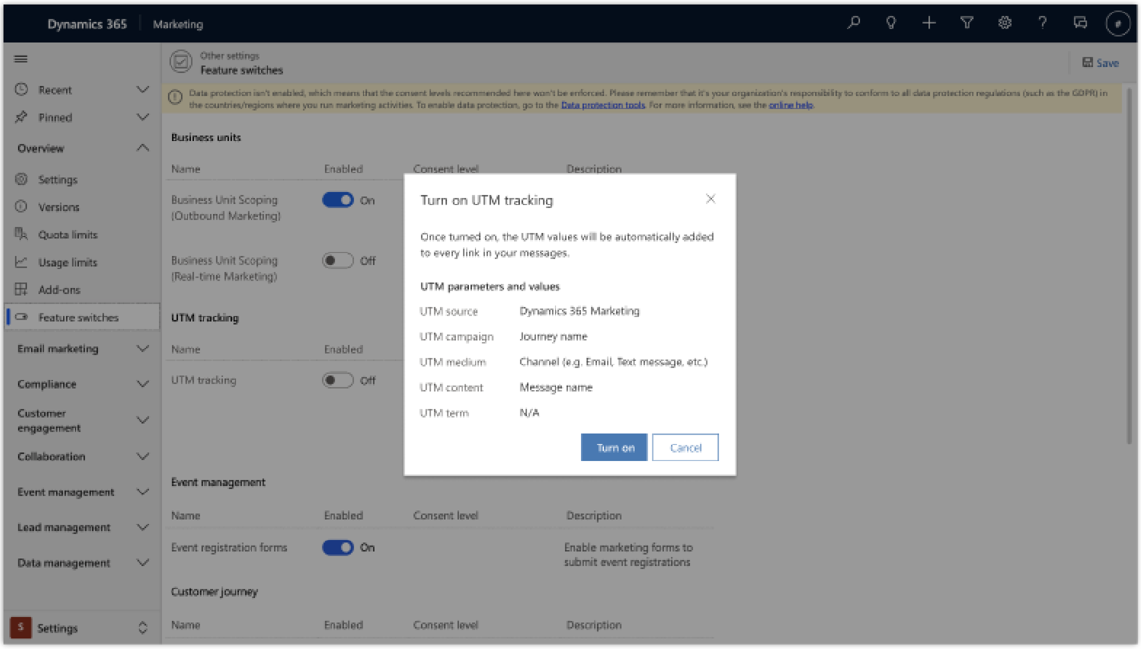
Business value

Urchin Tracking Module (UTM) codes help you track sources of traffic for your websites and landing pages, enabling you to attribute conversions to the right source. Marketing messages can be a significant contributor to this traffic, but it is hard to track them without UTM parameters. They’re often left out entirely from the links in messages due to the time-consuming process of manually adding the tags to each link.

Dynamic 365 Marketing now automatically tags all your messages with UTM parameters, following a consistent taxonomy. This gives you full visibility into your marketing contribution to web traffic and, in turn, empowers you to optimize traffic and conversions.

Feature details

- Every link in all your outbound messages is automatically appended with default UTM parameters.
- You can optionally override the default UTM campaign parameters and insert your own custom parameters.



Automatically add UTM parameters

See also

[Measure marketing effectiveness using UTM codes](#) (docs)

Scale your business effortlessly and define access to marketing assets

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Mar 2023	-	Apr 2023

Business value

Improve productivity by defining marketing asset access and visibility to match your business structure.

As businesses create vast amounts of assets, organizing data according to an organizational structure becomes critical for compliance and productivity purposes. Now in real-time marketing, you can effortlessly organize your digital assets, content, and journeys to match your organizational structure by separating business and customer data across organizational boundaries. Separating data enables you to gain comprehensive insights into a specific brand's marketing performance without losing sight of the bigger picture. Compliance risk is reduced by using out-of-the-box campaigns and data segregation capabilities across your organization.

Feature details

- Organize marketing journeys, digital assets, content, and customer preferences to support your multibrand business unit strategy needs.
- Reduce compliance risk by using out-of-the-box campaigns and data segregation capabilities across organizational boundaries instead of relying on processes and people.
- Review marketing analytics at individual brand, region, and organization levels.
- Built on top of modernized business units (Microsoft Dataverse) to ensure a no-cliff experience across your Dynamics 365 applications.

Accurately target customers using improved AI-powered natural language segments

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-	May 2023

Business value

The query assist feature is enhanced with generative AI capabilities. Use conversational, everyday language to quickly build targeted segments. Generate rules that are more accurate with less effort, allowing you to spend more time building customer relationships and less time constructing complex segments from scratch.

Feature details

- The upgraded query assist feature enables you to build real-time segments using more powerful AI, providing more accurate results for your query.
- Use conversational language to build your segment, such as in the following before and after examples:

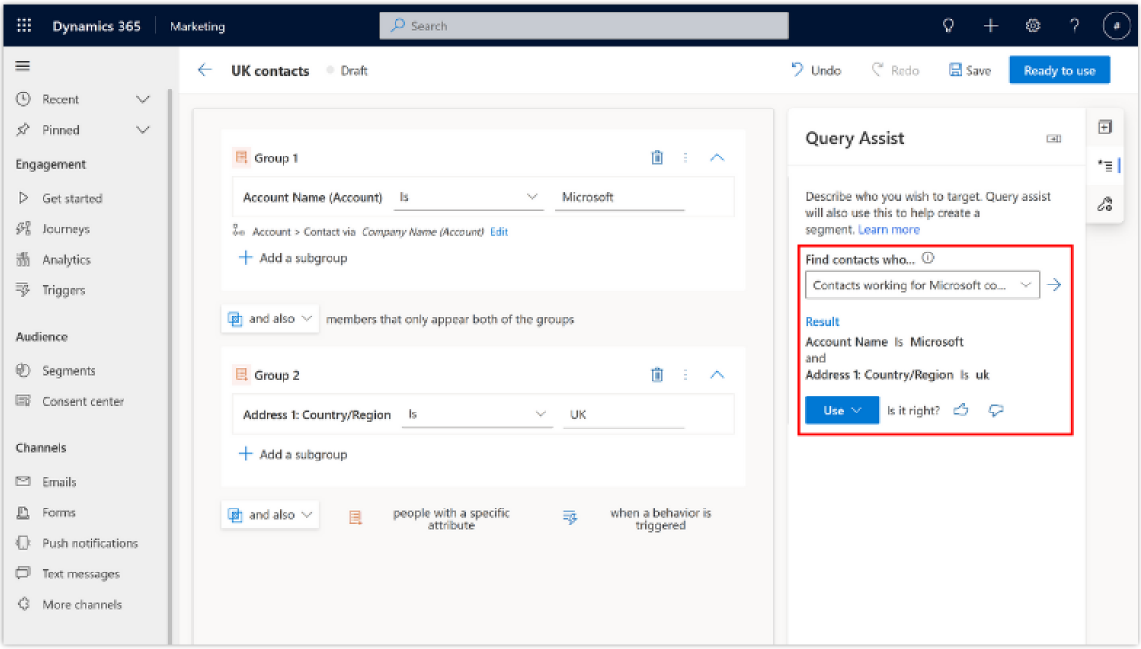
Before (without generative AI)

- All contacts who work in Contoso.
- All leads from Microsoft and Contoso accounts.
- Active contacts who report to Jessie.
- Contacts in account Microsoft who live in the UK.

Now (with generative AI)

- I work at Contoso. Please show me other contacts there.
- I want to sell to people at Microsoft. Can you show me any leads I have there? Contoso is also OK.

- I report to Jessie as a vendor. Can you show me other contacts who do too? They should be active as well.
- I work at Microsoft. Can you show me my active colleagues who live in the UK?



Screenshot of natural language segment with intelligent technology

Scale your business with confidence with 300M maximum monthly interactions

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-	Jul 2023

Business value

Reach up to 100 million contacts or leads and send up to 300 million messages per month with Dynamics 365 real-time marketing customer journey orchestration. This added capacity empowers you to deliver personalized experiences at scale and delight customers in new ways. Additional interactions will help you grow your business, whether you're increasing your customer base in new markets, reaching additional geographies, promoting new products, or expanding your prospective customer pipeline to reach higher sales targets.

Feature details

- Reach up to 100 million marketing contacts (up more than 3 times from the previous 30 million contact limit). Marketing contacts only include those that you engage with through interactions such as emails, SMS, and push notifications.

- Deliver up to 300 million monthly outbound interactions (through email messages, SMS, push, or custom channels). This is up 3 times from the previous 100 million outbound interaction limit.
- Create segments of up to 100 million marketing contacts.
- Engage with customers in near real-time with a 30-second response time. (The response time is the time from a trigger being activated to a message being sent for a single-step customer journey. The actual message delivery time varies depending on the recipient’s email server, the message-sending channel used, and other factors.)

NOTE This feature indicates the absolute maximum number of interactions that can be sent (assuming there is sufficient monthly interaction quota available) based on the number of contact or interaction packs you purchase. Your actual limits are visible on the **Quota limits** page.*

Moments-based

Overview

Define the best channels and identify relevant touchpoints to trigger interactions that will successfully engage customers in the moments that matter.

Easily create modern forms using the new intuitive form experience

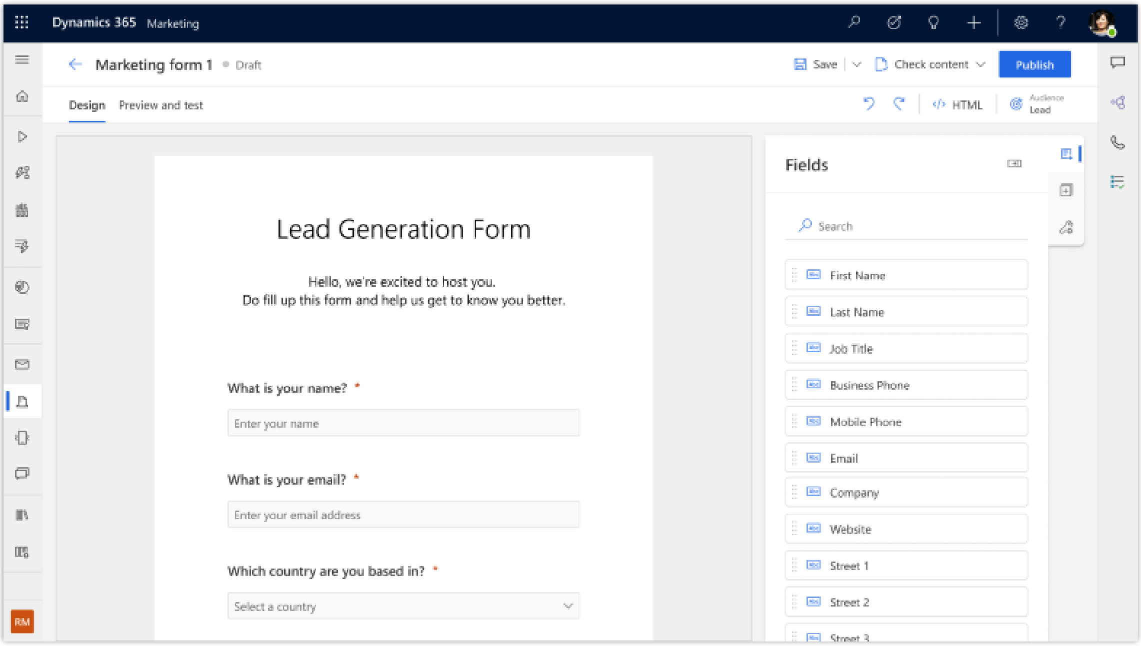
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Dec 1, 2022	-	Apr 2023

Business value

Effortlessly create smart forms to place on your websites and capture your customers’ attention while allowing them to input their details. Lead capture forms are crucial for gathering marketing information, turning visitors into leads, and turning leads into valuable customers. With the new intuitive forms experience in real-time marketing, you can easily create modern forms with advanced capabilities without depending on developers.

Feature details

- A modern drag-and-drop editor guides you through the entire form creation process.
- No need to depend on developers; start creating forms within seconds.
- Instantly publish a form as a standalone page or embed the form into an existing page.
- Deliver compelling forms to your customers that match your brand and track conversions.



Create lead capture forms using the new form editor

See also

[Create and manage forms in real-time marketing](#) (docs)

Prevent message fatigue by limiting the messages sent to a customer in a specific period

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2023	-	Apr 2023

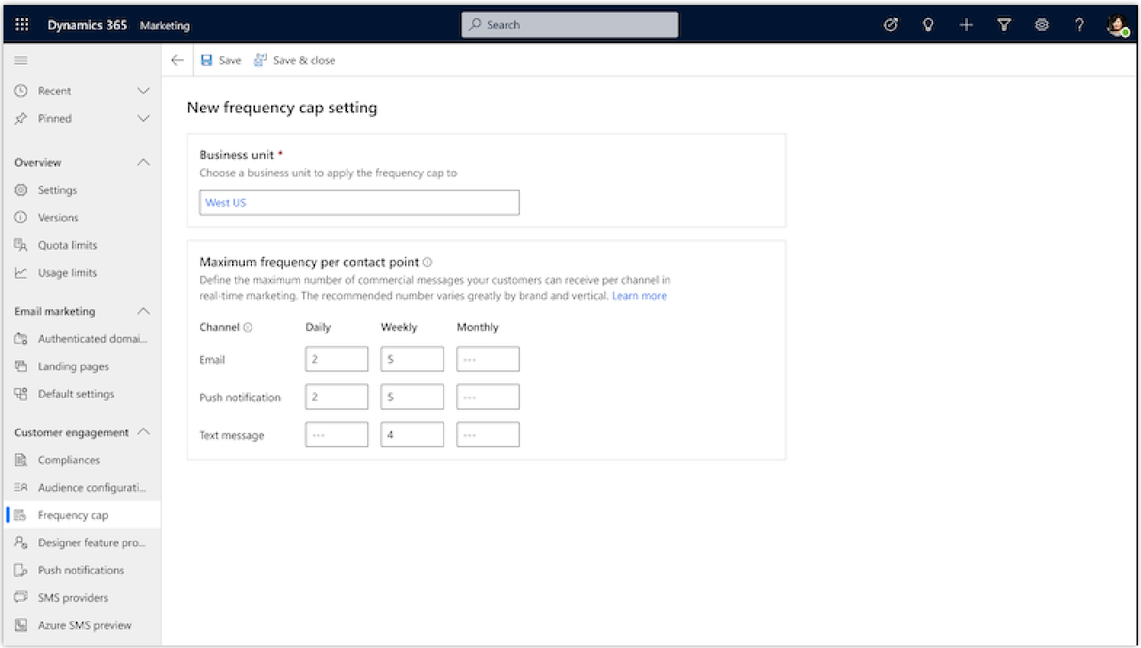
Business value

Ensure that your customers receive the right message at the right moment and at the right frequency to prevent fatigue, avoid unsubscribes, and facilitate optimal engagement with your key messages.

Some customers qualify for multiple journeys and campaigns that run simultaneously. This results in customers receiving multiple messages through one channel in a short period of time. Customers may perceive these messages as spam, which lowers their engagement. With the frequency cap feature, you can optimize engagement by controlling how many messages are sent across multiple channels over a period.

Feature details

- Define a specific cap per channel (email, text message, push, and custom channels).
- Enable daily, weekly, and monthly frequency caps.
- Decide which journeys should have the frequency cap enabled or disabled.
- Transactional messages will always be excluded.
- Check which messages have been sent and which are still pending for each customer.



Frequency cap setting

Send emails quickly without building a journey

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Mar 2023	-	Apr 2023

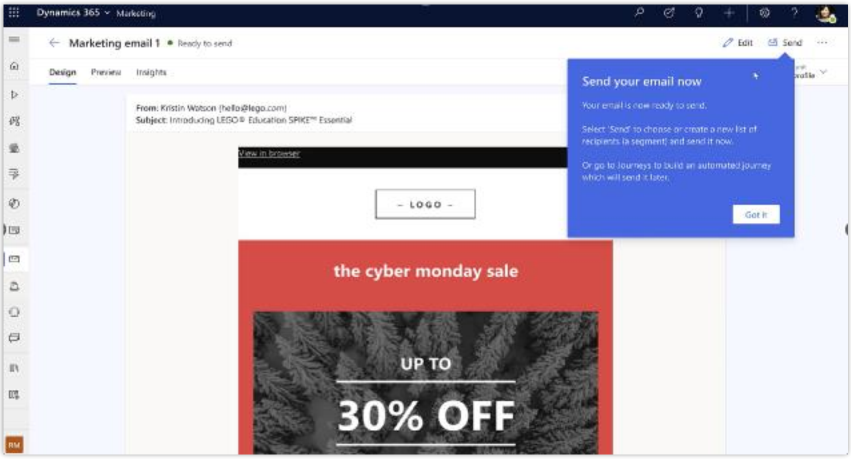
Business value

Send emails, such as newsletters, without creating a journey. This workflow allows you to select from a new template library, make changes easily with simplifications to the email editor, and send emails to the segment members you need to reach within minutes.

Feature details

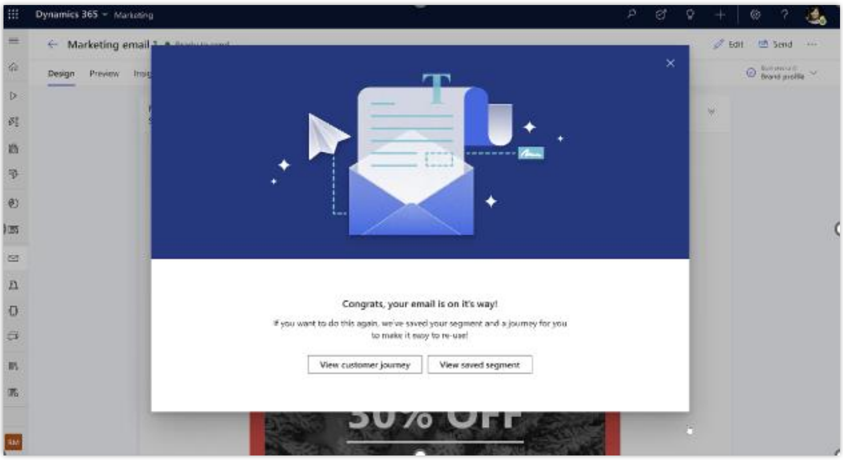
This workflow is optimized for any role or skill level, allowing senders to use Dynamics 365 Marketing to send emails that take advantage of email templates, personalization, email analytics, and connected CRM.

- Choose from email templates to craft your email quickly.
- Pick from an existing segment, preview the segment, and then send.



Send now email visual

Saved segments



Final send email visual

Boost your productivity with enhanced journey reminders

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-	Jun 2023

Business value

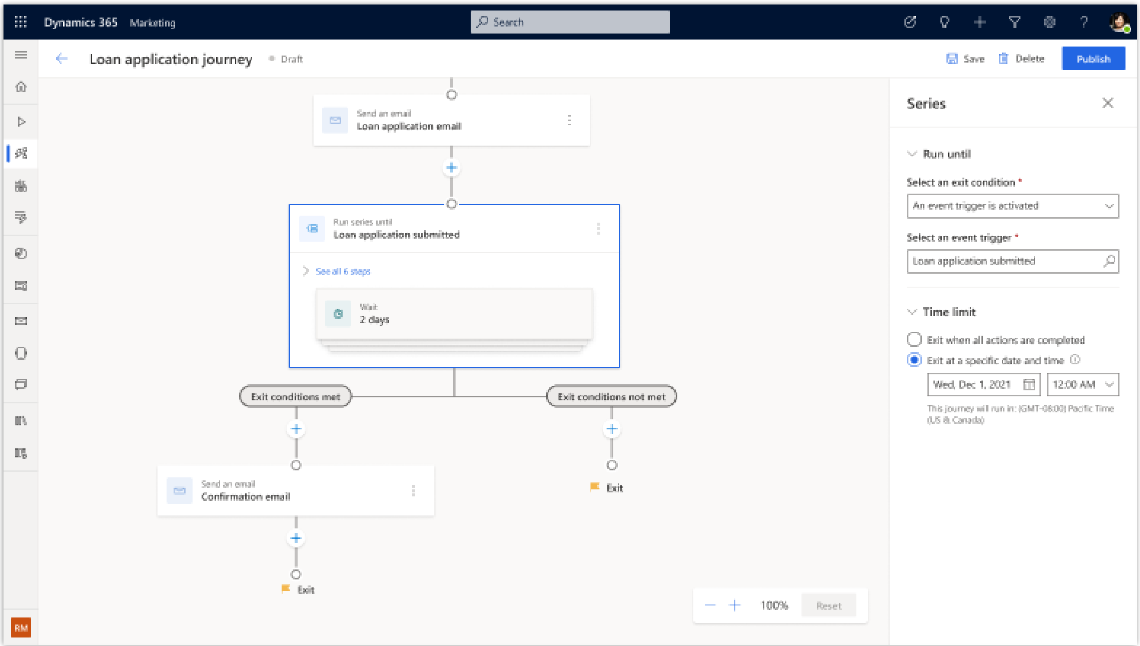
Boost your productivity with enhanced reminder and recurring message orchestration capabilities. Sending a series of messages is essential to invite customers to take action. For instance, you may want to send a checkout reminder to customers who abandoned a shopping cart. But setting reminders in journeys is often complex and requires maintenance.

To support marketers and boost their productivity, we've enhanced recurring message orchestration capabilities. You can now create action-oriented journeys, reminding customers until they complete a call to action or until a certain date or time. Built-in reminder orchestration eliminates the need to create cascading branches that check for the qualifying action after each step or specify conditions with more than two possibilities. This simplifies not only the journey logic required to capture the whole scenario in a single journey but also preserves all analytics for the journey actions in a single place when journeys are live.

Feature details

Here's an example of the reminder feature in action: An abandoned shopping cart journey starts with customers adding items to a shopping cart. Using the reminder feature, if a customer abandons a cart, the journey can remind them to check out and send multiple messages, including messages with certain offers, until they check out. Similarly, a customer who has started registering for a conference can be reminded to complete registration until they finish or until the registration window closes.

- Increase productivity by simplifying logic, increasing readability, and lowering maintenance.
- Create journeys that include a set of messages, such as reminders, until a qualifying event or activity occurs.
- Messages can end based on the customer taking an action or based on a certain date or time.



Reminders in journey

Personalization

Overview

Leverage your customer data and past interactions to transform your customer experience by delivering personalized messages, content, and images through the best channel.

Further personalize journeys using custom events with entity references

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	May 2023

Business value

Entity references for custom triggers enable greater personalization of messages sent to customers. Create entity references for custom events instead of adding multiple attributes manually, bypassing the previous limit of 29 attributes. For example, if you want to create a custom trigger that triggers a journey for all customers who purchased a specific product on your website, you can now capture the purchase event and the contents related to the SKU that was purchased. Instead of manually entering all attributes (with a maximum limit of 29) for the custom trigger, you can now add an entity reference to select as part of the custom trigger attribute definition.

Feature details

- Use custom triggers in journeys that use attributes tied to related Dataverse entities.
- Enable greater customization of messages sent to customers.
- Ensure attribute freshness.

Use interaction data to improve targeting in the redesigned segment builder

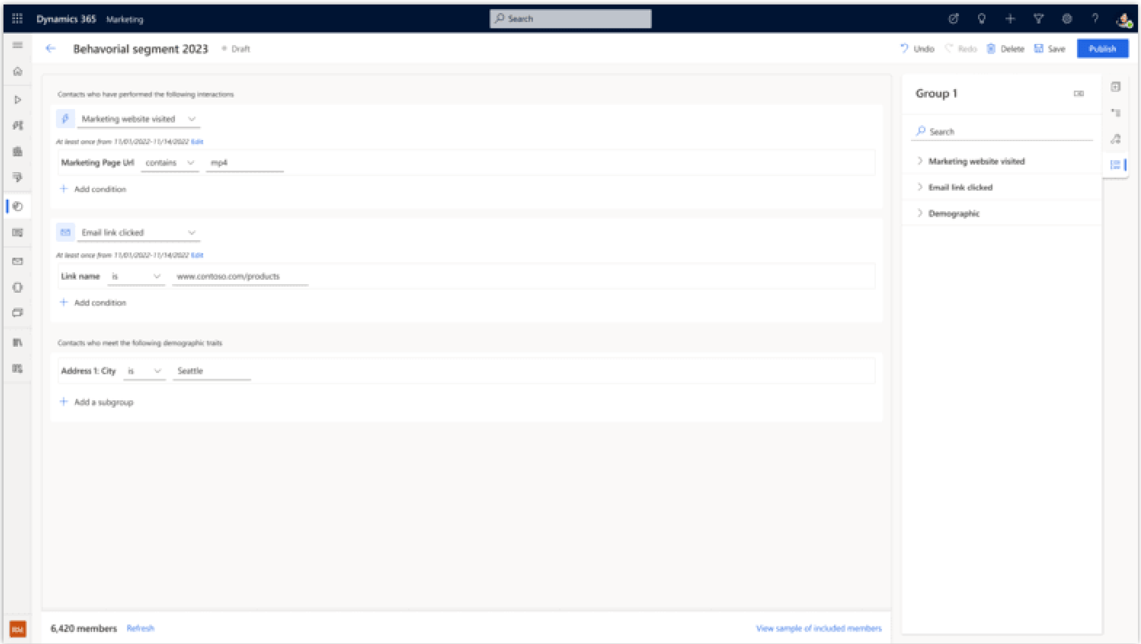
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-	May 2023

Business value

Segments are critical for targeting the right customers and personalizing their experience. The redesigned real-time marketing segment builder allows you to create segments based on customer interactions and engagement with your marketing messages, websites, events, or other channels. Combined with the demographic and firmographic attributes already available for segmentation, the segment builder enables you to reach the right customers at the right time. Use segments for journey branching or content variants to personalize the experience for each customer. Create complex, interaction-based conditions by defining frequency and a time window, enabling you to use event triggers to segment on more customer actions than before.

Feature details

- Leverage an easy-to-use segment builder experience to create segments on demographic and behavioral attributes.
- Seamlessly create complex conditions such as "all your contacts that have opened the newsletter twice within the last 30 days" with the improved builder experience.
- Create segments confidently through segment member size estimates and previews prior to marking the segment "Ready to Use."
- Use intelligent technology to describe behavioral segments in everyday language, such as "I want the list of all my customers who have engaged with my email."



Interactions segments

Match your business needs with multi-brand consent and customizable preference centers

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-	Jul 2023

Business value

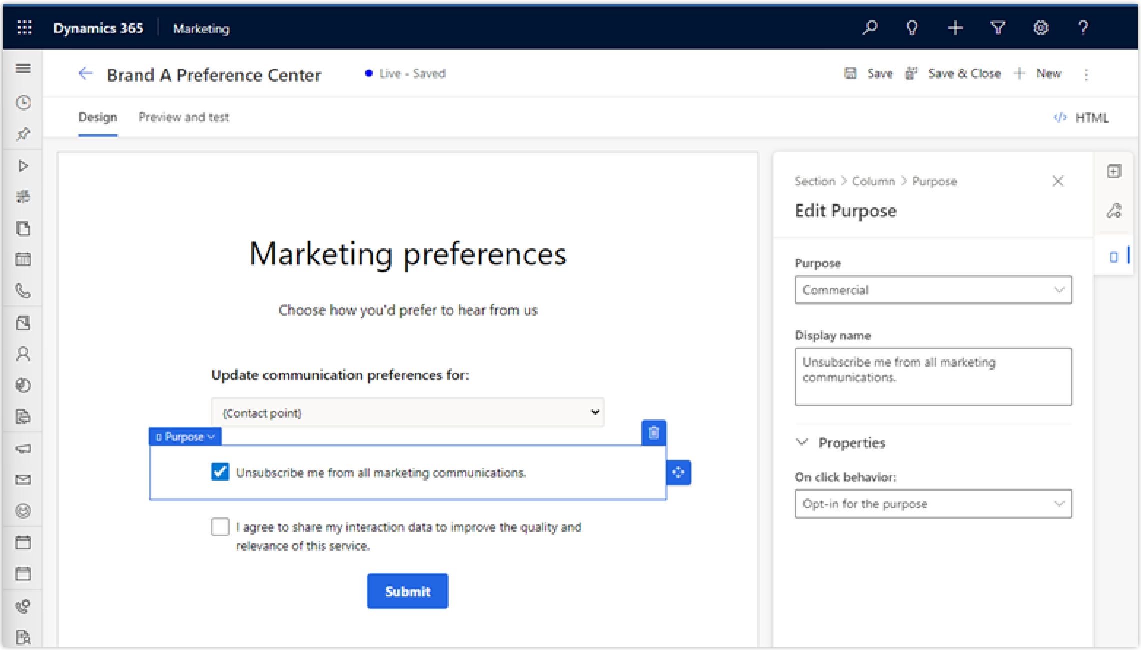
In real-time marketing, marketers can now fully customize out-of-the-box preference centers to better represent their brands and meet their business needs. Create separate preference centers per brand, allowing you to independently capture and manage consent for multiple lines of business. Keep your customers engaged by giving them control over the channels they want to connect to while ensuring that you capture the consent you need to satisfy legal and regulatory requirements.

Feature details

The following new functions allow you to design consent to match your brand and compliance needs:

- Configure real-time marketing preference centers that represent your brand's look and feel with new logo, style, and color options.
- Create multiple, line-of-business-specific preference centers.

- Real-time marketing preference centers are hosted by Dynamics 365 Marketing out of the box and can be embedded directly in your website.
- Capture and enforce consent independently for each line of business, allowing your customers to opt out of communication from one brand without impacting other lines of business.
- Channel-specific consent is tied to each customer's specific email address or phone number, giving your customers more control over which messages they receive from which channels.



Screenshot of marketing preference choices

Easily reference a copy of previously sent emails in the interaction timeline

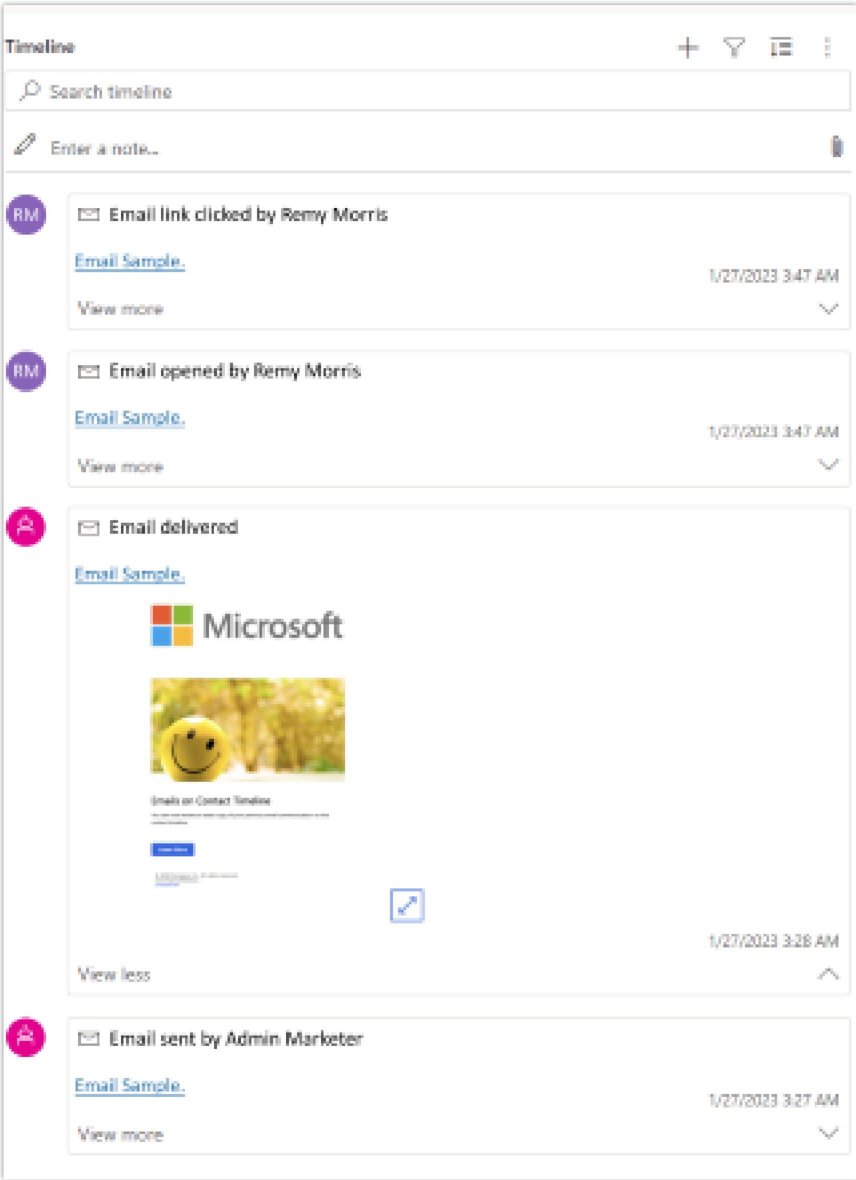
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Sep 2023

Business value

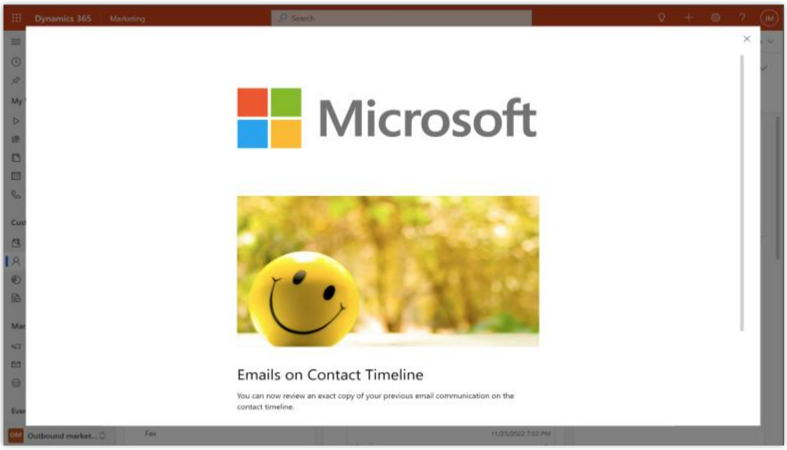
Understanding your company's customer interactions is key to improving your customer experience. Now, you can deepen customer understanding by viewing exact copies of sent emails, allowing you to build more personalized experiences. Reviewing sent emails improves your overall visibility, compliance, and auditing.

Feature details

- See exact copies of emails sent in contact and lead timelines.
- Review the output generated by advanced personalization features such as conditional content.
- Adjust storage of archived emails to meet your business needs.



Email preview in the timeline



Preview email full screen on contact timeline.

Tailor communications to the topics customers want to receive

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2023	-	Sep 2023

Business value

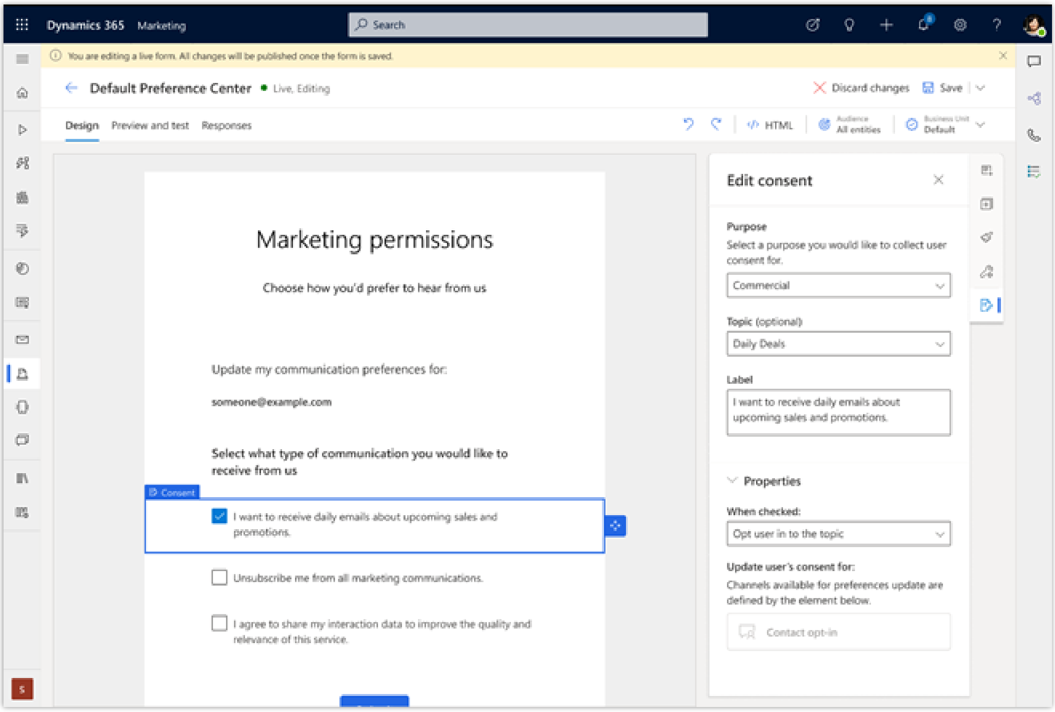
Improve customer engagement and reduce unsubscribes by giving customers granular control over the real-time marketing messages they receive. Target your messages to the audience that wants to engage with your content the most by capturing detailed consent. Easily configure topics for messages, enabling per-topic customer opt-in or opt-out. Allow customers to subscribe to the topics that matter to them while capturing the consent you need to satisfy legal and regulatory requirements. Avoid embarrassing and costly configuration mistakes by leveraging real-time marketing topic support, preventing the complications of maintaining and enforcing lists of subscribed customers, all while taking advantage of enhanced real-time marketing preference centers that better represent your brand.

Feature details

The following new functions allow you to reduce opt-out rates and gather consent at finer granularities:

- Create an unlimited number of topics, enabling customers to opt in to receive marketing subscriptions such as "Newsletters," "Community Events," or "Product Discounts."
- Easily capture consent for new customers on marketing forms with flexible options that allow you to gather consent explicitly (through visible fields) or implicitly (through hidden fields).

- Real-time marketing automatically enforces topic checks without the need to create and manage subscription lists of contacts.



Preference Center showing Topic Configuration

Sales

Plan and prepare for Dynamics 365 Sales in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Sales**.

Overview

Video: Learn about this product's new capabilities

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

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

For 2023 release wave 1, we continue to use data and AI to help sellers prioritize their engagement and personalize their execution to be more efficient and effective in their customer interactions - spending more time selling.

Do you have a new feature idea or some feedback? We encourage you to connect with us at Sales Ideas.

Investment areas

Revenue intelligence
The revenue intelligence capabilities in Dynamics 365 Sales allow your sales team to manage revenue by setting up pricing and discounts for products, defining targets, forecasting sales, visualizing deals, and managing their top line proactively and efficiently.

The following capability is planned for this release wave to enhance revenue intelligence in Dynamics 365 Sales:

- A new and enhanced opportunity management experience that helps you visualize your sales funnel and track your deals while being able to edit opportunities on-the-fly.
- Ability to create forecasts with yearly and weekly recurrence.
- Support for adjusting forecast values at the drill-down level.
- Ability to configure forecasts for each business unit in your organization.

Sales execution and sales force automation
The sales execution and sales force automation capabilities in Dynamics 365 Sales allow sellers to be more productive and efficient in their core area of work – selling. These capabilities help sellers initiate a campaign, generate leads, assign leads to sellers, convert those leads to opportunities, manage accounts and contacts, and manage all activities around leads and opportunities until the deal is closed.

The following capabilities are planned for this release wave to enhance sales execution and sales force automation:

- Prevent duplicate leads from entering the system either through manual creation or bulk import.
- Get follow-up tasks created automatically based on information from various Office applications like emails, Teams messages, and Teams call transcripts, and get friendly reminders to help you complete those tasks.
- Create opportunities with ease by using the new version of input forms that declutter information with an enhanced visual layout.

- Use the AI-powered solution to get account-based suggestions for targeted selling and precise workflows to leverage.
- Create a customer org chart so that sellers know the roles of contacts in the organization and view the relationship map.

Sales engagement
The sales engagement capabilities (formerly known as Sales accelerator) in Dynamics 365 Sales allow your sellers to engage with their customers in the smartest way possible, through AI-driven insights about their customer relationship and conversations, and through tools that help accelerate and standardize the selling process. These tools help sellers to maintain a healthy relationship with their customers and have an impactful conversation with them.

The following sales engagement capabilities are planned for this release wave:

- Engage a bot for the initial customer outreach so that only good quality lead reaches the sellers at the right time, thus saving precious time for the sellers.
- While you're on a call with a customer, get insights and tips based on past interactions with the customer and communicate effectively based on the suggestions.
- With conversation intelligence support extended for third-party telephony providers, you get seamless insights irrespective of the call provider you're using.
- Prepopulate emails based on the content you frequently use while drafting emails, such as self-introduction and product details, thus reducing the time spent preparing emails.
- A whole host of enhancements around sequences, including sequence step visibility, sequence performance, custom templates, step loops, multiple sequences assignment, personalization, automated replies, and more.
- Improvements to sales accelerator through enhanced worklist items, up next widgets, and better performance, personalization, and ease-of-use capabilities.
- Send and receive customer communication through SMS and get real-time notifications for incoming SMS.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Sales** below:

Check out the release plan

For application administrators

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

Features that must be enabled by application administrators
This release wave contains features that must be enabled or configured by administrators,

makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.

Get the most out of Sales

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Sales.
Product documentation	Find documentation for Sales.
User community	Engage with Sales experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Sales.

What's new and planned for Dynamics 365 Sales

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

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.

Revenue intelligence

Define and manage your top line like a pro with revenue intelligence.

Feature	Enabled for	Public preview	Early access*	General availability
Get basic relationship insights out-of-the-box	Users, automatically	-	Jan 2023	Apr 2023
Manage opportunities more effectively using the new pipeline view	Users, automatically	-	✓Feb 6, 2023	Apr 2023
Configure forecasts for multiple business units	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023
Adjust forecast values for drill-down entities	Admins, makers, marketers, or analysts, automatically	-	-	Jun 2023
Improve forecast accuracy with yearly and weekly forecasts	Admins, makers, marketers, or analysts, automatically	-	-	Sep 2023

Sales engagement

New sales engagement capabilities help sellers stay efficient and successful.

Feature	Enabled for	Public preview	Early access*	General availability
Get insights for calls made through third-party softphones from Dynamics 365	Users by admins, makers, or analysts	Jul 2023	-	-
Improve lead qualification with intent detection	Users by admins, makers, or analysts	Sep 2023	-	-
Guide sellers to favorable sales outcomes with next best step	Users, automatically	-	✔ Feb 6, 2023	Apr 2023
Work efficiently with enhanced Sales accelerator worklist items	Users, automatically	-	✔ Feb 6, 2023	Apr 2023
Prioritize engagement for any sales entity by working in focus mode	Users, automatically	-	✔ Feb 6, 2023	Apr 2023
Engage with your Customers using SMS conversation	Users by admins, makers, or analysts	Apr 2023	-	May 2023
More effective customer engagement with sequence preview	Admins, makers, marketers, or analysts, automatically	-	-	May 2023
Streamline sequence creation process with your own templates	Admins, makers, marketers, or analysts, automatically	-	-	Jun 2023
Leverage manager dashboards to coach sellers	Users by admins, makers, or analysts	Apr 2023	-	Sep 2023
Get tips and suggestions while on a call with customer	Users by admins, makers, or analysts	Jul 2023	-	Sep 2023
Capture crucial details of a sales call	Users by admins, makers, or analysts	Aug 2023	-	Sep 2023

Feature	Enabled for	Public preview	Early access*	General availability
Redact sensitive personal data from customer calls	Users by admins, makers, or analysts	✔ Feb 7, 2023	-	Sep 2023
Efficient account-centric selling with multiple sequences for a record	Admins, makers, marketers, or analysts, automatically	Aug 2023	-	To be announced

Sales execution and sales force automation

Sales execution includes tools and processes that help sellers engage with a prospective customer from the early stage of awareness to closing a sale.

Feature	Enabled for	Public preview	Early access*	General availability
Provide intelligent suggestions to improve seller effectiveness	Users by admins, makers, or analysts	May 2023	-	-
Visualize key stakeholders and take action with the smart organization chart	Users by admins, makers, or analysts	Jun 2023	-	-
Automate the creation of follow-up tasks	Users by admins, makers, or analysts	Jul 2023	-	-
Identify cross-sell and upsell opportunities with timely product recommendations	Users by admins, makers, or analysts	Aug 2023	-	-
Get improved user experience with new and enhanced opportunity form	Users, automatically	-	✔ Feb 6, 2023	Apr 2023
Stay on top of routing issues with harmonized monitoring	Admins, makers, marketers, or analysts, automatically	-	-	May 2023

Feature	Enabled for	Public preview	Early access*	General availability
Automatically assign multiple sequences to a record	Admins, makers, marketers, or analysts, automatically	Jul 2023	-	Aug 2023
Use statistics to improve assignment rule effectiveness	Admins, makers, marketers, or analysts, automatically	Jul 2023	-	Aug 2023

* You are able to opt into some features as part of early access on February 6, 2023, 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.

Revenue intelligence

Overview

The revenue intelligence capabilities in Dynamics 365 Sales allow your sales team to manage revenue by setting up pricing and discounts for products, defining targets, forecasting sales, visualizing deals, and managing their top line proactively and efficiently.

The following capability is planned for this release wave to enhance revenue intelligence in Dynamics 365 Sales:

- A new and enhanced opportunity management experience that helps you visualize your sales funnel and track your deals while being able to edit opportunities on-the-fly.
- Ability to create forecasts with yearly and weekly recurrence.
- Support for adjusting forecast values at the drill-down level.

- Ability to configure forecasts for each business unit in your organization.

Get basic relationship insights out-of-the-box

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Jan 2023	Apr 2023

Business value

Currently, the Dynamics 365 administrator has to enable the relationship intelligence feature for sellers to view the relationship KPIs and Who knows whom information. With this enhancement, sellers will be able to view the basic relationship KPIs and Who knows whom information out of the box based on the Dynamics 365 data without having to wait for the admin to enable the feature.

Feature details

As a seller, you can:

- See who in your organization is in contact with the current record.
- View basic relationship KPIs generated with the Dynamics 365 data like:
    - Customer interactions: Compares the total number of activities (except tasks) sent by us versus sent by them.
    - Relationship activities: Day-wise breakdown of each of the number of activities sent/received (shown over the last 60 days).
    - Email sent/received ratio: Compares the ratio of emails sent by us versus received by us.
    - Most contacted: Customer most contacted regarding the current record.
    - Most contacted by: Sellers who most contacted customers regarding the current record.
    - Email engagement: Shows statistics about the number of links clicked, attachments opened, and the total open count (email engagement needs to be enabled for this to work).

Manage opportunities more effectively using the new pipeline view

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Feb 6, 2023	Apr 2023

Business value

The new opportunity view in Dynamics 365 Sales enables you to get a bird's-eye view of your pipeline and manage your opportunities more easily and intuitively than ever before. The new opportunity experience has been designed with sellers in mind, saving time for selling by removing many redundant steps and improving sales efficiency. It eliminates many processes that sellers would normally need to do and streamlines everything into a single workspace. Sellers can uncover the deals that need their attention and act right away. Additionally, they can tailor their experience and personalize the view.

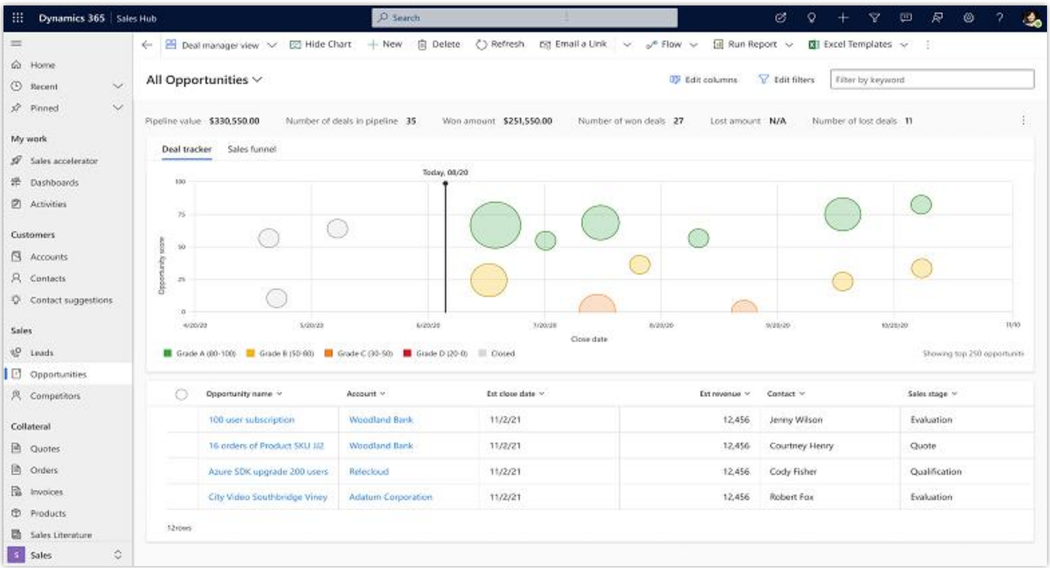
Feature details

As a seller, you can:

- Organize opportunities in a way that works for you.
- Personalize your views.
- Update information quickly using an editable grid and side-panel.
- Add notes and tasks, and much more.
- See aggregations for pipeline value, number of deals in the pipeline, and other metrics.

As an administrator, you can:

- Customize the record side panel forms with custom attributes.
- Add support for business rules.
- Configure the charts.



Deal Manager

See also

[Manage opportunities more effectively using the new pipeline view](#) (blog)

Manage opportunities using pipeline view (docs)

Configure forecasts for multiple business units

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Business value

Companies with multiple business units (BU) define different forecasts for each BUs to track, monitor, and provide targeted help. Organizations need a way to easily track forecasts at BU-level to understand how each business unit is performing and develop data-driven strategies.

Feature details

As an administrator or forecast manager, you'll be able to:

- Configure forecasts based on a business unit, which allows your sales team to monitor and track the progress of each business unit separately.
- Restrict the forecast only to the sales team in that business unit.

As a seller, you'll be able to:

- See the forecast for your business unit and make informed decisions to meet or exceed your quotas.
- Get a macro and micro view by monitoring your BU forecast and then drill down to your forecast to see how you're contributing to the BU forecast.

Adjust forecast values for drill-down entities

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Jun 2023

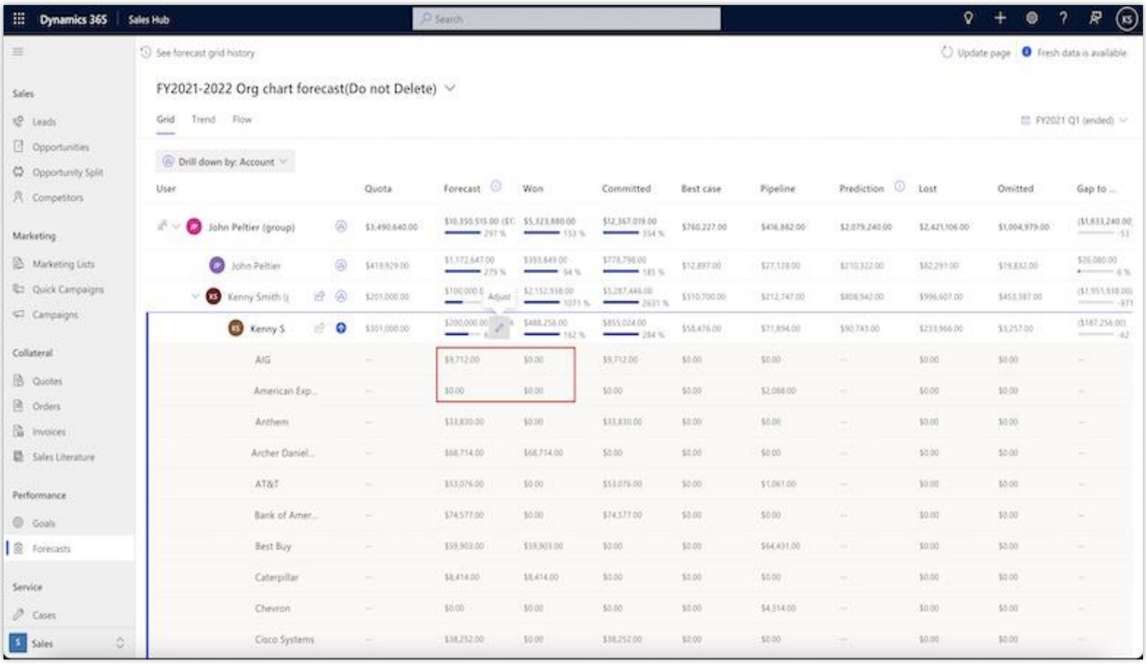
Business value

While managers can adjust forecast values directly for the top-level record, they also need the ability to adjust the forecast values at the drill-down level. For example, adjusting values for specific accounts or products under a user's forecast. With this enhancement, you can easily adjust forecast values for drill-down entities directly in the forecast grid.

Feature details

With this enhancement,

- You'll be able to edit the values of drill-down entities in the forecast grid, provided you have the manual adjustment privileges.
- You'll see the edit icon next to drill-down entities that allows you to edit the values of the drilled-down entity.



Drill down level adjustments

Improve forecast accuracy with yearly and weekly forecasts

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Sep 2023

Business value

Organizations track their sales objectives at varying intervals and want the ability to forecast accordingly. Sellers can now supplement their quarterly and monthly forecasts with a yearly forecast that surfaces the progress and projections for the entire year. In addition, weekly recurrences can be configured for sales organizations with short sales cycles to measure weekly sales goal progress.

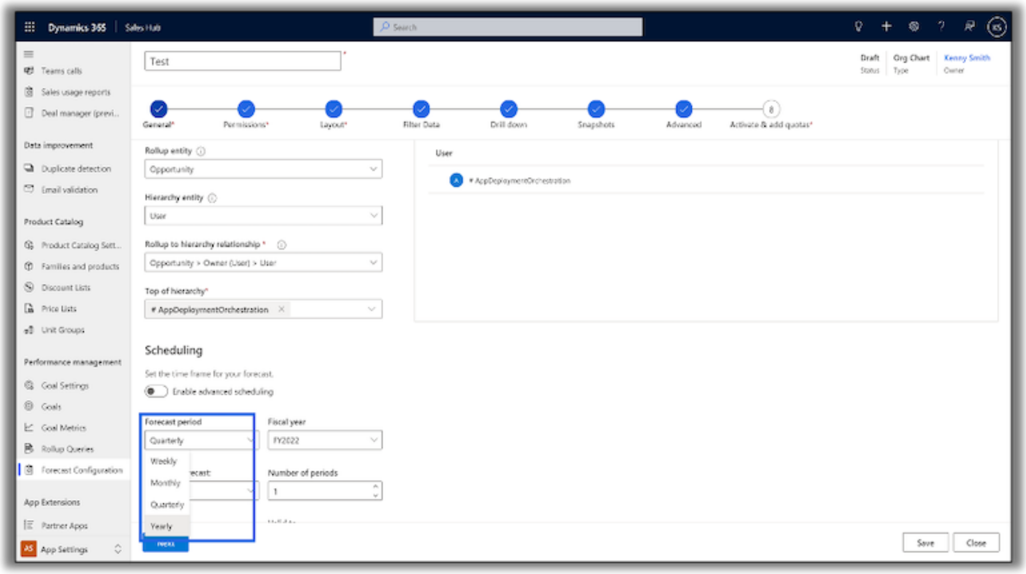
Feature details

As an administrator or forecast manager, you can:

- Configure forecasts with a yearly recurrence.
- Configure forecasts with a weekly recurrence.

As a seller or sales manager, you can:

- Track your yearly and weekly forecasts



Yearly and Weekly forecasts

Sales engagement

Overview

The sales engagement capabilities (formerly known as Sales accelerator) in Dynamics 365 Sales allow your sellers to engage with their customers in the smartest way possible, through AI-driven insights about their customer relationship and conversations, and through tools that help accelerate and standardize the selling process. These tools help sellers to maintain a healthy relationship with their customers and have an impactful conversation with them.

The following sales engagement capabilities are planned for this release wave:

- Engage a bot for the initial customer outreach so that only good quality lead reaches the sellers at the right time, thus saving precious time for the sellers.
- While you're on a call with a customer, get insights and tips based on past interactions with the customer and communicate effectively based on the suggestions.
- With conversation intelligence support extended for third-party telephony providers, you get seamless insights irrespective of the call provider you're using.

- Prepopulate emails based on the content you frequently use while drafting emails, such as self-introduction and product details, thus reducing the time spent preparing emails.
- A whole host of enhancements around sequences, including sequence step visibility, sequence performance, custom templates, step loops, multiple sequences assignment, personalization, automated replies, and more.
- Improvements to sales accelerator through enhanced worklist items, up next widgets, and better performance, personalization, and ease-of-use capabilities.
- Send and receive customer communication through SMS and get real-time notifications for incoming SMS.

Get insights for calls made through third-party softphones from Dynamics 365

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Jul 2023	-	-

Business value

There are various call technologies that sales organizations use to interact with customers. Many enterprises have on-premises systems in place, while small businesses use cloud-based video-telephony providers. The engagement also varies, such as inside sellers conducting 1:1 calls while account managers participate in multi-participant conversations. These conversations are captured in various formats and quality, aligning with cultural or regulatory reasons. The only thing unifying these interactions is the need to extract business-critical insights.

Sales conversation intelligence currently supports calls using Microsoft Teams. By extending it to calls made through third-party telephony providers from Dynamics 365, sellers get a seamless experience irrespective of the call provider they are using.

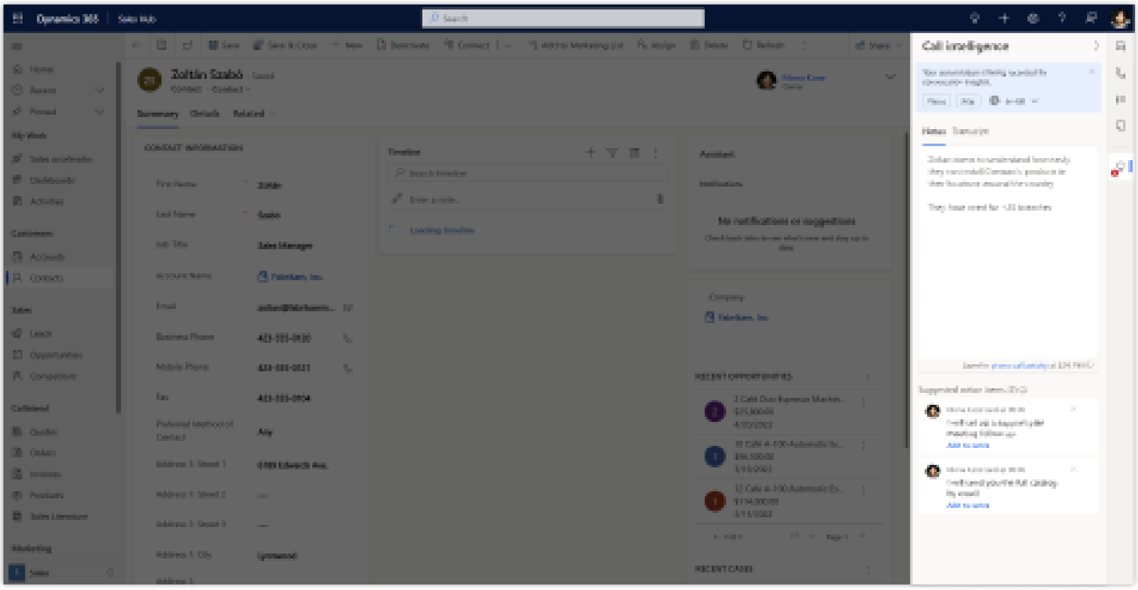
Feature details

As an administrator, you can:

- Configure conversation intelligence for the third-party telephony providers or softphones used by your sellers.

As a seller or sales manager, you can:

- Get real-time conversation intelligence, business insights, post-call reporting, and coaching tools for phone calls made through Dynamics 365 using third-party telephony providers or softphones.



Real-time call intelligence in Dynamics 365 Sales for third-party dialers

Improve lead qualification with intent detection

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Sep 2023	-	-

Business value

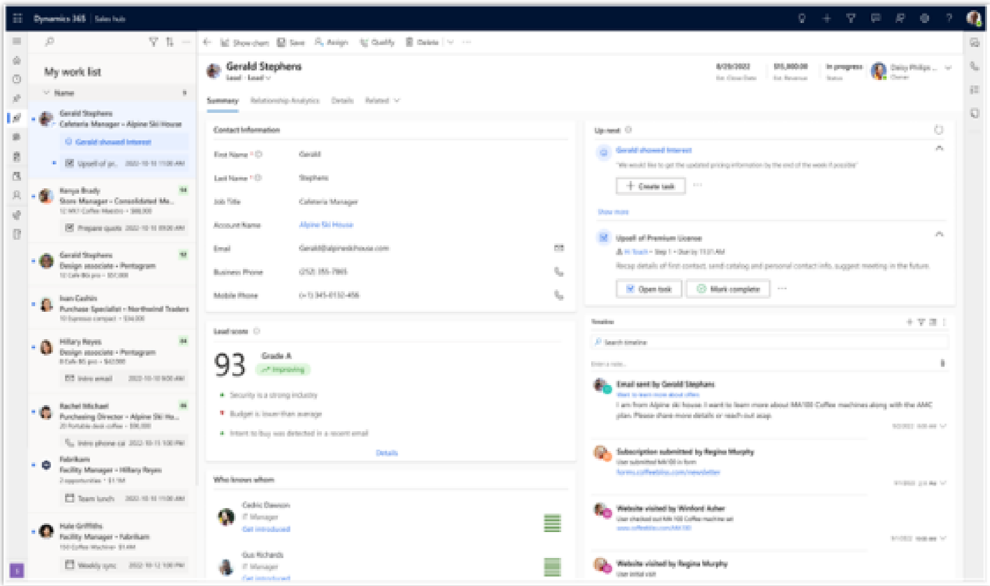
Sales teams receive millions of potential leads each year. Each lead requires a seller's time to analyze, engage and determine the potential customer's needs. Sellers' capacity and efficiency must be maximized while working on these leads. This new AI-based feature would detect customer intent from emails and ensure that good quality leads are acted upon by the sellers at the right time, thus saving precious time for the sellers. It helps sellers proactively engage with their customers.

This feature helps fast-track the lead qualification process, increasing sales effectiveness and creating operational efficiencies in the lead management process.

Feature details

As a seller, you'll be able to:

- Engage with the lead for the possible next steps based on the intent detected by the AI model, thus expediting the lead qualification process.
- Be proactive in your customer engagement and improve the sales process.



Intent detection lab prototype

Guide sellers to favorable sales outcomes with next best step

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Feb 6, 2023	Apr 2023

Business value

Multiple sales activities may be due for an account or deal for a seller to work upon. Guiding the sellers to work on these activities improves their customer interactions, leading to an enhanced sales relationship. It also makes them more efficient in completing the most important task.

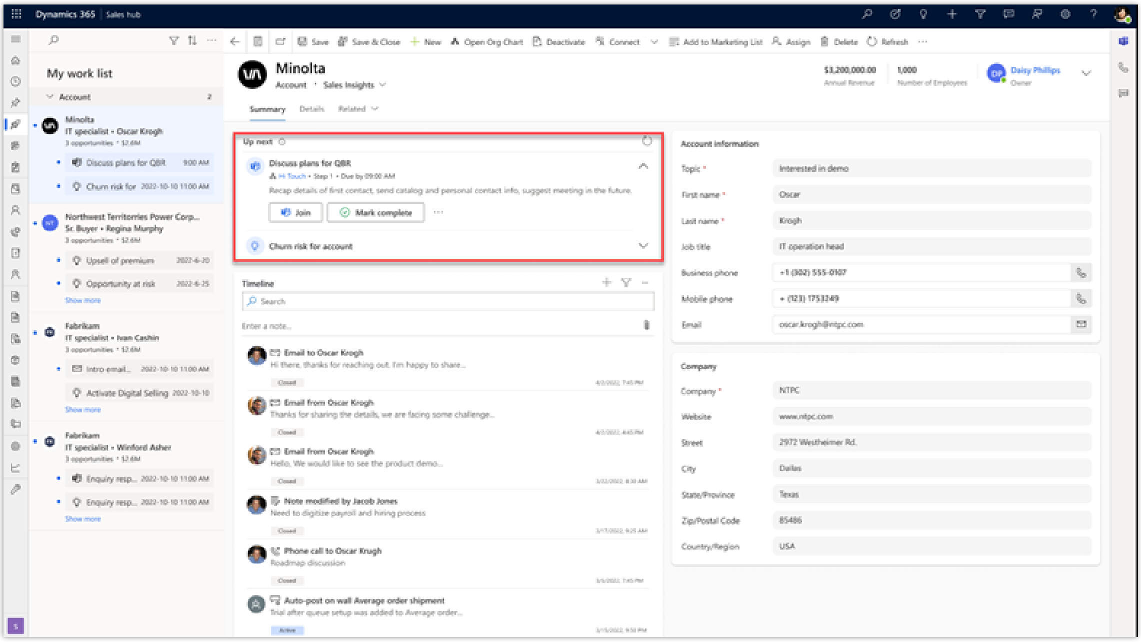
The enhanced up next widget can intuitively guide the sellers to focus on the critical task for an account or deal. It would also have intelligent suggestions and guided sales activities for the seller to focus upon.

Feature details

The Up next widget displays the upcoming actions assigned to that record. In the current release, you can see any scheduled activities to be completed, whether manually created or via a sequence. This is a great way to see the open actions for a particular record, such as an account. The widget is then visible to the seller within the Sales Accelerator or added to the form for the specific record type.

This new feature will enhance this working area to include intelligent AI-based suggestions within the same widget to help guide the seller on follow-up actions. Sellers will see the suggestion surface and can decide to take action or dismiss it. Typical suggestions can be as follows:

- Help in composing emails.
- Automatic follow-up tasks.
- Suggestions on product recommendations.



The new Up next widget

See also

[Understand the Up next widget](#) (docs)

Work efficiently with enhanced Sales accelerator worklist items

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Feb 6, 2023	Apr 2023

Business value

Sellers become frustrated when they must navigate between multiple screens to accomplish their tasks. This makes them inefficient, and they often lose the context of what they were working on. They would prefer to concentrate on selling activities for their account and deals in a simple and aggregated workspace.

The new sales accelerator worklist contains the activities that the seller needs to focus on and AI-based recommendations that could favorably impact the sales outcomes. A new prioritized view of the worklist items aggregated at an entity record provides a holistic view of the tasks that sellers should focus on, thus improving their customer engagement.

Feature details

The new worklist items would have the following capabilities:

- Ability of the sellers to view AI-based account suggestions and activities in a consolidated view.
- New enhanced look and feel of the worklist for an enhanced UI experience.

See also

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

Prioritize engagement for any sales entity by working in focus mode

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Feb 6, 2023	Apr 2023

Business value

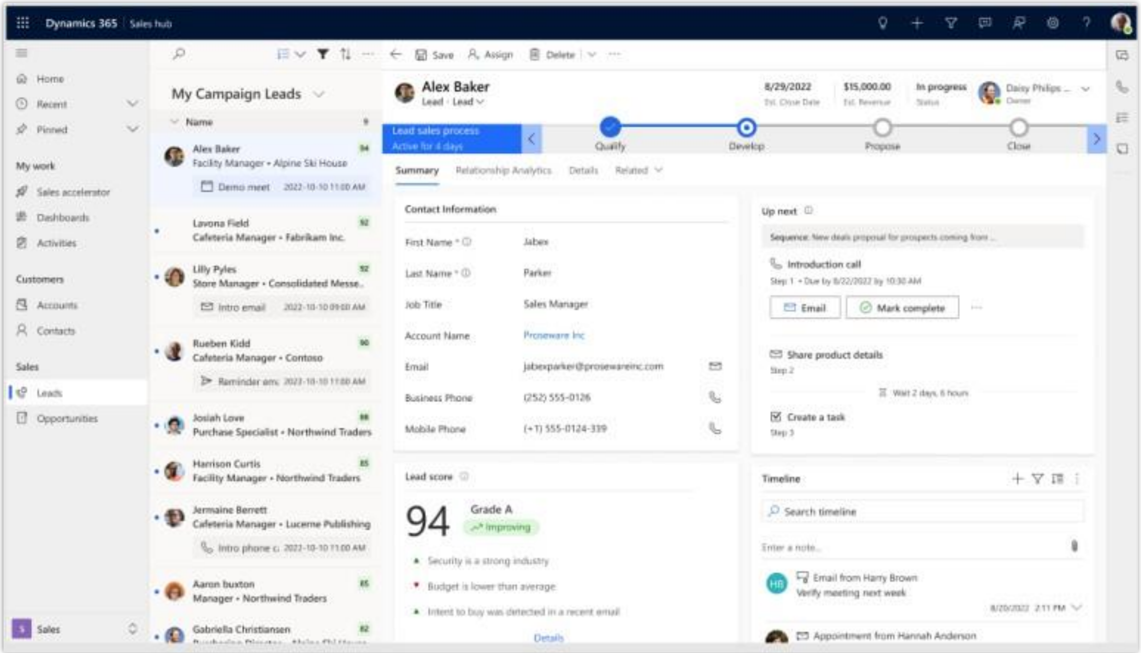
The sales accelerator experience is a great way to get a prioritized list of customers and an optimized workspace. It is a modern view that enables seamless navigation across records with activities associated without multiple context switches.

With this update, sellers can switch any sales view to focused mode to effectively work across their records regardless of whether they have a scheduled activity. This view is ideal for sellers who move across records quickly and need to conduct actions like prospecting calls, record updates, and action management.

Feature details

The functionality allows sellers to choose and work in the layout that works best for their use cases. The key capabilities include:

- Switch between the current grid and the focused view with one click.
- Get a consolidated set of filtering and sorting capabilities, including grid and focused view filters, to create a focused workspace.
- Define the structure and the fields you want to see as part of the work list cards in the focused view.



Focus View in Lead grid

See also

[View and manage records in focused view](#) (docs)

Engage with your Customers using SMS conversation

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Apr 2023	-	May 2023

Business value

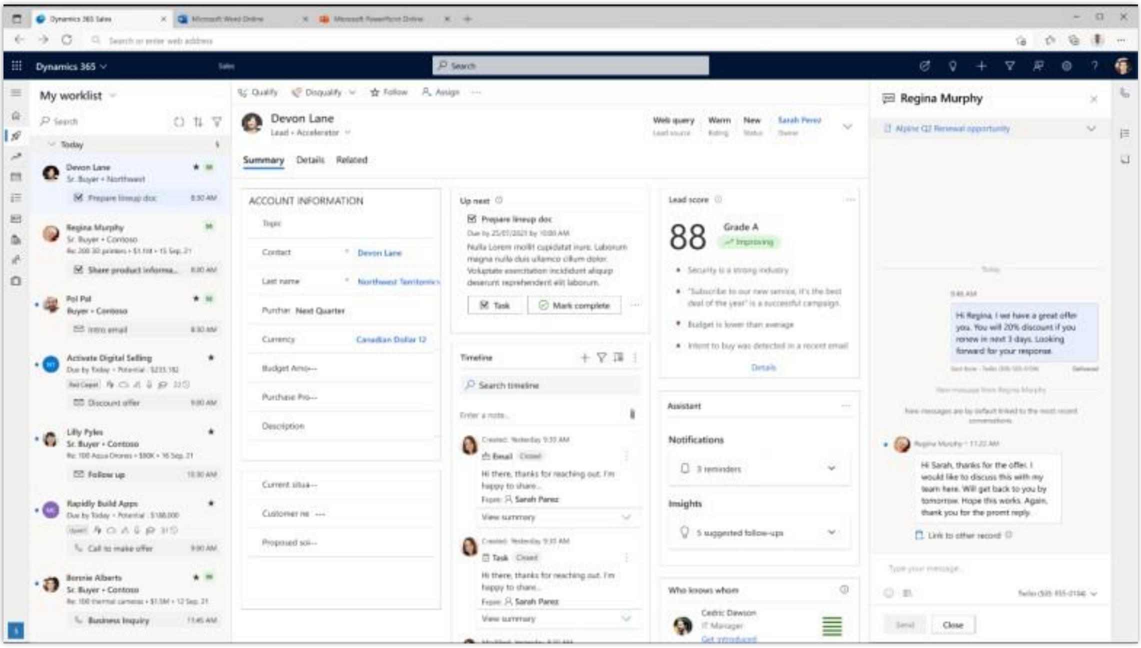
Effective customer engagement is an important means of building and maintaining customer relations to close deals in the current business-to-business industry. It is crucial to meet your customers where they prefer. As the world is changing towards a digital way of living, more and more customers prefer to be contacted via SMS. Even sellers find SMS a convenient and effective channel to send reminders, provide quick updates, or respond to customer queries. This feature will enable your sellers to engage with key customers and decision-makers via SMS during the ongoing sales process and build and maintain a lasting relationship.

Feature details

The key capabilities that your sellers will be able to use as part of this feature include:

- Admins will be able to assign specific numbers to any user/team for SMS.
- Receive customer responses for SMS sent and revert to build an ongoing conversation.
- Send and receive SMS from all relevant Dynamics 365 Sales entity forms.

- Get real-time notifications for incoming SMS.



SMS conversation

More effective customer engagement with sequence preview

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	May 2023

Business value

Sellers use sequences to follow activities and perform actions. They can connect an existing sequence to a record or create their own personalized sequence. Digital selling is a team activity wherein multiple sales team members work together to win a deal. For example, an account executive working on proposals and a solution architect helping with the implementation.

This feature helps sellers to preview a sequence and get an overview of sequence steps. The preview is required when you want to use or connect a sequence to a record. It enables team members to effectively work together and get details of sequences other team members follow for a shared account or opportunity.

Feature details

With this enhancement, you can:

- Get an overview of the sequence that shows the total number of steps, the number of days spent, the time required for completion, and other details.
- Find which team members completed different steps and who would work on future actions.
- View steps and activities that are completed or upcoming.
- View completion and due dates of sequence steps.

Streamline sequence creation process with your own templates

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Jun 2023

Business value

Sequences help you guide your sellers and improve their productivity. Sales managers regularly create sequences for different business scenarios. Today, managers design a sequence from scratch or can use an out-of-the-box system-provided template.

Sequence templates help you easily create new sequences and save you time. You can create templates and reuse those in different business scenarios. You can guide the team members to use your templates and modify them as per requirement. It is a great way to democratize sequences and streamline the sequence creation process.

Feature details

With this enhancement, you can:

- Create your own sequence template or convert a sequence into a template.
- As you create a new sequence, use your own template or out-of-the-box system-provided template.
- Share your sequence templates with team members.

Leverage manager dashboards to coach sellers

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Apr 2023	-	Sep 2023

Business value

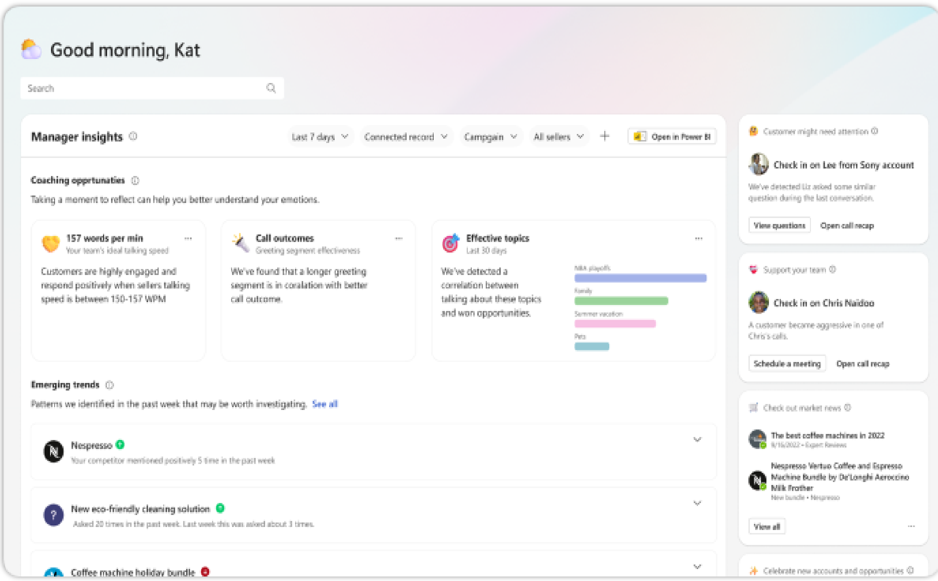
By analyzing aggregated customer interactions and seller behaviors, sales leaders can determine the effectiveness of their sales strategies, respond to market changes, and coach their sales staff more efficiently.

Feature details

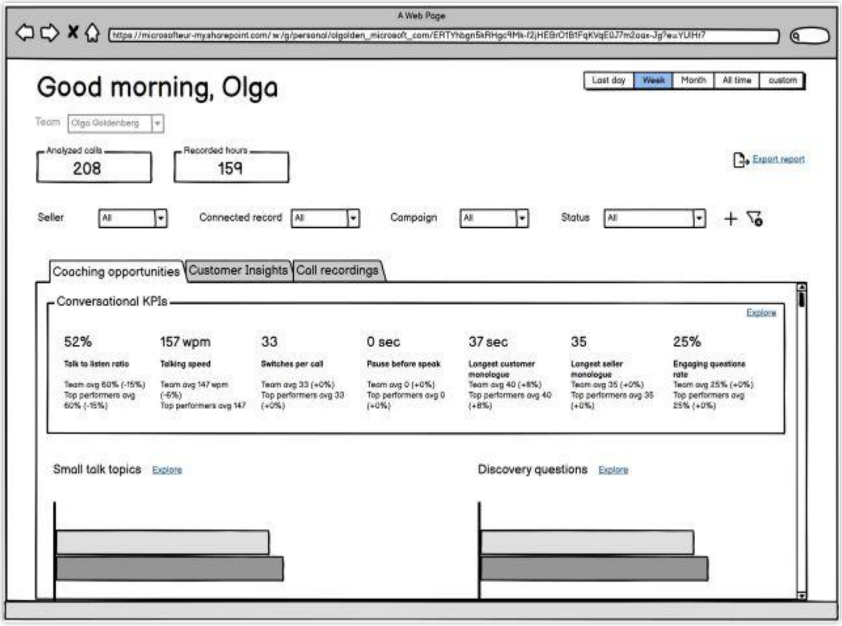
Managers can stay in touch with their field and sellers using the new manager insights dashboard for conversation intelligence.

In addition to the existing SCI dashboard functionality, as a sales manager, you'll be able to view:

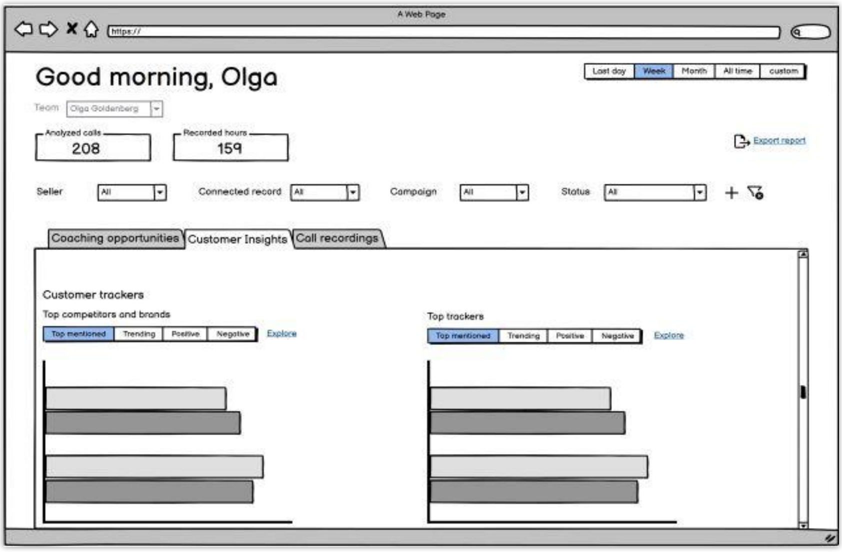
- Customer sentiment correlation with keyword and competitor mentions.
- Conversation style correlation to deal outcomes.
- Conversational KPI's over time.
- Holistic view of sellers' performances, as well as insight into conversation patterns that close deals.
- Messaging performance in the field and customer perceptions of the competitive landscape.
- Sales-oriented filters such as, call time and length, seller, connected record, connected record status, campaign, and more.



Manager's insights dashboard



Coaching opportunities exploration layer



Customer trackers enhancements

Get tips and suggestions while on a call with customer

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Jul 2023	-	Sep 2023

Business value

To make remote selling more powerful than face-to-face selling, it's important to surface real-time suggestions and tips while sellers are on a phone call with a customer. With this feature, sellers get real-time, AI-driven insights that enable them to easily access information on what to say when a sales call gets tough.

Feature details

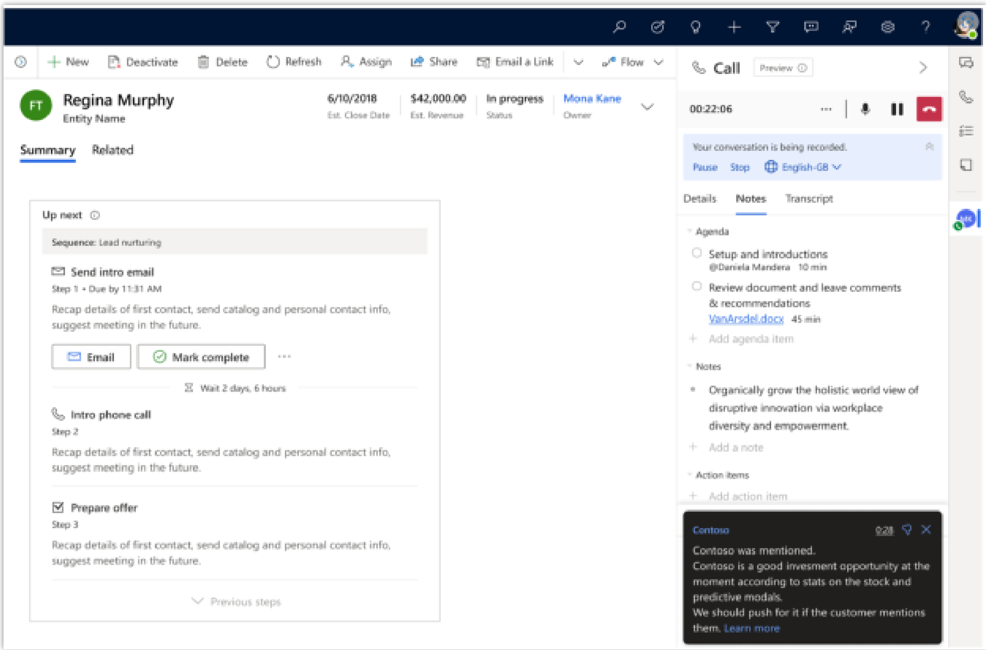
With this feature, conversation intelligence automatically surfaces real-time suggestions and tips while sellers are on a phone call with a customer.

As an administrator, you'll be able to:

- Enable the feature so your sellers can get real-time suggestions and tips.

As a seller, you'll be able to:

- Get suggestions on product and service details, competitive battle cards, brand info, pricing, and more, while you are on a call with a customer.



Battle card during a live call

Capture crucial details of a sales call

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Aug 2023	-	Sep 2023

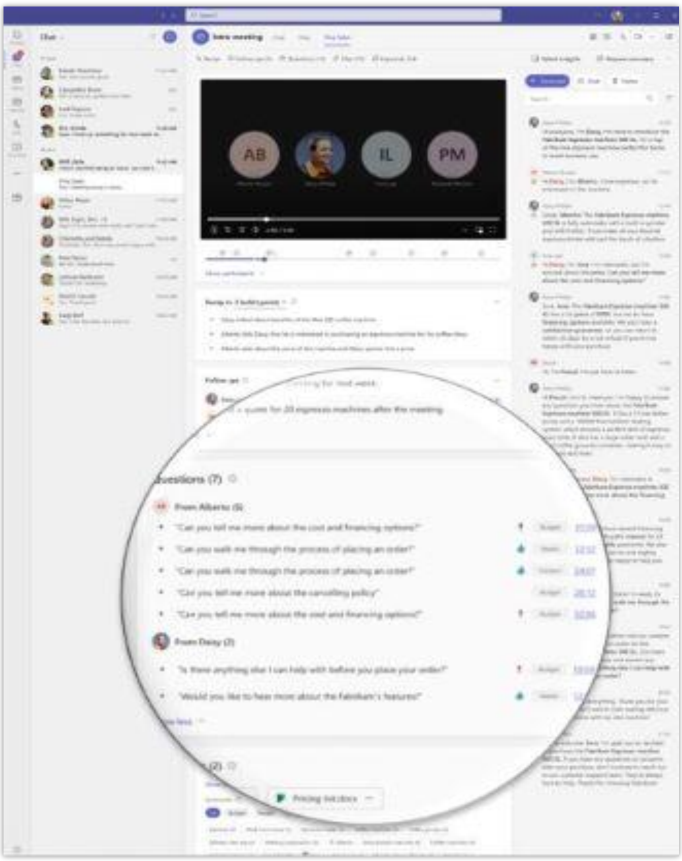
Business value

Make sure you never miss the most crucial sales call details, such as budget, authority, need, and timeline (BANT). In this release, conversation intelligence identifies discovery and sales-oriented mentions, surfacing these details in the call summary to ensure important signals are noticed to help progress their sale.

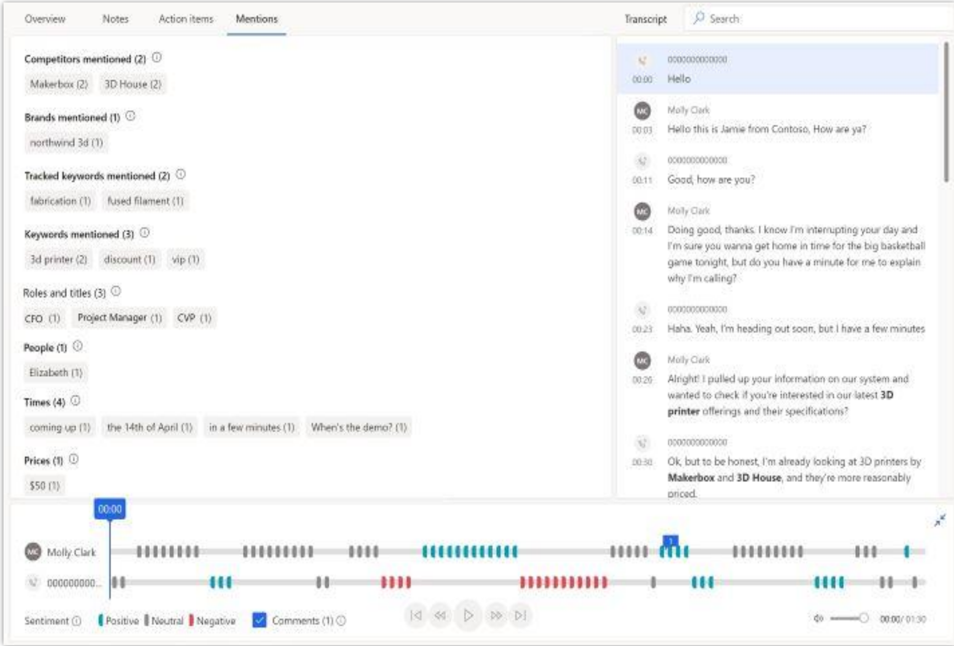
Feature details

As a seller or manager, you'll be able to see information related to budget, authority, need, and timeline (BANT) in the following places:

- BANT classification for detected questions.
- BANT-oriented call notes.
- BANT grouping of mentions, including a new category for a person's role, such as manager, VP, accountant, etc.
- BANT topics for playback segmentation.



BANT question categories



Roles and titles mentions category

Redact sensitive personal data from customer calls

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Feb 7, 2023	-	Sep 2023

Business value

When sellers engage with customers over a call, customers may share their data, such as credit card information, purely based on trust. It's vital to protect such sensitive data to help organizations build trust with their customers and comply with strict privacy regulations.

Feature details

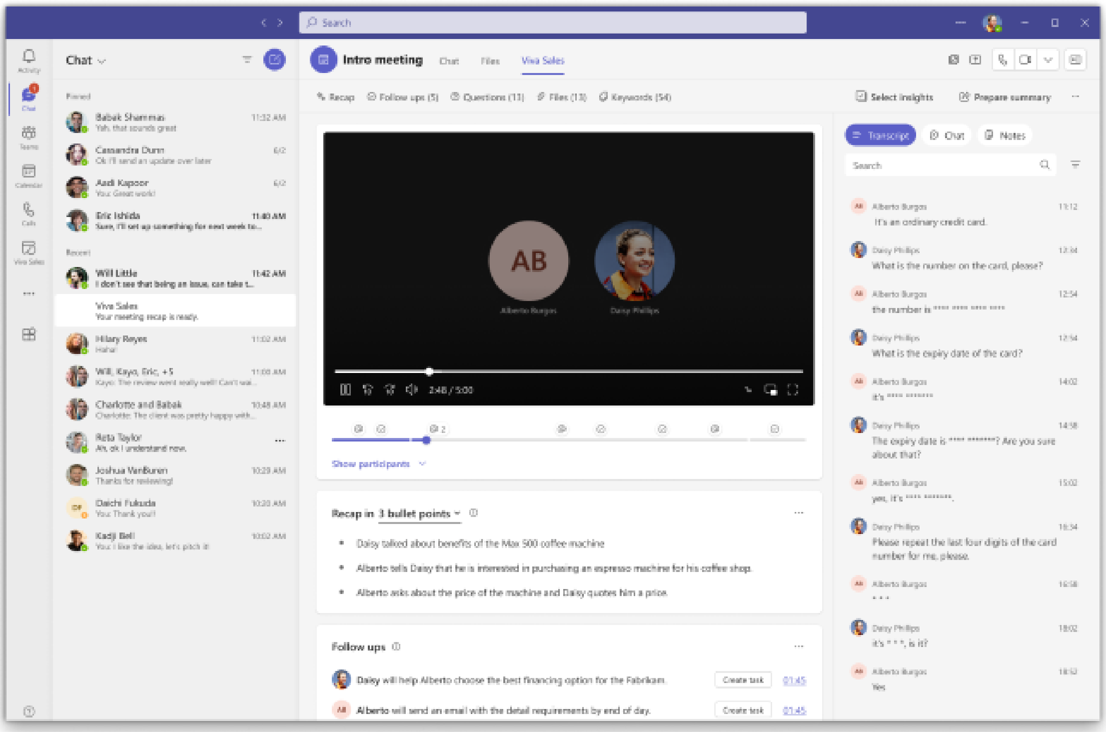
As part of the personal data redaction process, our AI technology identifies and masks sensitive information, such as credit card numbers and identifiers, in customer calls.

As an administrator, you'll be able to:

- Enable the feature so that sensitive information will be redacted in all future calls

As a seller, you'll see,

- Sensitive information related to credit cards is redacted from call summaries, transcripts, notes, and action items.



Call with redacted credit card information

See also

Hide personal data preview (docs)

Efficient account-centric selling with multiple sequences for a record

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2023	-	To be announced

Business value

Multiple sellers work together on the same account or opportunity, and those sellers follow a different yet coordinated set of actions to win a deal. Sellers need to know which other team members are working on that account or opportunity, the activities they are doing, and the sequences attached to that record. Sellers need to be aware of the changes happening to their accounts.

With this change, you can now assign different sequences to different sellers for a particular record at the same time. You can guide multiple sellers to work together and win a deal. For example, assign one sequence to an account executive and another sequence to a solution architect while they both work on a target account simultaneously. Sales team members can attach a sequence to a record even if they are not the owner of that record, and can easily view details of any sequence.

Feature details

With this enhancement, the sales manager or the operation team can:

- Use segments to define rules that can automatically connect multiple sequences to a record.
- Assign multiple sellers to work on different sequences for a particular record at the same time.

This will enable sellers to:

- View team members that are also using sequence on a record.
- Attach a sequence to a record.
- View details of a sequence and find a list of completed and upcoming activities.

Sales execution and sales force automation

Overview

The sales execution and sales force automation capabilities in Dynamics 365 Sales allow sellers to be more productive and efficient in their core area of work – selling. These capabilities help sellers initiate a campaign, generate leads, assign leads to sellers, convert those leads to opportunities, manage accounts and contacts, and manage all activities around leads and opportunities until the deal is closed.

The following capabilities are planned for this release wave to enhance sales execution and sales force automation:

- Prevent duplicate leads from entering the system either through manual creation or bulk import.
- Get follow-up tasks created automatically based on information from various Office applications like emails, Teams messages, and Teams call transcripts, and get friendly reminders to help you complete those tasks.
- Create opportunities with ease by using the new version of input forms that declutter information with an enhanced visual layout.
- Use the AI-powered solution to get account-based suggestions for targeted selling and precise workflows to leverage.
- Create a customer org chart so that sellers know the roles of contacts in the organization and view the relationship map.

Provide intelligent suggestions to improve seller effectiveness

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	May 2023	-	-

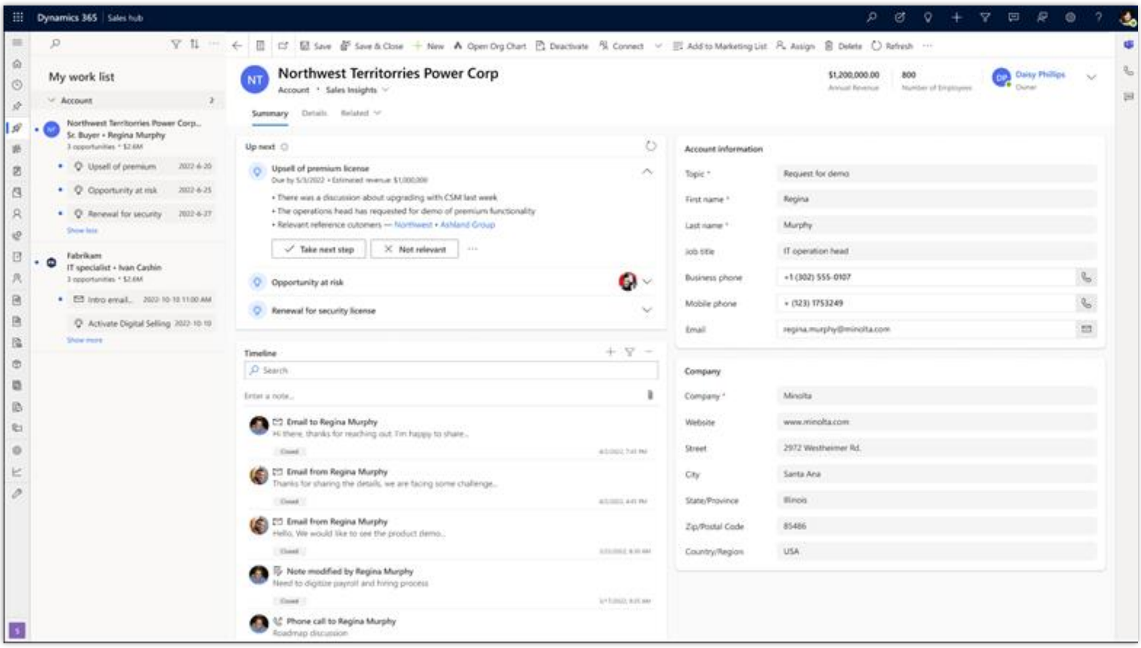
Business value

Enable sellers with relevant insights and workflows that help them spend more time intelligently and effectively engaging with accounts and less time hunting for information. With the help of the suggestions, the sellers can focus on the right tasks for the accounts and thus boost their productivity.

Feature details

An easy-to-use, AI-powered suggestions solution to deliver the following information:

- A curated list of account-based suggestions for targeting the prioritized list of accounts.
- Sellers can follow the precise workflows to leverage the suggestions for improving sales effectiveness.
- Sellers can seamlessly collaborate with the team to collectively work on suggestions.



Intelligent suggestions

Visualize key stakeholders and take action with the smart organization chart

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Jun 2023	-	-

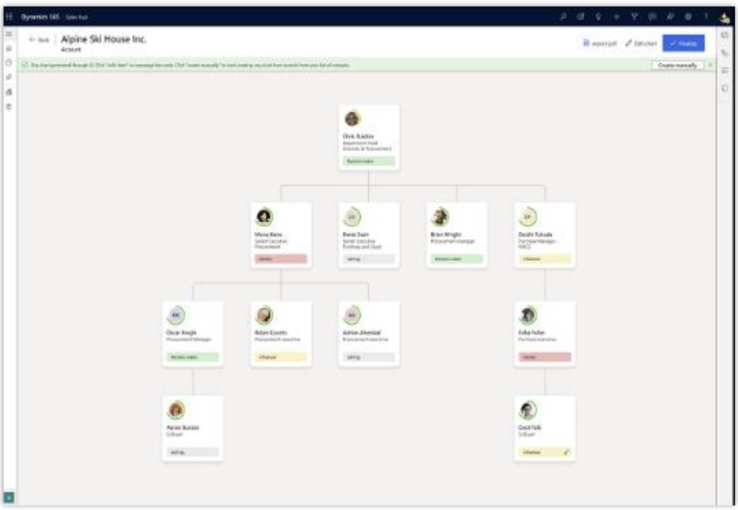
Business value

Formulate the right engagement plan to reach out to the right stakeholders. Account team members often need help identifying the right stakeholders within a customer organization for their deals. Sellers typically engage only with a fraction of the buying committee, which could lead to missed upsell/ cross-sell opportunities. There is a need to capture the buyers' roles easily but also get a snapshot of the contact's activity levels with your organization to see if this is a stakeholder who needs more attention. With the new org management feature, you can build and visualize your customer organization for maintaining a healthy business relationship.

Feature details

This new feature would have the following capabilities:

- Sellers/account managers can quickly create their customer org chart to understand the various stakeholders for an account.
- Maintain a relationship map to identify, engage and grow your network of customer contacts.
- Activity view of the contacts/stakeholders will enable you to understand your customer better.



Smart org chart lab prototype

Automate the creation of follow-up tasks

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Jul 2023	-	-

Business value

Sellers are informed of their follow-up tasks via multiple channels like calls, messages, and emails. Manually creating follow-up tasks can be cumbersome and prone to misses and creating the follow-ups should not become another task. With this new AI-based feature, you can automate the creation of follow-up tasks, giving you back valuable time to focus on higher-priority items and avoid important tasks from falling through the cracks. The system automatically captures your follow-up tasks from various Office applications like emails, Teams messages, and Teams call transcripts, then nudges you with friendly reminders, thus enabling you to take them toward completion.

Feature details

As a seller, you'll see that:

- Follow-up tasks are automatically created based on emails, Teams messages, and calls.
- Follow-up tasks are available for quick reference from within the Up Next widget.

Identify cross-sell and upsell opportunities with timely product recommendations

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Aug 2023	-	-

Business value

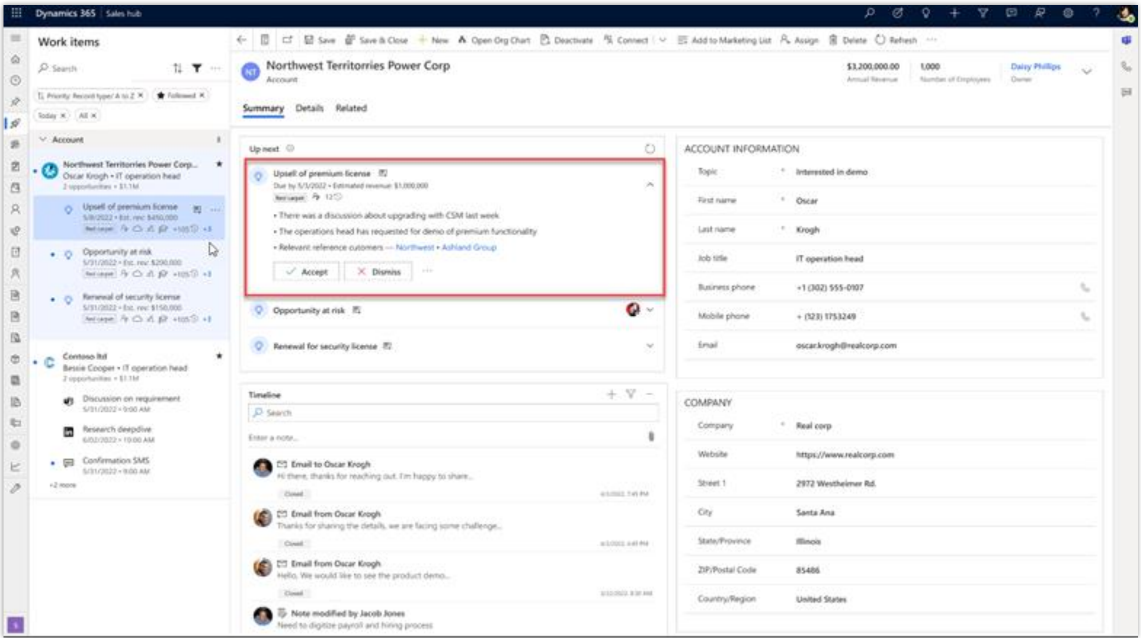
It takes more time, money, and effort to sell to a new customer than to sell to an existing one. Hence, sellers should equally focus on cross-selling to current customers as much as selling to new customers. The likelihood of the cross-selling and upselling strategy being successful is directly tied to the relevance of the product recommendations. AI-based product recommendations can leverage historical data to suggest the right product to sellers while they're working on an opportunity.

Account executives and sellers deal with multiple customers for selling different products. Proposing the right products to the right customer at the right time is critical for the success of a deal. Sellers need an extra bit of help to upsell and cross-sell products to increase their deal size and suggest the right product to customers. They want to leverage the transactional data that is available within the application to propose the right products to their customers.

Feature details

An artificial intelligence feature that considers historically successful deals and proposes products with upsell and cross-sell opportunities for creating new opportunities and increasing their deal size.

- As an administrator, you'll be able to enable and set up product recommendations.
- As a seller, you'll be able to view product recommendations while adding products to an opportunity.



Product recommendations

Get improved user experience with new and enhanced opportunity form

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓ Feb 6, 2023	Apr 2023

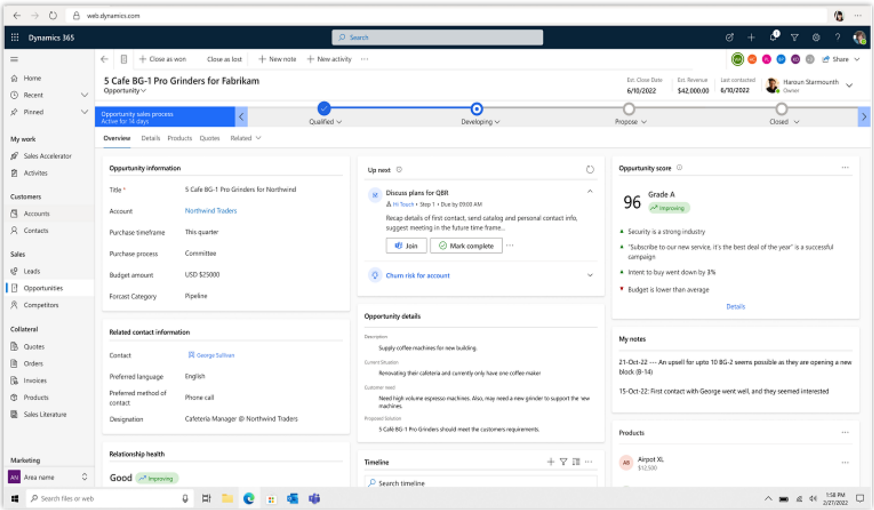
Business value

Sellers spend a lot of time in Dynamics 365 Sales to view and update information for different entities such as lead, opportunity, contact, and account. Sellers must maintain strong relationships with their clients; to do so, they need the correct information at the right time and place. A user-friendly environment improves seller productivity and makes it fun to work with the system. This update provides a new and improved version of input forms by decluttering information and an enhanced visual layout.

Feature details

This update provides the following:

- Changed the proportion of the out-of-box opportunity form columns to provide a wider central column for clear, actionable insights.
- Rearranged the command bar to provide the most frequently used buttons up-front.
- The account to which an opportunity is linked is mapped in the header.
- Added chevrons at the end of each BPF stage to highlight the button.
- Added widget headers "Key details" and "More info" for clarity of information.
- To provide consistency throughout the opportunity form, change all of the header and field values to sentence case.



Improved Opportunity Form

Stay on top of routing issues with harmonized monitoring

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	May 2023

Business value

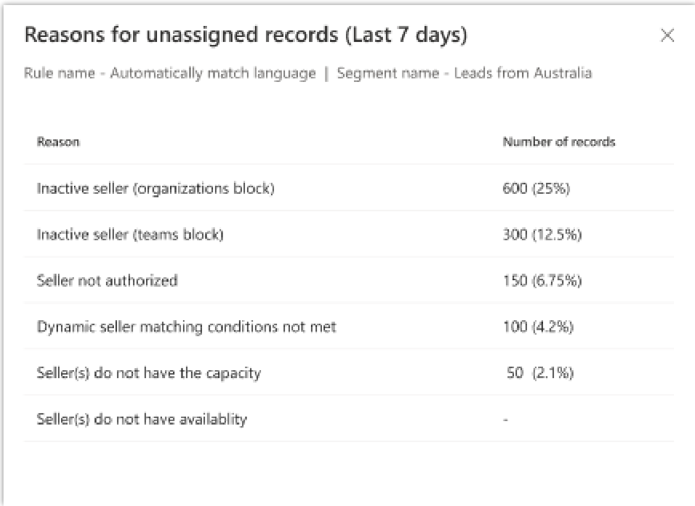
When records flow through the automated routing pipeline, various technical and business issues may be encountered during segmentation, seller assignment through assignment rules, and sequence connection and disconnection. It is important to clearly understand where the record is stuck to either process it again or take action manually.

With this feature, you can monitor the entire pipeline for each record through a single-screen experience and take action as needed.

Feature details

With this feature, as an administrator or sales manager, you'll be able to do the following actions:

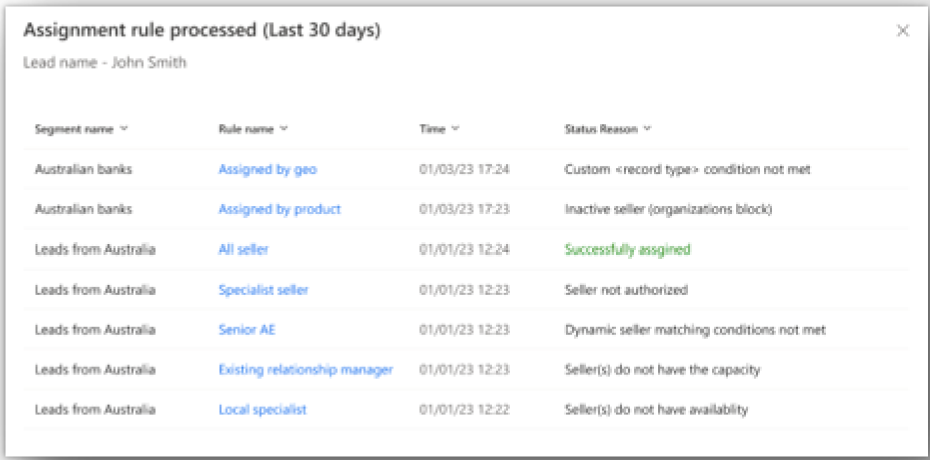
- View key pipeline statistics for the records and take action.
- View records successfully processed with details around what rule resulted in the success.
- View records that errored out due to a technical or business issue encountered. You'll see the step it has errored out (segmentation, seller assignment, sequence connection) and the reason.
- Initiate reprocessing of the errored records through the engine, or perform a manual assignment of seller and sequence.


Reasons for unassigned records (Last 7 days)

Rule name - Automatically match language | Segment name - Leads from Australia

Reason	Number of records
Inactive seller (organizations block)	600 (25%)
Inactive seller (teams block)	300 (12.5%)
Seller not authorized	150 (6.75%)
Dynamic seller matching conditions not met	100 (4.2%)
Seller(s) do not have the capacity	50 (2.1%)
Seller(s) do not have availablity	-

Showing reasons for unassigned records.



A journey of leads through segments and rules with statuses at each stage.

Automatically assign multiple sequences to a record

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2023	-	Aug 2023

Business value

When a deal requires multiple sellers to work on independent tasks, it is important to have a clearly defined sequence of tasks for each seller to avoid duplication and overlapping activities.

Feature details

This feature lets you do the following activities:

- Automatically assign multiple sequences to a record based on business rules.
- Define sequence owner based on record attributes by allowing multiple sellers to execute different sequences for the same record.
- Define different rules and conditions for each sequence so that only you can attach relevant sequences to the record.

Use statistics to improve assignment rule effectiveness

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2023	-	Aug 2023

Business value

Sales managers spend a lot of time assigning leads and opportunities to relevant sellers for closing deals. Delay in seller assignment leads to loss of business or delay in closing. Automated seller assignments based on continuously improved rules will help sales managers hit their targets.

Feature details

The following statistics and actions will be shown when a sales manager or systems administrator launches the assignment rules setup screen.

- Percentage of records created in the past days that were automatically routed through assignment rules.
- Effectiveness of each assignment rule by comparing the ratio of assigned to unassigned records and providing guidance on the reasons for unassignment.

Plan and prepare for Viva Sales in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Viva Sales**.

Overview

Viva Sales is the first Viva application designed to improve the employee experience for a specific role: sellers. Viva Sales brings together a seller's customer relationship management (CRM) system, Microsoft 365, and Microsoft Teams to provide a streamlined and AI-powered selling experience.

With Viva Sales, sellers can see customer information and relevant insights where and when they need it, enabling them to save time and return to what they love—connecting with customers and closing deals.

Designed for seller productivity in Microsoft Office and Microsoft Teams, Viva Sales delivers:

- Real-time business context from a seller's CRM system of record (supporting Salesforce and Dynamics 365 Sales).
- Purpose-built actions and experiences in a seller's flow of work to help move deals forward.
- AI-powered insights that help sellers build strong customer relationships faster with suggestions, recommendations, and tips to close.

Viva Sales does all this while keeping the CRM up to date, eliminating the need for sellers to switch applications and context.

For 2023 release wave 1, we continue to optimize the seller experience in Microsoft Teams and Outlook—using data and AI to help sellers remain in their flow of work. Viva Sales brings the system of record and productivity tools together to meet sellers where they are and surface in-context collaboration experiences that improve engagements and help sellers reclaim time to focus on customer connections.

Do you have a new feature idea or some feedback? We encourage you to connect with us at [Microsoft Viva Sales - Community]

Investment areas

Teams collaboration
Enable sellers to improve collaboration and group productivity by bringing together the right members, and provide them with contextual insights and tools.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Viva Sales** below:

Check out the release plan

For application administrators

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

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

Get the most out of Viva Sales

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Viva Sales.
Product documentation	Find documentation for Viva Sales.
User community	Engage with Viva Sales experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Viva Sales.

What's new and planned for Viva Sales

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

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.

Teams collaboration

Improve sales team engagement through integrated collaboration experiences.

Feature	Enabled for	Public preview	General availability
Empower sellers to collaborate in teams, channels using sales templates	Users by admins, makers, or analysts	-	Jun 2023

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience 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.

Teams collaboration

Overview

Enable sellers to improve collaboration and group productivity by bringing together the right members, and provide them with contextual insights and tools.

Empower sellers to collaborate in teams, channels using sales templates

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jun 2023

Business value

Bring together the right users, contextual insights, and productivity apps to boost seller collaboration in Teams. Viva Sales makes internal and external collaboration center stage. Sellers can use sales templates to create a collaboration space. Sales templates speed up structured team/channel creation with predefined channels, prepinned apps, and integrated access to CRM data.

Feature details

With this feature, sellers can:

- Set up a team to collaborate on account-related activities by applying an account team template.
- Set up a team to collaborate on opportunity-related activities by applying a deal room template.
- Add recommended team members to the team during setup to jumpstart collaboration.
- Communicate with customers in secure shared channels.
- Easily access business data in the flow of their work by navigating to the pinned CRM record tab (account/opportunities are pinned based on the template applied).
- Organize documents in a predictable fashion using starter folders.
- Access, from Teams, linked documents configured in a CRM—one app with all the required data.
- Stay productive by taking notes in a prepinned OneNote app.

Service

Plan and prepare for Dynamics 365 Customer Service in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Service**.

Overview

Video: Learn about this product's new capabilities

Dynamics 365 Customer Service is a part of the Digital Contact Center Platform that provides best-in-class customer service through live customer engagements, agent collaboration, advanced telephony, and AI-based analytics. Advanced routing, case management, knowledge management, assistive AI, and embedded Microsoft Teams capabilities maximize agent productivity, while simplified administration and integrated analytics optimize contact center operations. Organizations can provide an omnichannel experience with chat, voice, social, and business messaging channels.

In 2023 release wave 1, our focus is on delivering the following capabilities:

- Enhanced case creation
- Channel-based swarming with Microsoft Teams
- Availability of the voice channel in more regions
- Robust real-time analytics
- Customizable data models for analytics reports

Investment areas

Agent experiences

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

In 2023 release wave 1, the following features are aimed at further empowering agents to deliver quality services:

- Create and manage cases efficiently with enhanced case form.
- Case management enhancements.
- Enhancements to the email template selection experience.
- Enhancements to the email template creation experience.
- Enhanced Customer Service workspace layout.
- Enhanced conversation auto-summarization experience.
- Accelerate time to resolution with AI-suggested replies.
- Mark knowledge articles as favorite.
- Forecast case volumes daily and at 15-minute intervals.
- Forecast agent demand to handle customer conversations daily and at 15-minute intervals.

Supervisor experiences

The supervisor experience is targeted at customer service managers and analysts. The key operational metrics allow supervisors to continuously monitor and do course corrections like intervene if customer sentiment becomes negative, improve agent staffing to optimize productivity, and help keep service levels high.

The enhancements in 2023 release wave 1 will empower supervisors to get historical and near real-time insights on the performance of the contact center. If you find that your supervisors need additional metrics to improve your contact center efficiency, you can now customize the data models to add new metrics and report on custom entities.

Teams integration

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

Omnichannel

Omnichannel capabilities in Dynamics 365 Customer Service enable organizations to instantly connect and engage with their customers via channels like live chat, SMS, voice, and social channels. By providing a seamless agent experience and valuable conversation insights across channels, omnichannel capabilities enable organizations to deliver a true, all-in-one contact center.

In 2023 release wave 1, the following features will help deliver a more secure, robust, and efficient service experience:

- Integrate Nuance Gatekeeper to reduce fraud and improve trust.
- Integrate Nuance interactive voice response (IVR) system to provide continuous self-service to your customers.
- Enable your customers to request a callback from agents and help them avoid waiting in queues to speak to agents.
- Enable Customer Service workspace to be available by default for security roles in Omnichannel for Customer Service.

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

In 2023 release wave 1, the following features will help improve operational efficiency of the contact centers:

- Allow customization of data models for historical analytics reports.
- Integrate and use external knowledge sources in knowledge management search.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Customer Service** below:

Check out the release plan

For application administrators

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

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Get the most out of Customer Service

Helpful links	Description
Release plan	View all capabilities included in the release.
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Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Customer Service.
Product documentation	Find documentation for Customer Service.
User community	Engage with Customer Service experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Customer Service.

What's new and planned for Dynamics 365 Customer Service

This topic lists features that are planned to release from April 2023 through September 2023. 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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Administrator experiences

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

Feature	Enabled for	Public preview	Early access*	General availability
Improvements to agent experience profile assignment	Users by admins, makers, or analysts	-	-	Apr 2023
Integrate and search external knowledge sources	Users by admins, makers, or analysts	Feb 2023	-	Apr 2023

Agent experiences

Enable agents to handle multiple interactions, interact with multiple apps without losing context, and enhance workflows with productivity tools.

Feature	Enabled for	Public preview	Early access*	General availability
Accelerate time to resolution with AI-suggested replies	Users by admins, makers, or analysts	Apr 2023	-	-
Keep track of conversations with AI-generated summaries	Users by admins, makers, or analysts	Apr 2023	-	-
Create and manage cases efficiently with enhanced case form	Users by admins, makers, or analysts	-	-	Apr 2023
Find email templates faster with enhanced selection	Users by admins, makers, or analysts	-	-	Apr 2023
Improve agent productivity in timeline	Users by admins, makers, or analysts	-	-	Apr 2023

Feature	Enabled for	Public preview	Early access*	General availability
Access improved customer summary form	Users by admins, makers, or analysts	-	-	Apr 2023
Create email templates with new template designer	Users, automatically	-	Jan 2023	Apr 2023
Enhancements to simplify case management	Users, automatically	-	✓ Feb 6, 2023	Apr 2023
Multitask efficiently with enhanced workspace layout	Users, automatically	-	✓ Feb 6, 2023	Apr 2023
Mark knowledge articles as favorite	Users, automatically	-	✓ Feb 6, 2023	Apr 2023
Forecast agent demand to handle customer conversations	Users by admins, makers, or analysts	Apr 2023	-	To be announced
Forecast case volumes daily and at 15-minute intervals	Users by admins, makers, or analysts	Apr 2023	-	To be announced

Omnichannel

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

Feature	Enabled for	Public preview	Early access*	General availability
Enable customers to keep queue spot, get callbacks	Users by admins, makers, or analysts	-	-	Apr 2023
Customize, extend the conversation entity	Users by admins, makers, or analysts	-	-	Apr 2023
Improved authentication in Apple Messages for Business	Users by admins, makers, or analysts	-	-	Apr 2023
Make Customer Service workspace app available for omnichannel roles by default	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Feature	Enabled for	Public preview	Early access*	General availability
Integrate Nuance IVR with Customer Service	Users by admins, makers, or analysts	-	-	Jun 2023
Integrate Nuance Gatekeeper with Customer Service	Users by admins, makers, or analysts	May 2023	-	To be announced

Supervisor experiences

See the enhancements in 2023 release wave 1 that enable supervisors to monitor and improve contact center operations.

Feature	Enabled for	Public preview	Early access*	General availability
Customize visualization of omnichannel real-time analytics dashboards	Users by admins, makers, or analysts	✔ Oct 31, 2022	-	Apr 2023
Personalize out-of-the-box real-time analytics reports	Users by admins, makers, or analysts	✔ Oct 31, 2022	-	Apr 2023
Monitor support operations in near real time	Users by admins, makers, or analysts	✔ Oct 31, 2022	-	Sep 2023

Teams integration

Provide your agents with seamless integrations between Dynamics 365 and Microsoft Teams.

Feature	Enabled for	Public preview	Early access*	General availability
Use customer support swarming for complex cases	Users by admins, makers, or analysts	Apr 2023	-	-
View Teams chat on the connected record's timeline	Users by admins, makers, or analysts	Apr 2023	-	-
Dynamics 365 links are unfurled in Teams chats	Users, automatically	-	✔ Aug 1, 2022	Apr 2023

Feature	Enabled for	Public preview	Early access*	General availability
Keep chat participants informed when fields are updated	Users by admins, makers, or analysts	-	-	Apr 2023

* You are able to opt into some features as part of early access on February 6, 2023, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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Administrator experiences

Overview

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

In 2023 release wave 1, the following features will help improve operational efficiency of the contact centers:

- Allow customization of data models for historical analytics reports.
- Integrate and use external knowledge sources in knowledge management search.

Improvements to agent experience profile assignment

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2023

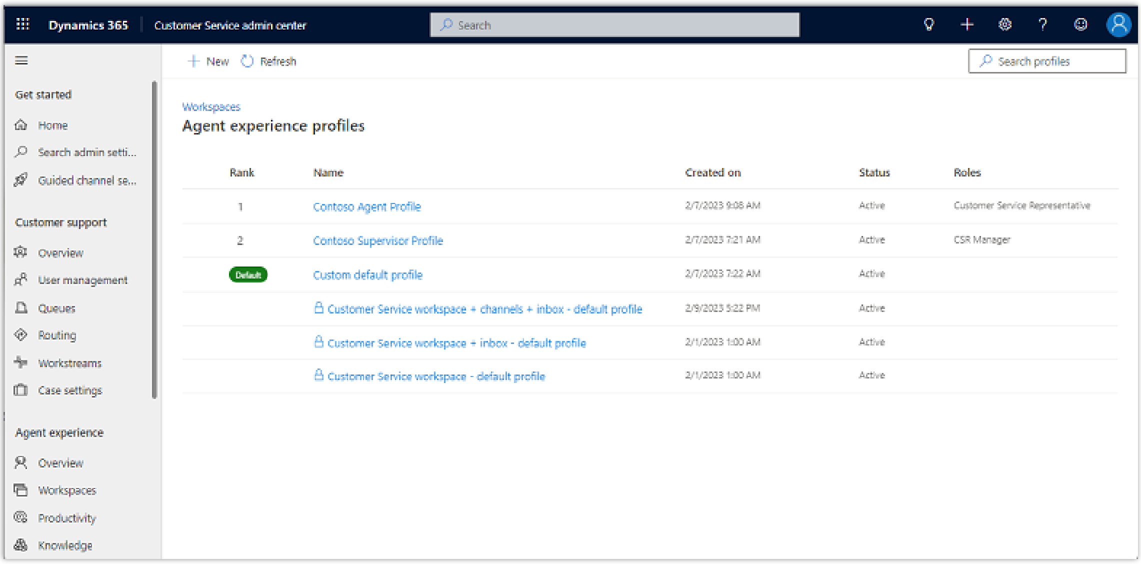
Business value

Agent experience profiles are an alternative to building and maintaining custom apps and help create targeted app experiences for agents and supervisors. Administrators can use agent experience profiles to create custom profiles with specific session templates, conversation channels, and productivity tools. The profiles can then be assigned to all users as a default profile or mapped to security roles.

Feature details

Administrators can now do the following:

- Set a custom agent experience profile as the default profile.
- Associate an agent experience profile with a security role.



Improvements to agent experience profile assignment via Customer Service admin center

Integrate and search external knowledge sources from Dynamics 365

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Feb 2023	-	Apr 2023

Business value

Organizations may have knowledge content spread across multiple sources. Examples include line-of-business knowledge-based websites and third-party knowledge management systems. Having the ability to identify the most relevant and contextual content across knowledge sources will help agents find the most suitable solution for your customers easily.

Feature details

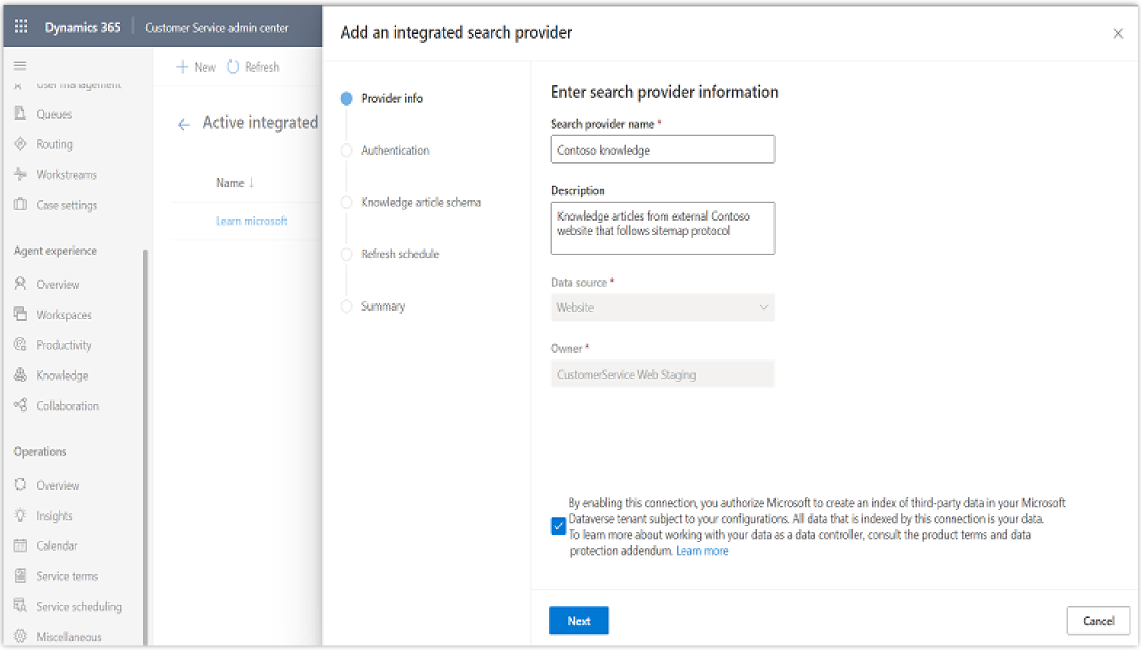
Integrated search providers allow you to configure external data sources such as enterprise websites that are based on the sitemap protocol. Content is ingested from external sources into Microsoft Dataverse and then search capability is provided across all sources.

Highlights of the feature for administrators include the following:

- Configure data from external data sources.
- Set up a data refresh schedule to specify the refresh frequency of the ingestion service that will capture newly created or updated articles and also any data that might have been missed during syncing and ingestion.

Highlights of the feature for agents include the following:

- View a consolidated list of relevant search results from Dataverse and external sources for their search query.
- View the list of relevant search results provided in a single ranking across data sources.



Add an integrated search provider.

Agent experiences

Overview

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

In 2023 release wave 1, the following features are aimed at further empowering agents to deliver quality services:

- Create and manage cases efficiently with enhanced case form.
- Try case management enhancements.
- Try enhancements to the email template selection experience.
- Enhancements to the email template creation experience.
- Enhanced Customer Service workspace layout.
- Enhanced conversation auto-summarization experience.
- Accelerate time to resolution with AI-suggested replies.
- Mark knowledge articles as favorite.
- Forecast case volumes daily and at 15-minute intervals.
- Forecast agent demand to handle customer conversations daily and at 15-minute intervals.

Accelerate time to resolution with AI-suggested replies

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Apr 2023	-	-

Business value

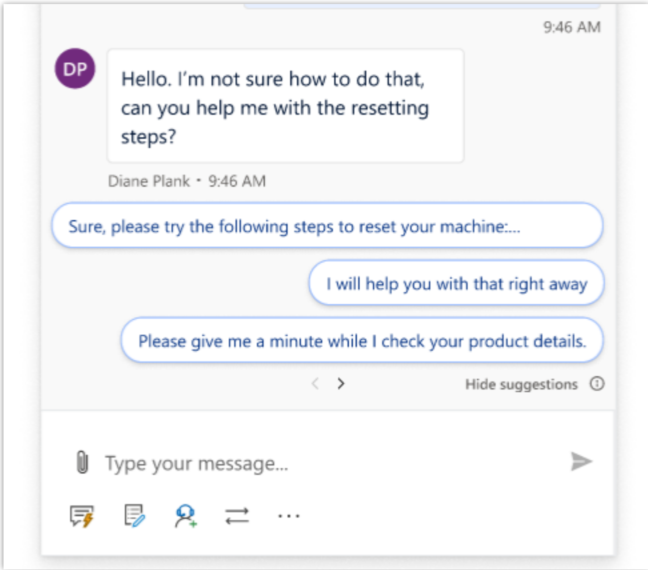
Support advocates today face challenges in finding the right response to send to customers. They often resort to solutions such as sticky notes or documents to maintain manually templated responses or draft the replies manually. Suggested replies will address this challenge by providing agents with multiline prompts and response suggestions in the chat control based on the context of an ongoing conversation. The model learns from the organization's chat history and adapts over time so that response suggestions are always relevant and of high quality. This will drive significant improvements in key contact center metrics including handle time, throughput, and agent satisfaction.

Feature details

Suggested replies in Customer Service will be powered by the state-of-the-art natural language processing technology used in Nuance Agent Coach. The highlights of the feature include:

- Intuitive, real-time suggested replies for agents directly in the digital messaging experience.
- Automated named-entity recognition and population that provides personalized responses for each user.

- Simplified data configuration experience to curate the reply set.
- Robust reply management experience for admins that provides visibility into the discovered responses and the ability to edit or consolidate responses.
- On-demand model retraining to ensure the model is always up to date and accurate.
- Unique models for each organization trained on historical support conversation data.



Suggested replies chat experience

Keep track of conversations with AI-generated summaries

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Apr 2023	-	-

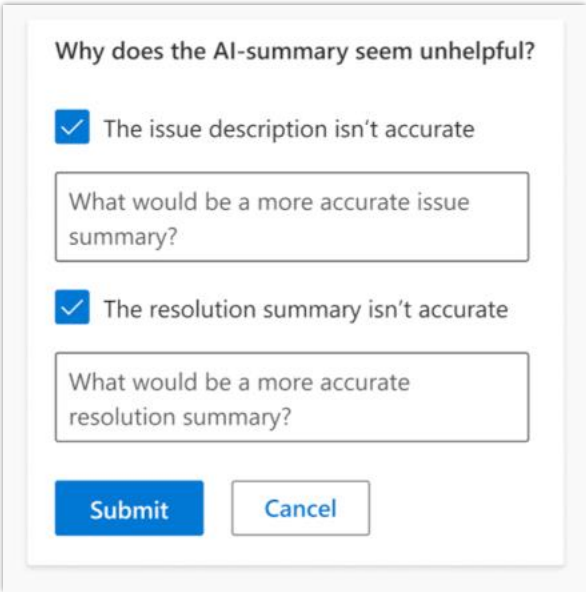
Business value

AI-generated conversation auto-summarization makes it easier to get and share conversational context, whether you're catching up on a conversation, wrapping up a case, or working with other agents to solve a customer's issue. Using these AI-generated summaries, you can quickly share context about the customer's issue, and the resolutions tried. With structured context, you can collaborate with other agents and subject matter experts to resolve the customer's problem faster and more effectively.

Feature details

The conversation auto-summarization feature in Dynamics 365 Customer Service allows agents, supervisors, and subject matter experts to get better summaries with improved user experience with actions such as copying the summary, creating a case from the summary, and the ability to provide feedback. Highlights include:

- Refinements to the generated summaries
- Enhancements to the summary user interface
- Improved feedback collection



Summary feedback collection experience

Create and manage cases efficiently with enhanced case form

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2023

Business value

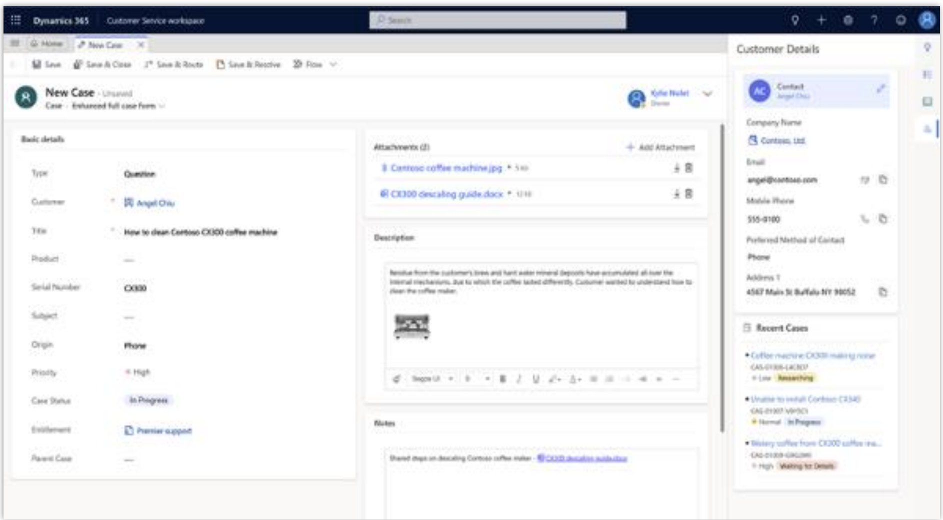
Agents create and work on multiple cases and need to switch between multiple screens to view customer details or refer to past cases and prior interactions. Currently, agents can't upload and view multiple attachments or capture notes during case creation. This leads to unnecessary and repetitive tasks. Agents need an intuitive case form that allows them to find the relevant information and perform operations quickly.

The enhanced case form helps agents upload multiple attachments and take quick notes, while simultaneously creating a case. This enables them to perform their daily case management operations with less effort and increases productivity. Contextual customer data with past cases and previous customer interaction data empowers agents to verify and edit customer details without switching tabs. Agents can also provide updates on existing cases without interrupting the case creation flow and avoid case duplication. The autofill feature of case fields when the case is created from a conversation reduces the manual efforts and saves time.

Feature details

This feature allows agents to:

- Find information quickly and manage cases efficiently by leveraging the streamlined case form.
- Add key information to the case quickly without losing sight of customer details, past cases, and previous interactions. This avoids case duplication.
- Provide updates on existing customer cases without interrupting the case creation flow or switching tabs.
- Take notes during case creation.
- Upload multiple attachments directly to the case.
- Use the Description field along with RTE capabilities to capture rich case details.
- Access all the attachments related to a case in a consolidated view.



This image shows enhanced case form during case creation mode.

Find email templates faster with enhanced selection

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2023

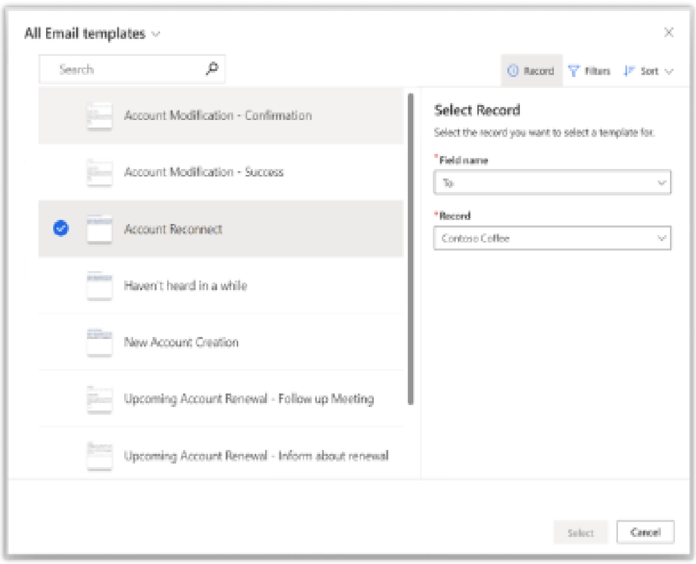
Business value

Email templates enable customer service agents to create consistent, professional, preformatted email messages that can be used to communicate with customers. At times when the number of email templates is high, it becomes difficult to find the right template quickly. With this feature, agents can find the templates faster by using preconfigured views of templates that have persisting filters. The record selector dialog box will be integrated in the selection pane to reduce the clicks required to select an email template, thereby reducing the time to select an email template and improving agent productivity.

Feature details

With the enhanced email template selection experience, agents can:

- Use preconfigured views of templates to find the right template quickly.
- Switch between views of templates that have persisting filters.
- Save extra clicks and time with the integrated record selection in the template selection dialog box.



Enhancements to email templates section

Improve agent productivity in timeline

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2023

Business value

New enhancements in timeline help agents improve productivity and save time when they help customers by making it easier to capture notes and view content.

Feature details

Administrators can enable the following productivity options in timeline for agents:

- Capture notes in timeline before saving the form in create mode.
- Choose a timeline layout between *roomy* and *cozy*.
- Copy a note using the copy-to-clipboard command.
- See consolidated inline images and files in the notes.
- Transfer a note from one record to another record in the timeline.
- See a *view more* option only when content is available.

Access improved customer summary form

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2023

Business value

The enhancements to the customer summary form provide a better look and feel and improved, configurable controls for associated customer and case details. The workspace enables agents to multitask on several cases and conversations simultaneously with the ability to switch among issues seamlessly without losing the context of the work in progress. When service agents accept a conversation, they need a single pane of glass that allows them to view and edit contextual customer data while interacting with the customer. They also want easy access to relevant cases associated with it and inline edit capability so they do not need to navigate away from the form.

Feature details

When an agent accepts a conversation, the customer summary form appears. The following capabilities are available:

- Enhanced customer card with inline edit capability.
- Enhanced case card with inline edit capability.
- Improved form layout.

Create email templates with new template designer

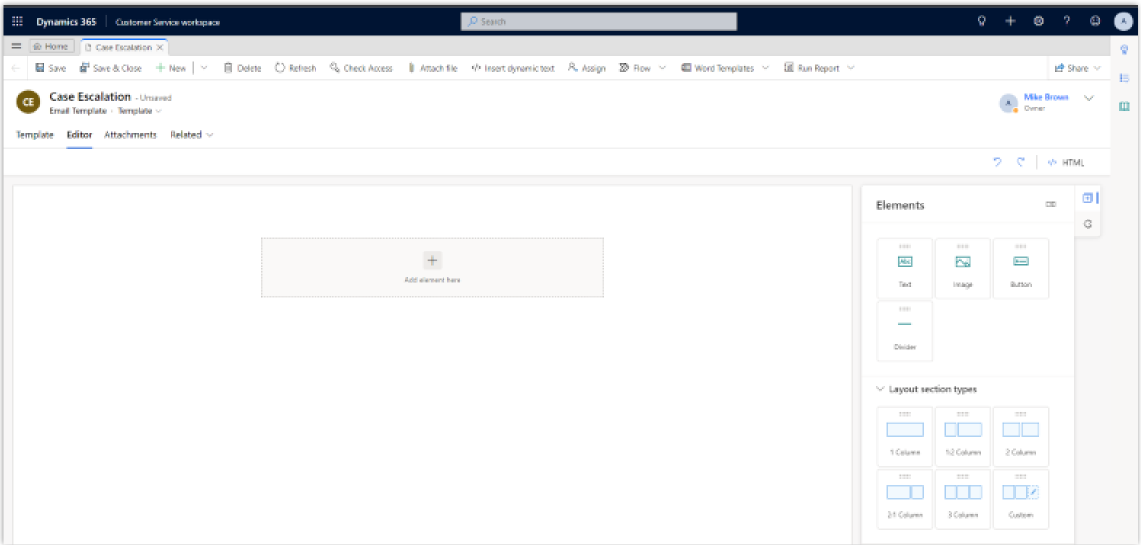
Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2023	Apr 2023

Business value

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

Feature details

The new email template creation experience provides an advanced, digital content designer for creating and styling templates. It includes advanced layouts that are responsive and adapt to any screen size. Users can add elements like images, text, buttons or dividers easily while creating email templates.



The image displays the enhanced email editor experience

Enhancements to simplify case management

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Feb 6, 2023	Apr 2023

Business value

Agents working on high-volume cases must manage cases efficiently for them to focus on solving customer issues effectively. Color-coded case status and icons for priority help agents find the required information quickly, visualize key information, and prioritize cases accordingly.

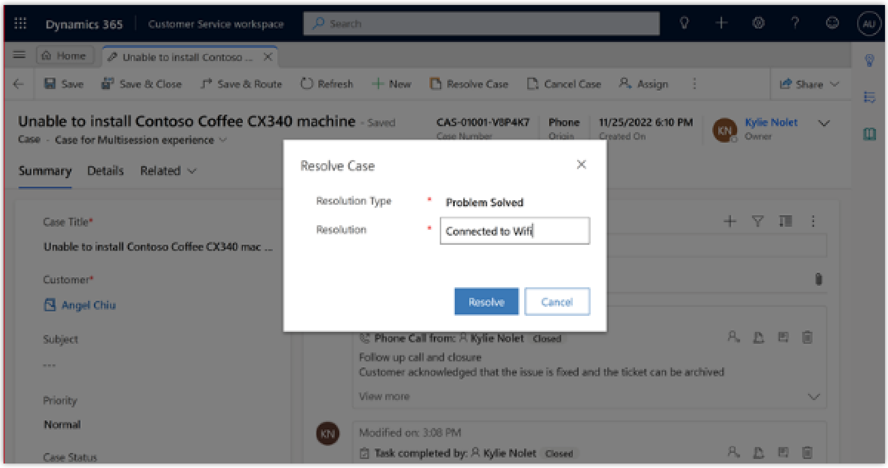
When agents need to add a case to a queue, they need to know if a case has already been added. The enhanced process of adding a case to a queue helps agents understand the queue to which a case belongs to, saving them multiple clicks, and displays only relevant queues to which a case can be added. The application only displays members of the selected private preview when setting the **Worked by** field on the case, avoiding unnecessary errors and confusion.

The improvements to the case resolution process will provide a simplified, intuitive, and clutter-free case resolution experience with fewer clicks and steps.

Feature details

Some of the key improvements to the case management process include:

- Color-coded priority icon.
- Color-coded case statuses for easy discoverability.
- Improved process of adding a case to a queue. The enhanced processing allows agents to view the queue to which a case belongs when attempting to add it to a queue. The queue list is filtered to only the queues to which a case can be added.
- The **Worked by** field on the case displays a filtered list of members belonging to the private queue to which a case is added. These improvements are available for any queue-enabled entity.
- Improved case resolution process. Resolving a case points the agent to the activities that are open, that can be used to navigate to the Activities tab, close them, and resolve the case quickly.
- The improved case resolution dialog box offers a clutter-free experience to the users.



This image displays the minimal case resolution dialog with relevant fields.

See also

[Resolve, cancel, and reassign cases](#) (docs)

Multitask efficiently with enhanced workspace layout

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Feb 6, 2023	Apr 2023

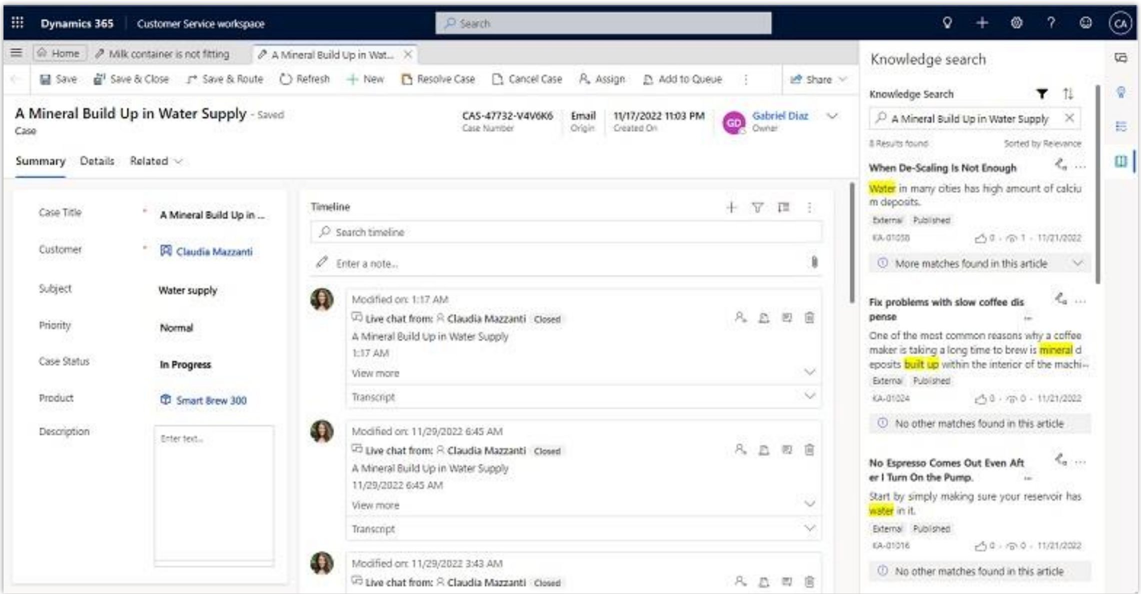
Business value

Customer Service workspace enables agents to multitask by switching seamlessly between cases, conversations, and issues, without losing the context of the work that's in progress. The modern design of the Customer Service workspace app has a new layout for the site map, sessions, and tabs.

Feature details

Some of the key capabilities in the Customer Service workspace app are:

- Sessions and child tabs are displayed horizontally.
- Improved handling of overflow tabs and sessions.
- Tab bar is visible only if multiple tabs are present in a session.
- Improved site map that's accessed from the Menu with support for grouping and areas.
- Improved accessibility with 400 percent zoom mode.
- Increased predictability of session closure in multisession apps.
- In-app notifications aligned with the multisession navigation.



Enhanced layout for Customer Service workspace

See also

[Get started with Customer Service workspace](#) (docs)

Mark knowledge articles as favorite

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Feb 6, 2023	Apr 2023

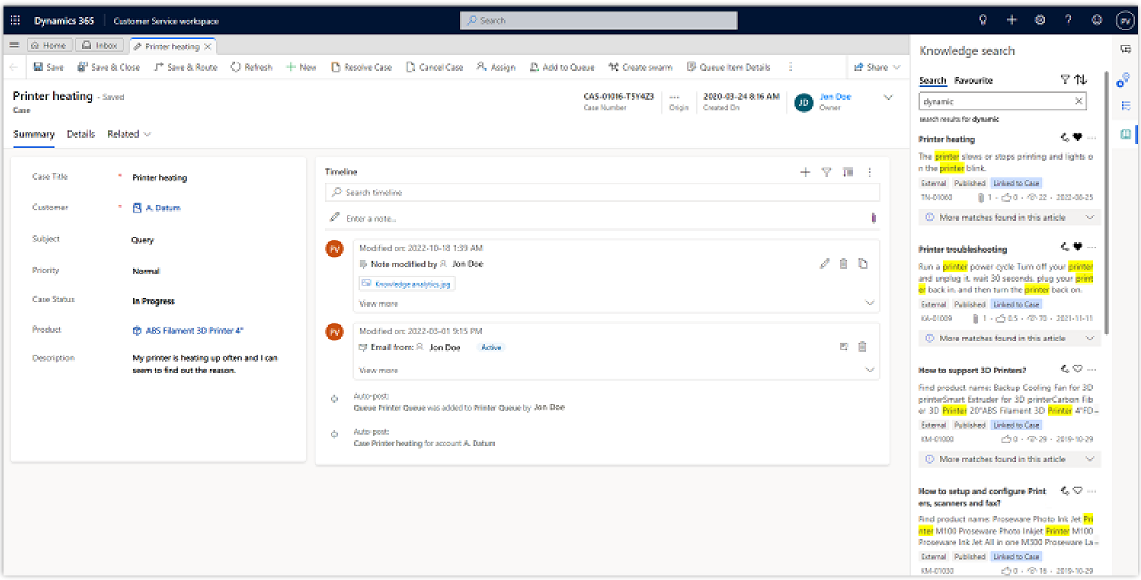
Business value

As an agent, you might need to refer to specific articles repeatedly to cater to a customer issue or read certain articles at a later time depending on your workload. You can mark such articles as favorite and access these at your convenience. You can also add or remove articles from the favorite list to keep your list relevant. This saves your time spent on searching articles and increases your productivity.

Feature details

This feature offers the following capabilities:

- Add or remove articles from the favorite list.
- View favorite articles in the form-embedded knowledge search control, app-side-panel-based knowledge search control, and independent knowledge search control.



Favorite knowledge articles

Forecast agent demand to handle customer conversations

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Apr 2023	-	To be announced

Business value

Customer service managers need trusted agent forecasts to plan future headcounts and schedule the right level of staffing to provide first-class customer service over voice and digital channels. Overestimation of the number of agents results in higher labor costs while underestimation leads to longer wait times and decreased customer satisfaction, damaging your brand loyalty.

In October 2022, we previewed daily agent forecast for Conversations, enabling customer service managers to make hiring decisions and staff adjustments for the coming budget year. Daily agent forecasts vary based on conversation volume forecasts and business goals that managers configure such as service-level agreements (SLAs), average handling time, shrinkage, and concurrency.

In this release, we will provide more granular agent forecasts at 15-minute intervals that customer service managers can use to create agent schedules for voice and digital channels.

Feature details

Agent forecasting for conversations (voice and digital channels) was released as a preview in October 2022 with the following set of capabilities:

- Forecast conversation volumes daily.
- Automatically detect seasonality from historical traffic to help customer service managers accurately forecast conversation volumes during special, seasonal events.
- Forecast agent demand to handle forecasted conversation volumes daily to account for business goals such as service-level agreements (SLAs) and average handle time.
- Visualize volume and agent forecasts on a daily, weekly, and monthly basis, for up to six months.
- Slice volume and agent forecasts by any combination of channels and queues.

As part of 2023 release wave 1, customer service managers can also forecast the number of agents needed to handle forecasted conversation volumes at 15-minute intervals.

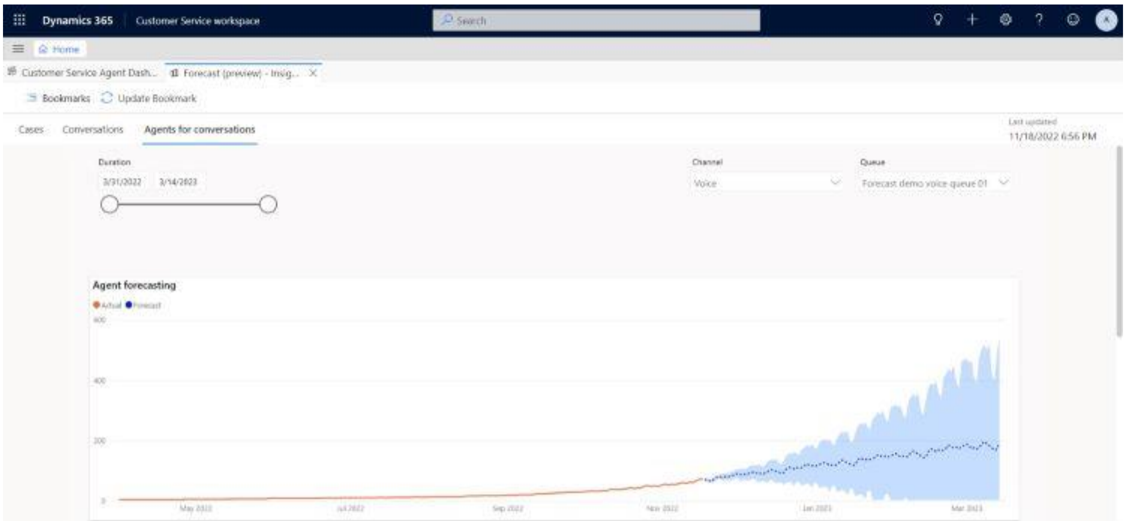


Chart view of daily agent forecast

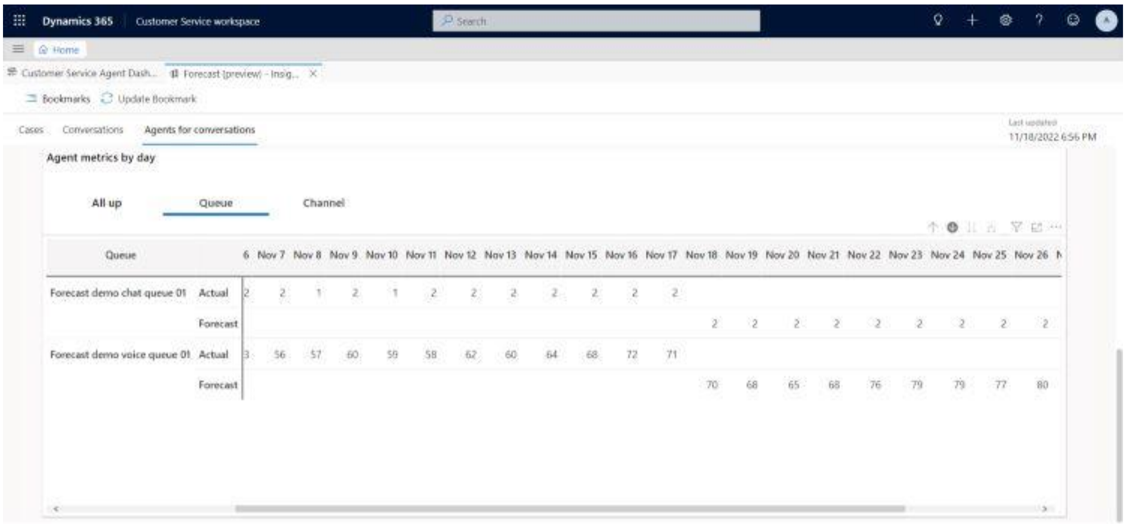


Table view of daily agent forecast by queue

Forecast case volumes daily and at 15-minute intervals

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Apr 2023	-	To be announced

Business value

Customer service managers must ensure that they have an adequate number of agents available to resolve customer cases. Overcapacity results in higher costs, while undercapacity results in longer customer wait times, which can reduce customer satisfaction. In October 2022, we released a preview of this feature to generate forecasts for cases daily. In addition to daily case volume forecasting, in this release we provide a more granular forecasting at

15-minute intervals so that managers can perform agent planning and scheduling with higher precision.

Feature details

Case volume forecasting was released as a preview in October 2022 with the following set of capabilities:

- Forecast case volumes on a daily basis.
- Visualize forecasted volumes on a daily, weekly, and monthly basis, for up to six months.
- Slice forecasted volumes by channel and queue.
- Automatically detect seasonality from historical traffic to help customer service managers accurately predict case volumes during special, seasonal events.

As part of the 2023 release wave 1, customer service managers can also forecast case volumes at 15-minute intervals from historical data.

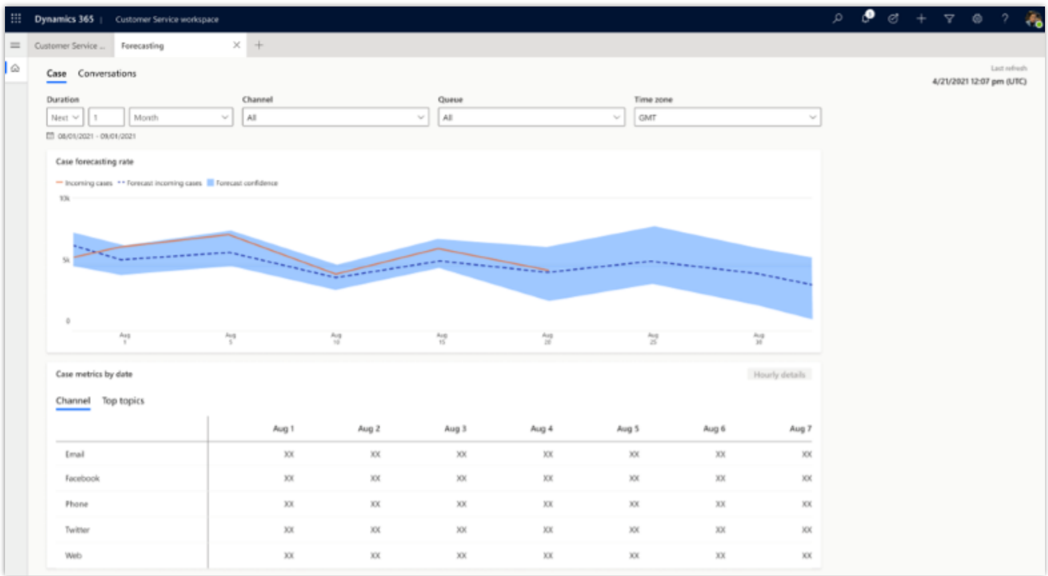


Image of volume forecasting screen

See also

[Forecast agent, case, and conversation volumes](#) (docs)

Omnichannel

Overview

Omnichannel capabilities in Dynamics 365 Customer Service enable organizations to instantly connect and engage with their customers via channels like live chat, SMS, voice, and social channels. By providing a seamless agent experience and valuable conversation insights across channels, omnichannel capabilities enable organizations to deliver a true, all-in-one contact center.

In 2023 release wave 1, the following features will help deliver a more secure, robust, and efficient service experience.

- Integrate Nuance Gatekeeper to reduce fraud and improve trust.
- Integrate Nuance interactive voice response (IVR) system to provide continuous self-service to your customers.
- Enable your customers to request a callback from agents and help them avoid waiting in queues to speak to agents.
- Enable Customer Service workspace to be available by default for security roles in Omnichannel for Customer Service.

Enable customers to keep queue spot, get callbacks

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2023

Business value

Companies want to enable active callbacks by using automation for their customers so that they don't have to remain on the call for an agent during busy periods. Direct callback provides better customer experiences and helps administrators staff queues more efficiently.

Feature details

Queue position with direct callback enables customers to request a callback as soon as an agent is available instead of remaining on the call. You can configure the direct callback option at the queue level by using the overflow action "direct callback" for a specific queue condition. After the call reaches the number one position in the queue, the direct callback work item is assigned to the next available agent like any regular work item in a queue. After the agent accepts the work item, a callback to the customer is automatically initiated and connected to the agent.

For companies using the voice channel, this feature provides their customers with an option to request a direct callback by retaining the caller’s queue position in the following scenarios:

- The call wait time exceeds the specified threshold.
- The call's queue position exceeds the specified threshold.

See also

Configure direct callback (docs)

Customize, extend the conversation entity

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2023

Business value

The standard conversation entity isn't customizable and, therefore, can't meet the business needs of several customers across industries. Customers want to include extra information and display it to their agents. Without the flexibility to customize, agents will have to do additional steps or switch windows to view the information, which affects their productivity. To support functions beyond Customer Service like Sales, we now allow customers to link the conversation entity with other entities like leads and opportunities or any other custom entity.

Feature details

Administrators can now customize the Conversation entity in the following ways:

- Create custom fields, views, and charts.
- Associate a conversation with a lead, opportunity, or any other entity enabled for activity.

Improved authentication in Apple Messages for Business

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2023

Business value

Auth V2 rich message support is required to maintain compliance with the Apple messaging service provider and continue offering the Apple Messages for Business channel. Without Auth V2 support, many consumer brands can't use authentication request-rich messages because their OAuth providers require functionality that's available only with Auth V2.

Feature details

The Apple Messages for Business messaging channel now allows you to send an authentication request to consumers using an OAuth 2.0 provider. Customers are able to respond to the authentication request with their user and password credentials, which can then be validated with the OAuth 2.0 provider.

Make Customer Service workspace app available for omnichannel roles by default

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Business value

Dynamics 365 Customer Service users with out-of-the-box omnichannel security roles will now have access to continued innovations in the Customer Service workspace app by default. This change is being made to support users with the planned deprecation of the Omnichannel for Customer Service agent-facing app.

Feature details

This feature release will make the Customer Service workspace app visible by default for the following roles:

- Omnichannel agent
- Omnichannel administrator
- Omnichannel supervisor

Administrators will still be able to remove access to the Customer Service workspace app for any of the roles if required.

Integrate Nuance IVR with Customer Service

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Jun 2023

Business value

Integration of Nuance interactive voice response (IVR) enables organizations to provide continuous self-service to their end customers. Self-service improves the call deflection rate so human agents have more time to engage in meaningful and impactful conversations with their end customers.

Feature details

This feature enables organizations to improve customer satisfaction and contact center productivity by integrating Nuance IVR technologies with the voice channel in Dynamics 365 Customer Service. It includes Nuance IVR capabilities as is today and escalation to omnichannel agents with call intent, and transcript by leveraging existing telephony services to orchestrate the call between IVR and omnichannel using SIP operations.

Use cases

- Customer can perform self-service tasks with conversational IVR.
- Customer intent and context for calling are precisely identified via industry-specialized natural language models.
- Customers can be transferred along with custom-defined context data to an agent who is fully informed and ready to continue the conversation and resolve cases.
- Call intent and customer data can be used for proper call routing.

Benefits

As we move forward into an AI world with increased speed and information, experiences have become more seamless and automated. This integration allows customers to achieve the following benefits:

- Improve call center productivity by increasing the ratio of call deflections and self-service calls.
- Reduce costs by optimizing the workforce.
- Reduce average time spent on calls escalated from IVR to agents due to the availability of context.

Geographic areas

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

- United States

Integrate Nuance Gatekeeper with Customer Service

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	May 2023	-	To be announced

Business value

Reduce fraud and improve trust and customer experience to bring operational efficiency in contact centers.

Feature details

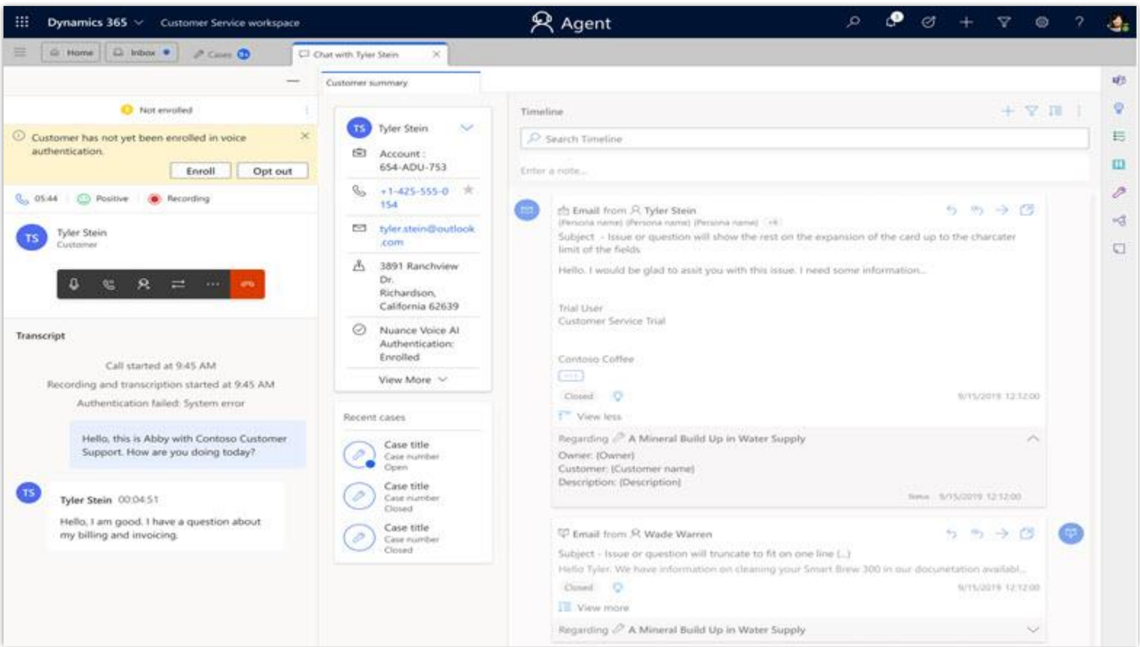
Business losses associated with fraud are an increasing threat in different industries. Fraudsters take advantage of high-volume e-commerce and self-service transactions by impersonating real customers and social engineering contact center engagements. Contact centers are looking for solutions that can reduce these losses, but vendor options are scarce and not easy to integrate into existing systems. The integration of Nuance Gatekeeper technologies with the voice channel in Customer Service enables organizations to improve customer satisfaction and contact center productivity by providing biometric authentication and fraud prevention.

Use cases

- Voice biometric authentication for contacts allowing secure transactions to be confirmed without sharing of personal data.
- Fraud prevention capabilities alert agents about known fraudsters and spoofing attempts, and allow agents to flag conversations for further investigation by a fraud analyst.
- Supervisors can monitor conversations flagged as suspicious or fraudulent.
- Integrated reporting for fraud analysis.

Benefits

- Improve agent productivity and reduce costs by optimizing the time spent in each call.
- Reduce losses caused by fraud. Fraudsters have developed patterns to socially engineer contact center agents toward completing transactions that are fraudulent.
- Fraud prevention is a new process in different industries and not part of the core processes in a contact center.



Gatekeeper controls integrated in the Conversation Control for Agents

Supervisor experiences

Overview

The supervisor experience is targeted at customer service managers and analysts. The key operational metrics allow supervisors to continuously monitor and do course corrections like intervene if customer sentiment becomes negative, improve agent staffing to optimize productivity, and help keep service levels high.

The enhancements in 2023 release wave 1 will empower supervisors to get historical and near real-time insights on the performance of the contact center. If you find that your supervisors need additional metrics to improve your contact center efficiency, you can now customize the data models to add new metrics and report on custom entities.

Customize visualization of omnichannel real-time analytics dashboards

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔Oct 31, 2022	-	Apr 2023

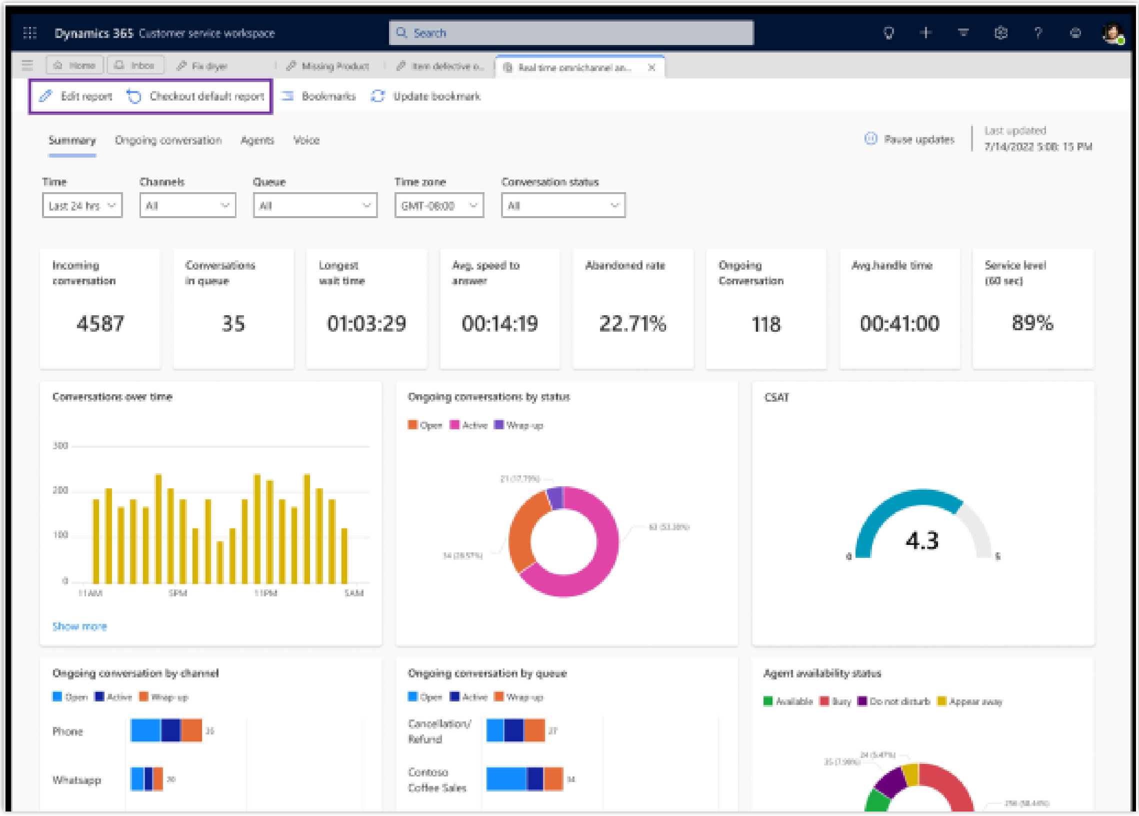
Business value

Out-of-the-box real-time analytics incorporate industry-standard metrics that are critical in helping supervisors get started with real-time monitoring of their contact centers. However, each supervisor has unique reporting needs based on the nature of their business. With this feature, administrators can customize reports to meet their organizational requirements by leveraging the out-of-the-box real-time Power BI-embedded data model.

Feature details

Key capabilities of this feature include the following:

- Rearrange the out-of-the-box report layout on omnichannel real-time analytics.
- Modify the graphical rendering of data. For example, you can have a graphic with the trend of a metric over time rather than a tabular view of the metric.
- Create visuals using metrics in the data model that aren't exposed directly in the out-of-the-box Power BI reports.



Visual customization

See also

[Overview of Omnichannel real-time analytics dashboards - Edit visual display]() (docs)

Personalize out-of-the-box real-time analytics reports

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Oct 31, 2022	-	Apr 2023

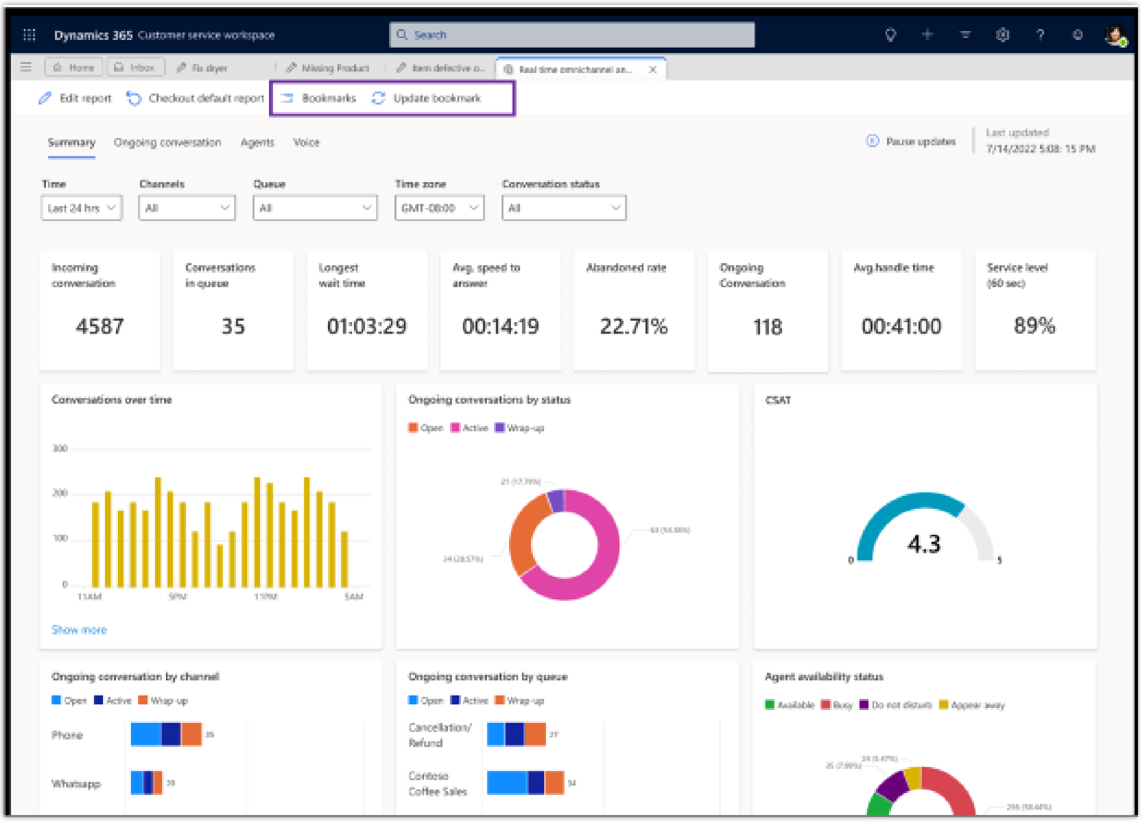
Business value

As a contact center supervisor, you might need to analyze the operational metrics across dimensions like queues and agent reporting to understand and improve the team's performance and the customer support experience. To address this need, you can use the out-of-the-box real-time reports with your selected filters by saving them as bookmarks. This helps personalize your reports and saves the time and effort required to reapply the filters every time you open the dashboards.

Feature details

Key capabilities of the feature include the following:

- Save filters as bookmarks for out-of-the-box reports.
- Select from a previously saved filter list (bookmarks) to view metrics based on the filters.
- Set one of the bookmarks as default.
- Delete one or multiple bookmarks.



Personalization with bookmarks

See also

[Overview of Omnichannel real-time analytics dashboards - Save report views using bookmarks](#) (docs)

Monitor support operations in near real time

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Oct 31, 2022	-	Sep 2023

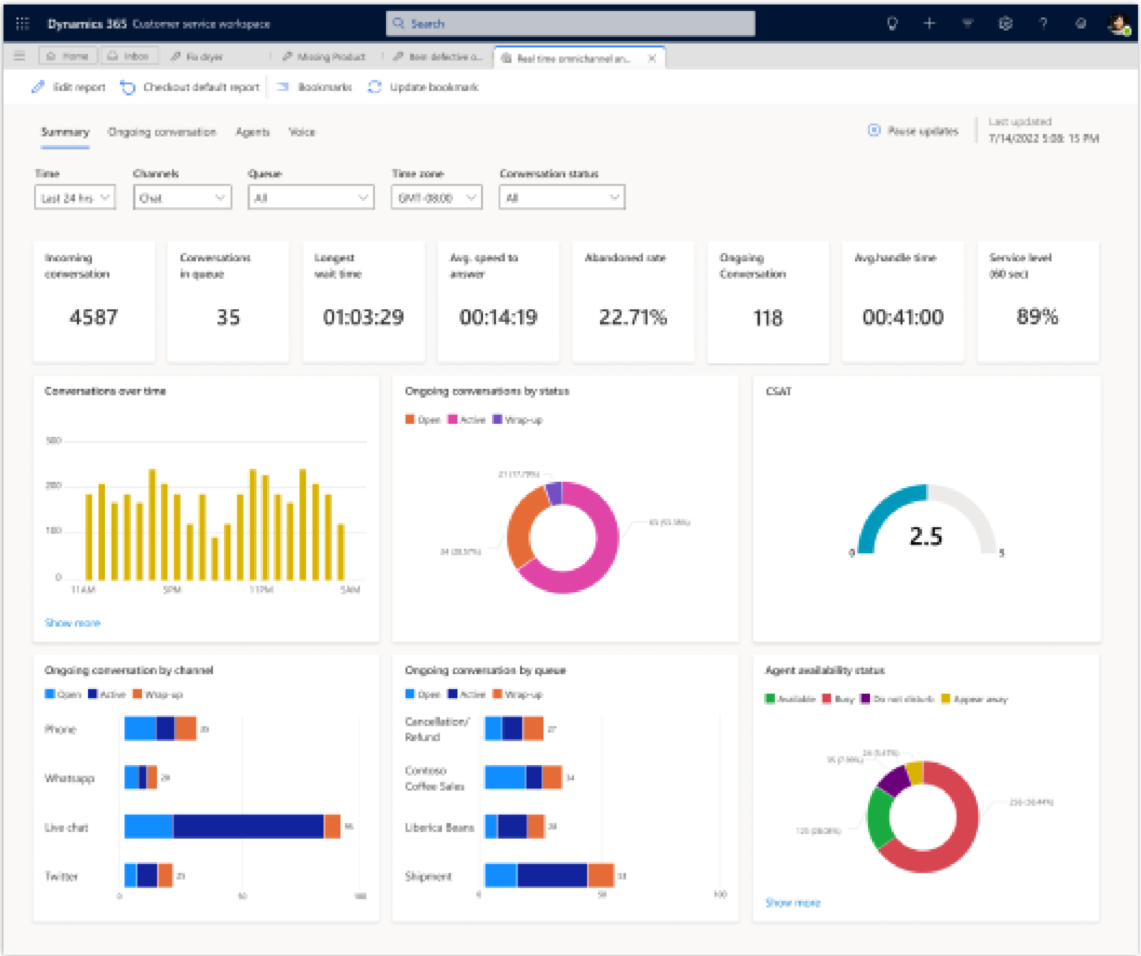
Business value

Contact center managers need to be able to react to events such as increases in the volume of incoming customer interactions, longer call lengths, and agent absences by optimizing agent allocation in real time to provide top-notch support and boost customer satisfaction. Having visibility into the overall support performance through near real-time reporting empowers managers to monitor key operational metrics, make course corrections at the right time, and keep service levels high.

Feature details

Key capabilities for supervisors and managers of contact centers include:

- **Summary report**: Helps understand the volume of customer interactions and service levels, along with the available capacity in near real time.
- **Agent report**: Provides information about the agent capacity and status for the last 24 hours with the ability to drill down to see details, like capacity and adherence, at each agent level.
- **Voice report**: Provides voice-specific metrics for the last 24 hours.
- **Conversation list**: Provides the list of currently ongoing conversations (in the last 24 hours).
- **Visual customization**: Helps customize the visual display of the out-of-the-box Power BI reports and publish to your organization.
- **Personalization**: Lets report users save and manage multiple bookmarks with the ability to set a default bookmark.
- **Auto refresh/Pause refresh**: Lets users pause and resume data refresh of reports.



Real-time analytics for Omnichannel

See also

[Overview of Omnichannel real-time analytics dashboards](#) (docs)

Teams integration

Overview

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

Use customer support swarming for complex cases

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Apr 2023	-	-

Business value

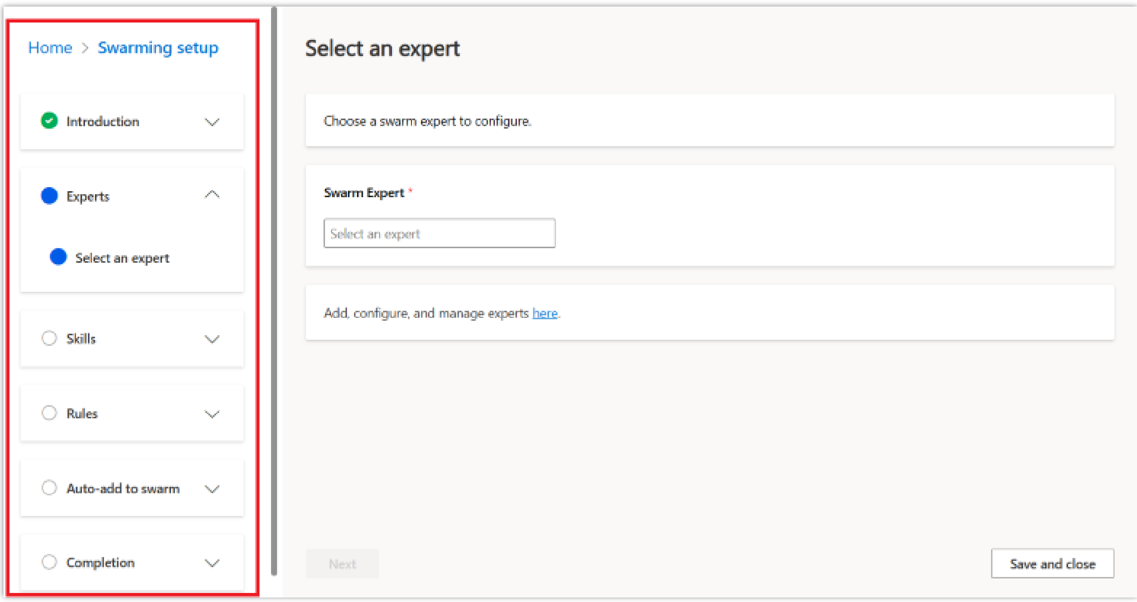
Customer support swarming enables agents to bring together the right experts across their organization to resolve complex cases faster.

Feature details

Enhancements to customer support swarming include the following highlights:

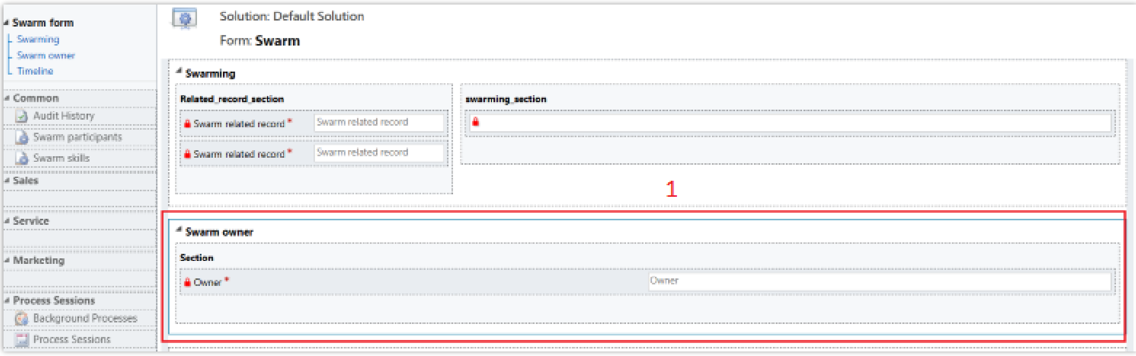
Enhancements to admin experience

- **Guided admin setup:**
  - A guided, step-by-step setup helps significantly reduce the time required for administrators to configure swarming in their organizations, helping make the onboarding experience more efficient.

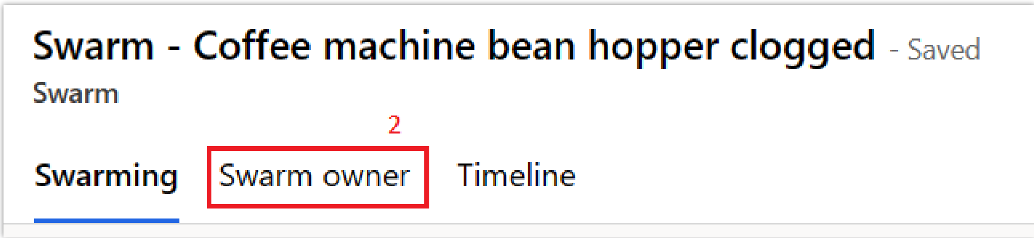


Admin quick set up

- **Swarm form enhancements:**
  - During the swarm configuration, administrators will no longer have to manually activate the case form for swarming. It will be automatically activated.
  - With the swarm form now being customizable, administrators will be able to add a new tab, section, or field to the swarm form (1). The changes they make will promptly reflect on the agent side (2).



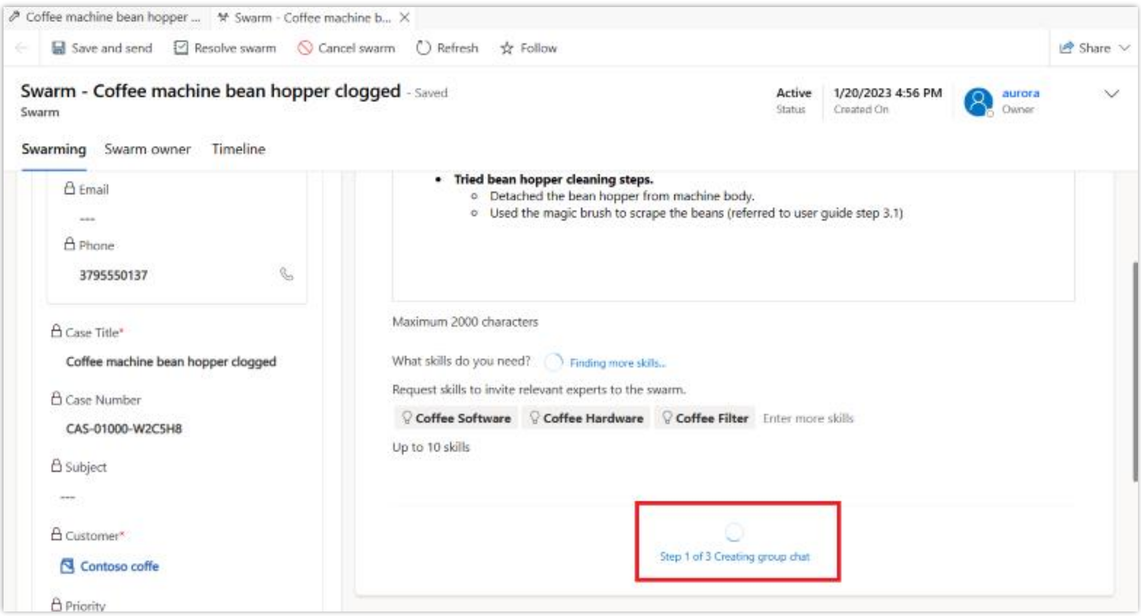
Customizable swarm form



Customizable swarming agent experience

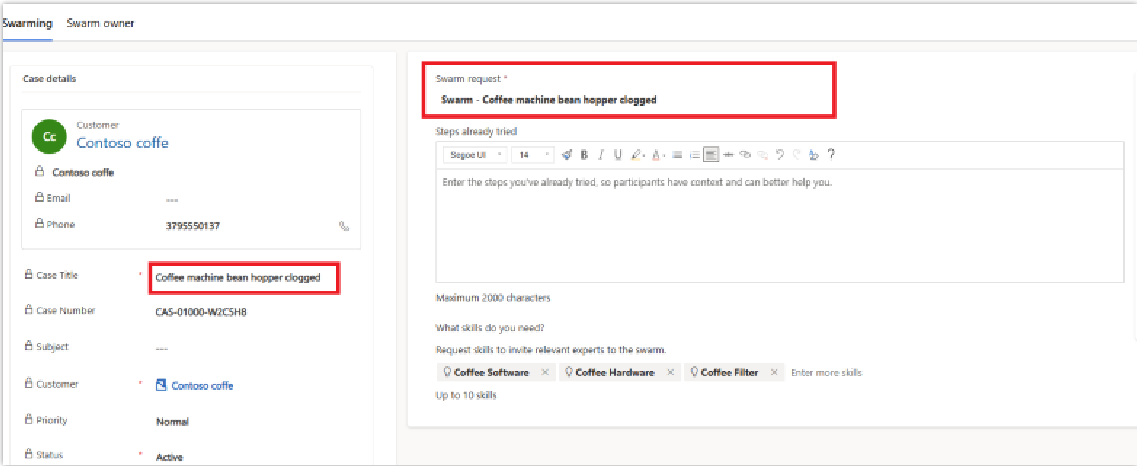
Agent experience enhancements

- **Enhanced user interface for swarm creation:**
  - The swarm creation form now comes with an advanced look and feel. With the visual indicator, agents can view the progress of swarm creation and see a clear indication of steps already completed and those remaining.



Swarm progress bar

- **Lesser manual effort required for agents to create swarms:**
    - Agents will no longer have to manually type the swarm title. The title will be prepopulated with the case title, which agents can then edit if desired. This will help them save time and allow them to focus on getting the expert help they need to quickly resolve customer cases.



Title autopopulate

View Teams chat on the connected record's timeline

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Apr 2023	-	-

Business value

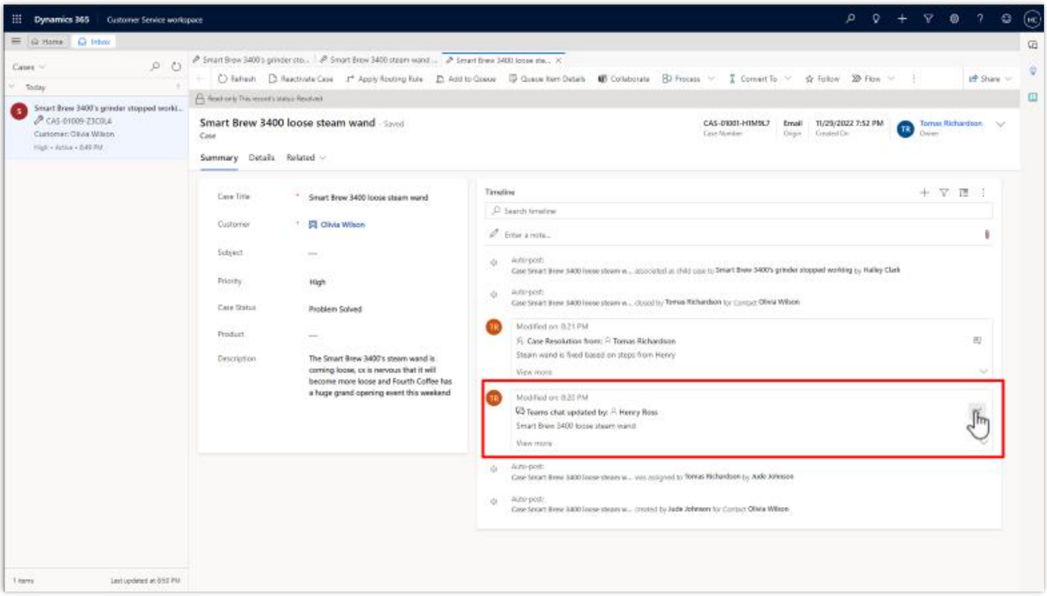
Make it easy for agents to get the full case 360 view by allowing them to see any chats related to the case (or any record) directly on the timeline.

Feature details

When starting a connected chat or connecting an existing chat to a record, agents will see the conversation appear as a new activity on the timeline with the details about who connected to the chat and when, as well as the last person to send a message in the chat and when.

Additionally, if agents change, the new agent, who may not have been a part of the chat initially, can also see the conversation on the timeline. The new agent can directly join the discussion (and be added as a chat participant) to see the entire chat exchange.

This feature is enabled when the admin has turned on the Join chat toggle in the Customer Service admin center app, giving those with read and write privileges the ability to join a connected chat.



Timeline integration

Dynamics 365 links are unfurled in Teams chats

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Aug 1, 2022	Apr 2023

Business value

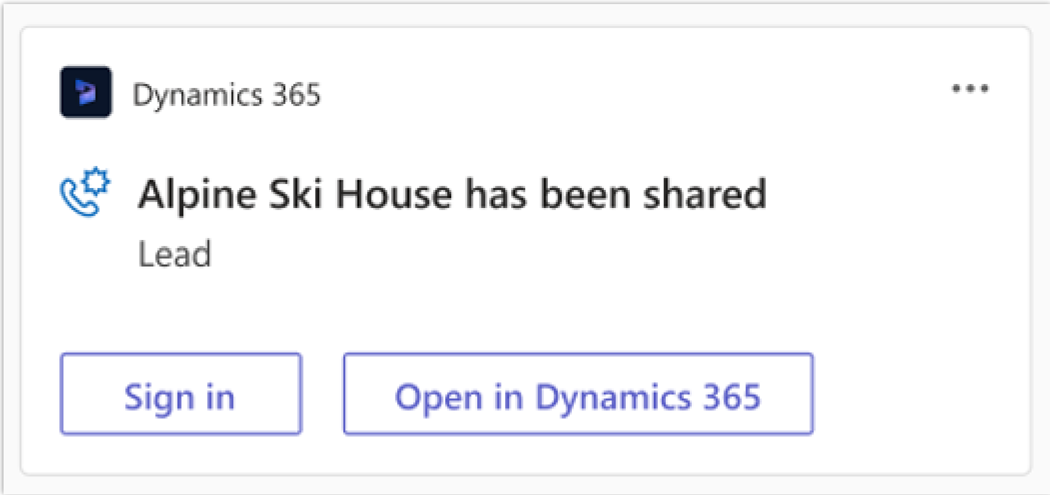
See the details of your business data in your Microsoft Teams chats and feel confident that the link you're selecting is an authentic Power Apps link.

Feature details

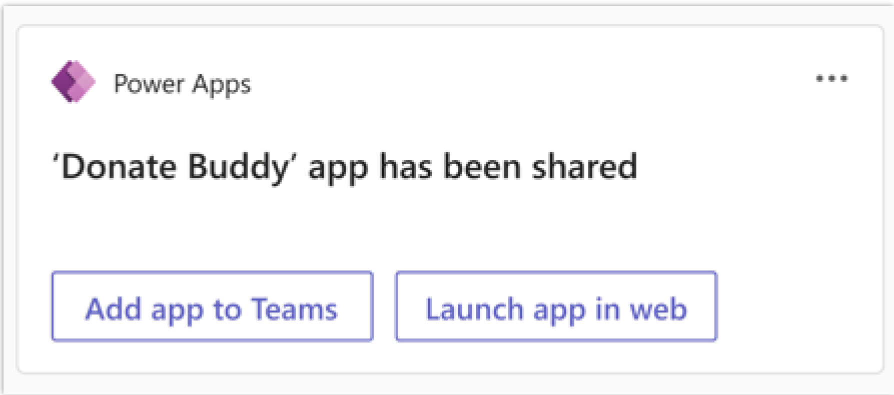
Now, when you paste a Dynamics 365 Customer Service link into a Microsoft Teams chat, meeting, or channel, it'll automatically be unfurled in an adaptive card, providing you with more details about the link that was shared. Links to canvas apps will show the app name and record name. Entity type will be shown for model-driven app links to records.

The user pasting the link can delete the card in the message compose window before sending the message, resulting in no card being sent.

NOTE If the user who is pasting the link doesn't have access to the app or the record, no app or record details will be shown in the unfurled card.



Link unfurl Dynamics 365 record



Link unfurl Power Apps record

Keep chat participants informed when fields are updated

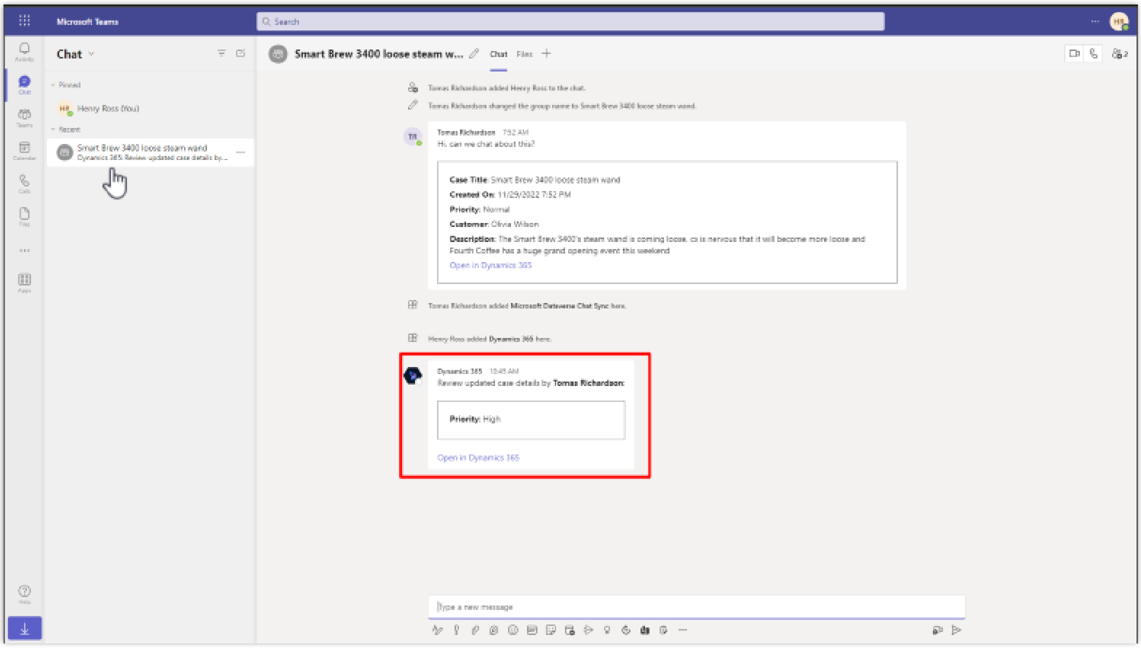
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2023

Business value

Reduce the overhead on agents by automatically updating all chat participants when an essential field on a connected record is updated. This time-saving feature helps keep everyone in the know without any manual effort, allowing agents to focus on what's important and helping experts in the chat be aware of pertinent updates.

Feature details

With the suite of Teams collaboration features, not only can you start a chat with users who are connected to a Dynamics 365 record, but now you can also keep them informed when things on the record change. For example, if there's a chat connected to a case, when the priority of the case is changed, all of the chat participants will be notified.



Bot event update

Plan and prepare for Dynamics 365 Field Service in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Field Service**.

Overview

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 work order management, resource scheduling, and asset management capabilities as well as frontline worker tools. Field Service allows organizations to move from paper-based reactive service to delivering proactive and predictive world-class service, empowering digital transformation and allowing innovative business models such as outcome-based service.

In 2023 release wave 1:

- Field Service aims to optimize field service operations for service managers.
- Dispatchers can more efficiently triage and assign work orders that are nearby and the refreshed schedule board experience is available for all users.
- Frontline workers get further improvements for their mobile apps.

Investment areas

Optimize service operations
Field Service empowers users to smoothly navigate service processes with seamless workflows and experiences. Simplified workflows mean service managers can manage work orders even easier, and make sure frontline workers successfully meet customer requirements on time.

The 2023 release wave 1 features help increase service manager productivity, improvements in maintaining assets and spaces, and new capabilities to support service delivery by vendors, especially in the field of facilities management.

Empower frontline workers
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 the customers' issues. It's critical that frontline workers have the best digital tools that enable 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 mobile application will receive several enhancements in 2023 release wave 1.

Resource scheduling
Resource management and scheduling optimization are at the heart of field service management. Resource scheduling enables service organizations to triage the unscheduled work orders and cases efficiently 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 (hours, days, weeks, months, maps, list, and more), and extensibility capabilities for partners to tailor functionality to their needs.

In this release wave, the user option to revert to the legacy experience of the schedule board is removed.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Field Service** below:

Check out the release plan

For application administrators

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

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

Get the most out of Field Service

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Field Service.
Product documentation	Find documentation for Field Service.
User community	Engage with Field Service experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Field Service.

What's new and planned for Dynamics 365 Field Service

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to [2022 release wave 2 plan].

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
Get information quickly with Field Service Mobile app enhancements	Users, automatically	-	✓ Feb 6, 2023	Sep 2023

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
Find Field Service information with enhanced search	Users, automatically	-	✓ Feb 6, 2023	Apr 2023
Model location and asset hierarchies for large facilities	Users, automatically	-	✓ Feb 6, 2023	Apr 2023
Manage work order costs using the not-to-exceed function	Users by admins, makers, or analysts	Mar 2023	-	Apr 2023
Organize your service operations using trades	Users by admins, makers, or analysts	Mar 2023	-	Apr 2023
Simplify user experience by optionally removing work order costs	Admins, makers, marketers, or analysts, automatically	Mar 2023	-	Apr 2023

Feature	Enabled for	Public preview	Early access*	General availability
Track cost per work order to establish predictable cost trends for your services	Users, automatically	Mar 2023	-	Apr 2023

Resource scheduling

Dynamics 365 Field Service resource scheduling features include key enhancements on manual, assisted, and automated scheduling.

Feature	Enabled for	Public preview	Early access*	General availability
Remove user option to switch to legacy schedule board	Users, automatically	-	Jan 2023	Apr 2023

* You are able to opt into some features as part of early access on February 6, 2023, 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 the customers' issues. It's critical that frontline workers have the best digital tools that enable 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 mobile application will receive several enhancements in 2023 release wave 1.

Get information quickly with Field Service Mobile app enhancements

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓Feb 6, 2023	Sep 2023

Business value

By improving the application performance and reliability, you can quickly get the information you need to perform the work and update relevant data—even when wireless networks aren't available. This ensures that your customers get fixes on time, and that the back office gets the latest information.

Feature details

Modern and trustworthy digital tools are critical to the successful digital transformation of every organization in today's world. For field-based organizations, it is critical to provide frontline workers with mobile devices and applications that can support their work in a variety of scenarios and rugged conditions. The Field Service Mobile app is the workhorse for frontline workers to manage their work orders and bookings, to stay in touch with their customers, and to get critical information regarding assets and facilities that they manage. We aim to make your mobile users happy so you can use the satisfaction rate as a differentiator to attract talent to frontline worker positions.

This set of features includes:

- Faster times to launch the app and load forms.
- Faster synchronization for offline data.
- Fewer errors in low network conditions.
- Increased stability to minimize crashes or app freezing.

These improvements roll out with incremental deployments over the course of 2023 release wave 1 and aren't tied to a specific release date.

See also

Field Service Dynamics 365 mobile app overview (docs)

Optimize service operations

Overview

Field Service empowers users to smoothly navigate service processes with seamless workflows and experiences. Simplified workflows mean service managers can manage work orders even easier, and make sure frontline workers successfully meet customer requirements on time.

The 2023 release wave 1 features help increase service manager productivity, improvements in maintaining assets and spaces, and new capabilities to support service delivery by vendors, especially in the field of facilities management.

Find Field Service information with enhanced search

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓ Feb 6, 2023	Apr 2023

Business value

The enhanced global search in Field Service increases your productivity by surfacing the most relevant information. You can now find work orders based on the customer name, or find bookings based on a technician's name. Faster results mean fewer clicks and increased productivity for your workforce.

Feature details

You can now build on the global search and get the most relevant information from Field Service surfaced in one place. This feature increases productivity and aims to delight you with a simple way to find information. Find work orders, bookings, and other related field service entities by account, technician's name, or priority. Simply type a search term in the global search bar and see the relevant records across Field Service tables, on a single page.

Once you find what you're looking for, you can take quick actions right from within your search results.

Model location and asset hierarchies for large facilities

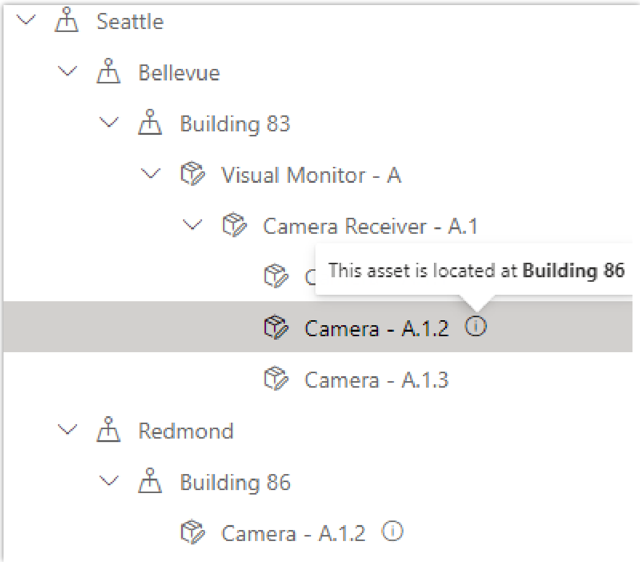
Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓ Feb 6, 2023	Apr 2023

Business value

This feature enhances the location and asset hierarchy experience that allows dispatchers and service managers to pinpoint the location of an asset within a physical space so a technician can deliver faster and more efficient service.

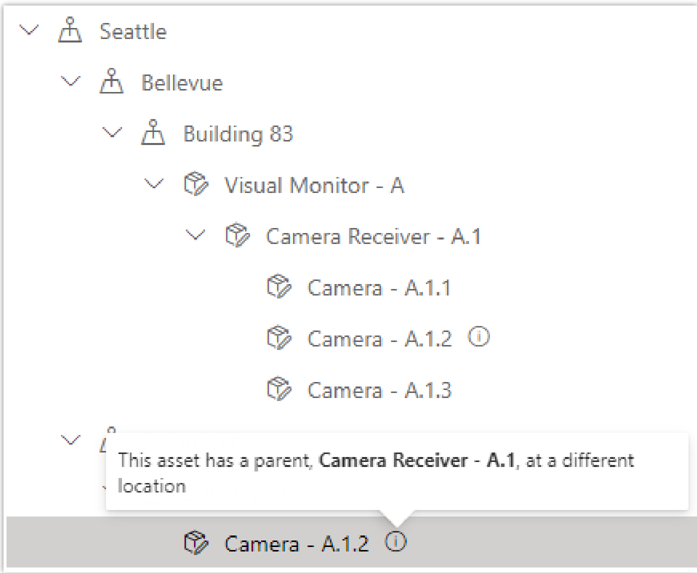
Feature details

Both assets and locations can be complex and have hierarchical models. Building and understanding the hierarchy of an asset or location, such as a large office building or campus site, is critical to provide world-class service.



Screenshot of assets at a different location from their parent showing in both places.

Subassets at a different location from their parents show up under their location, and under their parent asset with tooltips for added clarity. In addition, a new loading approach enables you to manage location and asset hierarchies regardless of the complexity of a hierarchy.



Screenshot of assets at a different location.

See also

Create functional locations in Field Service (docs)

Manage work order costs using the not-to-exceed function

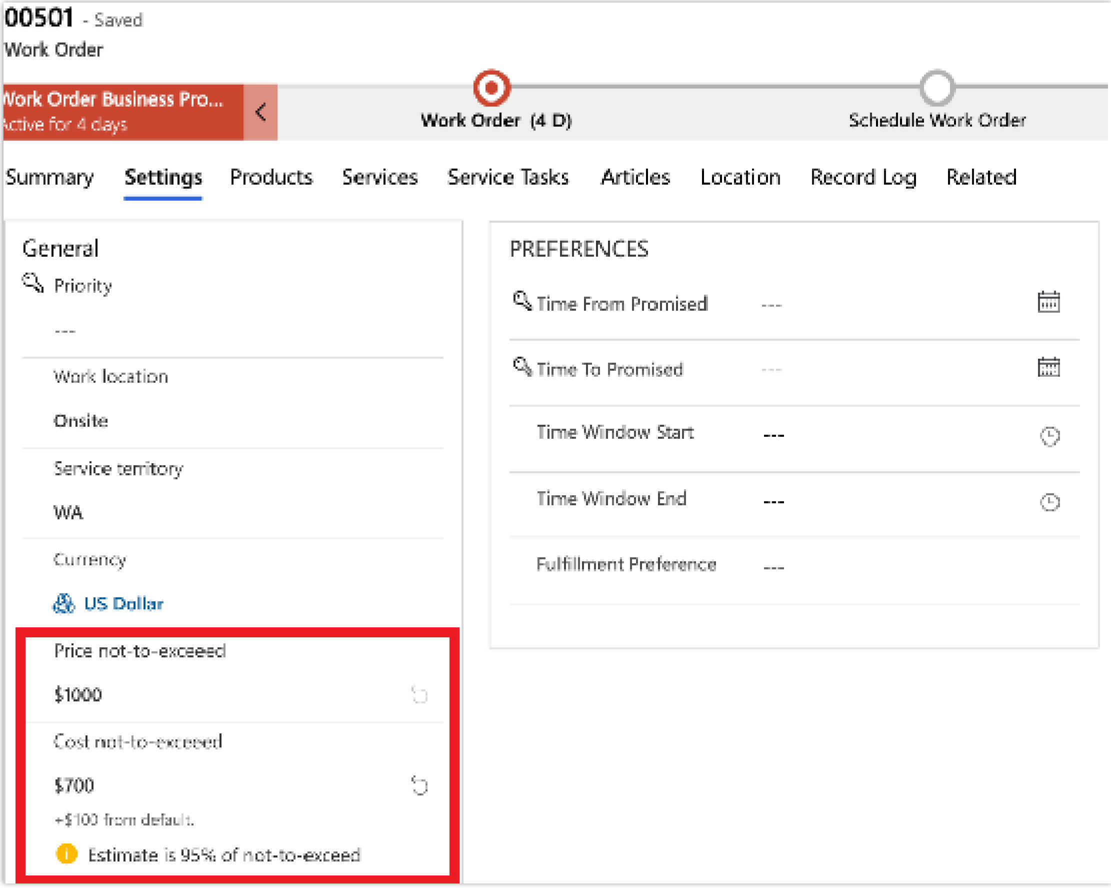
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Mar 2023	-	Apr 2023

Business value

Setting financial expectations with customers and vendors is critical for managing a company’s bottom line and maintaining successful relationships. This not-to-exceed capability helps service providers stay within the preapproved price from their customers and ensure frontline workers, including vendors and subcontractors, stay within the preapproved cost for work orders.

Feature details

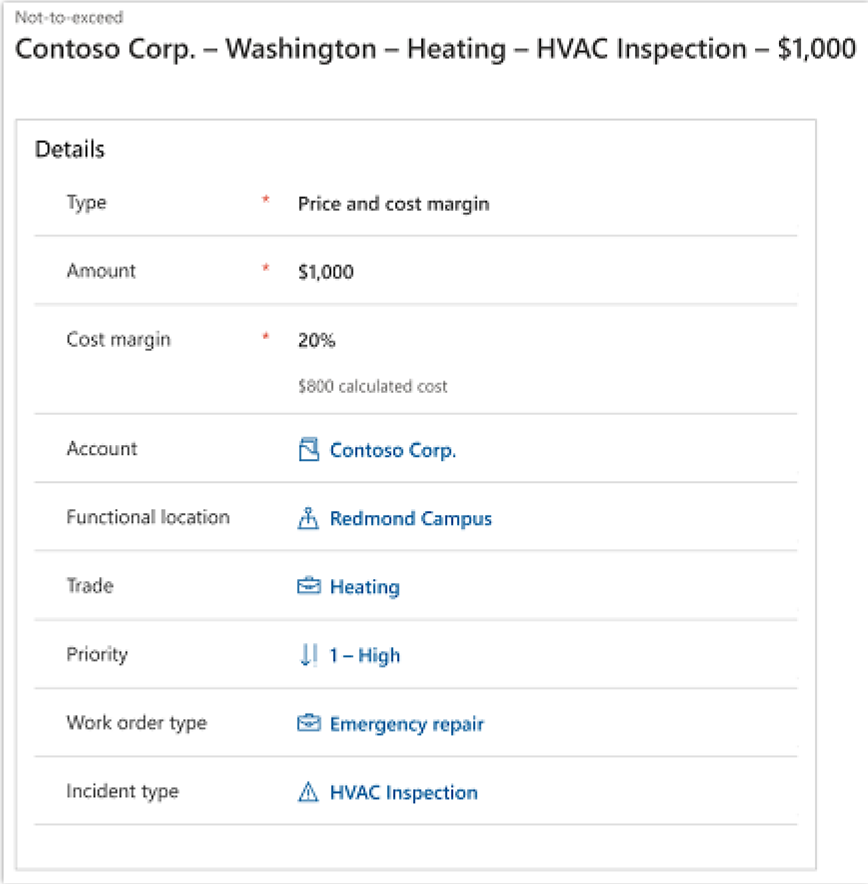
You can now set up not-to-exceed values for cost and price on work orders. Not-to-exceed values can automatically apply to the work order based on the customer, the incident type, and the location of the work. Alternatively, you can enter the not-to-exceed amounts directly on the work order.



Screenshot of a Work Order with not-to-exceed details.

Service managers and frontline workers see warning icons when the not-to-exceed value is almost reached or exceeds the limit, notifying them to take action.

This feature is applicable to any customer who has a limit on what they can charge their customer without requesting approval, as well as customers who establish a limit on the work order cost, especially when vendors are contracted to perform the work.



Screenshot of a Not-to-exceed form with record details.

You can also track when a not-to-exceed value was exceeded.

Organize your service operations using trades

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Mar 2023	-	Apr 2023

Business value

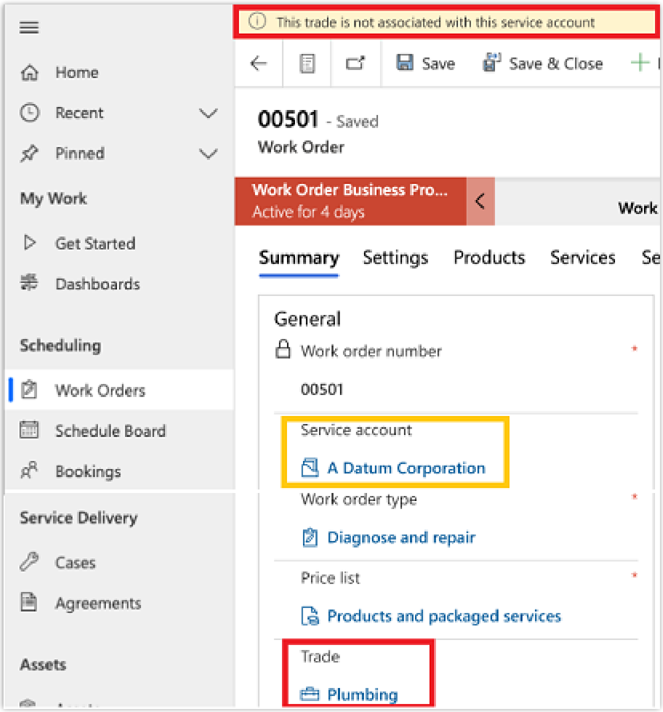
Save time and money by organizing your service operation using the new trade feature.

Feature details

You can now organize the types of services that you provide customers by creating categories of work called "trades." Examples include plumbing, roofing, electrical work, and air conditioning services. Your users will experience a simpler work-order creation process because only incident types related to the selected trade will be displayed.

You can also associate trades to locations and accounts to filter what types of trades you're allowed to provide, so you don't accidentally provide plumbing services if you're only contracted to perform air conditioning work.

This feature saves you time and your organization money by ensuring that you're only providing agreed-upon services.



Screenshot of a trade notification on a work order form.

Simplify user experience by optionally removing work order costs

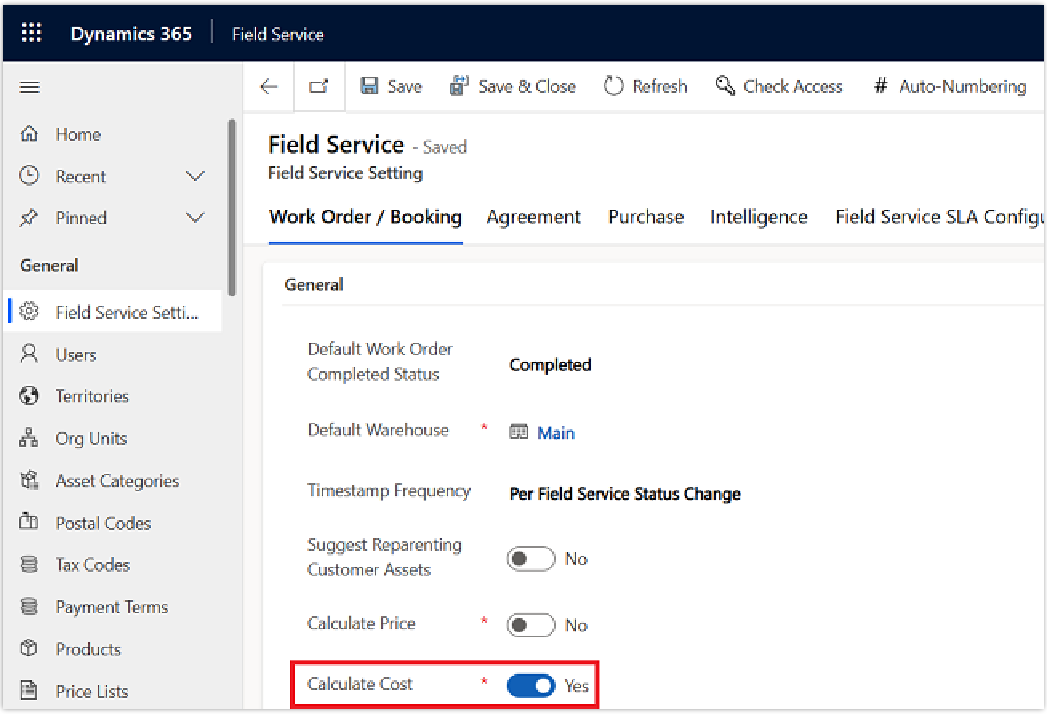
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2023	-	Apr 2023

Business value

Streamline the work order experience for end users and save time in your implementation with the new cost toggle.

Feature details

There's no more need to manually modify forms and views to show or hide cost information. With a single setting change, you can enable or disable work order cost information, making it easy to customize your users' experience. Whether you're already tracking costs, or your organization is working toward it, the cost toggle makes it easy to start whenever you're ready. Between the existing pricing toggle and the new cost toggle, you can also opt to enable pricing and costing independently.



Screenshot of Calculate cost toggle.

Track cost per work order to establish predictable cost trends

Enabled for	Public preview	Early access	General availability
Users, automatically	Mar 2023	-	Apr 2023

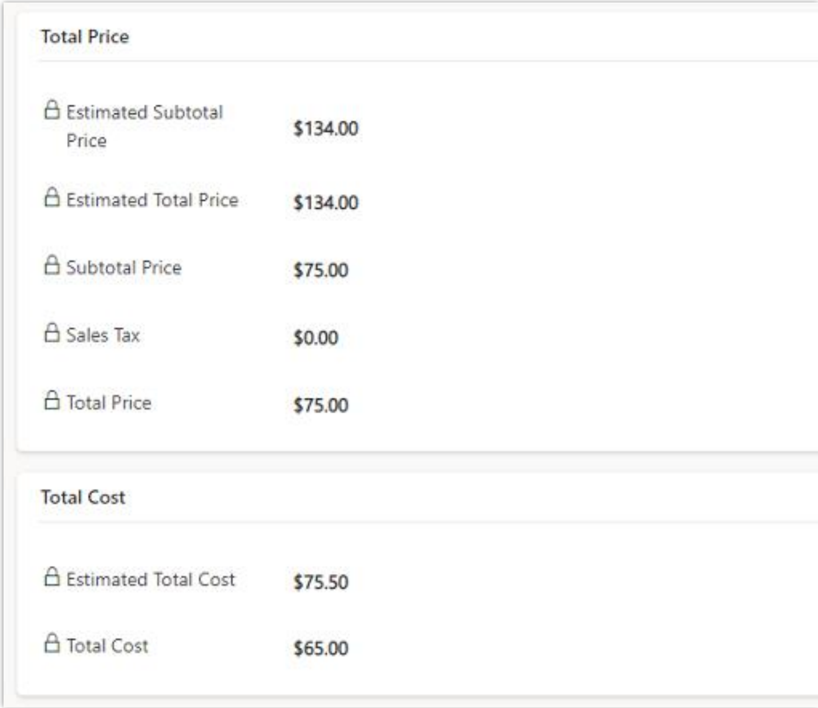
Business value

Ensure work meets customer cost and price expectations by estimating the total cost and price of work orders.

Feature details

Estimate the total cost and price of work orders—including all parts, services, and taxes—before work begins to ensure you meet the expectations and commitments to your customers. Additionally, compare estimated and actual work order costs to establish predictable cost trends and optimize service delivery.

Estimated total price, estimated total cost, total cost, and taxes are calculated on work order summaries. The cost totals are the sum of all work order product and service costs.



Screenshot of Total Price and Total Cost cards on a work order form.

Resource scheduling

Overview

Resource management and scheduling optimization are at the heart of field service management. Resource scheduling enables service organizations to triage the unscheduled work orders and cases efficiently 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 (hours, days, weeks, months, maps, list, and more), and extensibility capabilities for partners to tailor functionality to their needs.

In this release wave, the user option to revert to the legacy experience of the schedule board is removed.

Remove user option to switch to legacy schedule board

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Jan 2023	Apr 2023

Business value

The new schedule board makes scheduling easier and faster for dispatchers, which helps improve service delivery.

Feature details

In 2023 release wave 1, we are investing in reliability, performance, and new features for the schedule board. The option for individual users to switch to the legacy schedule board experience is removed. Administrators can still enable the legacy schedule board for their organizations through October 1, 2023.

Finance and Operations

Plan and prepare for Dynamics 365 Finance in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Finance**.

Overview

Video: Learn about this product's new capabilities

CFOs are embracing digital transformation journeys across their entire organizations, with their systems and people. Their core financial systems require the ability to react to changes in economic conditions and country-specific regulations, provide deep financial insights, and financial automation. Having a system that provides the flexibility to handle complex scenarios, react quickly, and allow people to focus on value-added activities versus manual tasks is critical for business success.

Updates to Microsoft Dynamics 365 Finance 2023 release wave 1 include:

Core financials

- Further enhancements to subscription billing solution, enhancements for advanced cost and revenue deferrals with project accounting and subledger.
- General availability of invoice capture. This automates the reading and recognition of vendor invoices by providing OCR capabilities to complete the full end-to-end automation of accounts payable.
- Continued enhancements around ledger settlement automation and introduction of financial tags.
- Public preview of archiving and purging data to save space and increase performance on large, enterprise datasets.
- Invoice number length extended to 50, and the ability to use payment schedule in invoice journal in accounts payable has been added.
- Continuous improvements for advanced bank reconciliation, which includes the capability to use booking dates to post new transactions in bank statements.

Globalization Studio

- **Expanding country coverage** to 51 out-of-the-box countries/regions by shipping additional seven LATAM country localizations for Chile, Colombia, Costa Rica, Nicaragua, Panama, Paraguay, and Uruguay.

- **Enhancing automation of complex tax scenarios** by simplifying tax rate provider integrations via Universal Tax Rate API (preview), integrating with a global e-invoicing ISV for last-mile connectivity to tax authority services for countries that require intermediate certified operators, and enabling tax-specific exchange rates for tax currency conversion.
- **Delivering regulatory updates** to comply with upcoming e-invoicing legislations in Japan and France, and other legislation changes.

Investment areas

Core financials

Organizations continue to strive to get more time to their users, more insights into the vast amount of data they have, and make quick and informed decisions to optimize their finance and operations. Core financials is for features focused on bringing additional enhancements to core financial capabilities, financial automation, and reporting.

In this release wave, investments in core financials are around the themes of analytical reporting, finance automation, thriving in the subscription-based economy, and moving toward a continuous, touchless period-end close.

Globalization Studio

Our customers run our solution globally and must meet multiple tax compliance and other regulatory and local business practice requirements (localization). Globalization Studio provides out-of-the-box tax compliance and other localization content for 51 countries/regions and in 57 languages. Our no-code/low-code globalization tools and services automate complex tax scenarios and make localization easy for Microsoft, as well as partners and customers, to create, extend, and maintain. Together, these capabilities enabled our customers to operate their solutions in over 200 countries and regions.

In 2023 release wave 1, we continue enhancing Globalization Studio by expanding the out-of-the-box country coverage by an additional seven LATAM countries, enhancing tax compliance automation, content, and scalability, and delivering regulatory updates to comply with upcoming e-invoicing and other legislations in multiple countries.

For more information on Globalization Studio, go to Globalization Studio documentation.

We continuously monitor legislation in all 51 out-of-the-box countries/regions and ship multiple regulatory updates per government deadlines. To follow on planned and released regulatory updates, go to [Search for country-specific regulatory updates](#).

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Finance** below:

[Check out the release plan](#)

For application administrators

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

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

Get the most out of Finance

Helpful links	Description
[Release plan](#)	View all capabilities included in the release.

Helpful links	Description
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Finance.
Product documentation	Find documentation for Finance.
User community	Engage with Finance experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Finance.

What's new and planned for Dynamics 365 Finance

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

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Core financials

Explore the 2023 release wave 1 features focused on bringing additional enhancements to core financial capabilities, financial automation, and reporting.

Feature	Enabled for	Public preview	General availability
Archive data	Users by admins, makers, or analysts	Jul 2023	-
Determine posting of disposal transaction	Users, automatically	-	Apr 2023
Credit card payment refactory	Users by admins, makers, or analysts	-	Apr 2023

Feature	Enabled for	Public preview	General availability
Define financial tags	Users by admins, makers, or analysts	-	Apr 2023
Define foreign currency revaluation posting profile	Admins, makers, marketers, or analysts, automatically	-	Apr 2023
Summarize vendor and customer payments to the bank subledger	Users by admins, makers, or analysts	-	Apr 2023
Accounts payable fully automated with invoice capture	Users by admins, makers, or analysts	-	Apr 2023
Support financial tags in ledger settlement (automated and manual)	Users by admins, makers, or analysts	-	May 2023
Support financial tags on additional financial journals	Users by admins, makers, or analysts	-	May 2023
Process free text invoices faster	Users by admins, makers, or analysts	Apr 2023	Jun 2023
Invoice automation – process vendor invoices during import	Admins, makers, marketers, or analysts, automatically	-	Jul 2023
Calculate gain/loss, for reporting currency only, during ledger settlement	Users by admins, makers, or analysts	-	Sep 2023
Use deferral schedules with stocked materials	Users by admins, makers, or analysts	-	Sep 2023
Business performance analytics – record to report and procure to pay data model	Users by admins, makers, or analysts	Apr 2023	To be announced
Business performance analytics - reporting hub and base reports on data	Users by admins, makers, or analysts	Apr 2023	To be announced
Business performance analytics - security	Users by admins, makers, or analysts	Apr 2023	To be announced

Globalization Studio

Globalization Studio provides out-of-the-box tax and localization content for 51 countries and regions and in 57 languages.

Feature	Enabled for	Public preview	General availability
Simplify integration with tax solution ISVs	Users by admins, makers, or analysts	Jul 2023	-
Electronic Invoicing service – French e-reporting and e-invoice integration with Chorus Pro	Users by admins, makers, or analysts	-	Apr 2023
Electronic Invoicing service – configurable Polish e-invoice and integration	Users by admins, makers, or analysts	-	Jun 2023
Country expansion - localizations for LATAM countries	Users by admins, makers, or analysts	Mar 2023	Jun 2023
Electronic Invoicing service - global e-invoicing ISV last-mile connector	Users by admins, makers, or analysts	Apr 2023	Jun 2023
Tax reporting – extending multiple tax ID reporting to more EU countries	Users by admins, makers, or analysts	Apr 2023	Jun 2023
Enable additional exchange rate types for tax currency conversions	Admins, makers, marketers, or analysts, automatically	-	Jul 2023
Indian taxation localization support for project integration journal	Users, automatically	-	Jul 2023
Withhold tax calculation during invoicing	Users by admins, makers, or analysts	-	Jul 2023
Electronic Invoicing service – configurable Japanese e-invoice	Users by admins, makers, or analysts	-	Jul 2023

Description of **Enabled for** column values:

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

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Core financials

Overview

Organizations continue to strive to get more time to their users, more insights into the vast amount of data they have, and make quick and informed decisions to optimize their finance and operations. Core financials is for features focused on bringing additional enhancements to core financial capabilities, financial automation, and reporting.

In this release wave, investments in core financials are around the themes of analytical reporting, finance automation, thriving in the subscription-based economy, and moving toward a continuous, touchless period-end close.

Archive data

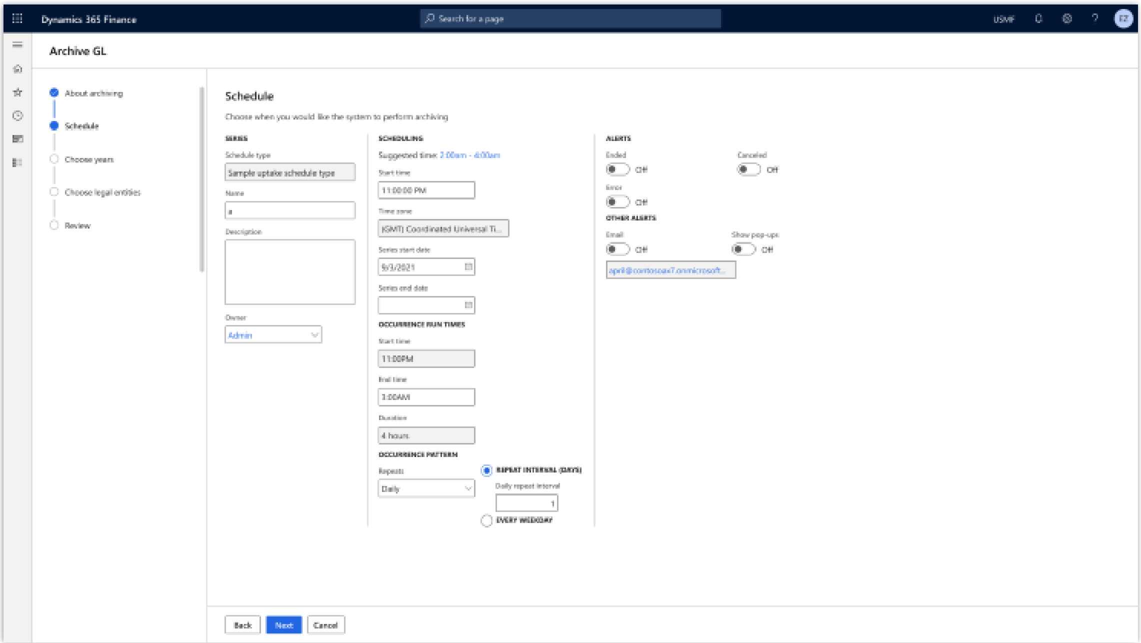
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2023	-

Business value

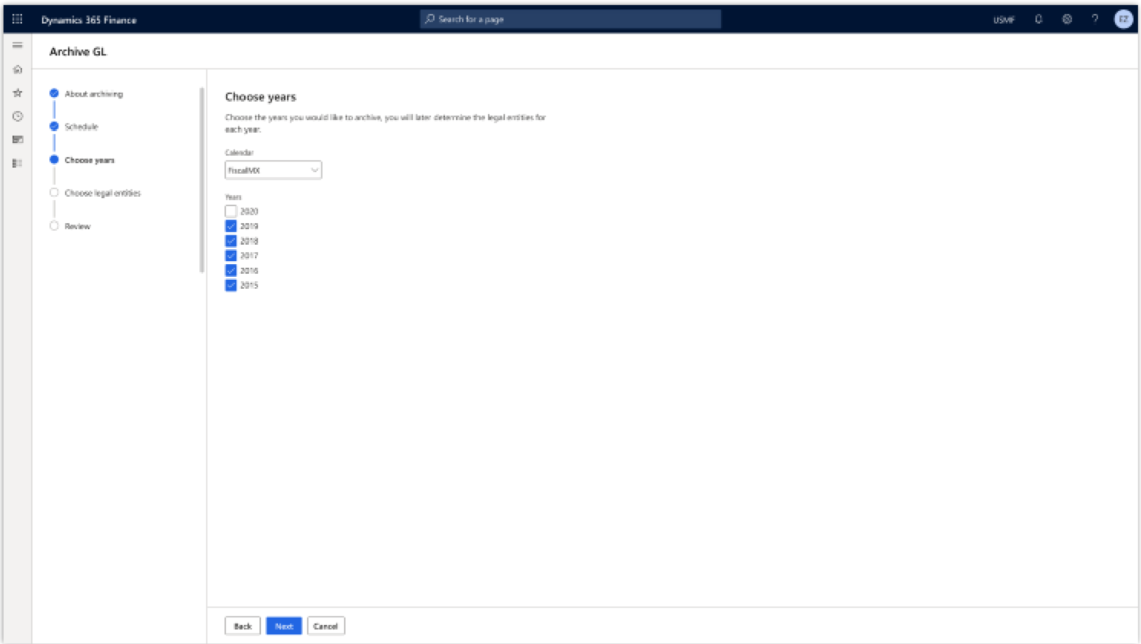
Save storage space and gain performance with a reduced data set to work against.

Feature details

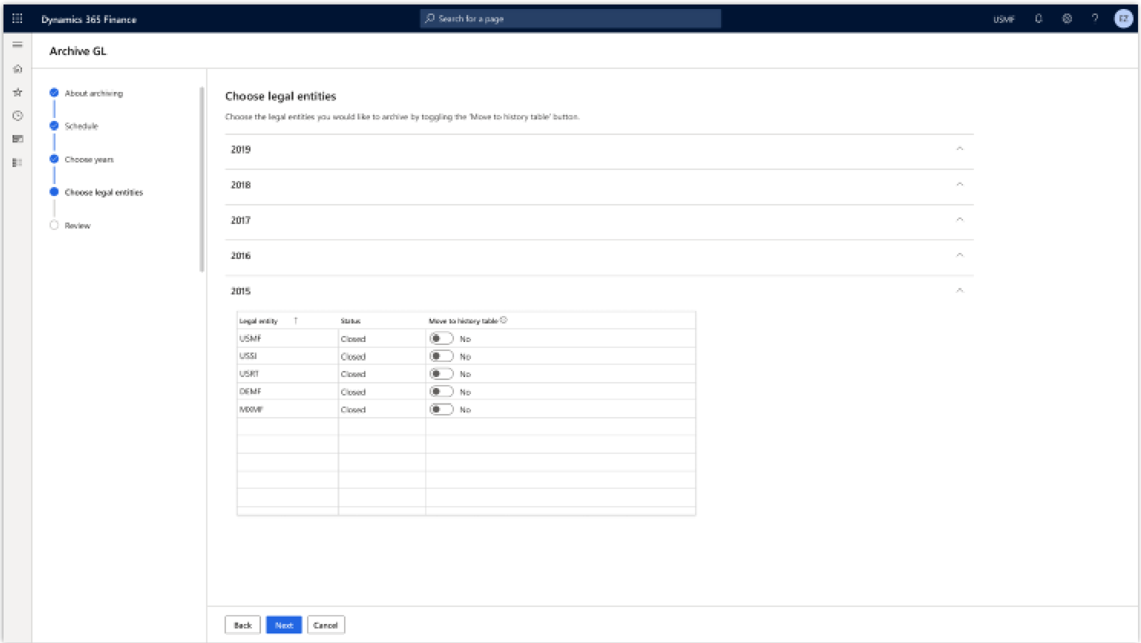
This feature lets you archive data in Dynamics 365 Finance. Using existing automation available in Dynamics 365 Finance, the data will move consistently, safely, and securely to the data archive while you continue to report and analyze historical data using standard reporting.



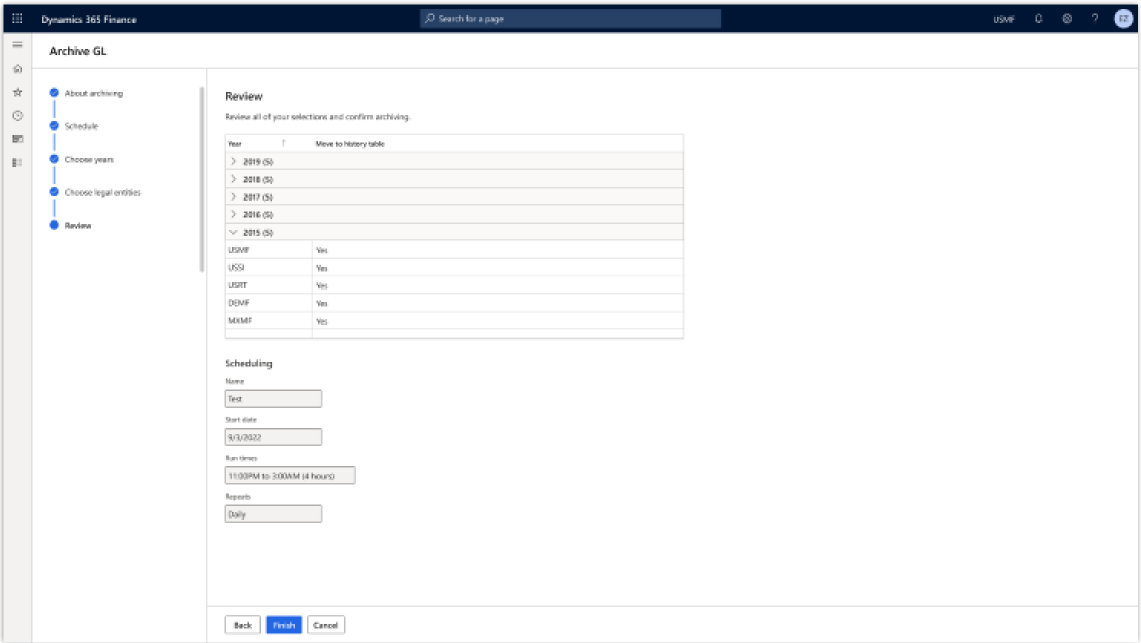
Schedule



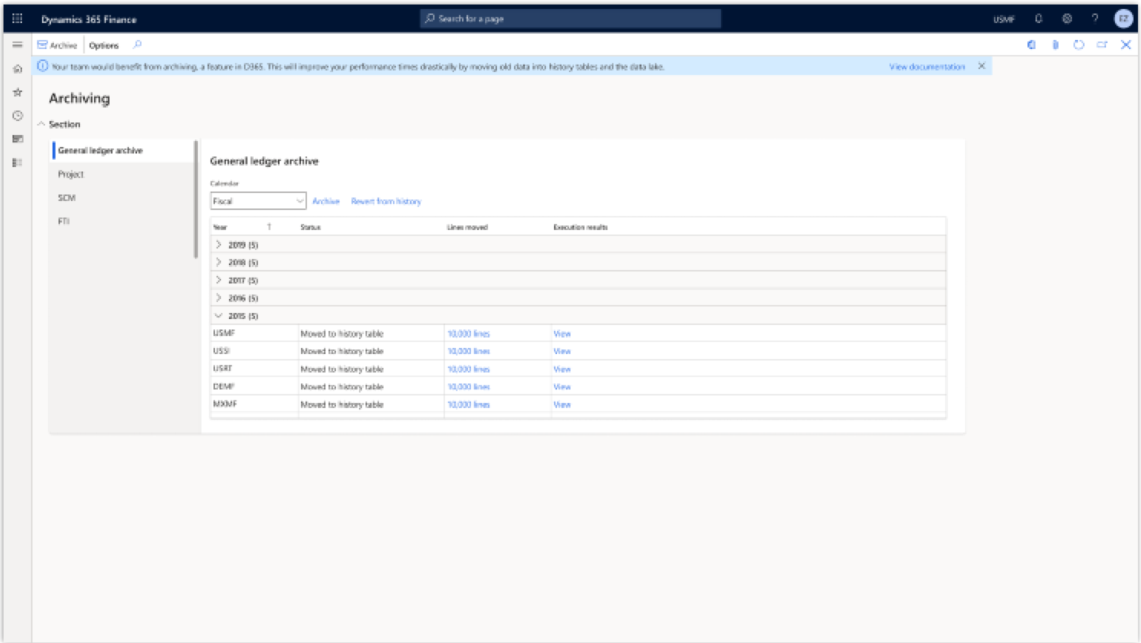
Choose years



Legal entities



Review



General ledger archive

Determine posting of disposal transaction

Enabled for	Public preview	General availability
Users, automatically	-	Apr 2023

Business value

This option allows you to determine the posting details of fixed asset disposal scrap/sale based on your business needs.

Feature details

By switching on this option, the disposal scrap/sale posting validates the defined posting profile for disposal sale/scrap for the asset within the transaction. The validation checks posting types such as acquisition this year and acquisition prior year, thus you're required to define accounts for posting types in the fixed assets posting profile.

Credit card payment refactory

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2023

Business value

It greatly improves the card (including credit card) payment process. In the case of exceptions, users have a central place to check and resolve errors. The whole customer payment process chain is improved.

Feature details

Cards payment is a typical payment scenario in the retail industry. In Dynamics 365 Finance, although it looks like a single step from process perspective, it contains several steps:

- Creating customer invoice for the sales order.
- Issuing cards payment (such as debit card, credit card, gift card).
- Generating payment posting in general ledger.

In previous versions, all steps are done within one transaction. Cards payment are external transactions and when a failure occurs, the transaction can’t be rolled back and results in inconsistent payments.

In version 10.0.32, the cards payment process is split into several stages:

- Customer invoice creation and posting
- Credit card capture/refund
- Payment journal posting
- Remaining amount authorization

The status of each stage is centrally logged and monitored per invoice and sales order. In case of failures in the process after the customer invoice is posted, users can check the failure reason and recover payment process.

Define financial tags

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2023

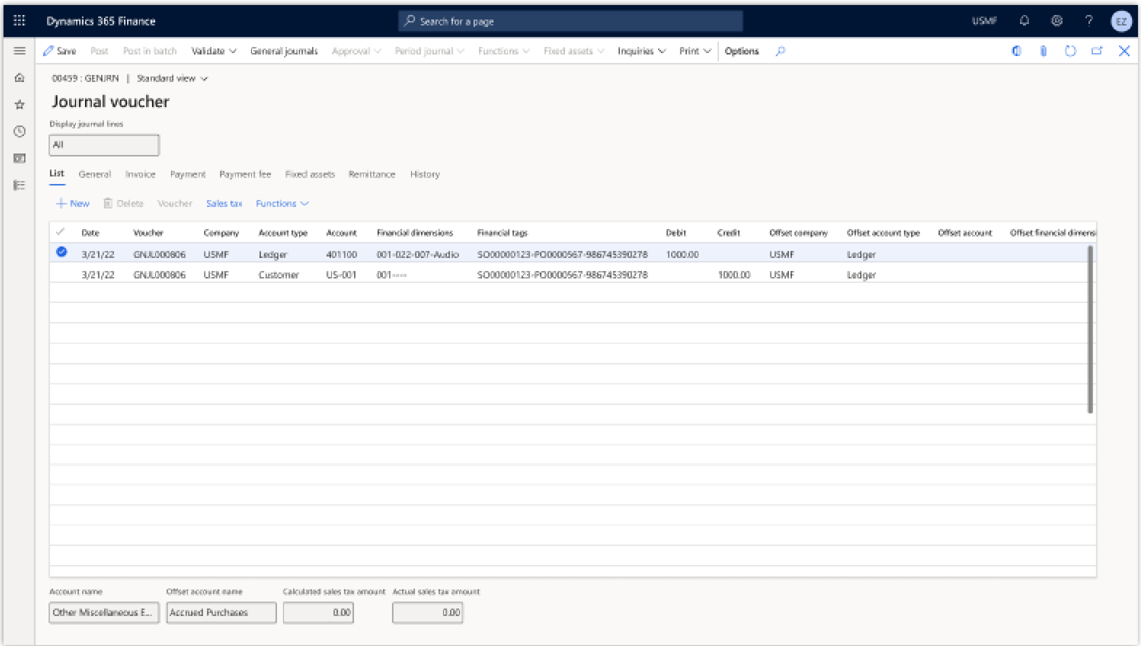
Business value

Financial tags let organizations track user-defined fields on accounting entries posted to the general ledger. Financial tags are an alternative to financial dimensions and should be used to track transaction-specific data, such as document numbers and even some master data. Additional financial dimensions increase the size of an organization's chart of accounts, causing a negatively impacting performance on processes such as the foreign currency revaluation and year-end close. Financial tag values are displayed on inquiries, such as voucher transactions, and can be used for reporting and analytics. They will be available for processes such as ledger settlement to provide more matching options. For example, you can create a financial tag to track payment references, making it easier to match transactions within ledger settlement.

Feature details

An organization can define up to 20 financial tags, which will be stored on accounting entries posted to the general ledger. The financial tag names are defined by the user, giving clarity to data entry clerks about the data expected in each field. Financial tags are very unstructured. Tag values have limited defaulting, are not required, and are not validated. They can be entered manually on transactions such as financial journals or imported through transactional entities. Because financial tags are not part of the ledger account posted on the accounting entries, the tag values can be changed after posting.

For the first release, financial tags can be created and have been incorporated in the General journal and Global general journal. With each subsequent release, financial tags will be incorporated into more transactions and processes. You can watch the release notes and "What's new" documentation for updates on uptake into journal and documents.



Screenshot of financial tags

Define foreign currency revaluation posting profile

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2023

Business value

The currency revaluation posting profile enables you to post currency revaluation adjustments to different currency adjustment accounts per currency and per module.

Feature details

The currency revaluation posting profile helps you to define currency revaluation adjustment accounts to a granular level per currency and per module (General ledger, Accounts payable, Accounts receivable, and Bank). It allows you to define the accounts across the module or for specific groups (main account category, vendor group, customer group, bank group) or specific accounts (ledger account, vendor, customer, and bank). You'll be able to identify the lowest level of defaulting to the currency or the account. When there isn't an account that is defined in the currency revaluation posting profile, the currency revaluation adjustment is posted to the defined accounts in currency revaluation accounts, or when not defined it will post to defined accounts in the ledger page.

Summarize vendor and customer payments to the bank subledger

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2023

Business value

It's common for bank account statements to show summarized transactions, such as a deposit slip for the summarization of multiple customer payments or a summarized withdrawal for multiple vendor payments. When posting the vendor and customer payments, those payments must show in detail in Accounts payable, Accounts receivable, and General ledger, but they must show in summary on the bank account's transactions. Posting the payments in summary to the bank account will ensure a much smoother bank statement reconciliation. Today organizations use the 'One voucher' capabilities to post the bank balance in summary, but this feature can be used instead to update the bank account balance in summary without using 'One voucher.'

Feature details

Today, organizations will do one of the following:

- Post detailed vendor and customer payments and then try to match the detailed transactions to the summarized transactions of the bank statement. This is difficult, if not impossible, due to the volume of vendor and customer payments that comprise the summarized amount on the bank account statement.
- Use the 'One voucher' functionality to post detailed vendor or customer payments within a single voucher so the bank account is updated with the summarized amount. While this may seem to be a good option, it causes issues with the accounting created during settlement, incorrect data on reports, and issues with reversing payments.

This feature allows an organization to post vendor and customer payments in separate vouchers but update the bank account in summary to match the bank statement, making reconciliation easier. This can now be done without using the 'One voucher' functionality.

New options on the **Journal name setup** page allow an organization to summarize or not summarize the vendor or customer payments in the bank subledger. The summarized amount is reflected on the **Bank account transactions** page and the bank statement for reconciliation, but the payment detail is also maintained on the bank account, similar to the deposit slip. The summary posting options are available on the General journal, Vendor payment journal, and Customer payment journal. The deposit slip functionality is still available for customer payments, but this new feature is more generic and can be used for both vendor and customer payments.

Accounts payable fully automated with invoice capture

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2023

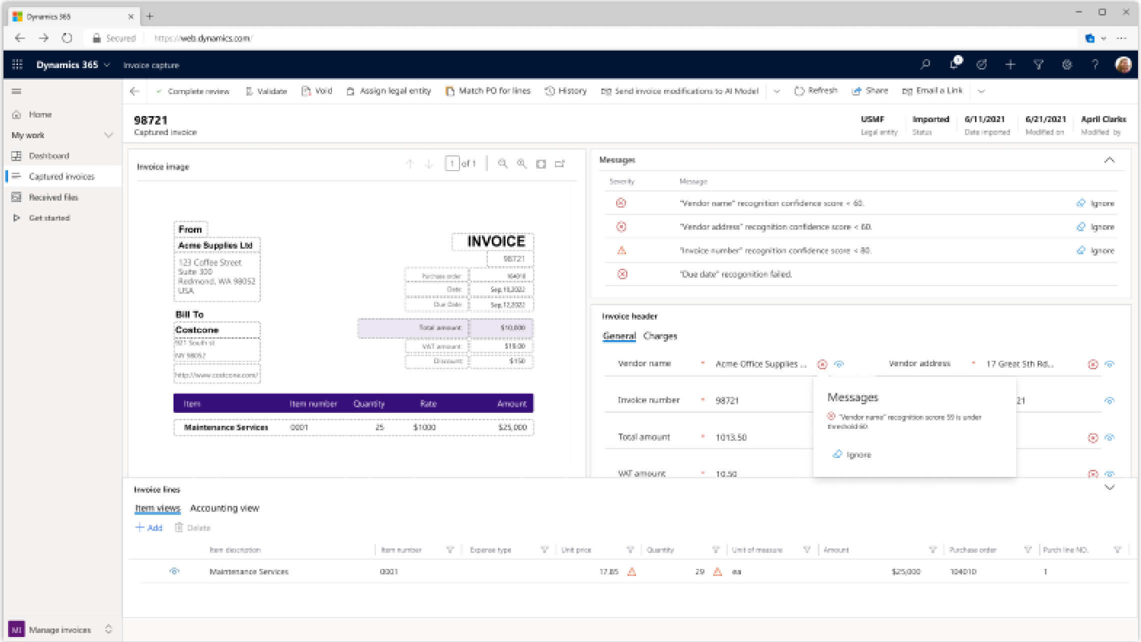
Business value

Processing vendor invoices is a manual and repetitive task in every organization, and capturing invoices saves time and errors by automating the heavy volume process.

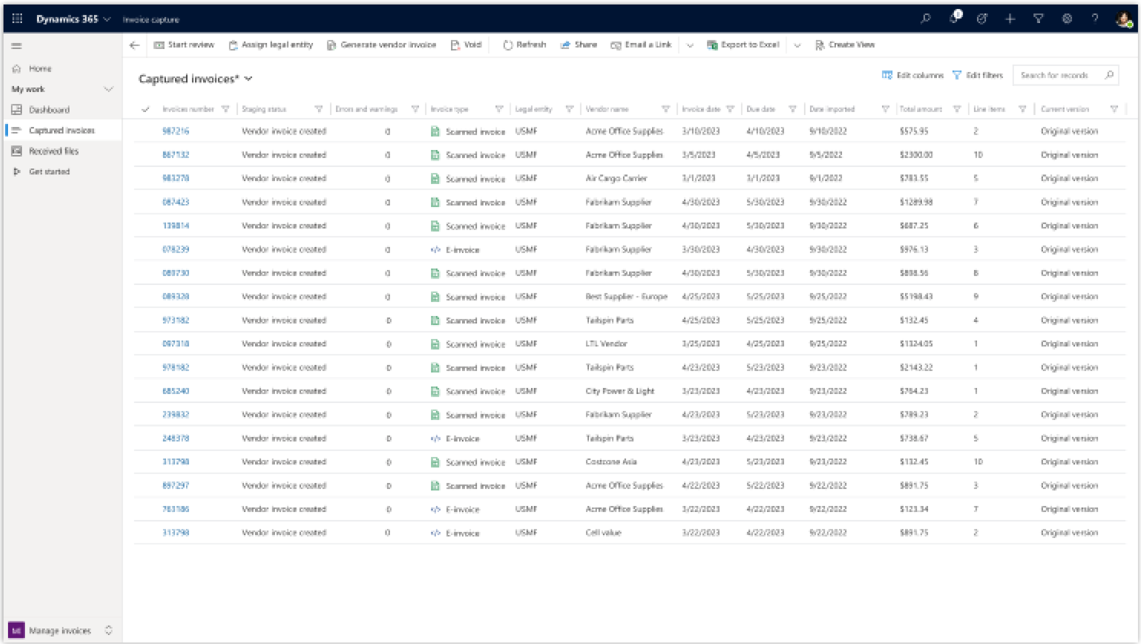
Feature details

Invoice capture provides continuous intelligent automation with reading and recognition of vendor invoices. Using Microsoft Azure Form Recognizer, AI Builder, and Microsoft Power Platform, users are provided with an out-of-the-box solution of vendor invoice models and a framework for continuous learning on invoice exceptions. This functionality went to public preview for the PO Invoice in 2022 release wave 1. Continued enhancements around matching, and additional capabilities around the non-PO invoice and vendor invoice journal were added so users can have a full accounts payable automation solution.

- **Support invoice journal**: There are two categories of invoices—pending vendor invoice and invoice journal. Invoice journal support was added for general availability.
- **Support custom AI model**: Although prebuilt invoice processing model can cover a large ratio of vendor invoices, to handle some complex invoice formats, customers need to define custom models. To efficiently orchestrate prebuilt and custom AI models during runtime, administrators will need to spend the effort to build flows to consume those AI models.
- **Continuous AI model training by exceptional data**: For recognized invoice data, the confidence score could be low for some fields. In an application layer, we have an app to let users check and correct the value with low confidence score. The corrected data should be sent to AI Builder for further training purposes so that the accuracy of recognition can be improved.



Invoice capture



Captured Invoices list

Support financial tags in ledger settlement (automated and manual)

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	May 2023

Business value

Organizations often use subledger data to help with assisting in matching transactions within ledger settlement. Financial tags can be used to track the subledger data, and now are available to be used for matching within ledger settlement. Using financial tags within ledger settlement automation will allow better matching, which reduces the number of transactions to be manually matched.

Feature details

Ledger settlement automation was released in 2022 release wave 2. This feature enhances the matching criteria within ledger settlement automation by adding financial tags. Financial tags can be used to track subledger data, such as a PO number, SO number, invoice number, or master data such as the customer or vendor. The matching criteria can be enhanced to use one or more of the financial tags, which will result in even more transactions being matched automatically and reducing the time for manual matching within ledger settlement.

The financial tags have also been added as columns to the Ledger settlement page. The columns give visibility into the tag values used by the ledger settlement automation (when viewing settled transactions), but also for transactions that require more investigation for manual ledger settlement.

Support financial tags on additional financial journals

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	May 2023

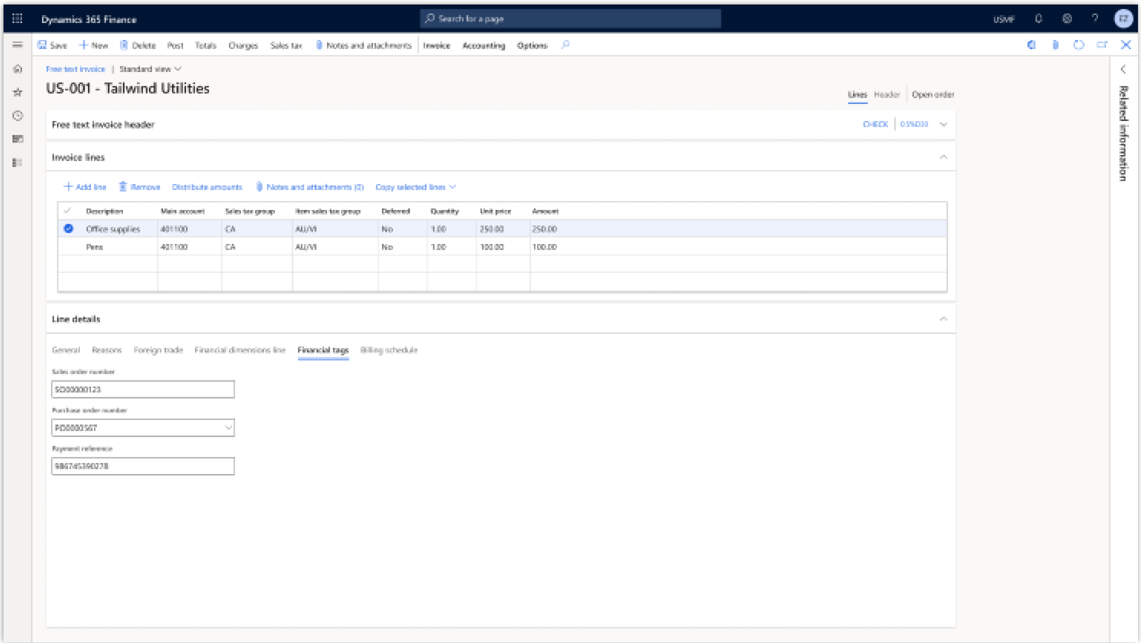
Business value

Financial tags can be used to track up to 20 user-defined fields on accounting entries. With the initial release of the feature, it supported definition of the financial tags and implementation of those tags into the general journal and global general journal. We will continue to implement financial tags into additional journals and documents.

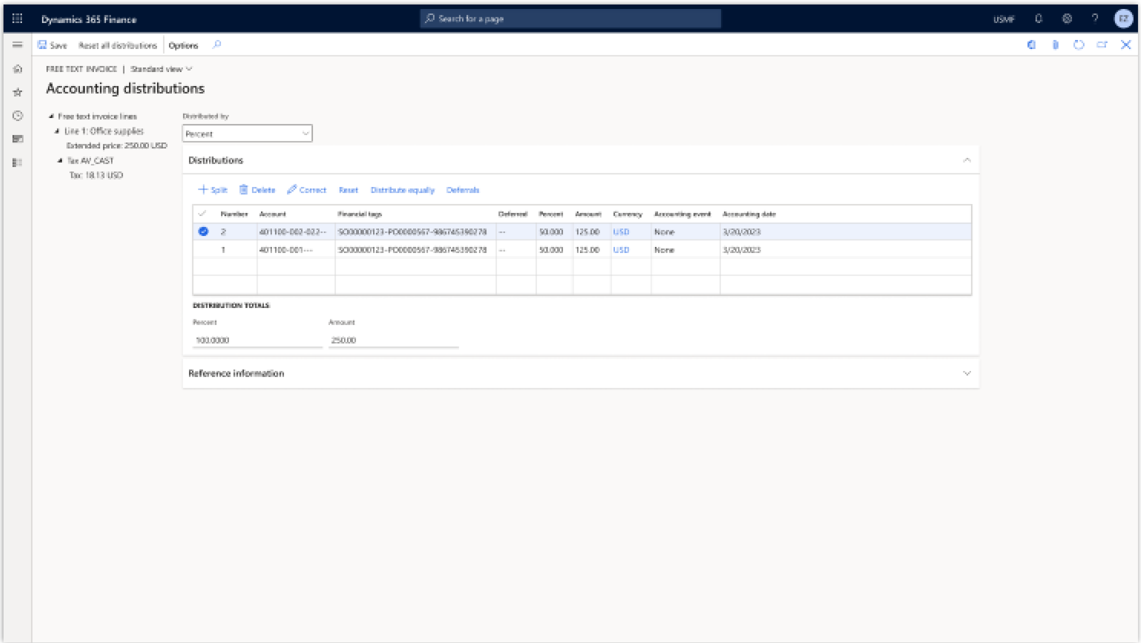
Feature details

Financial tags provide the flexibility to track 20 user-defined text fields on accounting entries. For this release plan, we are focused on the financial journals used most often, such as the customer payment journal and vendor payment journals. We will closely follow that with uptake into the vendor invoice journal, allocation journal, periodic journal, fixed asset journal, asset leasing journal, and more.

In the releases that follow the financial journals, we will focus on documents such as the sale order documents (entire lifecycle) and purchase order documents (entire lifecycle), along with project accounting.



Financial tags - Free text invoice header



Financial tags - Free text invoice accounting distributions

Process free text invoices faster

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	Jun 2023

Business value

Experience faster and higher-volume processing of free text invoices.

Feature details

Free text invoices are documents used heavily in the financial services industry. With movement to service-centric, organizations are processing larger volumes. Moving to asynchronous processing, starting with volume processes around free text invoices, will enable you to efficiently process billing system invoices into Dynamics 365 Finance. More work continues to improve processes for accounts payable product receipts and vendor invoices.

Invoice automation – process vendor invoices during import

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Jul 2023

Business value

This feature, part of the vendor invoice automation capability, saves time and effort for accounts payable clerks 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 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 processes vendor invoices automatically when the invoices are imported. This eliminates the need for additional background processing and frees accounts payable staff to focus their efforts on exceptions.

Calculate gain/loss, for reporting currency only, during ledger settlement

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Sep 2023

Business value

Today if the accounting currency is in balance (debits = credits) for matched transactions in ledger settlement, no realized gain/loss is posted if the reporting currency doesn't balance to zero. This feature addresses that gap by posting a gain/loss in the reporting currency if the accounting currency is in balance. This speeds up period-end closing by eliminating the need to first post the gain/loss in the reporting currency if it isn't already posted through accounts payment, accounts receivable settlement, or a manual reporting currency adjustment journal.

Feature details

This feature uses the accounting currency for matching within ledger settlement. If the accounting amounts are balanced in the accounting currency, the ledger settlement will post a gain/loss when necessary for the reporting currency. The gain/loss posting only occurs for main accounts that don't already have a gain/loss posted through the AR/AP settlement.

This is the first step to fully supporting gain/loss posting during ledger settlement. Other scenarios will be added in the following releases where gains and losses can also be posted for the accounting currency. Partial settlement will not be supported yet, but will come in later releases.

Use deferral schedules with stocked materials

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Sep 2023

Business value

Stocked item inventory value can be recalculated on a periodic basis based on inventory valuation method. This feature will offer cost deferrals accounting based on the latest calculated inventory value—no manual work to track the changes and manually adjust the deferrals.

Feature details

With this feature, users will be able to use stocked materials in the billing schedules along with service items. As item cost gets periodically recalculated using the inventory recalculation function, the remaining cost deferral schedule will be adjusted for the item accordingly.

Business performance analytics – record to report and procure to pay data model

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	To be announced

Business value

Financial and non-financial data and metadata are brought into Dataverse and transformed into analytical tables allowing you to build well-defined and readily available relationships between ledger, subledger, and source documents from multiple systems. This provides a single data source for reporting. It gives customers scalable and consistent access to their data, democratizing report writing to the accountant while removing the need for developer intervention.

Feature details

A data model that is created by business processes and visible in Excel and Power BI will allow users to easily create and edit reports.

With the full power of Excel and Power BI, you can now access the data you need in the tool you use most and generate transaction-level reports quickly and without support from developers.

Business performance analytics - reporting hub and base reports on data

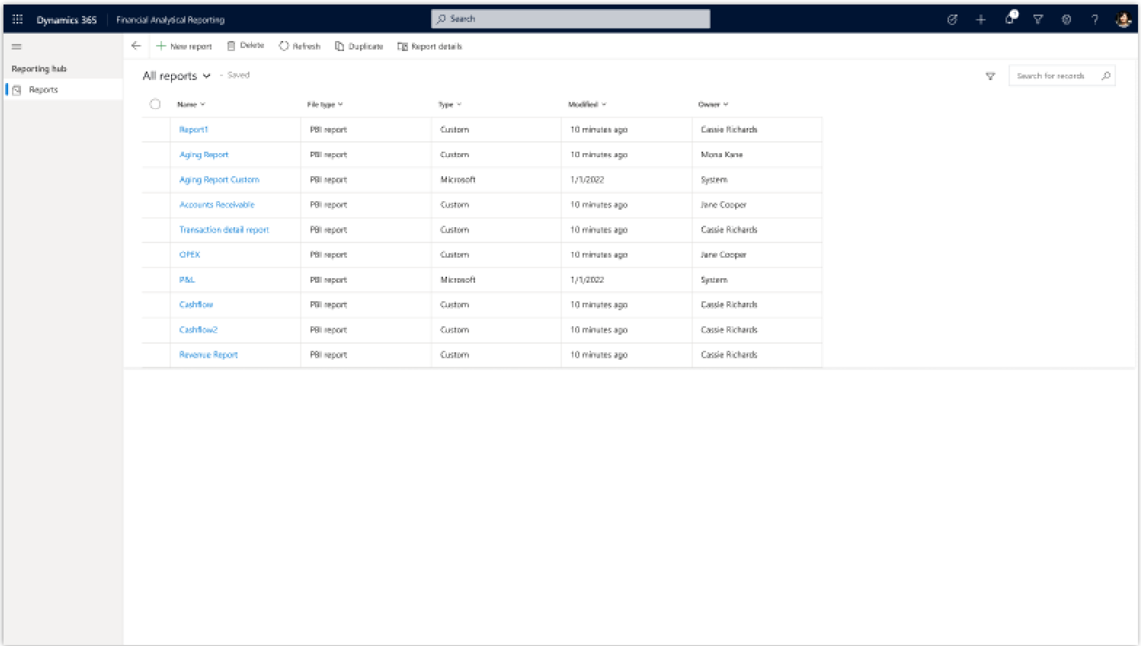
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	To be announced

Business value

With the power of the data model comes the need for report and data governance, as well as row and role-level security, which is stored in the reporting hub. The reporting hub is a central repository of preconfigured reports that are organized by business process. This will allow more users to create reports than was previously possible.

Feature details

This feature helps customers locate relevant reports by business process easily and quickly. These reports can be edited, shared, and grouped by function in the reporting hub. In addition, the hub provides data and report governance functionality.



All reports

Business performance analytics - security

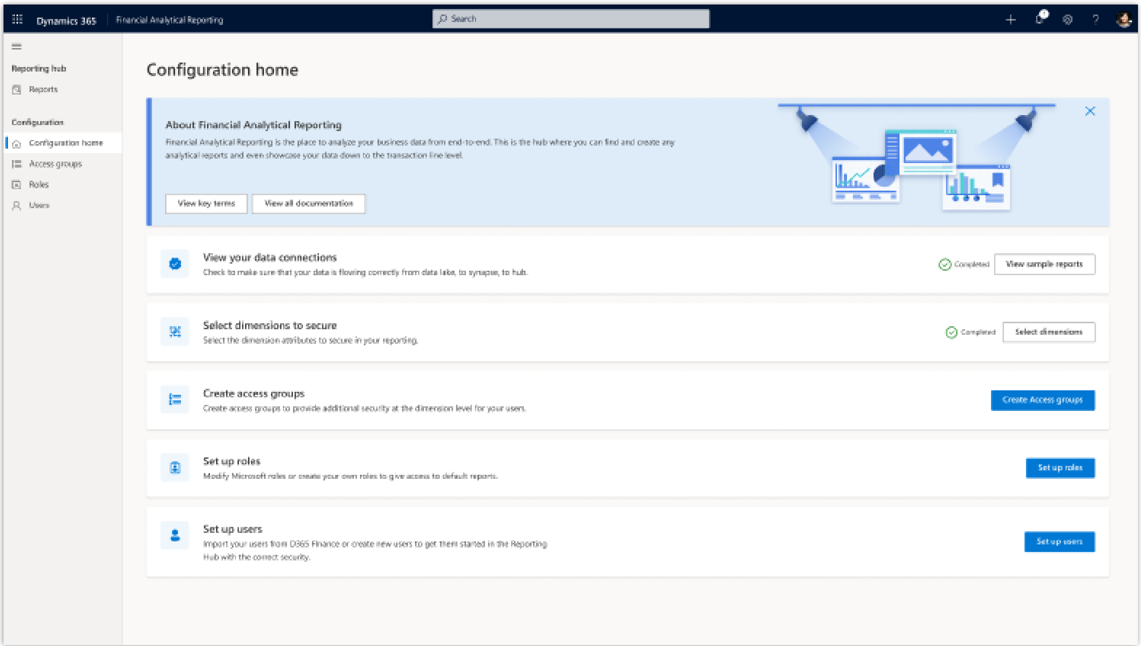
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	To be announced

Business value

Row and role-level security capabilities make the data model available to multiple users in your organization's finance and accounting teams, as well as to the staff in other departments within your company.

Feature details

The ability to set up reporting at the role level lets users share reports with team members where the data is refreshed automatically and provides fields for additional reporting capabilities. When paired with the extensibility of the data model, users can be set up to view reports by dimension and by legal entity. This lets you create refreshable, prewritten reports that can be distributed beyond the finance organization. For example, you can send a sales report to sales staff in the field that refreshes with the most current sales number but is restricted to a specific product and location.



Configure security

Globalization Studio

Overview

Our customers run our solution globally and must meet multiple tax compliance and other regulatory and local business practice requirements (localization). Globalization Studio provides out-of-the-box tax compliance and other localization content for 51 countries/regions and in 57 languages. Our no-code/low-code globalization tools and services automate complex tax scenarios and make localization easy for Microsoft, as well as partners and customers, to create, extend, and maintain. Together, these capabilities enabled our customers to operate their solutions in over 200 countries and regions.

In 2023 release wave 1, we continue enhancing Globalization Studio by expanding the out-of-the-box country coverage by an additional seven LATAM countries, enhancing tax compliance automation, content, and scalability, and delivering regulatory updates to comply with upcoming e-invoicing and other legislations in multiple countries.

For more information on Globalization Studio, go to Globalization Studio documentation.

We continuously monitor legislation in all 51 out-of-the-box countries/regions and ship multiple regulatory updates per government deadlines. To follow on planned and released regulatory updates, go to Search for country-specific regulatory updates.

Simplify integration with tax solution ISVs

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2023	-

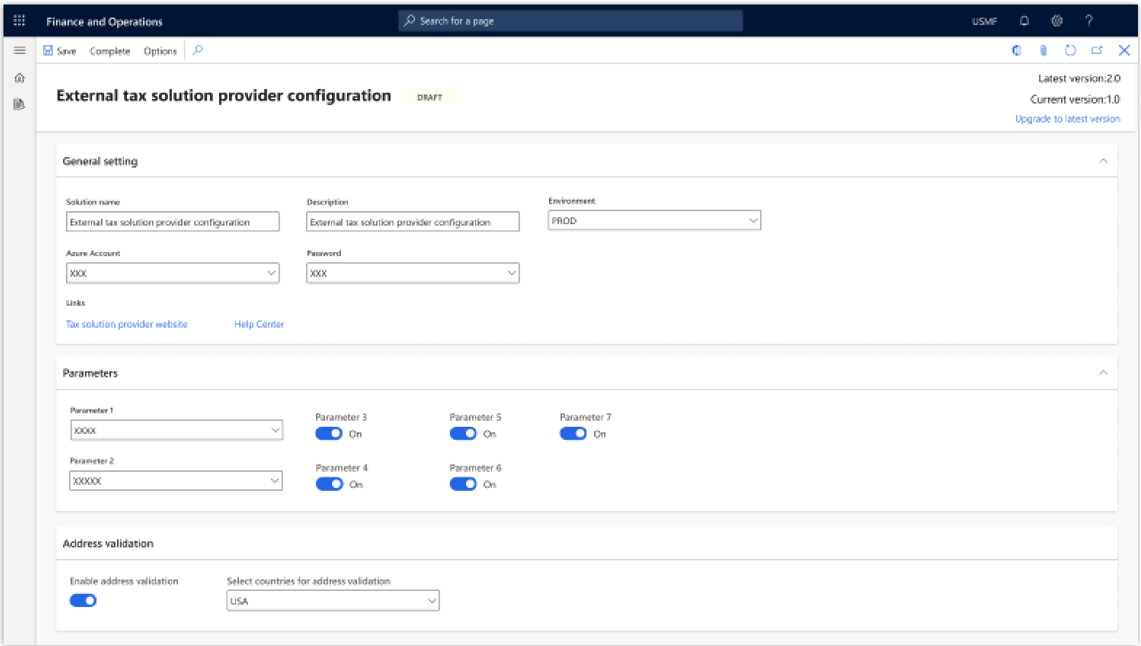
Business value

Implementors in countries like the United States and Canada, and enterprise customers operating in many different tax jurisdictions, must often manage a large variety of tax rates and complex tax determination rules. In these cases, customers may look for ISV tax solutions with automatic tax rate determination and calculation. These tax solution providers build the integration with Dynamics 365 Finance to automate the tax determination and calculation. This feature provides one generic tax calculation API to ISV tax solution providers, which can significantly simplify the complexity of the integration, reduce the entry bar for ISV tax solution providers to build their own connectors, and provide customers with more options.

Feature details

The following functions are supported in the Tax Calculation service to support tax determination and calculation with external tax solution providers:

- External tax rates API based on a unified tax data model. This data model can be extended.
- An ISV can configure the Tax Calculation service to define endpoints, parameters, mappings, and other required components to connect with an ISV tax solution.
- Configure credentials with Azure Key Vault, ISV tax solution parameters, and other required information to enable the ISV tax solution.
- Address validation.
- Tax tolerance validation for purchase invoices.



A standard configuration to simplify the integration with external tax solution providers.

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.

Electronic Invoicing service – French e-reporting and e-invoice integration with Chorus Pro

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2023

Business value

The Electronic Invoicing service in Dynamics 365 Finance allows businesses to fully automate the electronic invoicing clearance process end to end. This automation ranges from issuing sales, free text, and project invoices to submitting electronic invoices to Chorus Pro for clearance purposes and then distributing them to other companies registered in Chorus Pro.

This feature provides compliance with the legal requirements for electronic invoicing in France.

Feature details

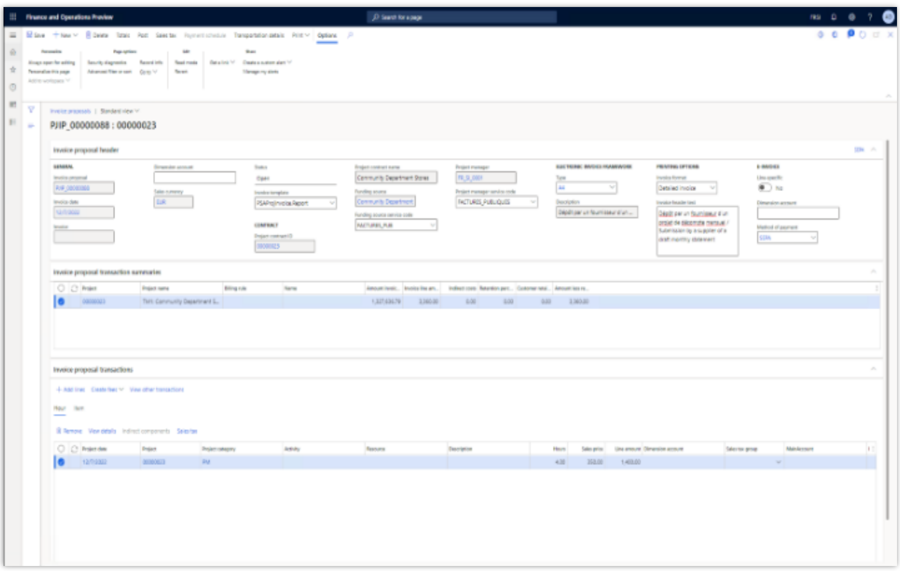
Chorus Pro is an electronic invoicing platform in France. This platform became mandatory through a phased approach from 2017-2020 for companies that maintain commercial relations with French public sector companies (B2G). With the updated legislation, the electronic invoicing mandate in France will be expanded to all companies, including all B2B transactions between 2024 and 2026. Consequently, all French companies that are subject to VAT and that operate in B2B relationships will be required to use electronic invoicing with Chorus Pro starting in 2024, depending on company size.

The following functionality is implemented to support enabling new business processes and to address a new set of **requirements for electronic invoices**:

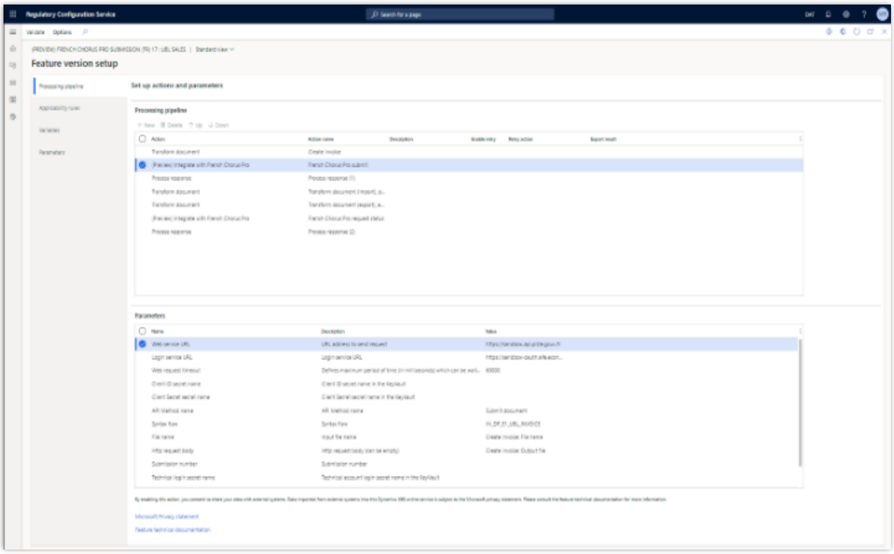
- Generate electronic invoice files in UBL Biz 3 (PEPPOL) format for sales invoice, free text invoice, and project invoice.
- Use different invoice frameworks.
- Submit electronic invoice files to the Chorus Pro public platform and process the statuses.
- Receive electronic invoices from Chorus Pro and import them into Pending vendor invoice workspace

Apart from electronic invoices, there also will be **e-reporting requirements** enforced as of 2024, mandating reporting to the tax administration the data pertaining to invoice payment and transaction data (payment without invoice). The reporting targets international B2B transactions, B2C transactions, and transactions between organizations not subject to VAT. Information about planned capabilities for French Electronic Reporting will be published in future release plans for 2023 release wave 2.

NOTE The French e-invoice integration with Chorus Pro feature is available only as a capability within the Electronic Invoicing service.



French Chorus Pro invoicing framework attributes in the project invoice proposal



Feature version setup for French Chorus Pro integration in Regulatory configuration service

Electronic Invoicing service – configurable Polish e-invoice and integration

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jun 2023

Business value

The Electronic Invoicing service, Microsoft's platform offering of a no-code/low-code e-invoicing solution, allows businesses to fully automate the electronic invoicing process end to end. This includes issuing Sales, Free text, Project, and Advance invoices and then submitting electronic invoices to the tax authorities for clearance purposes.

This feature provides compliance with the legal requirements for electronic invoicing in Poland.

Feature details

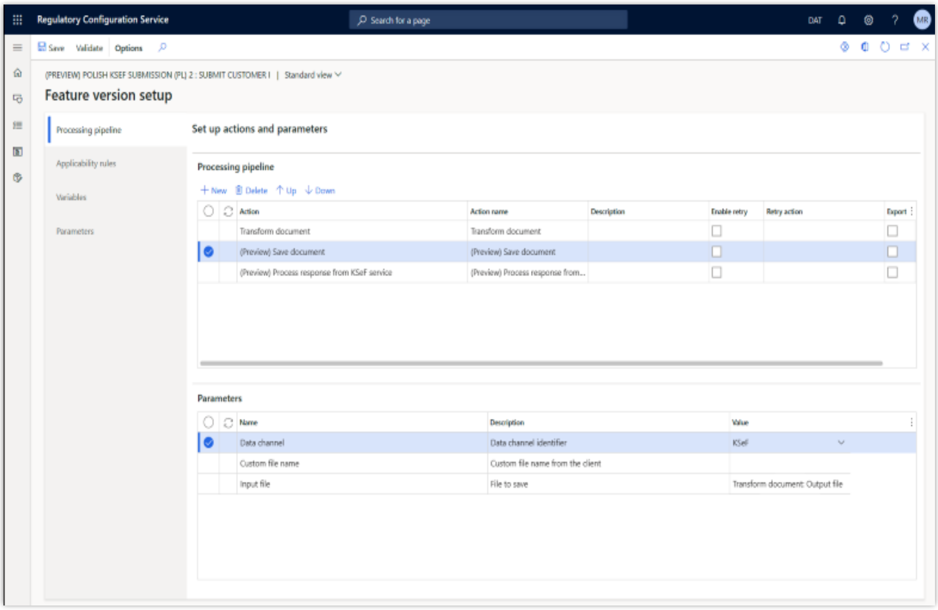
Poland is introducing, in phases, legislation to establish the continuous transaction control (CTC) system. The Polish CTC system, called Krajowy System of e-Faktur (KSeF), was made available for all taxpayers in 2022 for voluntary adoption. The KSeF platform supports issuing, receiving, and archiving e-invoicing for business to business (B2B) transactions while excluding customers for business to consumer (B2C) transactions. Starting July 1, 2024, the KSeF system will be rolled out as mandatory for all companies that are subject to VAT. VAT-exempted taxpayers will have until January 1, 2025, to adopt the requirements.

To comply with these legal requirements, the following functionality is implemented:

- Ability to generate XML files of Sales, Project, and Advance electronic invoices in the legally required format provided by KSeF.

- Ability to import electronic invoices issued and available for a recipient in the KSeF platform.
- Ability to integrate with the KSeF services to enable automatic submission of generated electronic invoices to Polish tax authorities.

NOTE The Configurable Polish e-invoice and integration feature is available only as a capability within [Electronic Invoicing service].



Processing pipeline for Polish KSeF submission

Country expansion - localizations for LATAM countries

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2023	Jun 2023

Business value

Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geo coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries will significantly extend our country support in LATAM, beyond our current support and provide customers with more consistent, out-of-the-box regulatory compliance coverage.

Feature details

In Latin America, our solution currently supports out-of-the-box localizations for Brazil and Mexico. As part of our plan to expand the localization in the territory and address the needs of multiple global and local customers, in 2023 release wave 1, Microsoft will extend out-of-the-box localizations for the following LATAM countries/regions:

Release schedule

Country/region	Public preview	GA
Chile and cross LATAM features	March 2023	June 2023
Costa Rica	April 2023	June 2023
Nicaragua	April 2023	June 2023
Panama	April 2023	June 2023
Paraguay	April 2023	June 2023
Colombia	May 2023	August 2023
Uruguay	May 2023	August 2023

Feature list

Cross LATAM features

- Tax
- Tax setup and calculation
    - Taxpayer type
    - Company tax and legal attributes
    - Customer tax and legal attributes
    - Authorization code (CA) number
    - Employees tax and legal attributes
    - Contact identification tax and legal attributes
    - Country identification
    - State identification
    - County identification
    - Third dimension setup
    - Vendor tax and legal attributes

    - Sales tax calculations (10.0.34)
    - Fiscal register - third party registration ID
    - Vendor withholding taxes (10.0.34)
- Invoicing
- Electronic invoicing
    - Electronic invoice format - Guia de despacho (shipment)
    - Electronic invoice format - Factura de Exportación (Export invoice=
    - Connector to PAC (10.0.34)
- Invoice processing
    - Process of vendors: Receiving invoicing from invoice journal
    - Process of vendors: Receiving invoicing from invoice register
    - Process of vendors: Packing slip
    - Process of vendors: Receiving invoicing from purchase request
    - Process of customer: Invoicing from order return
    - Process of customer: Packing slip in sales
    - Process of customer: Invoicing from sales order
    - Process of customer: Invoicing from free text invoice
    - Project packing slip
    - Project invoice
- Other invoicing
    - Sales return account
    - Fiscal document report
    - Parameters: Voucher mandatory in daily
    - Document classification: Fiscal documents
    - Document classification: Treasury documents
    - Sales point
    - Document classification permitted per client/vendor
    - Document classification type
    - Document classification: Payment media
- Reporting

- General ledger and tax reporting
    - Daily book (10.0.34)
    - Taxes report
- Supply chain management
- Packing slip
    - Packing slip document for inventory transfer
- Banking and payments
- Check, settings, and payment processing
    - Check printing
    - Customer checks accrual process
    - Bank - Regional settings and requisites for the **Bank** module (10.0.34)
    - Regional payments processing
    - Collection and payment documents

Country-specific features for Chile

- Invoicing
- Electronic invoicing
    - Ability to emit a DTE receival reply (10.0.34)
    - Ability to import a purchase invoice from a vendor (Factura de Compras) (10.0.34)
    - Electronic Invoice format (Factura de Ventas)
    - Export Invoice (Factura de Exportación)
    - Shipment (Guía de Despacho)
    - Debit and credit note - Export (Nota de Débito & Crédito Exportación)
    - Debit note and credit note (Nota de Débito & Nota de Crédito)
- Other invoicing
    - Invoice layout for sales order invoice, free text invoice, and project invoice (10.0.34)
- Reporting
- General ledger and tax reporting
    - Numbered General ledger book
    - Numbered ledger book
    - T8 Columns trial balance
    - Inventory and balance sheet book

- Fees certificate report
- Purchase VAT book
- Sales VAT book
- Sales per branch VAT book
- Withholdings book

Country-specific features for Colombia

- Invoicing
- Electronic Invoicing
  - Electronic Invoice format
  - Connector to PAC
- Other Invoicing
  - Invoice layout for sales order invoice, free text invoice, and project invoice
- Reporting
- General ledger and tax reporting
  - Declaration reports trial balance
  - Declaration reports General ledger
  - File export file format 1001 - PAGOS O ABONOS EN CUENTA Y RETENCIONES PRACTICADAS
  - File export file format 1003 - RETENCIONES EN LA FUENTE QUE LE PRACTICARON
  - File export file format 1005 - IMPUESTO A LAS VENTAS POR PAGAR -DESCONTABLE
  - File export file format 1006 - IMPUESTOS A LAS VENTAS POR PAGAR (GENERADO) E IMPUESTO AL CONSUMO
  - File export file format 1007 - INGRESOS RECIBIDOS
  - File export file format 1008 - SALDOS POR CUENTAS A COBRAR
  - File export file format 1009 - SALDOS POR CUENTAS A PAGAR
  - File export file format 1012 - INFORMACION DE LAS DECLARACIONES TRIBUTARIAS, ACCIONES Y APORTES E INVERSIONES EN BONOS, CERTIFICADOS, TITULOS Y DEMAS INVERSIONES TRIBUTARIAS.

Country-specific features for Costa Rica

- Invoicing
- Electronic Invoicing
  - Electronic Invoice format

    - Connector to PAC
- Other Invoicing
    - Invoice layout for sales order invoice, free text invoice, and project invoice
- Reporting
- General ledger and tax reports
    - Declaration reports trial balance
    - Declaration reports general ledger
    - Declaration reports purchases VAT book
    - Declaration reports sales VAT book

Country-specific features for Nicaragua

- Invoicing
- Electronic Invoicing
    - Electronic Invoice format
    - Connector to PAC
- Other invoicing
    - Invoice layout for sales order invoice, free text invoice, and project invoice
- Reporting
- General ledger and tax reporting
    - Declaration reports General ledger
    - Declaration reports sales VAT book
    - Declaration reports purchases VAT book
    - Declaration reports trial balance

Country-specific features for Panama

- Invoicing
- Electronic Invoicing
    - Electronic Invoice format
    - Connector to PAC
- Other invoicing
    - Invoice layout for sales order invoice, free text invoice, and project invoice
- Reporting

- General ledger and tax reports
  - Declaration reports General ledger
  - Declaration reports sales VAT book
  - Declaration reports purchases VAT book
  - Declaration reports trial balance

Country-specific features for Paraguay

- Invoicing
- Electronic Invoicing
  - Electronic Invoice format
  - Connector to PAC
- Other invoicing
  - Invoice layout for sales order invoice, free text invoice, and project invoice
- Reporting
- General ledger and tax reports
  - Declaration reports General ledger
  - Declaration reports sales VAT book
  - Declaration reports purchases VAT book
  - Declaration reports trial balance

Country-specific features for Uruguay

- Invoicing
- Electronic Invoicing
  - Electronic Invoice format
  - Connector to PAC
- Other invoicing
  - Invoice layout for sales order invoice, free text invoice, and project invoice
- Reporting
- General ledger and tax reports
  - Declaration reports trial balance
  - Declaration reports General ledger
  - Purchase VAT book
  - Sales VAT book

Electronic Invoicing service - global e-invoicing ISV last-mile connector

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	Jun 2023

Business value

Electronic invoicing is a fast-growing market, driven by tax digitization and invoice automation. While we deliver end-to-end automated regulatory e-invoicing, integrated directly with the government services in several countries, some governments require intermediate certified operators to exchange electronic invoice documents with tax authorities and between businesses. This connector provides customers with a fully automated end-to-end experience and enables them to have only one global e-invoice last-mile provider.

Feature details

This feature delivers a connector with a global ISV's e-invoice connectivity services to:

- Provide customers with a fully automated end-to-end regulatory e-invoicing experience for the countries where governments require intermediate certified operators.
- Extend e-invoicing coverage for non-Microsoft localized countries.
- Provide access to the E-Invoicing Exchange Frameworks, such as Open PEPPOL in Europe, to route electronic invoices created by using the Electronic Invoicing service.

Tax reporting – extending multiple tax ID reporting to more EU countries

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	Jun 2023

Business value

Many companies with established tax registrations in many foreign tax jurisdictions operate under transfer pricing or limited risk distributor (LRD) models and need to automate the process of VAT (value-added tax) reporting from a single legal entity. In prior waves we delivered functionality for most of the EU countries, and we will continue to extend the support for this scenario for more EU countries needed for global companies.

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.

The scope of supported countries and regions in the framework of Multiple Tax IDs registrations will be expanded to:

June 2023:

- Czech Republic

2023 release wave 2:

- Italy
- Hungary
- Estonia
- Latvia
- Lithuania

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 additional exchange rate types for tax currency conversions

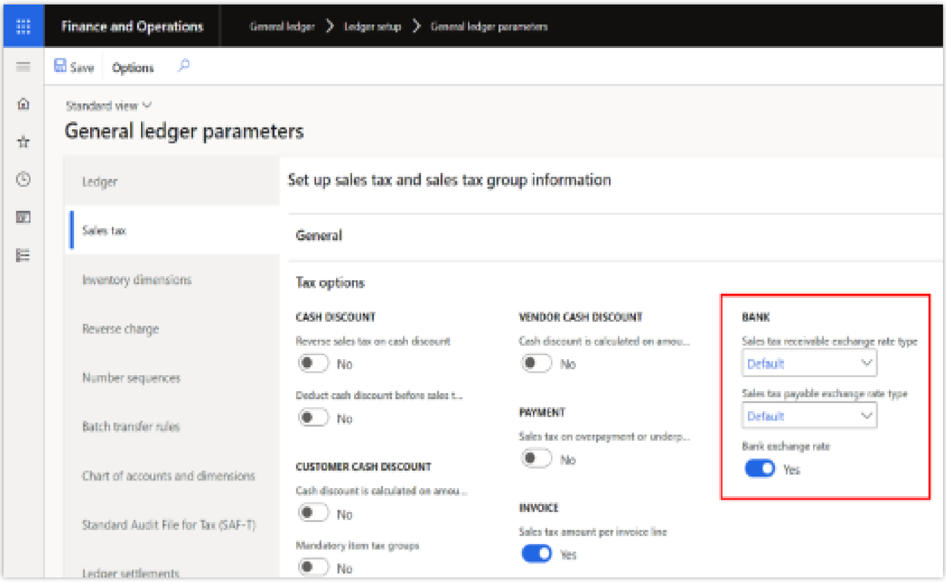
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Jul 2023

Business value

The tax authority usually requires a company to declare a tax amount in the local currency and a specific exchange rate in the import/export business. Currently, Dynamics 365 Finance only allows for the tax amount calculation that's based on the transaction currency. Finance then converts to the tax currency amount through the accounting currency or reporting currency. This feature provides additional tax-specific exchange rate types and converts a transaction currency amount into the tax currency amount directly.

Feature details

This feature enables additional exchange rate types for tax currency conversions. You can maintain the tax exchange rate types based on the local tax authority requirement. Tax is calculated based on the transaction currency amount of the document and converted to the tax currency amount using this exchange rate type.



Additional tax exchange rate types

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.

Indian taxation localization support for project integration journal

Enabled for	Public preview	General availability
Users, automatically	-	Jul 2023

Business value

This feature helps you record Indian taxes such as GST and TDS/TCS. Using Project integration journals, including Fee, Hour, Expense, and Item, you can also show project profitability correctly. This feature also allows you to generate legally compliant tax invoices and financial reporting.

Feature details

Project integration journals combine the existing Project management and accounting modules with Microsoft Dynamics 365 Project Operations. Project Operations offers end-to-end coverage of customer relationships and can handle operations such as proposal, modeling, scheduling, delivering, and billing services rendered. In order to execute the operations with appropriate legal compliance, Project Operations provides accountants with a tool to review transactions and adjust the accounting attributes as needed in Integration journals. India localization support for project integration journals enables you to calculate

Indian taxes such as GST and TDS/TCS. You can also generate customer tax documents, revenue recognition, and legally compliant financial reporting.

The following integration journals will be covered to calculate India taxes for Fixed and Time and material project scenarios.

- Project integration journal - Fee
- Project integration journal - Hour
- Project integration journal - Expense
- Project integration journal - Item

Withhold tax calculation during invoicing

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jul 2023

Business value

Though in many countries/regions, withholding tax is only due on payment, there are companies in other countries/regions such as Italy, Netherlands, Mexico, Egypt, Indonesia, and the Philippines with firm practices to calculate, display, and post withholding tax at invoice time. In the Philippines, withholding tax posting at invoice time is legally required.

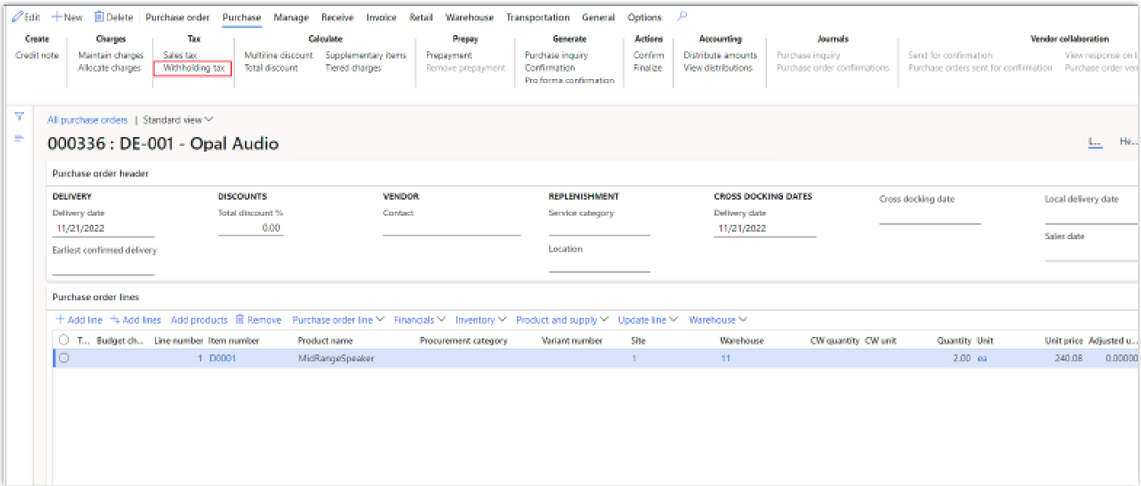
Feature details

With this feature, the withholding tax amount is estimated on the purchase order and the vendor invoice so that the user can validate the withholding tax setup prior to payment.

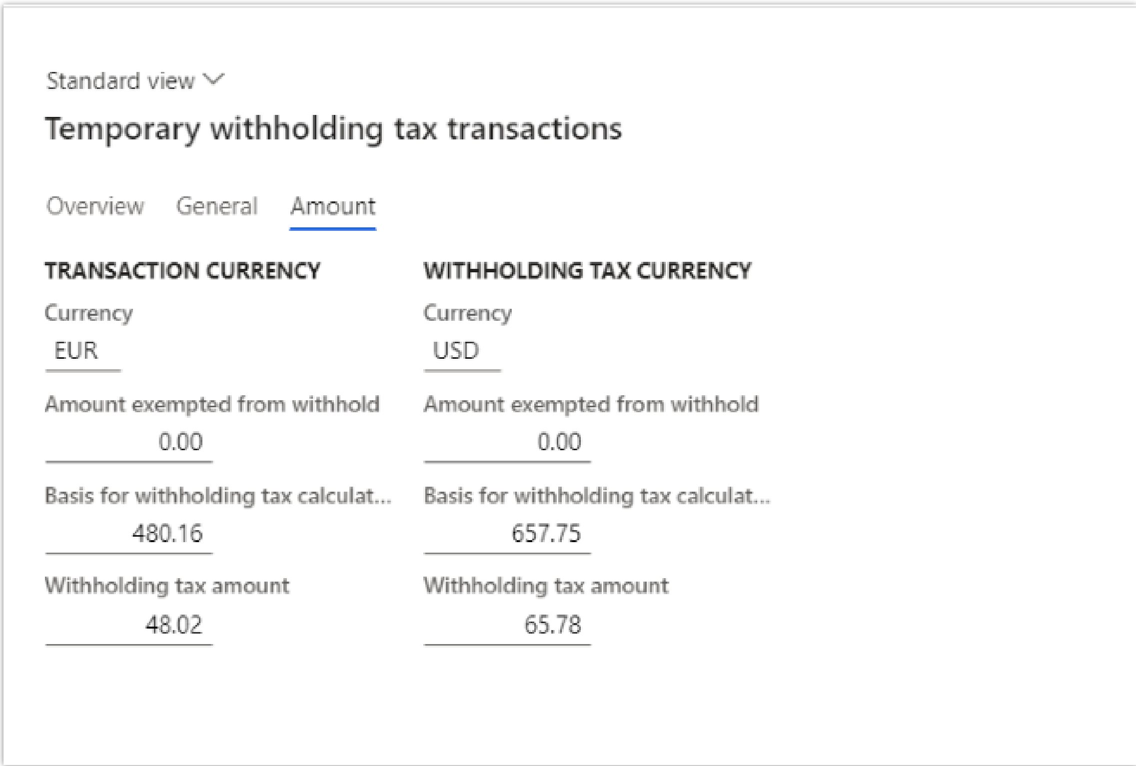
The following functionalities are available with this feature:

- A **Withholding tax** button for temporary withholding tax transactions that contain the withholding tax amount information at document header level.
- Withholding tax amount is calculated and recalculated after field and transaction updates.
- Withholding tax limit, threshold, and cash discount are considered in the calculation.
- Withholding tax group assignment, code determination validation, and error handling.
- Withholding tax currency exchange rate date adaptation.

At this time, withholding tax posting during invoicing is not available.



Withholding tax calculation during invoicing



Withholding tax calculation result

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.

Electronic Invoicing service – configurable Japanese e-invoice

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jul 2023

Business value

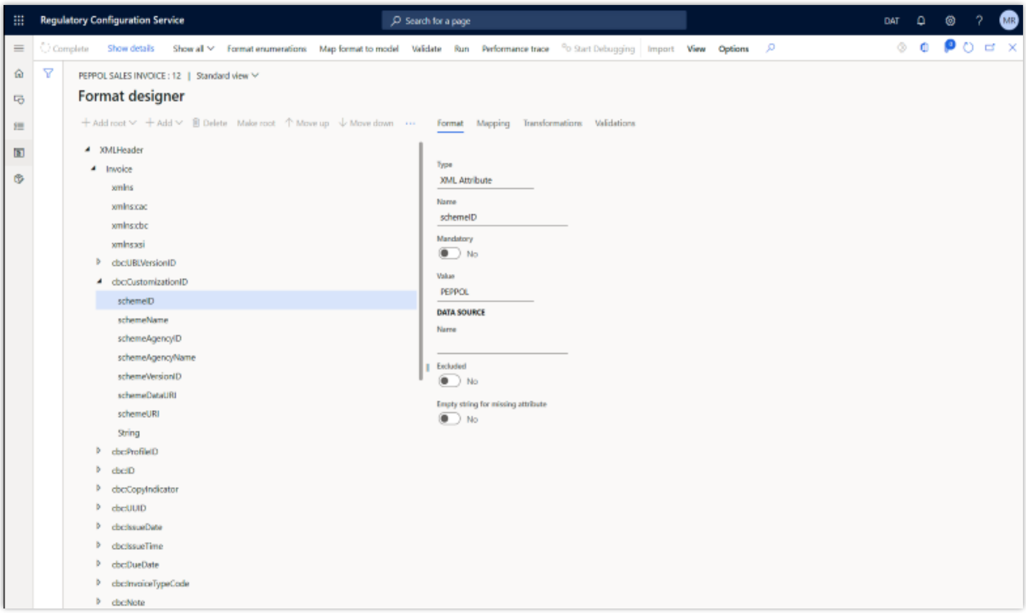
The Electronic Invoicing service makes it easy to configure invoices in countries and regions that your business is moving into or is already doing business in. You can also use the Electronic Invoicing service where there's an opportunity to process invoices in a more automated manner. This feature addresses the legal requirements coming from the introduction of Electronic Invoicing in Japan.

Feature details

According to regulatory changes, electronic invoicing is available for wide use in Japan starting from October 2022 and is planned to be mandated by October 1, 2023. In the scope of this feature, the following functionality is implemented:

- XML file generation of e-invoices in a format specific for Japan, which is the Japanese extension to PEPPOL International format (PINT).
- Import of vendor invoices in PINT format.
- Enabling interoperability model with Japan PEPPOL access point for e-invoice exchange.

NOTE The Configurable Japanese e-invoice and integration feature is available only as a capability within the [Electronic Invoicing service](#).



Electronic invoice PEPPOL format configuration in Electronic reporting designer

Plan and prepare for Dynamics 365 Supply Chain Management in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Supply Chain Management**.

Overview

Video: Learn about this product's new capabilities

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

Improving the agility and efficiency of front-line workers continues to be a priority in this release wave, with new and reimagined experiences for Inventory Visibility and Asset Management that simplify daily tasks and deliver actionable insights where and when needed. Warehouse management workers enjoy incremental usability and productivity enhancements in the Warehouse Management mobile app, including the added support for iOS devices.

Businesses with sales processes spanning Dynamics 365 Sales and Supply Chain Management benefit from true end-to-end process integration for improved accuracy and efficiency. Omnichannel sales strategies get a boost with new and improved ways of managing attribute-based pricing, integrated soft reservations, and improved order promising capabilities with an extended available-to-promise (ATP) horizon.

Discrete manufacturers that struggle to comply with both generally accepted accounting principles (GAAP) and local statutory accounting principles can now leverage the Global Inventory Accounting Add-in to supplement their statutory inventory accounting practice with parallel, standard-cost-based inventory accounting practices in multiple currencies. Manufacturers with a mix of discrete and process manufacturing processes can onboard Planning Optimization, which provides improved performance, scalability, and near-real-time insights into requirement changes.

Organizations seek increased agility and resilience through optimizing their fulfillment capabilities and warehouse operations. This release brings a simplified warehouse configuration experience that will reduce implementation time. It also provides insights into the performance and usage of the warehouse management system, which organizations can use for optimizing warehouse operations.

Investment areas

Inventory and logistics
The inventory and logistics capabilities of Dynamics 365 Supply Chain Management enable businesses to manage their sales and fulfillment processes effectively and efficiently, while ensuring inventory availability that matches the desired service levels. Investments in this area continue to focus on helping businesses gain more visibility, efficiency, and resiliency in their supply chain operations. The enhancements in this release wave include:

- **Manage attribute-based omnichannel sales pricing** to effectively plan and manage omnichannel sales prices with price attributes on customers, products, and order segments.
- **Evaluate costs in discrete manufacturing using standard cost** with the Global Inventory Accounting Add-in for Microsoft Dynamics 365 Supply Chain Management.
- **Calculate available to promise (ATP) up to three months in advance with Inventory Visibility**. Increase visibility into your future inventory statuses and order-promising capacity. Allow for order promising with fulfillment dates further out into the future.
- **Make soft reservations for Supply Chain Management sales orders**. Use Inventory Visibility to make soft reservations directly from a sales order, thereby maintaining a sole source of truth for omnichannel fulfillment and inventory inquiries.
- **A reimagined Inventory Visibility user experience** lets you manage and update data more efficiently and provides near-real-time insights into current and projected inventory levels and availability.
- **Prospect-to-cash scenario enhancements** across Supply Chain Management and Dynamics 365 Sales enable true end-to-end process integration in the prospect-to-cash flow. Improving the entire process from quotation to invoice helps organizations drive efficiencies in their sales and fulfillment processes, improve accuracy, and reduce lead times.
- **Archive inventory transactions and sales orders**. Businesses running large databases can establish rules for archiving data from their day-to-day working environment into a data lake, which allows for historical reporting, auditing, machine learning, and more.

This improves performance and usability in the day-to-day working environment while lowering operating costs.

Warehouse Management
The warehouse management solution in Dynamics 365 Supply Chain Management provides a rich and flexible set of capabilities that can be combined and configured to support many warehouse layouts and operational scenarios

The enhancements in this release focus on simplifying the configuration experience, reducing implementation time, and providing insights into the performance and usage of the warehouse management system. Warehouse workers using the Warehouse Management mobile app will experience usability and productivity enhancements, improved GS1 barcode support, improved packing functionality, support for iOS devices, and more.

Manufacturing and asset management
The manufacturing and asset management features in Dynamics 365 Supply Chain Management help companies gain agility, efficiency, and visibility in their manufacturing and maintenance operations while maximizing asset uptime and productivity. Investments in this area continue to focus on improving the user experience for greater agility and efficiency of front-line workers.

This release wave delivers a new and reimagined mobile experience for maintenance operations that simplifies daily tasks and presents relevant information and insights when and where they are needed most. In manufacturing, supervisors will get enhanced capabilities for checking availability of materials before releasing production orders to the shop floor.

Procurement
Investments in the procurement and sourcing area continue to be targeted at making organizations more resilient in their supply chain operations. In this release, the focus is on protecting the accuracy and integrity of vendor bank account information.

Planning
Planning Optimization provides significantly improved performance and scalability, which enables near real-time insights into requirement changes. The enhancements delivered in this release wave add support for additional scenarios that address the needs of manufacturers using a combination of discrete and light-process manufacturing. Other enhancements help manufacturers (especially make-to-order manufacturers) to manage schedule changes more effectively.

Product information management
Product information management enables companies to centrally manage information about products and product variants throughout their entire lifecycle, including the attributes, configurations, documentation, and identifiers needed for supporting key business processes. Investments in this area continue to focus on driving efficiencies for companies managing large product portfolios across large organizations.

The enhancements in this release wave let companies share released product data across legal entities, which reduces data duplication and simplifies maintenance.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Supply Chain Management** below:

Check out the release plan

For application administrators

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

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

Get the most out of Supply Chain Management

Helpful links	Description
Release plan	View all capabilities included in the release.

Helpful links	Description
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Supply Chain Management.
Product documentation	Find documentation for Supply Chain Management.
User community	Engage with Supply Chain Management experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Supply Chain Management.

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

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

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

Inventory and logistics

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

Feature	Enabled for	Public preview	General availability
Manage attribute-based omnichannel sales pricing	Users, automatically	Apr 2023	-
Inventory and logistics feature state updates for 10.0.32	Users by admins, makers, or analysts	✓ Feb 6, 2023	Apr 2023

Feature	Enabled for	Public preview	General availability
Create and update containers in batch processing mode	Users by admins, makers, or analysts	Feb 2023	Apr 2023
Split cost type codes for multiple voyages in the vendor invoice journal	Users by admins, makers, or analysts	Feb 2023	Apr 2023
Assign shipments to related route segments	Users by admins, makers, or analysts	Mar 2023	Apr 2023
Add efficiency in prospect-to-cash integration with Sales	Users by admins, makers, or analysts	Apr 2023	Jun 2023
Apply right tax with minimal effort in order entry for product variants	Users by admins, makers, or analysts	Apr 2023	Jun 2023
Archive inventory transactions	Users by admins, makers, or analysts	Apr 2023	Jun 2023
Archive sales orders	Users by admins, makers, or analysts	Apr 2023	Jun 2023
Calculate available-to-promise for up to three months	Users by admins, makers, or analysts	Apr 2023	Jun 2023
Empower users with near real-time inventory insights	Users, automatically	Apr 2023	Jun 2023
Make soft reservations from sales orders	Users by admins, makers, or analysts	Apr 2023	Jun 2023
Provide a better configuration experience for Inventory Visibility users	Users by admins, makers, or analysts	Apr 2023	Jun 2023
Evaluate costs in discrete manufacturing using standard cost	Users by admins, makers, or analysts	May 2023	Jul 2023

Manufacturing and asset management

Manufacturing and asset management features help companies gain agility, efficiency, and visibility in their manufacturing and maintenance operations while maximizing asset uptime and productivity.

Feature	Enabled for	Public preview	General availability
Manufacturing and asset management feature state updates for 10.0.32	Users by admins, makers, or analysts	✓ Feb 6, 2023	Apr 2023
Empower maintenance workers with new mobile experience	Users by admins, makers, or analysts	Mar 2023	Jun 2023
Check material availability for scheduled operations	Users by admins, makers, or analysts	Apr 2023	Jun 2023

Planning

Planning Optimization enhancements add support for additional manufacturing scenarios.

Feature	Enabled for	Public preview	General availability
Planning feature state updates for 10.0.32	Users by admins, makers, or analysts	✓ Feb 6, 2023	Apr 2023
Plan for manufacturing with Planning Optimization	Users, automatically	May 2023	Jul 2023

Procurement

New procurement and sourcing capabilities help organizations increase resiliency in their supply chain.

Feature	Enabled for	Public preview	General availability
Procurement and sourcing feature state updates for 10.0.32	Users by admins, makers, or analysts	✓ Feb 6, 2023	Apr 2023
Improve security for vendor bank account information updates	Users by admins, makers, or analysts	Apr 2023	Jun 2023

Product information management

Product information management enables you to centrally manage information about products and product variants throughout their entire lifecycle, including the attributes, configurations, documentation, and identifiers needed for managing your business processes.

Feature	Enabled for	Public preview	General availability
Share product information across legal entity boundaries	Users by admins, makers, or analysts	Apr 2023	-
Product information management feature state updates for 10.0.32	Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023

Warehouse Management

This release wave provides warehouse management enhancements that simplify the warehouse implementation and configuration experience and provide insights into system performance and usage.

Feature	Enabled for	Public preview	General availability
Optimize performance of internal movements in warehouse	Users by admins, makers, or analysts	Apr 2023	-
Run the Warehouse Management mobile app on iOS devices	Users, automatically	✔ Jan 30, 2023	Apr 2023
Pack shipments with speed and resilience	Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023
Warehouse management feature state updates for 10.0.32	Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023
Capture multiple GS1 label segments simultaneously	Users, automatically	May 2023	Jul 2023
Improve worker efficiency with optimized mobile device screen layout	Users, automatically	May 2023	Jul 2023
Optimize warehouse management implementation and maintenance	Admins, makers, marketers, or analysts, automatically	May 2023	Jul 2023

Feature	Enabled for	Public preview	General availability
Optimize warehouse management processes	Users by admins, makers, or analysts	May 2023	Jul 2023

Description of **Enabled for** column values:

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

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

Inventory and logistics

Overview

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- **Archive inventory transactions and sales orders**. Businesses running large databases can establish rules for archiving data from their day-to-day working environment into a data lake, which allows for historical reporting, auditing, machine learning, and more. This improves performance and usability in the day-to-day working environment while lowering operating costs.

Manage attribute-based omnichannel sales pricing

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	-

Business value

Traditional B2B businesses are increasingly considering moving to an omnichannel sales strategy to sell directly to customers and gain more control over pricing and margins. However, this change can be complex because it leads to massive changes of pricing models and pricing rules. The new attribute-based omnichannel pricing feature for Dynamics 365 Supply Chain Management supports B2B companies that are converting to this strategy. It enables sales managers to effectively plan and manage omnichannel selling prices by setting price attributes on customer, product, and order segments.

Feature details

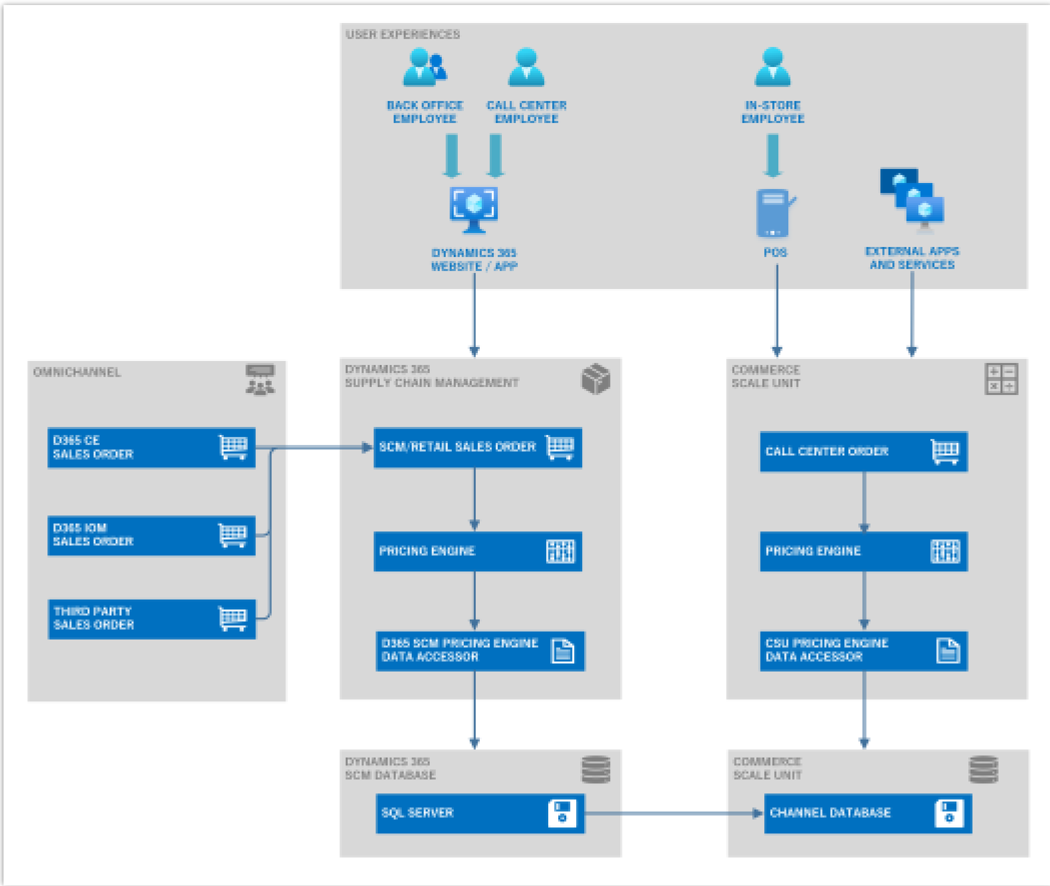
The new attribute-based omnichannel pricing feature lets you manage omnichannel sales and pricing using Dynamics 365 Supply Chain Management. The solution leverages the Commerce Scale Unit (CSU) Core feature of Dynamics 365 Commerce to help traditional B2B companies embrace the new normal of omnichannel sales.

The new attribute-based omnichannel pricing feature enables B2B companies to:

- Manage and calculate pricing in one central location and provide transparent pricing across all channels, which is essential for aligning pricing strategy across multiple channels.
- Calculate prices quickly while considering a wide range of business factors, including the base price, sales trade agreement price, long-term discount deal, short-term promotional discounts, and retrospective rebate calculations for each sales order. Real-time pricing

calculation is key to a unified omnichannel sales customer experience, downwards ordering, and the fulfillment process.

- Create pricing models based on each product's pricing differentiators, order types, and customer segments. In other words, implement segmentation based on customer, product, and order price attributes.
- Manage complex pricing structures with price component breakdowns and define margin component price adjustments on top of the item base price. On ordering, pricing details can provide a price component breakdown for future advanced analysis.
- Manage omnichannel sales easily when converting B2B and B2C pricing to consider the discount concurrency, bundle sales, mandatory items, and bonus item pricing rules.
- Simulate prices and view detailed price calculations.
- Leverage enhanced discount budget control to avoid margin leakage from fund consumption.
- Use APIs on the CSU for native Dynamics 365 Commerce point of sale or third-party retrieval of the calculated pricing.



An overall architecture view.

Inventory and logistics feature state updates for 10.0.32

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023

Business value

Turning on features by default helps ensure that your system stays current with the latest inventory and logistics capabilities of Dynamics 365 Supply Chain Management.

Feature details

Features becoming mandatory with the 10.0.32 release

These features are now mandatory and can no longer be disabled.

Sales and marketing

- **Limit the number of sales order lines per batch task**: Helps you optimize system performance when posting confirmations, picking lists, packing slips, and invoices by limiting the number of order lines processed by each batch task.
- **Update Requested receipt date with Confirmed date for intercompany orders**: Lets you control what will happen to sales and purchase date field values within intercompany direct delivery scenarios.

Features becoming enabled by default with the 10.0.32 release

These features are now turned on by default but can still be disabled manually. These are all targeted to become mandatory with 2023 release wave 1.

Cost Management

- **Inventory aging report storage**
- **Post on-hand adjustments using configurable reason codes connected to offset accounts**

Inventory Management

- **Inventory on-hand report data cleanup**: Provides a way to clean up the data that is used to create inventory on-hand report storage reports.

Rebate Management

- **Rebate management**

Sales and marketing

- **Calculate sales totals using multiple threads**: Helps improve system performance by using parallel processing when calculating sales totals in batch.

- **Update prices and discounts entered manually for intercompany**: Enables manual change policy functionality for intercompany commerce. It includes the ability to transfer manual change policies between intercompany sales and purchase orders. Previously, this functionality was only available for non-intercompany orders. Now, the **Update price and discounts** dialog option will be displayed after making changes to an intercompany order. This dialog option lets users choose whether to update or keep prices and discounts details on each intercompany order.

Transportation management

- **Goods in Transit Receiving and Put away**: Allows the goods-in-transit item receiving and putaway processes to receive goods using the legacy codes instead of the process guide framework.

Features becoming generally available with the 10.0.32 release

These features are now generally available. They are not turned on by default and must be enabled manually. Some features can be disabled again after being turned on, and these are targeted to become enabled by default with 2023 release wave 2. All of these features are targeted to become mandatory with 2024 release wave 1.

Cost Management

- **Enable error execution log for cost accounting overhead calculation**: Enables the logging of error messages when journal creation fails while the system is calculating overhead.

Rebate Management

- **Cancel posted rebate provision with a posting date**: Cancel a posted rebate provision with a specified posting date and reverse the original transactions and documents. Rebate provision transactions already posted before this feature was enabled can only be reversed by generating opposite provision transactions with a specific date and the current deal setup. Once this feature is enabled, newly posted rebate provision transactions can be fully reversed with a specific date regardless of current deal setup.
- **Credit note calculation enhancement in Rebate management**: Enables you to *Include credit note* in the rebate management deal line. The rebate management line will check both the sales order and credit note to consider the rebate value/quantity condition and calculate accordingly during the batch job process or process at posting of provision (based on the configuration). If the credit note is matched with a sales order line, the price details will include the original sales transaction.
- **Enable auto negative tier in Rebate management**: Enables the negative tier to be set up automatically for each deal line. The system will then calculate rebates automatically as needed.
- **Write-off before rebate claim**: In some cases, you can expect part of the provision amount will never be claimed back. This feature enables you to process rebate write-offs before you process the rebate management. The system will calculate the balance

between the posted provision and the posted write-off during the period and then propose the rebate management amount for you to process.

See also

[Preview of Dynamics 365 Supply Chain Management 10.0.32 March 2023](#) (docs)

Create and update containers in batch processing mode

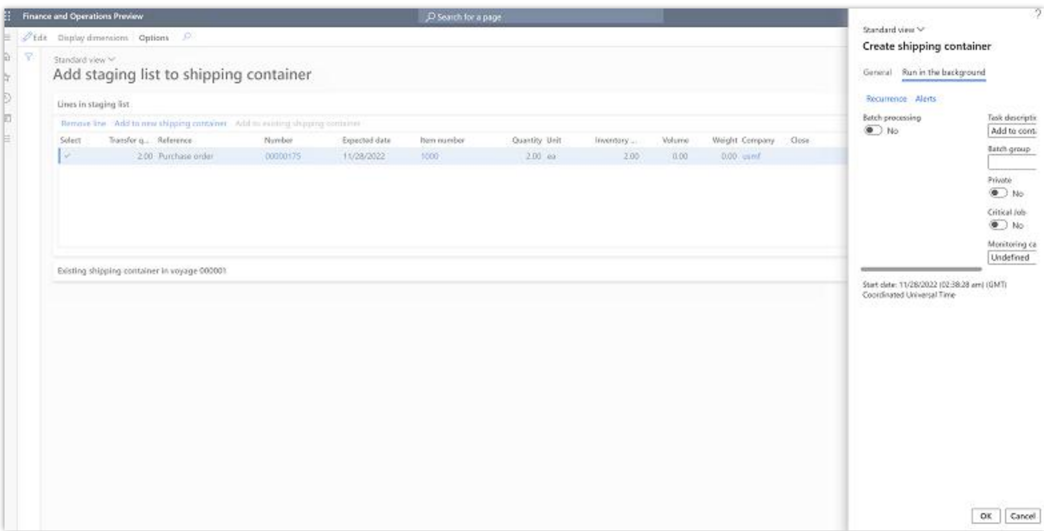
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2023	Apr 2023

Business value

Use batch processing to perform container operations on large numbers of purchase order lines included within a voyage. Batch processing allows you to apply many operations at once without experiencing long delays or timeouts on the front end.

Feature details

This feature lets users add purchase order lines to new or existing shipping containers and then choose to apply the changes in batch mode, which allows the system to process the updates in the background. Note, however, that background processing won't activate when the transfer quantity is less than the total quantity of the related purchase order line.



Batch processing selection form.

Split cost type codes for multiple voyages in the vendor invoice journal

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2023	Apr 2023

Business value

Businesses need to have a detailed understanding of the costs associated with transportation of products, but this can be difficult to obtain when considering multiple voyages with multiple costs using different cost type codes that are combined into one invoice delivered by their shipping vendor. This feature makes it possible to allocate costs on a more granular basis by breaking down costs from each voyage according to the cost type code. As a result, the invoice journal can include lines where each line represents a specific cost type code.

Feature details

This feature for the Landed cost module enables business to better allocate transportation costs associated with multiple voyages. With this feature, when a user is creating a vendor invoice journal for multiple voyages, each cost type code will have its own journal line that includes the voyage name in its description. This allows for easier reconciliation.

Previously, the system merged costs from all voyages that have the same cost type code into the same line in the vendor invoice journal. But now, vendor invoice journals will be split based on the cost type code.

Assign shipments to related route segments

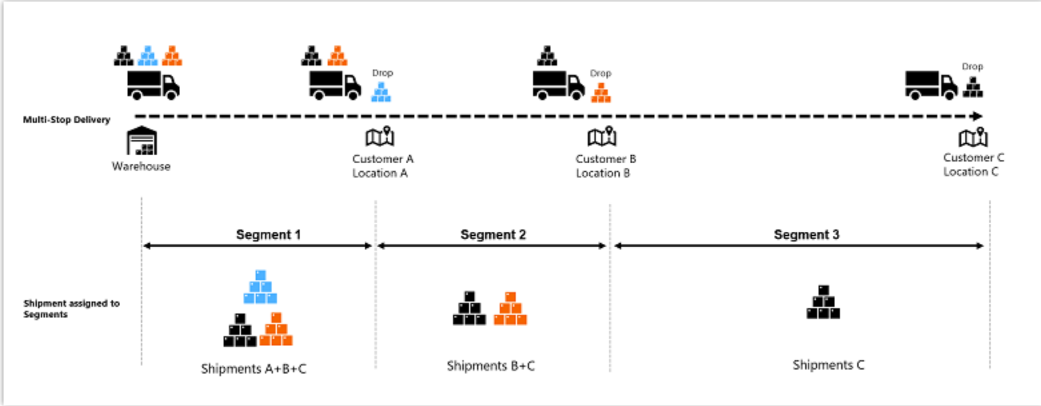
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2023	Apr 2023

Business value

This feature brings correct freight cost apportionment for multi-segment scheduled routes with inbound and outbound logistic process. With the correct freight cost apportionment, you can evaluate the true profitability of sales orders by apportioning freight cost at the item line level. This feature provides a fair and trusted foundation for the billing of freight cost and also reflects the cost of inbound freight in the material valuation of stock.

Feature details

This feature lets you apportion freight costs for multi-segment scheduled routes with inbound and outbound logistic processes. Now, you can evaluate the true profitability of sales orders by apportioning freight cost at the item line level.



View of shipments assigned to related route segments.

Add efficiency in prospect-to-cash integration with Sales

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	Jun 2023

Business value

Companies seek efficiency in their customer engagement activities. Front office salespeople, traveling sales representatives, account managers, and others need to engage efficiently with customers while using Dynamics 365 Sales, without spending time to ensure that data flows efficiently between their front-office work environment and the Dynamics 365 Supply Chain Management back-office environment. True end-to-end process integration must work seamlessly across systems, using an integrated process flow from quotation to invoice, to help businesses drive efficiencies in their sales and fulfillment processes, improve accuracy, and reduce lead times. This feature enables businesses to achieve these efficiencies by providing true end-to-end process support.

Feature details

This release introduces several important improvements to the prospect-to-cash scenario, which is enabled through dual-write integration between Dynamics 365 Supply Chain Management and Dynamics 365 Sales.

Previously, the dual-write integration between Dynamics 365 Supply Chain Management and Dynamics 365 Sales had several shortcomings, such as only allowing sales quotations and sales orders to be created in isolation rather than as an end-to-end process flow. Also, while the previous solution did make the advanced Supply Chain Management pricing engine available to Dynamics 365 Sales, important pricing features such as manual discounts were not fully supported.

This feature addresses these and other key shortcomings in several areas, including by adding support for the following capabilities:

- Support sales quotation revisioning and state transitions to ensure that sales quotation processing flows seamlessly between Dynamics 365 Supply Chain Management and Dynamics 365 Sales.
- Make sales quotation and sales order line pricing more transparent and solid.
- Support the crediting process to cover sales credit notes with respect to negative charges and discounts.

Apply right tax with minimal effort in order entry for product variants

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	Jun 2023

Business value

In some countries or regions, sales tax may differ for variants of the same product (such as for different sizes of clothes). Businesses facing this issue are confronted with the pain of having to set these tax rates manually for each sales order and quotation line, resulting in extra work and the risk of error. Defining the item sales tax group at the released-product variant level eliminates this pain, effort, and risk.

Feature details

With this feature, you can set a specific item sales tax group for any or all released product variants, both for sales and procurement. This eliminates the cost, pain, and risk of not having the correct taxation applied to an order line for a product variant.

When an item sales tax group is set for a released product variant for sales, this tax group is used as the default when creating a sales quotation or sales order line for that variant. If a specific tax group isn't set for a released product variant for sales, then the tax group set for the released product is used as the default instead.

Similarly, for a purchase order or purchase requisition, if a specific item sales tax group is set for a released product variant for purchase, then this is used as default.

Archive inventory transactions

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	Jun 2023

Business value

Over the years, companies will typically generate and store a large volume of inventory transaction records. Although these records aren't required for day-to-day operations, they may still be needed for purposes such as historical reporting, auditing, machine learning, and so on. Keeping a large volume of historical inventory transaction records in your day-to-day working environment not only results in increased storage costs, but also impacts system performance and usability.

With this feature, you can leverage the archival framework to perform rule-based archiving of historical inventory transaction data. The archived records are removed from your day-to-day working environment and stored in your Dataverse-managed data lake, thereby improving system performance and lowering operating costs while keeping your historical inventory transaction records available as read-only data for when you need them.

Feature details

Leverage the data archival solution provided with Microsoft finance and operations apps to archive your historical inventory transaction records. Administrators can set up logical rules to control when and how the records will be archived from your day-to-day Supply Chain Management database to your Dataverse-managed data lake, where the data will remain available for historical reporting, auditing, machine learning, legal claims, and other purposes.

Archive sales orders

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	Jun 2023

Business value

Over the years, companies will typically generate and store a large volume of sales orders and sales order lines. Although these records aren't required for day-to-day operations, they may still be needed for purposes such as historical reporting, auditing, machine learning, legal claims, and so on. Keeping a large volume of historical sales orders and lines in your day-to-day working environment not only results in increased storage costs, but also impacts system performance and usability.

With this feature, you can leverage the archival framework to perform rule-based archiving of historical sales orders and lines. The archived records are removed from your day-to-day working environment and stored in your Dataverse-managed data lake, thereby improving system performance and lowering operating costs while keeping your historical sales records available as read-only data for when you need them.

Feature details

Leverage the data archival solution provided with Microsoft finance and operations apps to archive your historical sales orders and sales order lines. Administrators can set up logical rules to control when and how sales orders and sales order lines will be archived from your day-to-day Supply Chain Management database to your Dataverse-managed data lake, where the data will remain available for historical reporting, auditing, machine learning, legal claims, and other purposes.

Calculate available-to-promise for up to three months

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	Jun 2023

Business value

Sales demand can be fulfilled either by on-hand stock, stock that is purchased, or stock that is under production. Visibility into your inbound inventory is equally important as visibility into your on-hand stock. To commit to your customers' sales demands and confirm order shipment dates, you need fast and accurate availability-to-promise (ATP) validation on projected stock levels. Moreover, a much longer ATP time fence visibility helps you to track slow goods movements during supply chain disruptions and contributes to your supply chain resiliency.

Feature details

The maximum time fence for the Inventory Visibility Add-in available-to-promise (ATP) feature has been extended from seven days to a full three months. This significantly increases visibility into your future inventory statuses and order-promising capacity.

ATP lets you check inventory for a specified future day or check for the next available dates for products. This is especially useful to support sales inquiries and to calculate shipment dates. The extended time fence allows you to view your projected inventory availability longer into the future, which will help you identify potential supply risks sooner. Moreover, a long ATP time fence lays the foundation for optimizing order fulfillment. With the longer time fence, your order system can match a sales order that doesn't require urgent shipment with an inbound purchase order that has a scheduled delivery in the future, which lets you save existing on-hand stock for more critical orders.

Inventory Visibility

Inventory Visibility provides an independent and highly scalable microservice that enables real-time, on-hand inventory change postings and visibility tracking across all your data sources and channels. For more information about Inventory Visibility, see the Inventory Visibility Add-in overview.

Empower users with near real-time inventory insights

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	Jun 2023

Business value

A holistic and visualized view of inventory that is updated in near real time enables supply and inventory managers to prepare the right level of stock to service all customers on time. It also lets sales representatives query inventory availability immediately upon customer inquiry. A logistics manager can also use the Inventory Visibility Add-in dashboard to investigate worrisome key performance indicator (KPI) values and take mitigation measures before it's too late.

Feature details

The Inventory Visibility Add-in dashboard lets business users (such as supply chain planners, inventory managers, and sales clerks) view inventory quantity and status across data sources, legal entities, locations, and channels, with a quick, wholistic overview. It enables users to do the following:

- Set up and filter on inventory dimensions to focus on the regions and products you care about most.
- Identify stock out, understock, and overstock products for timely inventory replenishment or reduction.
- Compare allocated and consumed quantities to decide whether an allocation top-up is needed (for example, to support a promotion or campaign).
- View inventory KPIs (such as on-hand quantity, supply, and demand) into the near future so that inventory trend risks can be mitigated before it's too late.

Inventory Visibility

Inventory Visibility provides an independent and highly scalable microservice that enables real-time, on-hand inventory change postings and visibility tracking across all your data sources and channels. For more information about Inventory Visibility, see the Inventory Visibility Add-in overview.

Make soft reservations from sales orders

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	Jun 2023

Business value

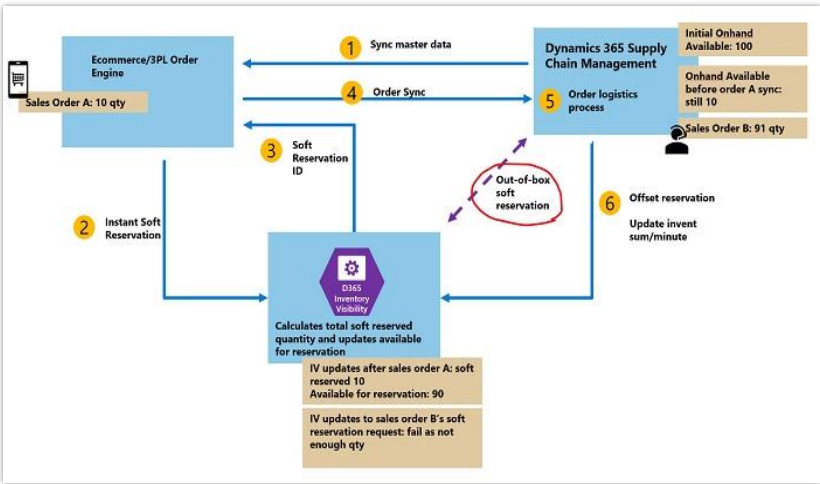
Double-booking or overselling can sometimes be a problem for companies that operate across multiple order channels. Now companies can establish a single source of truth of inventory status for omnichannel fulfillment and prevent overselling by enabling users to make soft reservations directly from sales orders in Supply Chain Management.

Feature details

The Inventory Visibility add-in for Dynamics 365 Supply Chain Management prevents overselling by storing and respecting soft reservations placed on inventory. This feature allows users to create these soft reservations directly from sales orders in Supply Chain Management. Soft reservations can be triggered instantly or via a batch job. Failed soft reservations will either show a warning or block the user from proceeding. A successful soft reservation will be offset for inventory that changes status to a hard reservation or another status that generates a physical inventory deduction within Supply Chain Management. A soft reservation center lets you track failed soft reservations so you can take further actions.

Inventory Visibility

Inventory Visibility provides an independent and highly scalable microservice that enables real-time, on-hand inventory change postings and visibility tracking across all your data sources and channels. For more information about Inventory Visibility, see the [Inventory Visibility Add-in overview](#).



Soft reservation flow

Provide a better configuration experience for Inventory Visibility users

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	Jun 2023

Business value

Whether you're an implementation partner, IT admin, or a business user working with inventory or sales, you'll benefit from the reimagined Inventory Visibility Add-in user experience, which has been expanded to support both basic configuration and many new functional operations. You can easily manage data and upgrade the configuration more efficiently and accurately. Business users can now view and update inventory information directly in the user interface, which adds convenience and improves the efficiency of stock inquiries.

Feature details

The rebuilt power app for Inventory Visibility offers a new configuration experience that enhances the onboarding experience. New user interface (UI) designs for working with features—including on-hand queries, soft reservations, allocations, and available to promise (ATP)—make it faster and easier for business users to query and act on inventory as part of their daily operation.

The new Inventory Visibility power app provides the following capabilities:

- Implementation partners and IT admins can use the *configuration UI* to manage data and features in one place.
- Inventory and sales clerks can leverage the *on-hand query UI* to quickly check product inventory levels across locations.
- Warehouse and store managers can use the *update on-hand UI* to post inventory adjustments directly to Inventory Visibility after counting inventory.
- Sales managers can use the *post reservation UI* to quickly soft-reserve stocks or revert existing reservations.
- Inventory planners and channel managers can use the *inventory allocation UI* to preallocate, deallocate, and reallocate stocks to sales channels or B2B customers.
- Fulfillment managers can use the *available to promise UI* to quickly make stock-availability checks within a future time fence.

In addition to operational user interfaces, users can also open an inventory summary that provides a full inventory snapshot and dashboards that track key performance indicators (KPIs).

Inventory Visibility

Inventory Visibility provides an independent and highly scalable microservice that enables real-time, on-hand inventory change postings and visibility tracking across all your data sources and channels. For more information about Inventory Visibility, see the Inventory Visibility Add-in overview.

Evaluate costs in discrete manufacturing using standard cost

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2023	Jul 2023

Business value

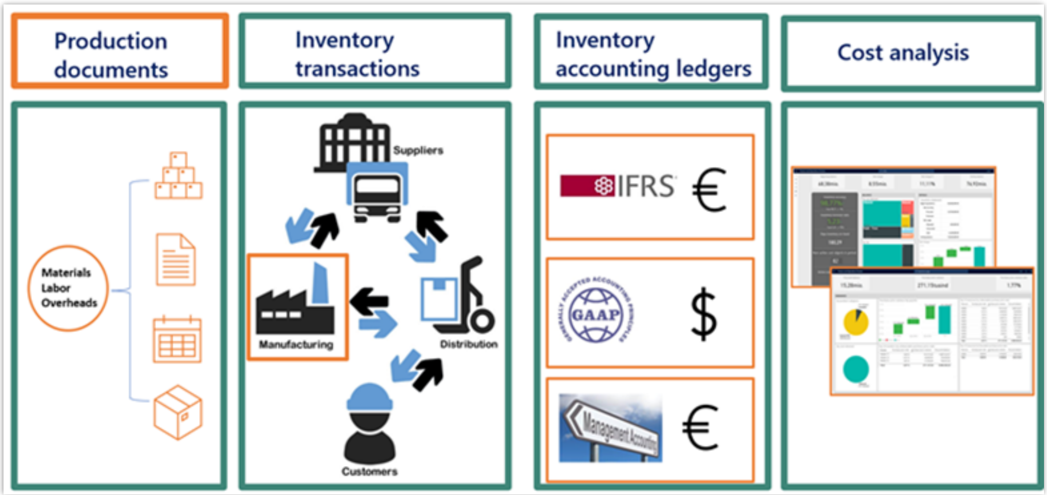
International discrete manufacturing companies are under pressure to comply with both local general accepted accounting practices and statutory accounting principles (inventory financial reporting standards), even when these directly conflict with one another. In addition, companies or their subsidiaries may need to account inventory costings using both a local and fluctuating currency and a solid second currency for statutory compliance. Finally, companies may need to use the standard cost valuation method internally while also using another valuation method that is required by their local country or region. Manufacturing companies can perform parallel inventory accounting practices for standard cost (based on a single document) using multiple currencies or cost calculation methods.

Feature details

This enhancement for the Global Inventory Accounting Add-in for Microsoft Dynamics 365 Supply Chain Management enables discrete manufacturing companies to perform parallel inventory accounting practices for standard cost (based on a single document) using multiple currencies or cost calculation methods. This release enables you to:

- Build three categories of manufacturing expenses (materials, labor, and overhead) by setting up cost element policies.
- Gain an accurate understanding of cost inflow and outflow processes. Visible posting policies and rules establish the foundation for enhanced transparency.
- Track and record discrete manufacturing costs by applying standard cost calculations to production documents (including picking lists, route cards, job cards, and report-as-finished journals).
- Query for operational events and measurements related to production orders to track and trace calculation basis. You can also query for events and measurements within Global Inventory Accounting for calculated results in different ledgers.
- Analyze costing results and make management decisions using visual, interactive, and informative Power BI reports embedded into the system.

The collection of features included in this release supports several typical use cases. In future releases, we will continue to expand this functionality to further enhance support for discrete manufacturers.



Global Inventory Accounting Add-in

Manufacturing and asset management

Overview

The manufacturing and asset management features in Dynamics 365 Supply Chain Management help companies gain agility, efficiency, and visibility in their manufacturing and maintenance operations while maximizing asset uptime and productivity. Investments in this area continue to focus on improving the user experience for greater agility and efficiency of front-line workers.

This release wave delivers a new and reimagined mobile experience for maintenance operations that simplifies daily tasks and presents relevant information and insights when and where they are needed most. In manufacturing, supervisors will get enhanced capabilities for checking availability of materials before releasing production orders to the shop floor.

Manufacturing and asset management feature state updates for 10.0.32

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023

Business value

Turning on features by default helps customers stay current with the latest manufacturing and asset management capabilities of Dynamics 365 Supply Chain Management.

Feature details

Features becoming mandatory with the 10.0.32 release

These features have become mandatory and can no longer be disabled.

Manufacturing

- **Enable to enter batch and serial numbers while reporting as finished from the Job Card Device**
- **Improved production catch weight quantity picking**: Lets you use production catch weight quantity picking, provided you only change the catch weight quantity. It also lets you adjust the production catch weight quantity in a direction that is different from the nominal quantity.
- **Manufacturing execution system integration**
- **"My day" view for the production floor execution interface**: Lets each worker track their daily registrations of time spent on various types of activities such as work, breaks, and absence. The **My day** view also shows the current balance for time spent on various activities and the balance for the period.
- **On-demand material availability check for production orders**: Lets you open the **Production orders to release** page on demand and initiate the materials check only for selected orders.
- **Report on co- and by-products from the production floor execution interface**
- **Report on planning items in the production floor execution interface**
- **Validate expiration of raw materials against planned consumption date**: Validates the batch expiration date against the planned consumption date (the raw material date), as established on the production BOM line or batch order formula line. Previously, the batch expiration date was validated against the planned delivery date of the production or batch order.

Asset management

- **Apply rules for grouping work orders while running a maintenance plan**
- **Work order billing**

Features becoming enabled by default with the 10.0.32 release

These features are now turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2023 release wave 2.

Manufacturing

- **Auto-picking of warehouse enabled materials for auto-posted picking lists**: Lets you auto-pick and resolve inventory dimensions for auto-posted, derived, and backflushed picking list journals.

- **Copy generic routes**: Enhances the *copy route* function to allow users to copy routes that aren't item specific. It enables the system to update all relevant information (such as *site*, *route group*, *resource requirements*, and various times) after the *copy route* function has been used to overwrite a route that is not yet assigned to an item.
- **My jobs tab on the production floor execution interface**: The **My jobs** tab lets workers easily view all unstarted and unfinished jobs that are assigned specifically to them.
- **Production teams in the production floor execution interface**: When multiple workers are assigned to the same production job, they can now nominate one worker as a *pilot*. The remaining workers automatically become assistants to that pilot. For the resulting team, only the pilot must register job status, whereas time records apply to all team members. This feature also supports the *assist resource* scenario, where a worker can register as an assistant to another worker, who then becomes the pilot for the newly formed group.
- **Register material consumption on the production floor execution interface (non-WMS)**: Enables workers to use the production floor execution interface to register material consumption, batch numbers, and serial numbers. This feature supports items that are not enabled to use advanced warehouse processes (WMS).
- **Update related resource requirements when a route operation is changed**: This feature enables the system to update the related resource requirements after a user changes the operation of an existing route step.

Asset management

- **Counter-based maintenance enhancements**
- **Offset accounts for expenses in work order journals**: This feature lets you specify an offset account for each expense listed in a work order journal. You might typically associate a vendor account with each expense, but other account types are also supported. It adds two new columns (**Offset account type** and **Offset account**) to the **Expense** FastTab on the **Work order journal** page.

See also

Preview of Dynamics 365 Supply Chain Management 10.0.32 (docs)

Empower maintenance workers with new mobile experience

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2023	Jun 2023

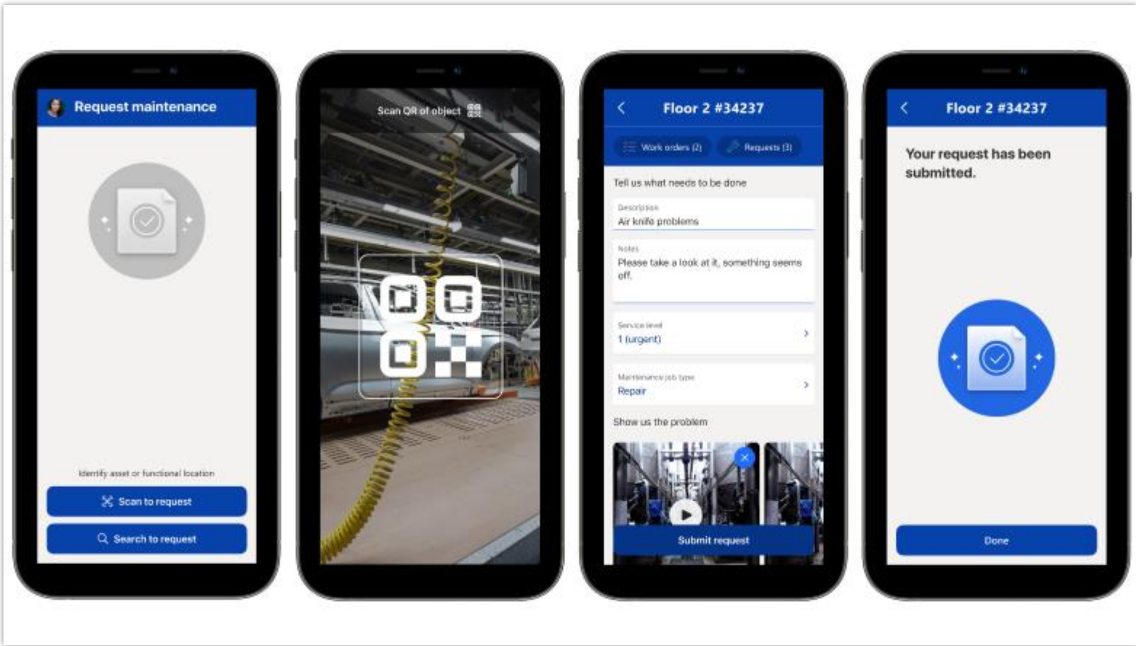
Business value

Organizations using the Asset Management Add-in for Microsoft Dynamics 365 Supply Chain Management can now provide workers with a mobile app that supports most common platforms, devices, and form factors. The mobile app assists workers doing maintenance on machines and equipment installed both on their own premises and at remote locations in the field.

Feature details

The Asset Management mobile app provides the following capabilities for workers and organizations using the Asset Management Add-in for Microsoft Dynamics 365 Supply Chain Management:

- **Manage work orders**: Maintenance workers use work orders as a daily to-do list that provides the information necessary to complete their planned maintenance tasks. In the app, workers can search for work orders assigned to them. Workers then use the app to record their progress so the system can track labor, materials, and services for the work done. Workers can create new work orders, process existing orders, and perform tasks such as updating checklist items, updating asset counters, registering time and material, and viewing and adding notes.
- **Create maintenance requests**: Administrators can use the role-based security setup in Supply Chain Management to grant workers permission to create new maintenance requests. Workers that receive this permission will then be able to use the mobile app to proactively request maintenance of assets.



Flow for creating a maintenance request.

Check material availability for scheduled operations

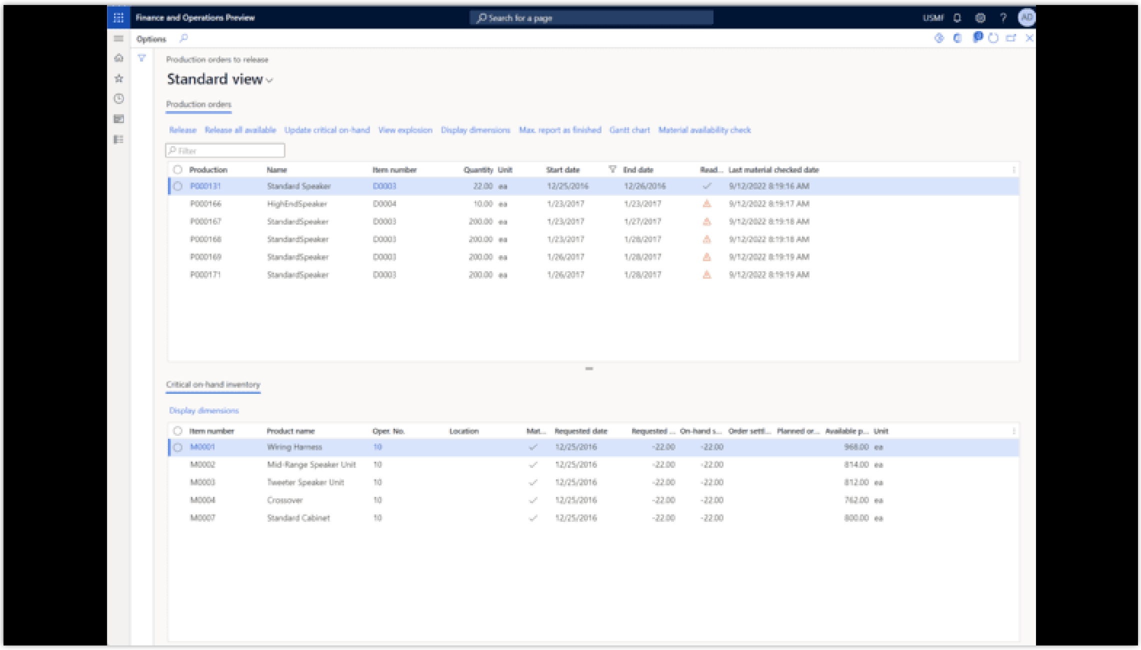
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	Jun 2023

Business value

To minimize the risk of running out of materials while working on a production order, supervisors use Dynamics 365 Supply Chain Management to check production orders for material availability before releasing orders to the shop floor. This feature makes it possible for organizations that use the scheduling type "Schedule operations" to check for material availability. Previously, it was only possible to check for material availability when using the "Schedule jobs" scheduling type.

Feature details

To check whether materials are available for one or more production orders, supervisors can now open the **Material availability check** page from a menu item on the **All production orders** and **Production order (details)** pages. The **Material availability check** page shows all selected orders that have a status of *Scheduled* and all orders that have a scheduling type of *Schedule operation* or *Schedule jobs*. The supervisor can then make material availability checks on all the listed orders.



View of Material availability check page.

Planning

Overview

Planning Optimization provides significantly improved performance and scalability, which enables near real-time insights into requirement changes. The enhancements delivered in this release wave add support for additional scenarios that address the needs of manufacturers using a combination of discrete and light-process manufacturing. Other enhancements help manufacturers (especially make-to-order manufacturers) to manage schedule changes more effectively.

Planning feature state updates for 10.0.32

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023

Business value

Turning on features by default helps customers stay current with the latest planning capabilities of Dynamics 365 Supply Chain Management.

Feature details

Features becoming mandatory with the 10.0.32 release

These features have become mandatory and can no longer be disabled.

- **Batchable firming and consolidation for planned bulk and pack batch orders**: Lets you use batch jobs to firm and consolidate planned bulk and pack orders.
- **Include items with on-hand when pre-processing filters are enabled**
- **Planned orders simplified**

Features becoming enabled by default with the 10.0.32 release

These features are now turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2023 release wave 2.

- **Azure Machine Learning Service for demand forecasting**: Enables the Azure Machine Learning Service to generate demand forecasts based on historical data.
- **Make-to-order supply automation**
- **Priority driven MRP support for Planning Optimization**

Features becoming generally available with the 10.0.32 release

These features are now generally available. They aren't turned on by default and must be enabled manually. Some features can be disabled again after being turned on, and these are targeted to become enabled by default with 2023 release wave 2. All of these features are targeted to become mandatory with 2024 release wave 1.

- **Consider inventory lead time when creating a planned transfer order**: When a planned transfer order is created, this feature causes the system to consider the inventory lead time that is specified in the item's default order settings when it calculates the receipt date of a planned transfer order (when using a lead time type of *None* or *Sales*). When a specific transfer lead time is set, that value will be used for the receipt date calculation and transport days will be disregarded.

See also

Preview of Dynamics 365 Supply Chain Management 10.0.32 (docs)

Plan for manufacturing with Planning Optimization

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jul 2023

Business value

Manufacturers can now switch to Planning Optimization for master planning. By using Planning Optimization (the planning service) instead of the deprecated planning engine, manufacturers can significantly reduce the time required to run material requirements planning (MRP) jobs, with most organizations now able to run MRP in minutes rather than hours. Because of this improved performance, you'll be able to run planning multiple times a day, so you can receive orders in the morning and ship them the same day or run planning simulations for what-if scenarios.

Feature details

Planning Optimization now supports many manufacturing planning features that were previously only supported by the older deprecated planning engine. This means that most manufacturers can now move to Planning Optimization to start taking advantage of its significant performance improvements and other benefits. The following manufacturing capabilities are now supported by the service:

- **Bill of material (BOM) lines with multiples or rounding factors**: Set up bills of materials where some components are part of a grouped component, bag, bottle, or similar. For example, a production might make use of a full spool of thread, a full bottle of spray paint for painting a subcomponent, or a certain quantity of liquid where the dispenser holds at least five deciliters. For these cases, planning will take the specified multiples or rounding factors into account.
- **BOM lines with negative quantity**: Previously, Planning Optimization interpreted BOM and formula lines with negative quantities as having a quantity of zero, and showed an error if you tried to define them. This release fully supports BOM lines with negative

quantities, which means that you can now register co-products or by-products. For example, if you're refining crude oil to produce gasoline as the main output, your process might also result in co-products such as diesel, kerosene, naphtha, and water. Negative-quantity BOMs let you model sub-operations that output products that can be used later in the process, which is often the case with water in chemical processes.

- **Scheduling with explosion of production orders**: Previously, Planning Optimization could schedule production orders individually but not with explosion. This release lets you schedule production orders with explosion, so you can view all sub-production orders, on-hand inventory, and transfers related to the sales order demand. This capability is critical for make-to-order scenarios and allows you to fulfill committed dates to customers by managing all schedule changes for an order at once.
- **Release production orders with a scheduled start date earlier than today**: For manufacturers where production plan changes are common, or where production orders may be delayed, it is of utmost importance to keep track of the date when each production order was started, and even more so if they were not started. With this release, each production order will keep both its expected completed date and its actual start date. Previously, if a production order was delayed, Planning Optimization would assume that it would be completed the same day.

With the addition of these features, most manufacturers will be able to move to Planning Optimization. Refer to the fit analysis to identify which features you require from Planning Optimization.

For more information about Planning Optimization, see the Master planning home page.

Procurement

Overview

Investments in the procurement and sourcing area continue to be targeted at making organizations more resilient in their supply chain operations. In this release, the focus is on protecting the accuracy and integrity of vendor bank account information.

Procurement and sourcing feature state updates for 10.0.32

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023

Business value

Turning on features by default helps customers stay current with the latest procurement and sourcing capabilities of Dynamics 365 Supply Chain Management.

Feature details

Features becoming mandatory with the 10.0.32 release

These features have become mandatory and can no longer be disabled.

- **Add lines to PO invoices associated with a purchase agreement**: Lets you add lines to a generated purchase order invoice prior to posting. This can be useful for adding a service item to an invoice that was generated for a purchase order that is associated with a purchase agreement.
- Allow vendors to apply for procurement categories through vendor collaboration: Allows vendors to request a new procurement category.
- **Bid submission success message**: Displays a success message when bids are submitted.
- **Clean up purchase-order update history**: Lets you clean up temporary historical records related to purchase order updates. It adds a new button, **Clean up purchase update history**, to the action pane on the **All purchase orders** page.
- **Disable Purchase Requisition Distribution Reset Button**: This **Accounting Distribution** page feature disables the **Reset** button for purchase requisitions that are in review.
- **Maintain vendor bank information using vendor collaboration workspace**: Lets vendors use the **Vendor collaboration** workspace to enter information that their customers will use for electronic payments. You can see the information that vendors entered using a new inquiry page. After the information has been reviewed and validated, the records can be marked as reviewed.
- **Purchasing cXML enhancements**
- **Put vendor on hold for purchase orders**: Lets you put a vendor on hold for purchase orders. It adds a new *Purchase order* hold type that marks a vendor as on hold for purchase orders. You won't be able to create new purchase orders for vendors that are on hold for purchase orders, but you will still be able to proceed with any open invoices or payments for those vendors.
- **RFQ questions and answers**

Features becoming enabled by default with the 10.0.32 release

These features are now turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2023 release wave 2.

- **Check unit precision for not-stocked items**: Check unit precision for not-stocked items.
- **Default broker contract tax information on vendor invoice lines**: Introduces logic to set default values for the **Sales tax** and **Item sales tax** fields on broker contract vendor invoice lines. This logic is applied only when the charge type on the broker contract line is ledger/ledger. The item sales tax group will take its default value either from the

brokerage procurement category (if it's set up) or from the charge type. The sales tax group will take its default value from the vendor account.

- **Enable vendor collaboration certification management**: Allows vendors to add, edit, or remove certifications related to their company through the **Vendor collaboration** workspace.
- **Limit the number of purchase order lines per batch task**: Helps you optimize system performance when posting confirmations and product receipts by limiting the number of purchase order lines processed by each batch task.
- **Post registered quantities of stocked products and remainders of not-stocked products for receipts and vendor invoices**: Changes how quantities of not-stocked products (such as services) are posted when processing vendor invoices and inbound shipments against purchase orders. The **Registered and services** quantity option now works as the **Registered quantity and not-stocked products** option and aligns with the similarly named option already available for posting quantities for sales packing slips.
- **Purchasing card processing**: Lets you track purchases and expenses that your agency incurs while using purchasing cards.
- **Sealed bidding for RFQs**
- **Synchronize tracking dimensions on intercompany sales and purchase order lines**: Lets you control whether serial and batch number tracking dimensions are synchronized across intercompany sales and purchase order lines. It adds new settings to both the **Purchase order policies** and **Sales order policies** tabs of the **Intercompany** setup page for customers and vendors. It also updates the names of a few related, nearby settings for clarity. If you are using warehouse management processes (WMS), then be aware that this feature will only synchronize batch and serial numbers when those dimensions are above location in the target destination reservation hierarchy.

Features becoming generally available with the 10.0.32 release

These features are now generally available. They are not turned on by default and must be enabled manually. Some features can be disabled again after being turned on, and these are targeted to become enabled by default with 2023 release wave 2. All of these features are targeted to become mandatory with 2024 release wave 1.

- **Request for quotation amendment and cancellation email framework options**: Lets you send RFQ amendment and RFQ cancelation emails using either SSRS reports or the email distributor framework. This feature adds new settings to both the **Amendment** and **Cancelation** field groups on the **Request for quotation** tab of the **Procurement and sourcing parameters** page. When this feature is enabled, the new **Send email using** options become available and let you set a preferred way of sending emails. Select the *SSRS report* option to send an email while generating the SSRS report (this is the default setting). This option should be used if only a few people should receive the email or if the report should be delivered as an attachment to the email. Select the *Email distributor* option to send an email using the email distributor framework. With the *Email distributor* option, the email can be monitored in the batch email sending status. This option should be used when sending emails to many recipients. When using the *Email distributor* option, the report can't be sent as an attachment. Without this feature, the system always sends email while generating the SSRS report.

See also

Preview of Dynamics 365 Supply Chain Management 10.0.32 March 2023 (docs)

Improve security for vendor bank account information updates

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	Jun 2023

Business value

Legal compliance and protecting supplier's bank account information against fraud are two of the most important requirements for any organization. One of the best ways to prevent fraud is to implement the right controls for managing changes. The new vendor bank account information approval workflow makes it more difficult for employees to commit fraud and enables financial controllers and auditors to oversee the accuracy of each supplier's bank account information.

Feature details

The vendor bank approval workflow in Dynamics 365 Supply Chain Management ensures that bank data submitted by suppliers is secure, financially compliant, and protected against fraud. Businesses can evaluate and approve any incoming changes to a supplier's bank account information and make sure the provided bank details meet their organization's standards and policies. This helps reduce the risk of fraud by detecting and preventing unapproved changes.

When you enable the vendor bank account workflow, any changes submitted for specific bank-details fields will be sent through the workflow for approval. You can configure approval triggers and decide whether to invoke the approval workflow when a supplier’s bank details are created, changed, or both.

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.

Product information management

Overview

Product information management enables companies to centrally manage information about products and product variants throughout their entire lifecycle, including the attributes, configurations, documentation, and identifiers needed for supporting key business processes. Investments in this area continue to focus on driving efficiencies for companies managing large product portfolios across large organizations.

The enhancements in this release wave let companies share released product data across legal entities, which reduces data duplication and simplifies maintenance.

Share product information across legal entity boundaries

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	-

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 to 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.

See also

Cross-company product sharing (docs)

Product information management feature state updates for 10.0.32

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023

Business value

Turning on features by default helps customers stay current with the latest product information management capabilities of Dynamics 365 Supply Chain Management.

Feature details

Features becoming mandatory with the 10.0.32 release

These features have become mandatory and can no longer be disabled.

- **Country of origin management feature**
- **Enable change management on existing products**
- **Engineering notifications for production**: When a product is changed in engineering, it might be important to notify production about those changes. In that way, production workers can take appropriate action, such as component substitution, bill of materials (BOM) replacement, or route replacement. This feature lets you notify production about changes to products that are being produced.
- **Improved attribute inheritance for Engineering Change Management**: Simplifies the management of attributes for finished goods or intermediate items. When this feature is turned on, it's easier to identify all the attributes that belong to an item, and you can select the attributes that should be propagated from that item to its parent item. This feature is useful when, for example, one component of a finished good is fragile, toxic, or flammable, because you can easily identify the fragile, toxic, or flammable attribute and propagate it to the finished good.
- **Product readiness checks**
- **Variant generation for engineering products**

Features becoming enabled by default with the 10.0.32 release

These features are now turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2023 release wave 2.

- **Clean up product attribute values**: Adds a periodic task called *Clean up product attribute values*, which cleans up product attribute value records that are no longer associated with any product via a product category.
- **Populate product attribute values**: Adds a periodic task that is named *Populate product attribute values*. This new periodic task creates missing product attribute value records for attributes that are associated with products via a product category.

See also

Preview of Dynamics 365 Supply Chain Management 10.0.32 March 2023 (docs)

Warehouse Management

Overview

The warehouse management solution in Dynamics 365 Supply Chain Management provides a rich and flexible set of capabilities that can be combined and configured to support many warehouse layouts and operational scenarios

The enhancements in this release focus on simplifying the configuration experience, reducing implementation time, and providing insights into the performance and usage of the warehouse management system. Warehouse workers using the Warehouse Management mobile app will experience usability and productivity enhancements, improved GS1 barcode support, improved packing functionality, support for iOS devices, and more.

Optimize performance of internal movements in warehouse

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	-

Business value

Businesses that use batch or serial tracked items require warehouse processing that is both fast and effective. The capabilities added by this feature improve the performance of all warehouse movements, including batch and serial tracked items, thereby improving the speed and efficiency of warehouse workers processing warehousing tasks.

Feature details

A new tiered approach to handling batch and serial tracked items improves the ability of the warehouse management system to track internal movements. This improves performance and enables warehouse workers to be fast and effective when processing any warehouse movement task for all types of items, including those that are tracked by batch or serial number.

This feature replaces the previous type of inventory transaction with a new type, which targets operations that process internal warehouse movements without financial impact.

See also

Introducing warehouse-specific inventory transactions (blog)

Run the Warehouse Management mobile app on iOS devices

Enabled for	Public preview	General availability
Users, automatically	✔ Jan 30, 2023	Apr 2023

Business value

Companies that have standardized on using Apple iOS as their mobile platform, or that are already using iOS-powered mobile devices, can now leverage this investment when implementing Dynamics 365 Supply Chain Management for their warehouse operations. The Warehouse Management mobile app for Supply Chain Management is now available for iOS in addition to Microsoft Windows and Google Android platforms.

Feature details

The Warehouse Management mobile app is now available for Apple iOS devices such as iPads and iPhones. It empowers warehouse workers to complete warehouse tasks and connects directly to your Dynamics 365 Supply Chain Management environment. Using the Warehouse Management mobile app, workers can complete material handling, receiving, picking, putaway, cycle counting, production tasks, and more, directly from the warehouse floor.

Pack shipments with speed and resilience

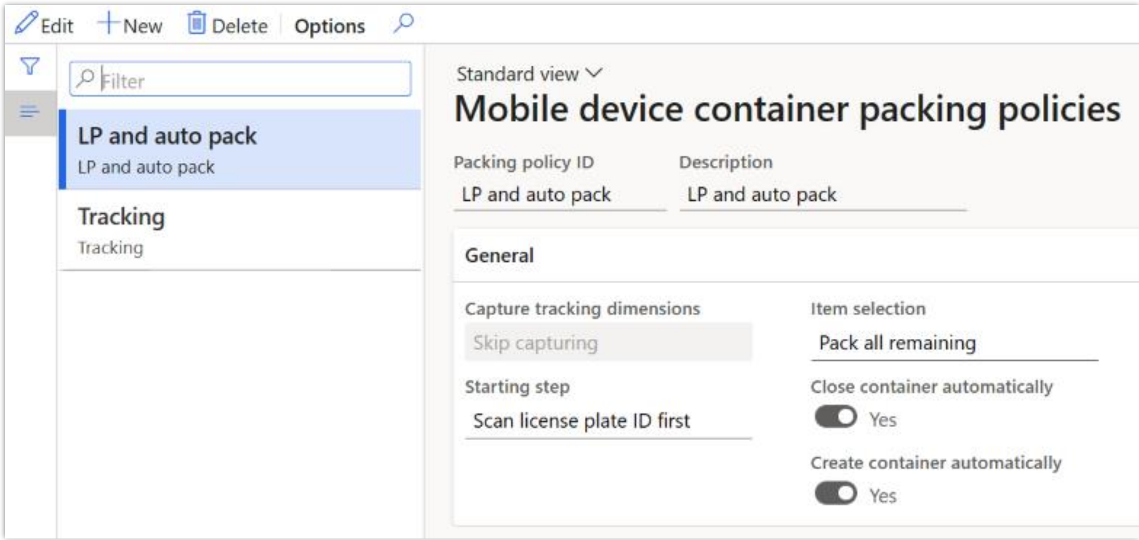
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023

Business value

Businesses that ship large items or have large packing areas need to provide warehouse workers with a highly responsive mobile application that allows flexibility when it comes to running packing operations. The Warehouse Management mobile app for Dynamics 365 Supply Chain Management now lets workers on the warehouse floor pack and close the last container in a shipment without waiting for the back-end system to process a sales packing slip, which makes the packing process faster and more resilient.

Feature details

This feature lets warehouse workers work more quickly and move on to their next task immediately. It builds on the *Pack shipments with the Warehouse Management mobile app* feature (released last year), which enables warehouse workers to manage and register packing work using a mobile device, thereby adding flexibility for workers shipping large items or working in large packing areas.



Screenshot of mobile device container packing policies.

See also

[Packing containers with the Warehouse Management mobile app](#) (docs)

Warehouse management feature state updates for 10.0.32

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 6, 2023	Apr 2023

Business value

Turning on features by default helps customers stay current with the latest warehouse management capabilities of Dynamics 365 Supply Chain Management.

Feature details

Features becoming mandatory with the 10.0.32 release

These features have become mandatory and can no longer be disabled.

- **Allow editing of physical dimension for a released product and its handling unit**: Allow editing of physical dimensions for a released product and its handling unit. Changes will be synchronized back to the corresponding values on the released product. Changes to the gross weight will set the net weight on the released product to the gross weight less tare weight.
- **Auto update shipment**
- **Cross-docking templates with location directives**: Lets you use location directives to help determine the best location to move cross-docking inventory to. To set this up,

assign a directive code to each relevant cross-docking template. Each directive code identifies a unique location directive.

- **Deferred put - container**: Extends the deferred processing functionality for work that uses containers.
- **Disable expected receipts from quality orders that sample blocked inventory**: Prevents the system from creating expected receipt transactions for quality orders that sample inventory with a blocking status.
- **Item consolidation location utilization**: The new location utilization page enables warehouse managers to view and filter the volumetric use of locations across the warehouse. If necessary, managers can select locations and create inventory movement work straight from the page to consolidate items, thereby making better use of warehouse space.
- **License plate receiving history**: Logs all license plates registered through the menu items **License plate receiving** and **License plate receiving and put-away**. Each record stores the license plate ID, load and shipment information, the date and time of receiving, and the user ID of the worker who handled the license plate. This information is displayed on the **License plate receiving history** page.
- **Location directive inventory picking aging**
- **Manual shipment consolidation**: The manual consolidation of shipments is a time-driven requirement. Some shipments get consolidated at release to warehouse, while some should be consolidated when they are already at the dock.
- **Manual transfer line picking service for admin or similar trusted users**: Allows administrators to manually pick inventory transactions related to transfer lines, including lines that have already been released to warehouse.
- **Maximum execution time for the warehouse management on-hand entries cleanup job**
- New load planning workbench pages: Enables two new load planning workbench pages—Inbound load planning workbench and Outbound load planning workbench.
- **Organization wide wave step code**: Enables the wave step code feature for all legal entities. The wave step code feature ensures that wave step codes are no longer based on free text but on codes stored in a dedicated table. Going forward, users must select between predefined wave step codes when using wave step codes to link specific wave method instances with their corresponding templates.
- **Organization-wide "Schedule work creation" wave method**: On enabling this feature, the *Schedule work creation* wave method will be configured to run in parallel across all legal entities. Several additional settings will also be affected.
- **Organization-wide system directed work sequencing**: System-directed work sequencing makes it possible to sort and filter which work orders the system will present to users for execution. This functionality solves scenarios where additional criteria are

required to drive the warehouse picking process (for example, based on ship time, picking zone, location profile, or a combination of different criteria). This feature enables the system-directed work sequencing feature for all legal entities within the organization.

- **Outbound sorting**
- **Packaging product dimensions**
- **Quality Management For Warehouse Processes**
- **Replenishment over location capacity**: Some high-volume or space-constrained warehouses may need to ship more quantity of an item in a day than what will fit in the picking location. Replenishment over location capacity allows all replenishment work to be created that will be needed for the day and manages availability of the replenishment work to ensure that the pick location doesn't run out of inventory, but also doesn't go above capacity.
- **Scale unit support for warehouse app work lists**: This feature updates the way work list configurations for the warehouse app are stored in the database using table names instead of table IDs. Admins are still able to configure which fields are shown in the work list, and there are no changes to the user interface.
- **Scan GS1 barcodes**
- **Schedule work creation**
- **System directed cluster picking**
- **System directed work sequencing**
- **Warehouse management app data inquiry flow**
- **Warehouse management application - blank GTD**: This feature is for Russian localization only. It allows workers using the Warehouse Management mobile app to leave Russian customs declaration numbers (GTDs) blank when needed. If the GTD tracking dimension is set up to allow blank values, the system will accept blank values for GTD for inventory operations provided on-hand inventory is available.
- **Warehouse release rule**
- **Wave Load building feature**
- **Wave step code**
- **Work split**
- **Validate templates selected for replenishment jobs**: Helps ensure that users select valid replenishment templates when setting up a replenishment job. This feature prevents users from creating a replenishment job without a template and from selecting templates of type *Wave demand*, which won't create any replenishment work and may take a long time to process.
- **Use faster API for containers closing/reopening on packing station**: Creates inventory transactions related to containers using a new lightweight process to improve

the performance of closing or reopening containers during manual packing station processing.

Features becoming enabled by default with the 10.0.32 release

These features are now turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2023 release wave 2.

- **Change the error to a warning when releasing a load where sufficient quantity isn't available**: This feature lets you change the error to a warning when a user tries to release a load for an order where sufficient quantity isn't available.
- **Enhanced parser for GS1 barcodes**: Enables an enhanced parser for GS1 symbol data. The parser implements the GS1 General Specification algorithm for parsing GS1 symbols and includes stronger validations of data correctness.
- **Evaluate work header breaks before work header maximums during work creation**: Enables more optimal work header grouping during work creation, which can lead to a smaller number of created work headers. This is accomplished by changing the order in which the work header maximums and work header breaks are evaluated during work creation. When this feature is enabled, the work header breaks will be evaluated before the work header maximums.
- **Include Confirmed ship and Confirmed receipt dates into date filters on Load planning workbench**: Expands the existing filtering capability of the Ship date and Receipt date fields on the Load Planning Workbench page to include the sales order line's Confirmed ship and Confirmed receipt dates to determine lines to add to a load. If those dates are blank, order lines will be filtered based on the Requested ship and Requested receipt dates, respectively.
- **License plate receiving enhancements**
- **License plate validation on source document lines**
- **Line reservation enhancements for the batch number reservation form feature**
- **Over receipt of load quantities**: Lets you choose whether to allow or prevent over receipt of inbound load quantities. Over receipts occur when a worker registers a quantity that is greater than the remaining unregistered quantity for a selected load (adjusted for over delivery percentage).
- **Packing work for packing stations**
- **Parent license plates cannot be target license plates**: Enforces the use of a new target license plate when processing picking work from a parent license plate. This applies to sales, inventory movements, transfer issue, and production picking.
- **Pick line grouping**
- **Purchase order quantity left to load calculation using registered quantities**: With this feature, the calculation of **Quantity left to load** for a purchase order line is replaced with a view that shows the registered quantity marked with a load.

- **Sales order packing slip corrections/cancellation transaction status change**: With this feature, the processing of a sales order packing slip cancellation/correction will cause the inventory transaction status to become *OnOrder* when the transaction is not linked to a warehouse management load line.
- **Work policy enhancements for inbound work**

Features becoming generally available with the 10.0.32 release

These features are now generally available. They are not turned on by default and must be enabled manually. Some features can be disabled again after being turned on, and these are targeted to become enabled by default with 2023 release wave 2. All of these features are targeted to become mandatory with 2024 release wave 1.

- **Options for updating the mode of delivery for sales order lines when creating loads**: Lets you use accounts receivable options to control whether sales order lines are assigned a matching mode of transportation the first time you create a load for one or more lines belonging to a sales order. This feature ensures that when you create a load for a sales order line, the system will respect the accounts receivable setting for updating lines based on sales order header changes.
- **Options for validating ingredient batch expiration dates**: This feature lets you choose which date is used to validate the expiration of an ingredient batch when making a physical reservation from a bill of material (BOM) or formula line.
- **Reverse match feature**: Reverse match for the settlement process.

See also

Preview of Dynamics 365 Supply Chain Management 10.0.32 March 2023 (docs)

Capture multiple GS1 label segments simultaneously

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jul 2023

Business value

Workers at companies that use GS1 barcode labels to encode multiple pieces of information into a single bar code label can now capture all this information with a single scan. This enables workers to operate more efficiently when handling items in the warehouse.

Feature details

This feature builds on the existing GS1 barcode label support provided by the Warehouse Management mobile app for Dynamics 365 Supply Chain Management. An important innovation of the GS1 standard is its support for encoding several types of information into a single barcode, and workers using the Warehouse Management mobile app can now capture all this information with just one scan. This capability will help to improve the efficiency of many inbound and outbound warehouse processing flows.

Improve worker efficiency with optimized mobile device screen layout

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jul 2023

Business value

With labor and skills shortages impacting warehouse operations across many industries, worker efficiency and productivity is a top concern. To address this, the Warehouse Management mobile app for Dynamics 365 Supply Chain Management now provides optimized screen layouts that make better use of product images to guide picking activities and increase worker efficiency.

Feature details

The Warehouse Management mobile app improves worker effectiveness and efficiency by providing the following usability enhancements:

- More key fields can be highlighted on the screen to help draw workers' attention to the most important information more quickly.
- Item images, which help workers identify items more quickly, can be displayed as thumbnails that workers can select to zoom in for more details when needed.

Optimize warehouse management implementation and maintenance

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2023	Jul 2023

Business value

Efficient implementation and maintenance experiences are key to running any successful warehouse management system. Businesses require accurate and optimal system configuration tools that also help to reduce training costs. Dynamics 365 Supply Chain Management now provides a toolset that lets businesses bootstrap their initial warehouse management setup while also helping them adjust the configuration with confidence as their business needs change. New tools for monitoring, troubleshooting, and visualizing warehouse processes will streamline the rapid implementation and configuration experience while also reducing the time and expense associated with warehouse management implementations.

Feature details

New capabilities of Dynamics 365 Supply Chain Management help warehouse managers to set up, monitor, troubleshoot, and maintain their warehouse management system. The system now includes tools that will help improve efficiency by enabling warehouse managers to:

- Set up and configure Supply Chain Management through a business-focused user experience supported by guardrails to ensure a quality outcome.
- Address and manage complex warehouse configurations using a simplified configuration and maintenance experience built for efficiency.
- Verify their warehouse configuration using monitoring tools that ensure the smooth operation of business processes.
- Make continuous or breakthrough warehouse configuration changes using change-management tools that help managers adjust the system to adapt quickly to changing business needs.

Optimize warehouse management processes

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2023	Jul 2023

Business value

Optimizing the configuration of fundamental warehouse management processes is a key factor for streamlining warehouse operations, reducing costs, and reducing errors. It gives businesses a better understanding of their warehouse management system and helps make warehouse operations more effective. The new toolset provided for Dynamics 365 Supply Chain Management enables businesses to discover optimization opportunities related to configuring and operating warehouses. New tools for monitoring, optimization, and troubleshooting will improve visibility, support rapid implementation and maintenance, and reduce the workload and cost associated with implementing warehouse management processes (WMS) in Supply Chain Management.

Feature details

New optimization tools for Dynamics 365 Supply Chain Management enable warehouse managers to manage and improve their warehouse management system. With these tools, warehouse managers can:

- Monitor and evaluate warehouse quality, efficiency, and productivity through innovative solutions for measuring configurational and operational effectiveness.

- Understand and optimize the warehouses management processes through easy-to-use tools for viewing and monitoring the configuration and operation of the warehouse management system.

Plan and prepare for Dynamics 365 Project Operations in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Project Operations**.

Overview

[Video: Learn about this product's new capabilities](https://aka.ms/ReleaseHighlight/2023W1/Finance)

In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams so they can 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 2023 release wave 1, we're delivering functionally rich experiences in the following areas:

- Improve user experience and incorporate performance investments in project estimation, sales processes, and project invoicing.
- Implement project budgeting and time-phased forecasting for Resource/Non-stocked deployments of Project Operations.
- Use the improved notifications, approvals, and itemization support in the expense mobile application.
- Use advanced cost and revenue deferrals with time and materials projects for stocked or production-based scenarios.
- Allow cancellation of PO receipts with connected item requirements.

Investment areas

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Project Operations** below:

Check out the release plan

For application administrators

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

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

Get the most out of Project Operations

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Project Operations.
Product documentation	Find documentation for Project Operations.
User community	Engage with Project Operations experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Project Operations.

What's new and planned for Dynamics 365 Project Operations

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

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
Project budget management and time-phased forecasting	Users by admins, makers, or analysts	Sep 2023	-
Cancel PO receipts with connected item requirements	Users by admins, makers, or analysts	-	Apr 2023
Use deferrals for stock or production project scenarios	Users by admins, makers, or analysts	Apr 2023	Jun 2023
Leverage quote, win, contract creation improvements	Users by admins, makers, or analysts	-	Sep 2023
Project invoicing usability and performance improvements	Users by admins, makers, or analysts	-	Sep 2023
Use improved Expense mobile application	Users by admins, makers, or analysts	-	Sep 2023
Modernize user experiences for time entry	Users by admins, makers, or analysts	Jun 2023	Sep 2023

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.

Project budget management and time-phased forecasting

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2023	-

Business value

This feature provides better control over the status of spend and work progress and helps project managers forecast trends for the future duration of the project.

Feature details

A project budget is a versioned snapshot of the financial estimation of time, expenses, and materials required on the project. Project managers can create these snapshots at different periods during the project lifecycle based on revisions and re-estimations of project scope and work.

The latest snapshot represents the best-known scope of the project at any given time. All monitoring of spend and consumption will be tracked against the latest snapshot. Project Operations adds this key capability to help the project manager get a clear view of how they are tracking to their spending and progress targets. This provides the ability to add forecasts based on current spending trends and follows these within a desired granularity of periods configured using project calendars and working days. Comparison of actual spending to budgeted and forecasted spending will help project managers come up with earned value analysis for their project to understand the schedule and financial progress. Project managers can also revise the project budget based on the new scope or changed reality and track the actuals against the revised budget going forward.

With this release, time-phased forecasting would be added to Project Operations Lite deployment and the whole feature would be enabled for Project Operations for resource/nonstocked deployment.

Cancel PO receipts with connected item requirements

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2023

Business value

This feature provides a streamlined process for canceling product receipts that are associated with project item requirements. Users can perform this action using the cancel receipt function.

Feature details

When this feature is enabled, the system allows using the **Product receipt cancellation** function for **Project purchase orders** that are associated with item requirements that have not been invoiced. Upon selection, the system will:

- Cancel any posted item requirement packing slips and create posted project transaction reversals. The original entry and reversal entry will be connected and not available for further adjustments.
- Cancel the selected product receipt.

Use deferrals for stock or production project scenarios

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	Jun 2023

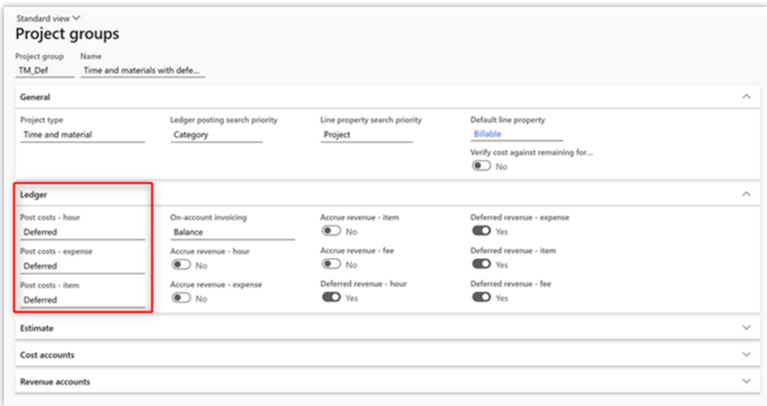
Business value

There's an increasing trend within modern organizations to transform their business models to sell project-based work and subscription-based services in a consolidated contractual agreement. Dynamics 365 Finance has released new features to help manage subscription-based services. These features include the ability to configure and use advanced cost and revenue deferrals. With this update, Microsoft Dynamics 365 Project Operations for production or stocked scenarios will support these features.

Feature details

This feature will include the following capabilities:

- Configuring cost and revenue deferrals for different project transaction types.
- Recording deferred cost and revenue to the project subledger.
- Adjusting project transactions with cost and revenue deferrals.



Advanced cost and revenue deferrals with Projects

Leverage quote, win, contract creation improvements

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Sep 2023

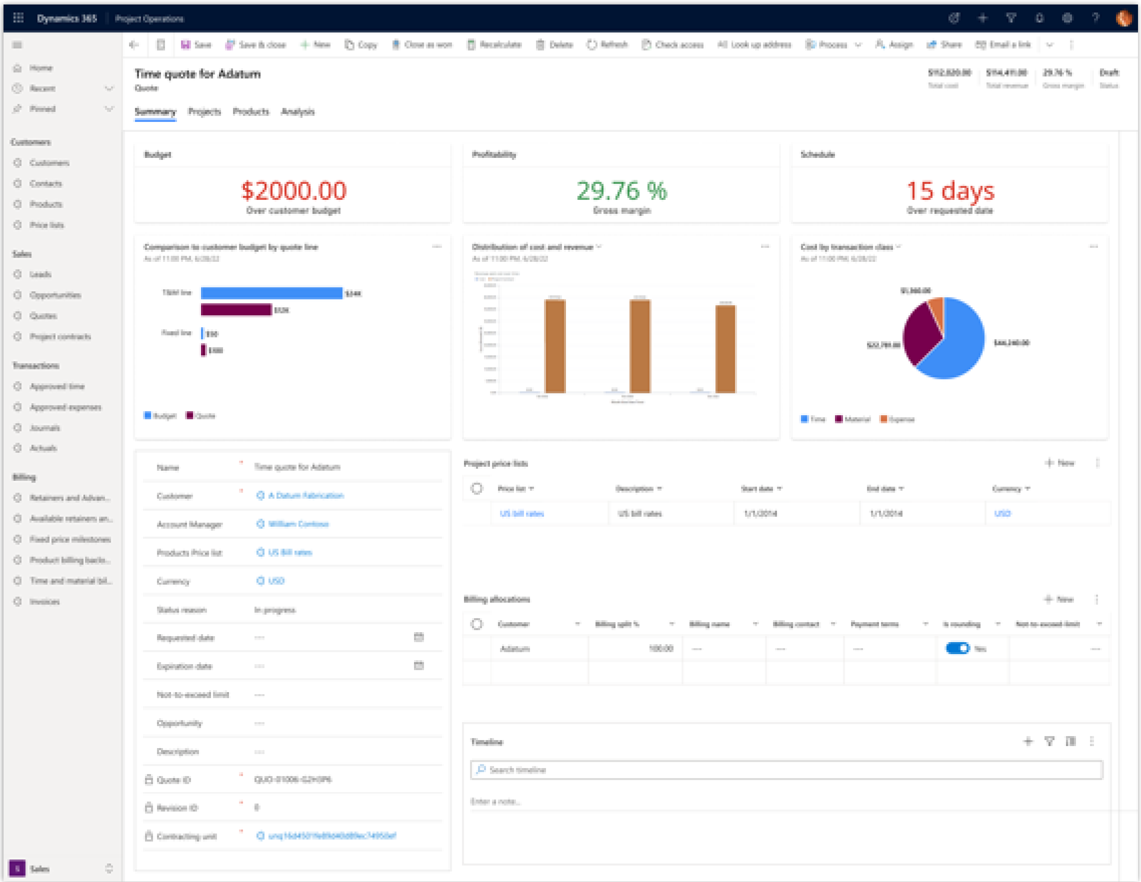
Business value

Usability and performance improvements on Quotes and Contracts will empower salespeople working on project proposals to create quotes with detailed estimates and accurate pricing information quickly and easily. Updated form layouts and improvements to editable grid experiences make it easy to change prices, hours, and resourcing mixes. Understand the impact of these changes to the value, feasibility, and profitability of the bid.

Feature details

Key enhancements will include:

- Limit the creation of chargeable roles and categories for every new contract line by moving to an exception model.
- Leverage xMultiple paradigms and parallelize CRUD options in the contract creation context to improve the scale and throughput.
- Continue usability improvements to Quotes to make it easy and intuitive to:
  - Visualize key metrics like profitability and comparison to customer expectations.
  - Update prices for specific roles and categories on a quote line.
  - Complete the migration to editable grid experiences to be able to change values and visualize the impact on key metrics.



Screenshot of the Quote summary page

Project invoicing usability and performance improvements

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Sep 2023

Business value

It is common for project-based companies to create an invoice for a large team that is working on a project that has a recurring lifespan. Each invoicing period can involve thousands of transactions across time, expense, and material usage activity for projects that will need to be reviewed and confirmed before generating a customer-facing invoice. This process of reviewing is an essential function to ensure a quick invoice and maintain healthy operational metrics. Keeping a clean, intuitive, and performant experience for reviewing and making corrections for the project manager will add strong business value to ensure the smooth running of a service-centric practice.

Feature details

Key enhancements will include:

- Usability investments to ensure that a Project Manager can:
  - Review billing backlog for the next invoice cycle with lines and details and proposed invoice total with the fewest clicks possible.
  - Make edits to billable hours and chargeable aspects of transactions.
  - Add transactions to the invoice when reviewing the invoice.
  - Easily evaluate the impact of any of these changes on the amount to be invoiced.
- Enhance the creation of proforma invoice entry points by improving the control and selection of which transactions in the billing backlog are OK to get included on an invoice.
- Leverage xMultiple paradigms and parallelize CRUD options in the invoicing context to improve the scale and throughput of invoicing operations.

Use improved Expense mobile application

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Sep 2023

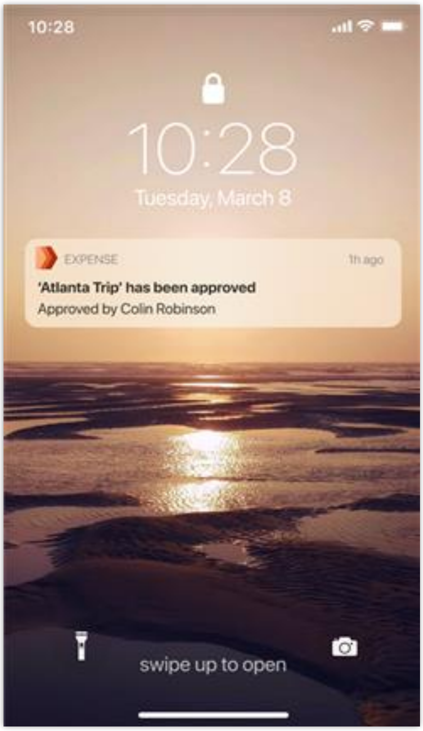
Business value

A business user can itemize expense entries, such as hotel costs, confirm expenses, and receive expense related notifications on the go when using the Expense mobile application.

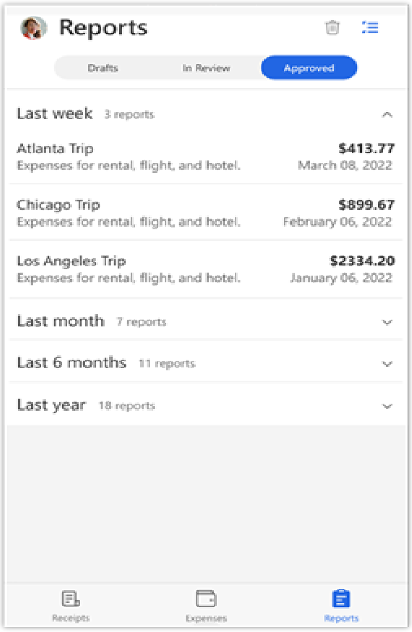
Feature details

Our new Expense mobile app will be further improved with the following capabilities:

- Expense itemization - when required by your expense policy, you can split the total expense amount into the required breakdown, such as hotel day rate, fees, meals, etc.
- Review and approve expense reports that are submitted to you.
- Get notifications about the expense reports your manager has reviewed and require action from you.



Expense mobile notification



Expense mobile approved reports

Modernize user experiences for time entry

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2023	Sep 2023

Business value

Reduce the number of clicks and improve the user experience in time entry for consultants working on projects.

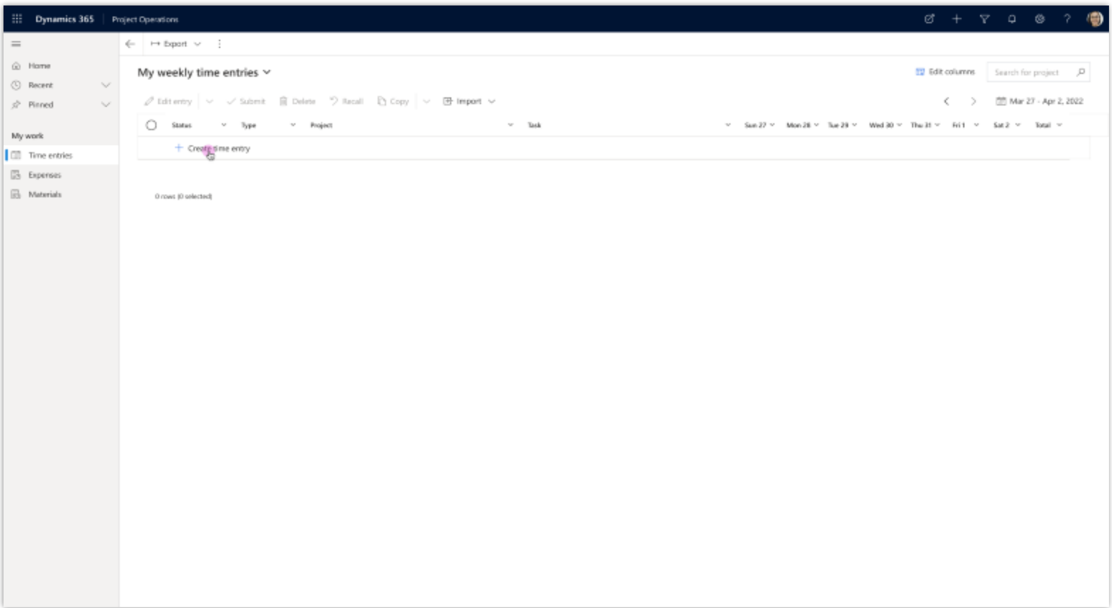
Feature details

This feature updates the time entry grid experience by aligning with the new OneGrid control. These improvements provide modern, new experiences such as:

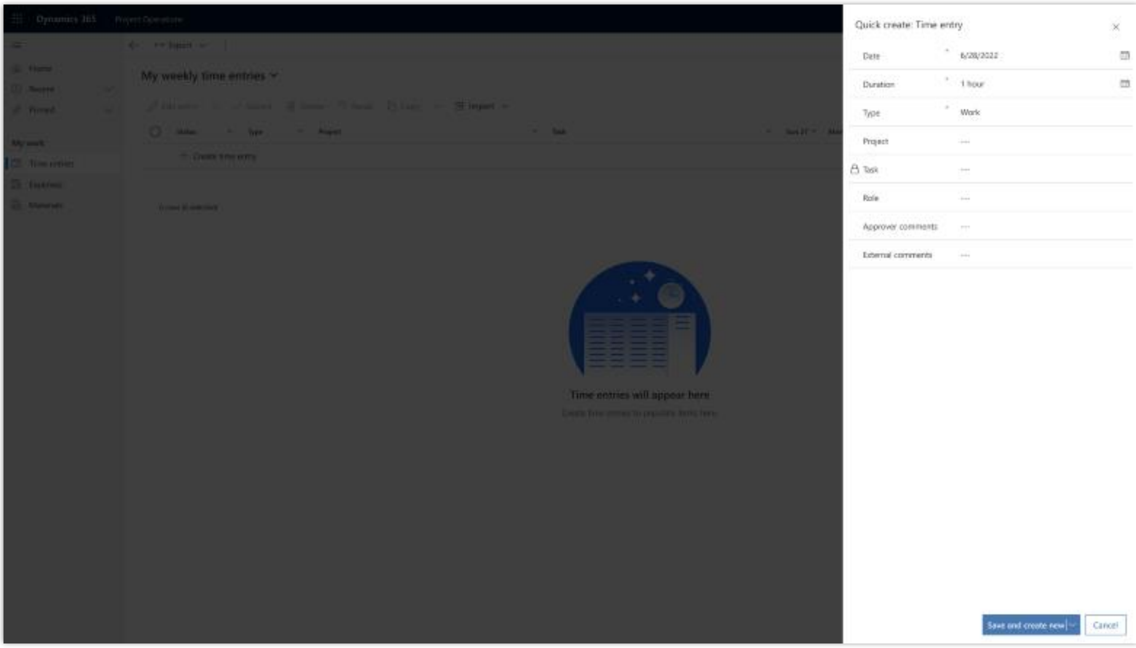
- Inline editing for header and time entries.
- In-table record creation.
- Improved field customization support.
- Optimizing for improved usability, accessibility, and extensibility.

These changes will be released in stages to allow customers to move into the new grid experience when the feature set meets their needs while allowing us to ensure the best possible experience for all users.

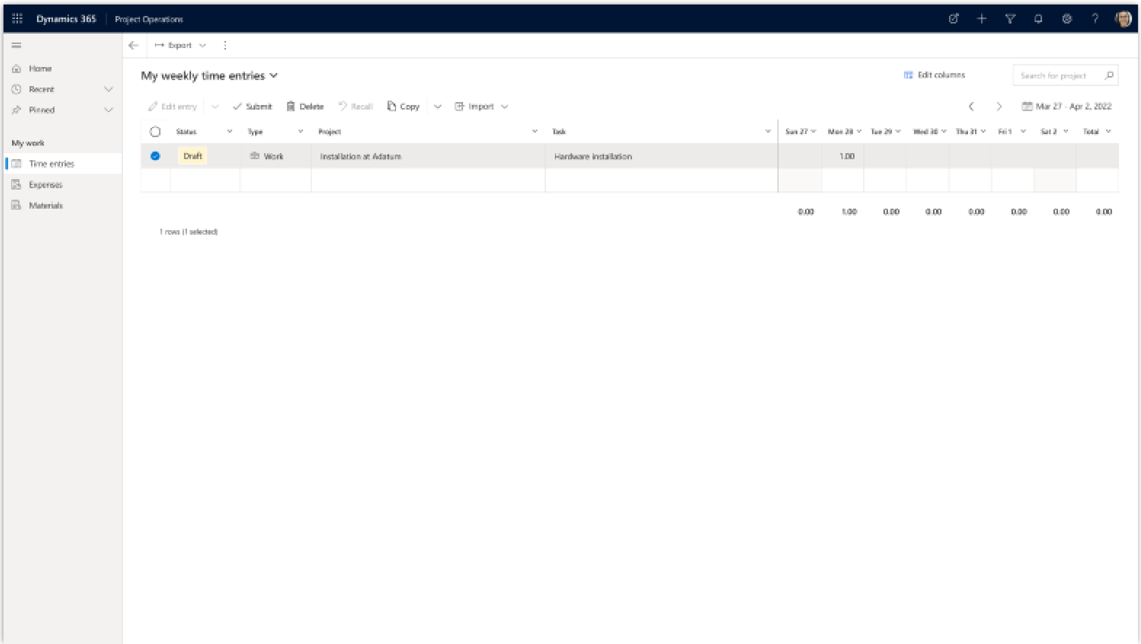
Our first release includes basic time entry capabilities, like what is possible today in the grid, but will be built on the new OneGrid control. During this wave we will build the underlying infrastructure that allows us to add more extensive features in subsequent waves.



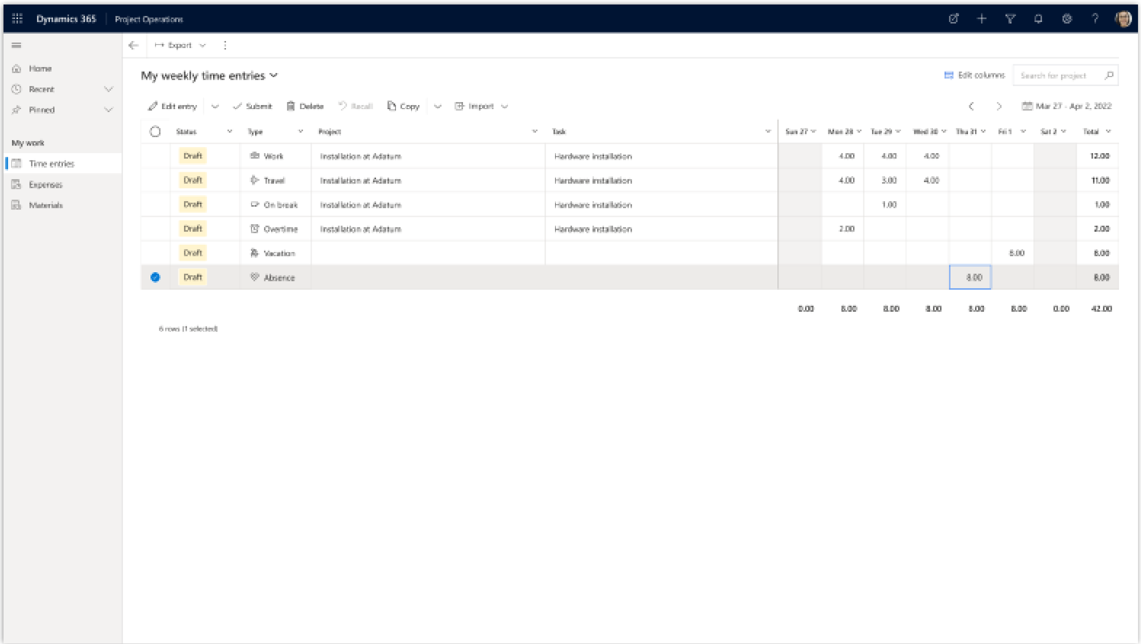
Screenshot of the updated time entry screen.



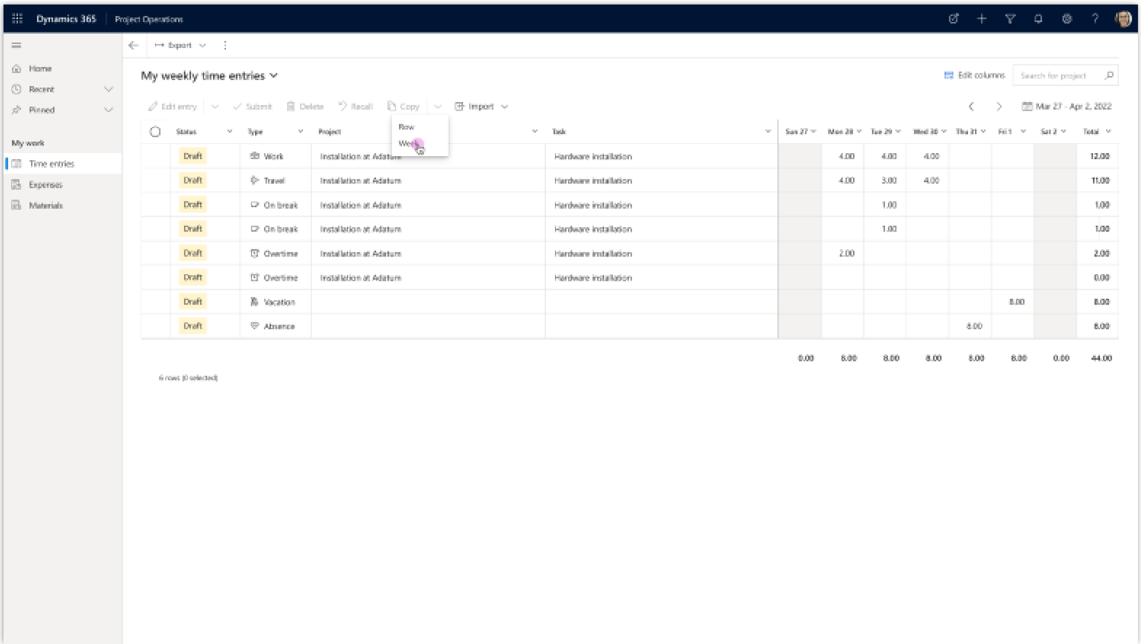
Screenshot of the Quick Create form for a New Time Entry.



Screenshot of a newly created time entry.



Screenshot of a single time entry cell that's been selected.



Screenshot showing an updated layout for Copy buttons.

Plan and prepare for Finance and Operations cross-app capabilities in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Finance and Operations cross-app capabilities**.

Overview

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, we deliver frequent updates that help customers stay current in a consistent, predictable, and seamless manner. The key driver for the new core capabilities is increasing productivity and return on investment.

Investment areas

One Dynamics One Platform
One Dynamics One Platform focuses on the convergence of Finance and Operations apps with Microsoft Dataverse, and enables customers to take full advantage of Power Platform with each Finance and Operations app environment. These features improve the development, administration, and user experiences by removing barriers, tightening integrations, and enhancing cross-platform capabilities. In 2023 release wave 1, we will start enabling developers to write business logic that spans both platforms (Finance and Operations apps and Dataverse) in a transactional, consistent manner, enable them to create background jobs in Dataverse, introduce IP-based cookie binding for apps, and improve performance of virtual tables.

Cross-application features
This section of the release plan focuses on new capabilities and features that apply to all Finance and Operations apps including Finance, Supply Chain Management, Human Resources, Commerce, and Project Operations. These new capabilities include enhancements to improve user productivity and improvements to the user experience in general.

The focus for this wave is on performance improvements and ensuring that customers have the latest innovations in the areas of personalization and grids, including saved view support for dialogs and workspaces, the ability to save filters to views on more page types, the ability for users to set and change tile sizes on workspaces, and extended aggregation capabilities in grids beyond showing totals. These changes allow customers and users to better optimize their experiences to suit their needs and optimize their productivity.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Finance and Operations cross-app capabilities** below:

Check out the release plan

For application administrators

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

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

What's new and planned for Finance and Operations cross-app capabilities

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

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

Cross-application features

This section includes capabilities and features that apply to all Finance and Operations apps.

Feature	Enabled for	Public preview	General availability
Incremental visual refresh of the Finance and Operations apps user experience	Users, automatically	✓ Feb 6, 2023	Apr 2023
Improvements to the grid control	Users, automatically	✓ Feb 6, 2023	Apr 2023
New extension methods to improve handling of default queries with saved views	Admins, makers, marketers, or analysts, automatically	✓ Feb 6, 2023	Apr 2023
Updates to client feature states with version 10.0.32	Users, automatically	✓ Feb 6, 2023	Apr 2023
Configure X++ enum data types for more than 251 values	Admins, makers, marketers, or analysts, automatically	Jul 2023	Sep 2023

One Dynamics One Platform

One Dynamics One Platform focuses on the convergence of Finance and Operations apps with Microsoft Power Platform, enabling customers to take full advantage of Power Platform with each Finance and Operations environment.

Feature	Enabled for	Public preview	General availability
Automated application lifecycle management for dual-write solution deployment	Users by admins, makers, or analysts	Mar 2023	May 2023
Enable support for asynchronous operation in dual-write functionality	Users by admins, makers, or analysts	Mar 2023	May 2023
Improve virtual table performance	Admins, makers, marketers, or analysts, automatically	-	Jun 2023
Simplify access to Dataverse by Finance and Operations apps	Users by admins, makers, or analysts	May 2023	Jun 2023

Feature	Enabled for	Public preview	General availability
Block cookie replay attacks with IP-based cookie binding	Users by admins, makers, or analysts	May 2023	Jul 2023
Dual-write availability expands to new countries	Users by admins, makers, or analysts	-	Sep 2023
Provide advanced debugging for troubleshooting dual-write data sync failures	Users by admins, makers, or analysts	Jun 2023	Sep 2023
Ensure consistency in service requests	Users by admins, makers, or analysts	Jun 2023	To be announced
Improve performance of dual-write synchronization	Users by admins, makers, or analysts	Jul 2023	To be announced
Enable background jobs in Dataverse	Users by admins, makers, or analysts	Aug 2023	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.

Cross-application features

Overview

This section of the release plan focuses on new capabilities and features that apply to all Finance and Operations apps including Finance, Supply Chain Management, Human Resources, Commerce, and Project Operations. These new capabilities include enhancements to improve user productivity and improvements to the user experience in general.

The focus for this wave is on performance improvements and ensuring that customers have the latest innovations in the areas of personalization and grids, including saved view support for dialogs and workspaces, the ability to save filters to views on more page types, the ability for users to set and change tile sizes on workspaces, and extended aggregation capabilities in grids beyond showing totals. These changes allow customers and users to better optimize their experiences to suit their needs and optimize their productivity.

Incremental visual refresh of the Finance and Operations apps user experience

Enabled for	Public preview	General availability
Users, automatically	✔ Feb 6, 2023	Apr 2023

Business value

The increased alignment in the look and feel of the user experience in Finance and Operations apps compared to other Microsoft apps in Office 365 and Dynamics 365 aims to make the Finance and Operations experiences easier to learn and use and ultimately improve user satisfaction.

Feature details

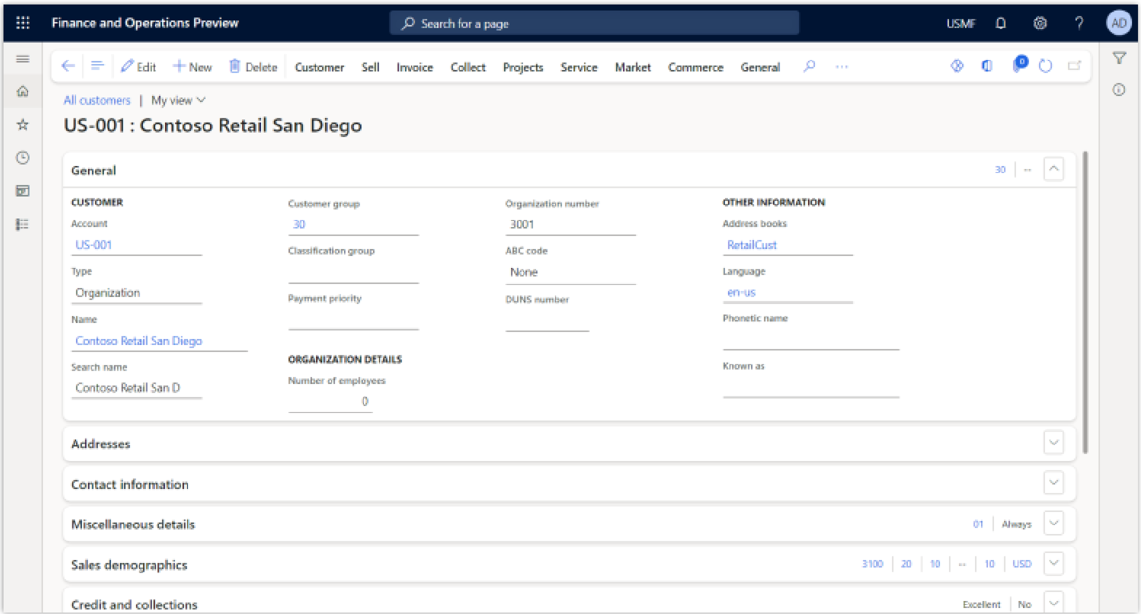
Design languages, like Microsoft Fluent, naturally evolve over time to not only increase the visual appeal of user experiences, but more importantly to make those experiences more intuitive and to help users be more comfortable and productive. Though the Finance and Operations user experience is currently based on an old version of Fluent, we've heard your feedback about that experience and will address this with another visual facelift of the product to better align to both the latest guidance from Fluent, which has already been adopted in other Microsoft apps like Word, PowerPoint, Outlook, Teams, and Azure, and the visuals in other Dynamics 365 apps.

The largest changes to the user experience are included in version 10.0.32, with smaller enhancements targeted for subsequent releases that will continue to evolve and improve the Finance and Operations interface for the benefit of end users.

Changes included in version 10.0.32

- Alignment to the Microsoft Fluent design language involves styling changes with rounding of containers and bringing attention to containers through visual elevation.
- Alignment to other Dynamics 365 apps involves relocation of the four system actions:
    - The **Close** button, the last button in the Action pane, has been transformed into a **Back** button, which is now the first button in the Action pane.
    - The **Show list** button, which exists only on certain page types, has been moved into the Action pane, just after the **Back** button.

- The **Show filters** button now resides in the new right rail. This action still causes the Filter pane to open, but it now opens on the right side of the page.
- The **Related information** button is now an icon-only button in the new right rail, just below the **Show filters** button.



New look for the Finance and Operations apps user experience

Improvements to the grid control

Enabled for	Public preview	General availability
Users, automatically	✔ Feb 6, 2023	Apr 2023

Business value

These enhancements increase grid user productivity and general usability of the grid.

Feature details

Grids are a critical component to ERP applications that are used extensively throughout all Finance and Operations applications and cater to a variety of user scenarios. In this release wave, a number of improvements have been made to the grid control to help users be more efficient and productive when interacting with the grid.

- **More robust fast data entry**: In some situations, changes that users had made in the grid ahead of what the system had processed had to be discarded due to page logic refreshing the grid data. Improved tracking of records with edits (via RecIDs) is now available so that unsaved changes are retained after data refreshes for most scenarios. Unsaved changes may still be discarded for scenarios where records do not have persistent RecIDs (temp tables).

- **Be more efficient with the keyboard**: For users who want to be as efficient as possible in the system using just their keyboard, a number of new keyboard shortcuts have been added to the grid control to help you be as productive as possible. These shortcuts include actions related to fast data entry, grouping, column pinning, and column aggregation.
- **Select a range of cells**: When users need to extract specific information from a tabular grid, they no longer have to copy entire data rows. Instead, users can use the keyboard to select only the desired rows and columns, similar to Excel. The selected cells can then be copied and pasted into other applications, like Excel.
- **See aggregate values for selected rows**: When columns are configured to show an aggregate value like a total, minimum, maximum, or average, the aggregated values were computed based on the entire dataset. If multiple rows were selected, no aggregate value was displayed. Based on customer feedback, this capability has been extended to compute and display the desired aggregate for the selected rows when more than one row has been selected.

See also

Grid capabilities (docs)

New extension methods to improve handling of default queries with saved views

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Feb 6, 2023	Apr 2023

Business value

These extension points allow saved views to behave as users expect in more complex scenarios. The successful usage of views can result in fewer steps in completing business processes and higher user satisfaction.

Feature details

The Saved views feature can be an extremely useful mechanism for users or organizations to optimize the user experience. Data indicates this feature is primarily used today to save queries on list pages, allowing users to quickly return to specific datasets either on page load (when the view is made the default view) or on demand. However, feedback from the community has indicated that view usage on list pages is impeded in some scenarios due to the default handling of the view query in relation to the form query, typically resulting in the default view query not loading and the user receiving a warning or error message.

One common scenario where this occurs is when users navigate to a page where the corresponding menu item has a query defined for the page. In this case, if the default view also contains a query, the page loads using the default menu item query instead of the default view's query, and the user sees this warning message: "The view query has been overridden because of a conflict." This scenario is alluded to by two separate highly voted suggestions in the Ideas portal (see Saved views on pre-filtered forms and Extension of feature "saved views" for more details) and has also been reported to Microsoft through other avenues.

To address the most commonly reported customer concerns and enable users to use views as they expect in more situations, two new extension mechanisms have been added to give form developers more control over the query executed when a page or view is loaded.

- The **EnableSavedViewQueryPriority** method in the **FormRunPersonalizationSettings** class allows the default view query to have priority over any menu item query.
- When the standard platform merging of the view query and the base form query is performed and that process fails, a replaceable **OnFailureQueryPersonalizationApply** method is now available to give form developers a fallback method for making any needed adjustments to the query so the view can load as expected. Using this method, developers can programmatically adjust the target query as desired so that users have the desired experience.

See also

Saved views (docs)

Updates to client feature states with version 10.0.32

Enabled for	Public preview	General availability
Users, automatically	✔ Feb 6, 2023	Apr 2023

Business value

This information helps customers stay current on the latest client capabilities of Finance and Operations apps.

Feature details

Mandatory features with the 10.0.32 release

- Saved views support for dialogs
- Allow queries to be saved to views on Task Single and Task Double pages
- Allow users to select and change tile sizes
- Streamline tabbing behavior in full-page forms
- Optimize loading of Action center notifications

Enabled-by-default features with the 10.0.32 release

- Enable system notification management
- Extended grid aggregation capabilities
- Saved views performance enhancement

Configure X++ enum data types for more than 251 values

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2023	Sep 2023

Business value

Currently in Finance and Operations apps you can declare up to 251 (0 to 250) enum values in a single X++ enum type. Industry enhancements demand a higher number of enum values to be configurable, however. Some areas, such as LedgerPostingTypes, for example, get trimmed due to the 251 value size limitation. Removing the value limitation will provide more flexibility so that you can declare as many enum values as needed.

Feature details

In 2023 release wave 1, we are removing the enum value restriction. That way, enums that require more than 251 values, such as LedgerPostingTypes, can be successfully configured.

One Dynamics One Platform

Overview

One Dynamics One Platform focuses on the convergence of Finance and Operations apps with Microsoft Dataverse, and enables customers to take full advantage of Power Platform with each Finance and Operations app environment. These features improve the development, administration, and user experiences by removing barriers, tightening integrations, and enhancing cross-platform capabilities. In 2023 release wave 1, we will start enabling developers to write business logic that spans both platforms (Finance and Operations apps and Dataverse) in a transactional, consistent manner, enable them to create background jobs in Dataverse, introduce IP-based cookie binding for apps, and improve performance of virtual tables.

Automated application lifecycle management for dual-write solution deployment

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2023	May 2023

Business value

As a developer, implementor, or administrator for Finance and Operations apps, you can save time and effort in dual-write setup, management, and upgrade scenarios.

Feature details

Today, the dual-write administration page offers individual functions to manually handle the solution deployment process. In 2022 release wave 2, we automated the solution deployment process by exposing additional metadata for the dual-write solution publisher, entity maps versions, underlying integration keys, and execution order. The plug-ins will be extensible for building a custom deployment process.

In 2023 release wave 1, this feature becomes generally available.

Enable support for asynchronous operation in dual-write functionality

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2023	May 2023

Business value

This feature lets you enable asynchronous business processes for dual-write functionality for your business.

Feature details

Dual-write functionality currently supports initial synchronization and live synchronization modes. In 2022 release wave 2, dual-write functionality also supports continuous, asynchronous data movement between Finance and Operations apps and Microsoft Dataverse for eventual data consistency. It enables asynchronous business processes to participate in dual-write functionality. By executing bulk create and update operations in asynchronous mode, you can avoid session timeout problems. This feature will go through preview and general availability in incremental stages.

In 2023 release wave 1, this feature becomes generally available.

Improve virtual table performance

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Jun 2023

Business value

This feature enables you to build performance apps and integrations against Microsoft Dataverse virtual tables for Microsoft Dynamics 365 Finance and Operations apps.

Feature details

You can build more performant apps and integrations against Dataverse virtual tables for Finance and Operations apps by reducing the latency in API responses between Dataverse and the Finance and Operations platform.

Simplify access to Dataverse by Finance and Operations apps

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2023	Jun 2023

Business value

This feature brings Finance and Operations closer together with Microsoft Power Platform.

Feature details

Application teams and ISVs creating Finance and Operations app packages need an API to send requests from Finance and Operations apps to Microsoft Dataverse. For the Uno experience, it must require as little configuration by the user as possible to enable access to the API.

The scope of this feature is to streamline the experience of enabling access for Finance and Operations apps to make requests to the IOrganizationService API. The Dataverse environment administrator will have the ability to provide Finance and Operations apps with admin access to send requests to the API of the Dataverse environment linked through the Microsoft Power Platform integration.

The feature can be enabled at any point when the Power Platform integration is enabled for the Finance and Operations environment. This includes during or after deployment in either Microsoft Dynamics 365 Lifecycle Services or in the Power Platform admin center. In this document we describe the user experience for enabling access to the API.

Block cookie replay attacks with IP-based cookie binding

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2023	Jul 2023

Business value

As an administrator, you'll be able to safeguard your Finance and Operations apps platform from cookie replay attacks coming from different computers or IP addresses.

Feature details

You can stop cookie replay attacks by binding the IP address of the computer with a cookie to block unauthorized access to Finance and Operations apps. You can apply this control when needed to help keep your organization secure. This vulnerability can be exploited only if the device is compromised or an adversary-in-the-middle attack happens, and the browser's valid cookie is copied by a malicious user. This valid cookie can be replayed until it expires.

For example, a user copies a valid browser cookie from one computer using publicly available tools and tries to replay the same cookie from a different computer using any publicly available tool. The cookie IP binding feature will evaluate the IP address of the cookie origin in real time and will prompt the user with a message if the IP address of the cookie origin is different than the IP address of the request being made.

Today, cookie binding with an IP address doesn't exist, but in 2023 release wave 1, administrators will be able to use cookie IP binding in Lifecycle Services for Microsoft Dynamics 365 to block cookie replay attacks.

Dual-write availability expands to new countries

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Sep 2023

Business value

Dual-write availability in China encourages Dynamics 365 customers to take advantage of the dual-write capability for their businesses.

Feature details

In this release, we expand dual-write availability. For a current, regional availability list, see System requirements and prerequisites.

Provide advanced debugging for troubleshooting dual-write data sync failures

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2023	Sep 2023

Business value

This feature provides advanced debugging for troubleshooting dual-write data sync failures.

Feature details

We released a table map health check feature in 2022 release wave 1 that helps to validate and fix the dual-write map quality. The feature eventually fixes most of the data sync issues at the design time. In 2022 release wave 2, we enhanced it to runtime diagnostics to identify the patterns of data problems in debug mode and provide recommendations for fixing. This feature will be released to general availability in 2023 release wave 1.

Ensure consistency in service requests

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2023	To be announced

Business value

One Transaction provides transactional consistency between Finance and Operations apps and Microsoft Dataverse, bringing the Finance and Operations platform and the Microsoft Power Platform closer together in support of the One Dynamics One Platform efforts.

Feature details

Transactions originating in X++ and making calls to Dataverse through the IOrganizationService API will be bound to a single transaction, enabling commits and rollbacks to be consistent between the two platforms. Similarly, transactions originating in Dataverse and making calls to Finance and Operations apps through virtual tables will maintain transactional consistency.

Improve performance of dual-write synchronization

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2023	To be announced

Business value

As an administrator, implementor, or user, you'll see better system performance during dual-write initial synchronization and live synchronization.

Feature details

The 2023 release wave 1 focuses on performance improvements to the dual-write initial sync and live sync modes through the use of optimized APIs.

Enable background jobs in Dataverse

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Aug 2023	To be announced

Business value

Finance and Operations customers will benefit by leveraging Power Automate to schedule background jobs along with over 800 Microsoft Dataverse connectors. Providing the ability to execute background jobs in Dataverse will enable low-code and professional code developers to leverage the Async API pattern in Dataverse.

Feature details

Dataverse background jobs provide the capability to author, schedule, troubleshoot, and manage Finance and Operations batch jobs and Dataverse in one place. This capability allows Finance and Operations batch jobs to be available in Power Platform. Makers can create Power Automate flows, using over 800 connectors to complete end-to-end business processes using Finance and Operations batch jobs. The first set of Finance and Operations platform batch jobs are available as custom APIs in Dataverse.

Human Resources

Plan and prepare for Dynamics 365 Human Resources in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Human Resources**.

Overview

Video: Learn about this product's new capabilities

The way we work and the workplace has fundamentally changed—and yet, for many businesses, HR processes have not. Today people are connected via mobile devices, plugged into their network, have higher career path expectations, and want to work for organizations aligned with their values.

Legacy HCM systems are disconnected, and data is siloed across HR architectures, typically made up of multiple vendor solutions. Many processes are still manual, and the employee experience is disconnected. Employee disruption ultimately impacts the organization by lacking product innovation, expensive operational errors, less satisfied customers, and suboptimal financial results.

We aim to help you limit the number of manual processes and connect your employee experiences. We also aim to bring systems together to ensure data is readily available and not siloed. Our goal is to enable employees to focus on their work, inspire managers to help employees grow, and help HR business partners focus on strategic areas of the organization.

For 2023 release wave 1, our themes are:

- **Improve efficiency** by limiting manual decisions and tasks for HR business partners, managers, and employees.
- **Expand the HCM ecosystem** to include learning management system integration through public APIs leveraging Dataverse along with expanding our payroll partner network.
- **Build better together experiences** that cross the Dynamics 365 space.

Investment areas

Integrations and extensibility
Integrations and extensibility are critical for customers needing to fill in the white space of their business processes. By leveraging Dataverse, public APIs are made available for customers and partners to build out the integrations required to optimize HR business processes.

In this wave, customers will be able to integrate with their learning management providers to leverage learning enrollment and status within Dynamics 365. Customers will also be able to leverage worker information in universal resource scheduling to ensure the right resources are allocated to the right projects.

Benefits management
Benefits management provides a flexible solution that supports a wide variety of benefit options. Human Resources also includes an easy-to-use employee experience that showcases your benefit offerings.

This wave continues the investment in helping benefit administrators enroll employees or confirm employee selections by quickly selecting and confirming benefits through different data pivots and other custom filter criteria.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Human Resources** below:

Check out the release plan

For application administrators

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

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

Get the most out of Human Resources

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Human Resources.
Product documentation	Find documentation for Human Resources.
User community	Engage with Human Resources experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Human Resources.

What's new and planned for Dynamics 365 Human Resources

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

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 supports various benefit options, including an employee experience that showcases benefit offerings.

Feature	Enabled for	Public preview	General availability
Simplifying managing employee benefit elections	Users by admins, makers, or analysts	-	Jun 2023

Integrations and extensibility

See the new integrations and features that streamline custom integrations in Dynamics 365 Human Resources.

Feature	Enabled for	Public preview	General availability
Get single view of training and other employee data from learning management providers	Users by admins, makers, or analysts	-	Jul 2023
Enable resource management integration	Users by admins, makers, or analysts	Jul 2023	Sep 2023

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 a flexible solution that supports a wide variety of benefit options. Human Resources also includes an easy-to-use employee experience that showcases your benefit offerings.

This wave continues the investment in helping benefit administrators enroll employees or confirm employee selections by quickly selecting and confirming benefits through different data pivots and other custom filter criteria.

Simplifying managing employee benefit elections

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jun 2023

Business value

This feature simplifies how benefits are managed by adding bulk editing capabilities as well as enabling employees to more easily select their benefits in Dynamics 365 Human Resources.

Feature details

Manage multiple benefit elections

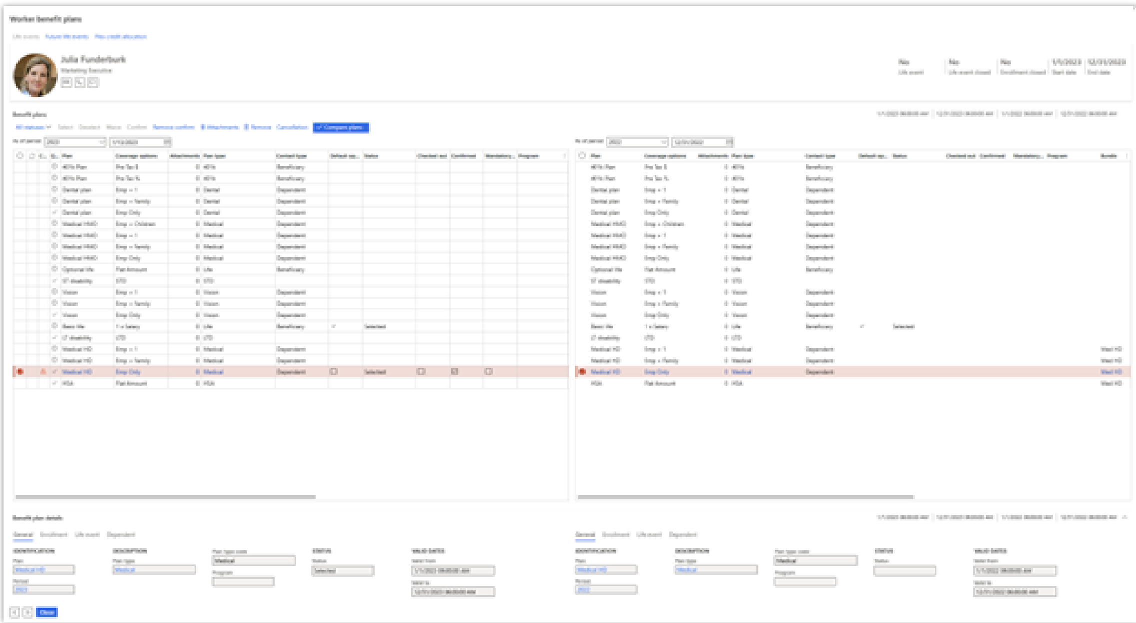
Benefit administrators can quickly apply filters and groupings based on period, plans, plan types, program, bundles, plan validity and status to select the desired records and then take bulk actions on the selected records. They can easily navigate through the selected list of records and access related information regarding enrollment, life events, dependents, beneficiaries, and cost. To make your experience smooth, the new page provides optimized screen space. Email notifications can be sent out to workers from the bulk update page. Administrators can identify which plan records have changed as compared to the previous period and select those plans for further validation.

Compare benefit selections

This feature provides the ability to make quick validations by capturing the changes in the benefit plans selections, coverage options, coverage amounts or dependents and beneficiary information. Administrators can easily select the employee changes and validate their selection by comparing the data against a previous period or point-in-time data. Administrators can also compare employee plan selection between two benefit periods, or between two timespans within same period—for example, before and after Life Event selections. Notifications can be sent to employees if needed based on the outcome of the validation.

Prorate benefit plan contributions

This feature provides a configuration option to enable proration of employee contribution amounts per available pay periods. The maximum annual contribution amount is prorated in the available pay periods for the employee. The feature supports proration of contribution amounts for the available pay periods within a defined benefit period. Configure pay cycles to allow for proration of contributions.



Compare benefit elections

Integrations and extensibility

Overview

Integrations and extensibility are critical for customers needing to fill in the white space of their business processes. By leveraging Dataverse, public APIs are made available for customers and partners to build out the integrations required to optimize HR business processes.

In this wave, customers will be able to integrate with their learning management providers to leverage learning enrollment and status within Dynamics 365. Customers will also be able to leverage worker information in universal resource scheduling to ensure the right resources are allocated to the right projects.

Get single view of training and other employee data from learning management providers

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jul 2023

Business value

With the continued globalization of workforces, the ability to assign, deliver, and track employee training is becoming more of a challenge for companies than ever before. To bring the utility of existing learning management systems closer to Dynamics 365 Human Resources, we need to build integrations with partners. This feature fills a gap in functionality by creating a centralized place to view training data alongside all other employee data.

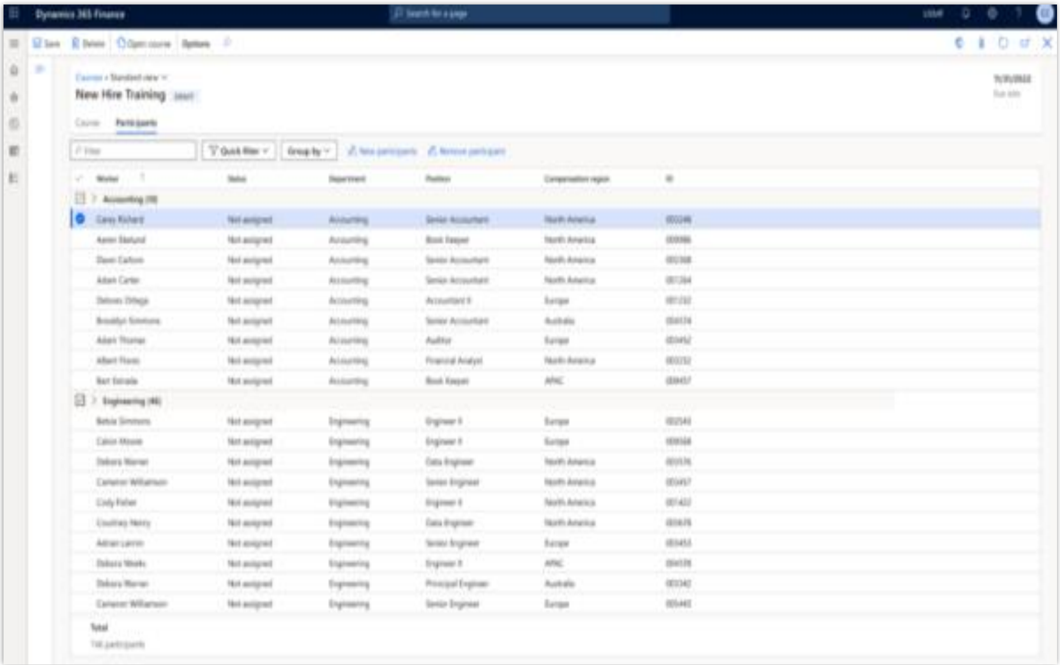
Feature details

This new capability will enhance employee, manager, and HR business partner experiences by bringing together all of the training data from partner learning management systems in a single view, alongside all other employee data.

We will update the course capabilities in Human Resources to support virtual training along with the traditional instructor-led training that is supported today. We will also create a set of scenario-specific APIs in our integration platform, based on Microsoft Dataverse, that are streamlined to enable partners to quickly create tight integrations with Human Resources. This will enable an end-to-end scenario of assigning online training to an employee for companies using a wide range of partner-learning management systems.

Features include:

- Setting up virtual courses with links to course content.
- Viewing courses by type and status in the employee self service workspace.
- Mass assignment of courses from multiple systems.
- Purpose-built learning APIs for integration.



Mass course assignment

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 resource management integration

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2023	Sep 2023

Business value

This new capability enhances the resource manager's experience by bringing together all the employee information around skills, time, and more in Human Resources so it can be used when resourcing projects.

Feature details

Finding the right resources for a project can be challenging. The skills and availability of resources are needed to make sure projects can be successfully executed. By integrating the worker information from Dynamics 365 Human Resources into the universal resource scheduler, resource managers within Project Operations can quickly and easily find the right resources for projects without having to re-enter information.

This feature will enable resource managers to:

- View workers available for projects from Human Resources as bookable resources.
- Find or book resources by skills and certificates associated with the worker in Human Resources.
- View the availability of the resources based on their time off in Human Resources.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Commerce

Plan and prepare for Dynamics 365 Commerce in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Commerce**.

Overview

Video: Learn about this product's new capabilities

Dynamics 365 Commerce is an end-to-end solution for delivering seamless commerce across all retail channels. It encompasses sales, mobility, intelligence, and productivity to help customer-facing businesses achieve more in a cloud-first, mobile-first way. The solution offers comprehensive support to operate a broad range of business processes, including point of sale (POS), call center, e-commerce, clienteling, merchandising, inventory, and channel management, while providing a unified and immersive customer experience for B2B and B2C engagements across physical and digital channels.

We are investing in many areas for Dynamics 365 Commerce as a part of 2023 release wave 1 . Organizations can leverage Commerce to drive better business outcomes by:

- **Engaging customers across channels**: Give your customers or partners the option to purchase when, how, and where they want—on any device—by delivering a frictionless and consistent engagement across physical and digital channels.
- **Building your e-commerce presence**: Grow your business with a unified digital commerce solution that scales to meet your needs and is optimized for both business (B2B) and consumer (B2C) sales.
- **Enabling AI-driven intelligent commerce**: Delight your customers with engaging, personalized, and item-based AI-powered recommendations discovery experiences to increase repeat visits, customer retention, and loyalty.
- **Modernizing retail stores and streamlining operations**: Create personalized and friction-free retail commerce experiences through user-friendly applications powered by robust back-office operations.
- **Gaining agility and scalability through a natively headless solution**: Support traditional and emerging channels by using an agile, API-driven headless commerce engine to help adapt to current and emerging needs. Employ a configurable and extensible platform that expands and grows to fit your business needs.

Key features for this release include:

- **New B2B e-commerce capabilities**: Distributers can be modeled as sellers for B2B buying, B2B fulfillment dashboard for distributers, and improvements to the B2B signup flow.
- **Optimized payment processing workflows for POS**: Cashiers will benefit from a simplified UI for accepting payments at checkout that are consistent across payment types.
- **Support for asynchronous payment methods**: Infrastructure investment enables asynchronous payment methods such as "buy now, pay later" provided by popular payment providers.
- **New network health checks for POS**: Diagnose network-related issues and maximize POS uptime with new latency, connectivity, and memory health checks.

Investment areas

Store Commerce
Investments in this wave provide reliability and usability improvements for store workers in Store Commerce on Windows, iOS, and Android devices.

Omnichannel Commerce
Investments in this release include enhancements to omnichannel payments and order fulfillment with distributed order management.

Digital Commerce
Investments in this release streamline site management and design and add key features and capabilities for your digital sales channels.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Commerce** below:

Check out the release plan

For application administrators

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

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Get the most out of Commerce

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Commerce.
Product documentation	Find documentation for Commerce.

Helpful links	Description
User community	Engage with Commerce experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Commerce.

What's new and planned for Dynamics 365 Commerce

This topic lists features that are planned to release from April 2023 through September 2023. 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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Digital Commerce

Provide fully integrated e-commerce storefronts for both B2C and B2B customers.

Feature	Enabled for	Public preview	General availability
Enable units of measure in e-commerce	Admins, makers, marketers, or analysts, automatically	Apr 2023	Jun 2023
Improve the B2B buyer sign-up flow	Admins, makers, marketers, or analysts, automatically	May 2023	Jun 2023
Use selective site copy for CMS content	Admins, makers, marketers, or analysts, automatically	Sep 2023	Sep 2023
Enable distributors to view orders to be fulfilled by them on the B2B dashboard	Users by admins, makers, or analysts	Jul 2023	Sep 2023
Host a B2B platform where distributors and buyers from retail outlets can place orders	Users by admins, makers, or analysts	Jul 2023	Sep 2023

Omnichannel Commerce

Enable end-to-end omnichannel capabilities and unified back-office management and operations.

Feature	Enabled for	Public preview	General availability
Enable asynchronous payment methods	Users by admins, makers, or analysts	Jul 2023	Sep 2023

Store Commerce

Improve your store worker's effectiveness and ability to quickly and easily assist their customers.

Feature	Enabled for	Public preview	General availability
Detect POS network and connectivity issues with health check	Users, automatically	Mar 2023	Apr 2023

Description of **Enabled for** column values:

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Digital Commerce

Overview

Investments in this release streamline site management and design and add key features and capabilities for your digital sales channels.

Enable units of measure in e-commerce

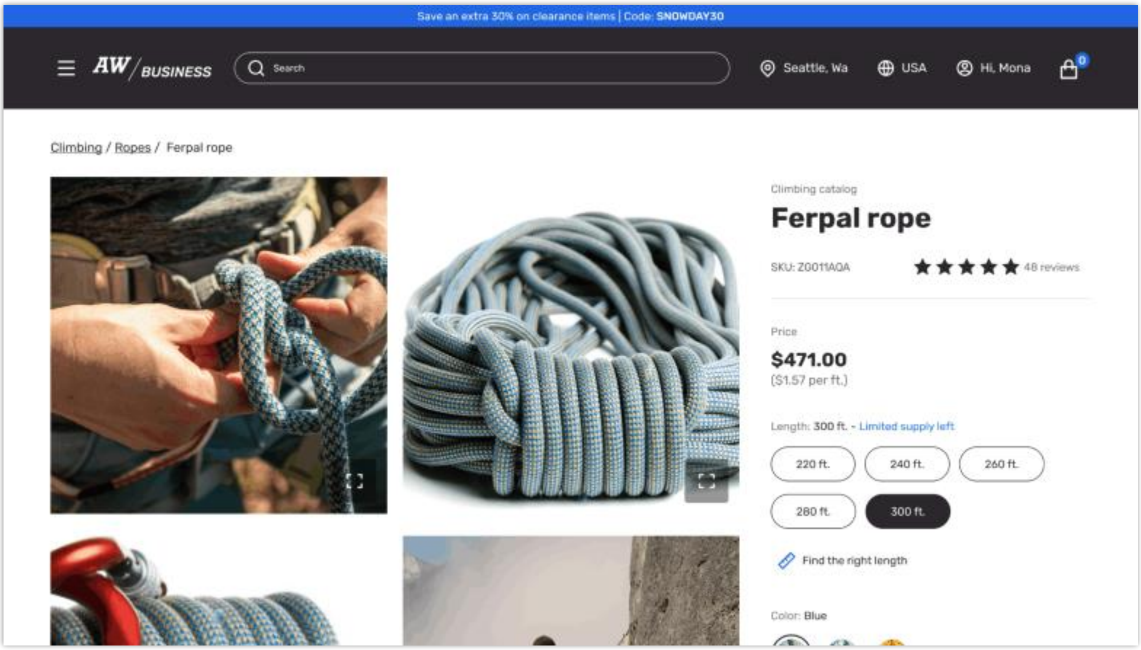
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	Jun 2023

Business value

B2C and B2B customers expect to be able to purchase products in different units of measure, for example, a single item or a 12-pack. Additionally, customers want to be able to view prices per unit of measure for comparison purposes. Dynamics 365 Commerce will enable such functionality, thereby giving sellers and buyers more options.

Feature details

For some products, sellers may want to set additional discounts for products in larger units of measure. They also may need to display the price per the primary unit of measure (such as a price per square foot or price per millimeter) side-by-side with a price of the product in a different unit for comparison purposes.



E-commerce site displays a Ferpal rope product with multiple images and pricing information.

Improve the B2B buyer sign-up flow

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2023	Jun 2023

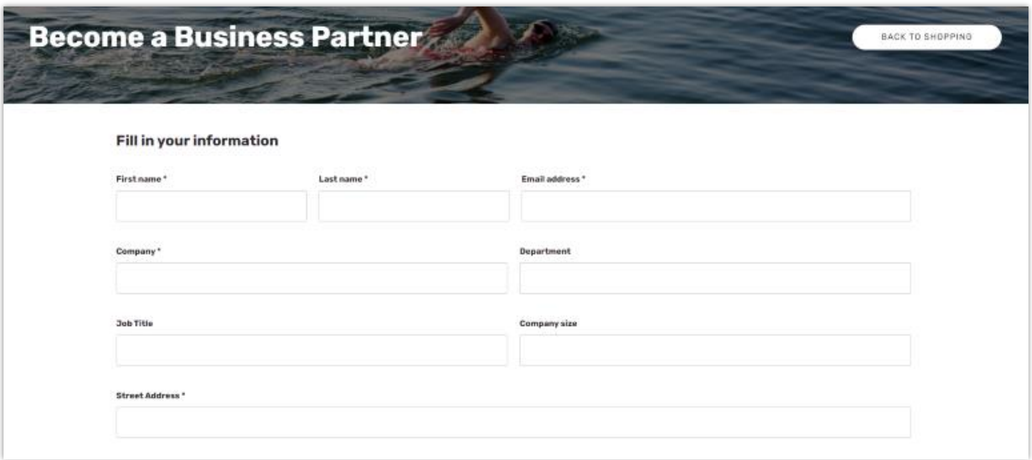
Business value

B2B buyers must be able to sign up for a B2B site in as seamless and effective a manner as possible. Increasing the ease of the sign-up flow will address customer feedback and contribute to increased adoption and improved sales while reducing overall support costs.

Feature details

Today, a potential business customer for a Commerce customer's business website must use the new business buyer sign-up form to register their interest in becoming a customer and then wait to be approved by the website owner. Once they are notified of approval, the business customer must return to the website and use the user account creation experience to create their password. This process can be confusing to business users. To streamline the process, the business customer will be directly diverted to the password creation experience so that they can complete their account sign-up in a single process.

Similarly, today, after a business customer administrator adds additional business users to their e-commerce website, these new business customers must use the sign-up experience to create new passwords. To streamline this process, these users will be diverted to a password creation experience to complete their sign-up process.



Current B2B Signup experience.

Use selective site copy for CMS content

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2023	Sep 2023

Business value

This feature in Dynamics 365 Commerce enables content authors to easily select the assets they want to copy between development, user acceptance testing (UAT), and production content management system (CMS) tenants. Selective copy augments the current site copy behavior, which copies and overwrites all content, and enables only user-selected content to be copied between environments. This capability saves time and simplifies common CMS environment management tasks.

Feature details

Dynamics 365 Commerce content authors maintain separate CMS environments for development, UAT, and production purposes. Over time, website and product media content diverge within these environments, as users create or edit documents in one environment but not in the others. Marketing and product media personas constantly update the production site with updated media assets, pages, and other related site content. Meanwhile, developers and testers modify or create new module and theme definitions to test in development and UAT environments, often requiring separate CMS configurations and content.

As different CMS environments for development, UAT, and production diverge over time through normal activities, content authors periodically need to synchronize these deltas to bring them back in line with one another. In some cases, the development or UAT environments need content from production. In other cases, production needs content that was created and tested in development or UAT. While Commerce CMS currently supports a self-serve "all-or-nothing" copy behavior today, selective copy simplifies common content synchronization tasks between development, UAT, and production CMS tenants.

Enable distributors to view orders to be fulfilled by them on the B2B dashboard

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2023	Sep 2023

Business value

A B2B digital ordering platform hosted by a consumer-packaged goods (CPG) company or manufacturer enables retail outlets to select a distributor and order items online. However, it's possible that some of the items in the orders can't be fulfilled by the distributor, so the distributor needs a way to accept or reject an order. Additionally, to prevent retail outlets from placing orders on out-of-stock items, distributors need a way to define the availability of the items they fulfill. Dynamics 365 Commerce will provide those capabilities in this release wave.

Feature details

As a part of this feature, distributors are able to access a dashboard using the same B2B site that they use to place orders to the CPG company or the manufacturer. The dashboard enables the distributors to view the orders that are assigned to them for fulfillment, avoiding the need to visit a different website or ERP system to view such orders. Additionally, distributors can accept or reject orders so that the retail outlets can take a different action. Distributors can also use this dashboard to update inventory information for the items they fulfill.

Host a B2B platform where distributors and buyers from retail outlets can place orders

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2023	Sep 2023

Business value

It's common for consumer-packaged goods (CPG) companies and big manufacturers (host organizations) to sell to retail outlets by using distributors. The retail outlets build a working relationship with one or more distributors and purchase goods from them. These sales are usually performed over the phone or email, with the use of spreadsheets. This method is not only inefficient, but it also has a major drawback for host organizations in that they have no visibility into the orders placed by the retail outlets. This new Dynamics 365 Commerce feature helps maximize the efficiency of such transactions.

Feature details

With this feature, host organizations can host a B2B platform where both distributors and buyers from retail outlets can place orders. Distributors place orders directly with the host organization, while retail outlets select a distributor prior to placing an order. Distributors are mapped to a unique online channel where they manage their assortment, pricing, and inventory. Distributors are also mapped to the customer hierarchy associated with the retail outlets. This mapping determines which outlets are connected with each distributor.

This new capability not only provides a digital ordering mechanism for retail outlets but also provides the host organization with visibility into the demand of their products. By using integration, the distributors can view and fulfill their orders from their own ERP systems.

Omnichannel Commerce

Overview

Investments in this release include enhancements to omnichannel payments and order fulfillment with distributed order management.

Enable asynchronous payment methods

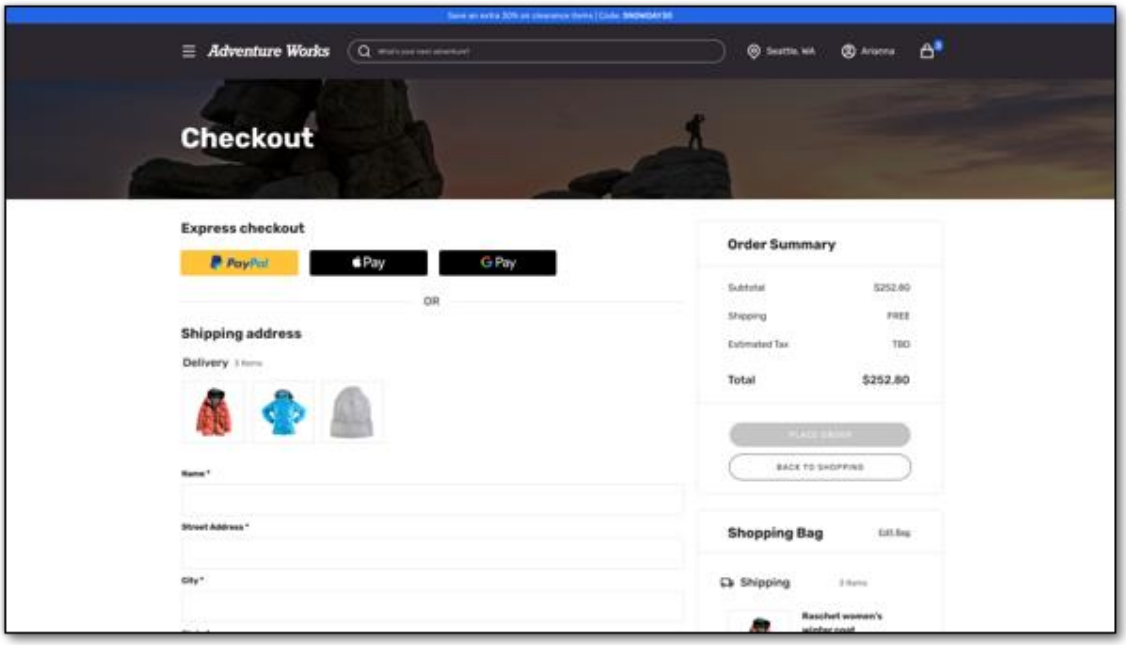
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2023	Sep 2023

Business value

Dynamics 365 Commerce provides infrastructure support for asynchronous payment methods that enable the platform to interact across the lifespan of an order. This infrastructure addition sets the framework for payment methods such as buy-now-pay-later options that require asynchronous interaction to generate a payment request with service approval and detailed order updates as the status of an order changes. The infrastructure sets the framework for popular payment methods such as Klarna, Affirm, and Afterpay, as well as for bank-to-bank transfer status interactions popular with business-to-business (B2B) site payments.

Feature details

Asynchronous payment support will bring infrastructure updates that support payment gateway webhook interactivity. The functionality supports the required payment status interactions between order management and payment issuers. Detailed order line item information is supplied to payment issuers to approve, update, and alter asynchronous payment method requests. Asynchronous service requests will be managed at scale to provide detailed information at high volume to payment gateway services. The changes to the asynchronous payment methods infrastructure will enable Payment SDK capabilities to support custom asynchronous payment methods. The feature will also enable future product support for Adyen asynchronous payment methods like Klarna, AfterPay, Affirm, and iDeal.



Asynchronous Payment Method support in Dynamics 365 Commerce

Store Commerce

Overview

Investments in this wave provide reliability and usability improvements for store workers in Store Commerce on Windows, iOS, and Android devices.

Detect POS network and connectivity issues with health check

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

In a retail setting, downtime and performance issues with the point of sale (POS) have a direct impact on customer satisfaction, sales associate morale, and sales conversions. When such problems occur, it's critical that they are diagnosed and remedied as soon as possible. New health check tests and features in the Dynamics 365 Commerce POS apps give sales associates, managers, and IT staff the information they need to diagnose and resolve network and connectivity issues.

Feature details

New tests in the POS health check operation provide key information about network and performance-related health metrics. New tests include:

- **Network latency test**: Measures the latency between the POS terminal and the Commerce Sale Unit it's connected to.
- **Memory usage test**: Determines how much RAM the POS is consuming currently and tracks how it changes over time.
- **Retail server connectivity**: Confirms that the POS terminal can communicate with Retail Server and the channel database.

Health check capabilities can be accessed directly from the **Settings** page in the POS. It's no longer necessary to manually add the tile to a button grid to expose the operation. Access to health check can be managed by role by disabling the **Manage devices** permission. When the **Manage devices** permission is disabled for a role, users who are assigned to that role will be prompted for manager approval when launching health check functionality.

Fraud Protection

Plan and prepare for Dynamics 365 Fraud Protection in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Fraud Protection**.

Overview

Microsoft Dynamics 365 Fraud Protection provides a 360-degree view of the fraud landscape to partners and businesses and helps them discover and combat fraud efficiently and effectively.

In this release, we are introducing an Assessments API that enables you to define your own fraud event above and beyond the default events provided with Fraud Protection, such as purchase protection and account protection. With this API, you can configure Fraud Protection to protect against fraud events specific to your business.

Investment areas

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Fraud Protection** below:

Check out the release plan

For application administrators

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Features that must be enabled by application administrators
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Get the most out of Fraud Protection

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Fraud Protection.
Product documentation	Find documentation for Fraud Protection.
User community	Engage with Fraud Protection experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Fraud Protection.

What's new and planned for Dynamics 365 Fraud Protection

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

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Feature	Enabled for	Public preview	General availability
Use assessments API for customized fraud coverage	Users, automatically	Mar 2023	Jun 2023

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Use assessments API for customized fraud coverage

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Jun 2023

Business value

This feature helps solve fraud at scale and protects the many inflection points in the end-to-end e-commerce journey that financial institutions, merchants, and customers participate in daily. Dynamics 365 Fraud Protection provides a new and rich way to define customized fraud assessments tailored to a customer's specific business needs. With Assessments API, customers can customize all of the same core fraud protection capabilities in the product today. For example, a customer can customize risk scoring, rules, device fingerprinting, and case management to meet the individual needs of their business.

Feature details

The assessments API offering improves a customer's ability to fight fraud significantly by providing an à la carte way to define their customized fraud assessments that go beyond the purchase, account creation, and account sign-in scenarios currently supported in the product. Customized fraud assessments can be created using a catalog of predefined templates or from scratch using the new assessment wizard. This feature also introduces a more unified product experience, greater consistency across our core fraud protection capabilities (for example, risk scoring, rules stack, device fingerprinting, and case management), and product performance and scale improvements.

SMB

Plan and prepare for Dynamics 365 Business Central in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Business Central**.

Overview

Business Central is a business management application for small and mid-sized organizations that automates and streamlines business processes. Highly adaptable and rich with features, Business Central enables companies to manage their finances, supply chain, manufacturing, shipping, project management, services, and more. Companies can easily add functionality that's relevant to their region of operation, and customize the app to support highly-specialized industries. Business Central is fast to implement, easy to configure, and simplicity guides innovations in product design, development, implementation, and usability.

2023 release wave 1 improves support for managing multiple companies, including improvements to the intercompany features. This release reduces the time it takes to onboard customers by creating seamless onboarding experiences that are supported by quality content from Microsoft and our partners. We'll help organizations stay compliant with various government regulations by providing features that automate regulatory tasks, so organizations can focus on their primary business. For example, we'll add support for non-deductible VAT in our W1 version and then, in phases, add it to Microsoft country versions that support VAT. Usability is always a focus, and in this release we'll boost efficiency when working with lists of records. You can personalize columns by adding any field from the table, use bulk actions on multiple rows, and get more comprehensive views to work faster and smarter.

We're investing in the productivity of developers and consultants by introducing Visual Studio Code AL Explorer, which offers seamless collaboration on development through GitHub and adds self-service capabilities for administrators who manage apps and environments. We'll also enable our ISVs to perform transactions through the AppSource marketplace.

Additional updates in 2023 release wave 1 include:

- **Adapt faster with Microsoft Power Platform**: It's easier to set up approval workflows in Business Central so that people can be more productive by automating more of their processes. Additionally, we're delivering sample apps to help Power Apps makers get started faster.
- **Application**: In the financials area we're investing in intercompany capabilities and enabling the possibility for general ledger settlement. All countries will be able to export

SAF-T audit files. The supply chain capabilities in Business Central are improved with several optimizations and enhancements that let you run your inventory and warehouse processes more efficiently.

- **Country and regional**: More countries and regions are added to bring Business Central to more than 100 countries and regions.
- **Development**: We've moved entirely to Visual Studio Code, where we continue to invest in areas that enhance productivity for developers. For example, Visual Studio Code Visual Designers lets consultants create simple, per-customer extensions. Developers are also getting better compiler resource management and code analyzer performance. We're modernizing the permissions system to make it easier for developers to define and maintain permissions that are easy to understand.
- **Governance and administration**: Business Central delivers a set of additional self-service features to help administrators manage their environments.
- **Legislation**: This release enables support for non-deductible VAT in the W1 version, which we'll upgrade to country versions in upcoming minor releases.
- **Onboarding**: Organizations can get to productive use of the application faster thanks to improved in-app guidance and user assistance.
- **Productive with Microsoft 365**: We're improving the efficiency of collaborative business processes in Microsoft Teams.
- **Reporting and data analysis**: We're adding a new mode on list pages to enable users to analyze and pivot data directly in the client.
- **Service and platform**: We're continuing to invest in the fundamentals of our service, with a focus on performance, stability, resource governance, security, and compliance.

Investment areas

User experiences
Business Central offers a broad portfolio of user interfaces enabling our customers to work with their data, from anywhere and on any device, including an installable desktop app, browser web application, and mobile apps. Whether users need to enter data at high speed,

casually update their entries or analyze relational data, Business Central offers numerous features that are easy to get started with and powerful when needed.

Every release includes enhancements to usability, accessibility, performance, and reliability. In 2023 release wave 1, we boost efficiency when working with actions and lists of records. We also empower customers and consultants to personalize the fields on a page by choosing from existing table fields, reducing the time and effort to optimize their workspace.

Application
Application spans the functional capabilities of Business Central and contains the features that help customers manage their businesses. In 2023 release wave 1, we're continuing to modernize our financial and operations processes to give our customers more advanced features as they grow their businesses.

Accounting processes for multiple companies

In the financial management area, we're focusing on making it easier to manage accounting tasks for multiple companies in an intercompany setup. The **Intercompany Postings** feature has been improved to make it easier to set up, get a better overview, and make the intercompany transaction processes more seamless and flexible.

Accounting period-end processes and analysis

In addition to dimensions, you can add data for analytics using **Statistical Accounts**. Statistical accounts let you enter numerical data for general ledger (G/L) transactions that you can use for analyses.

When you manage the accounting for businesses that have a high volume of transactions, it's now easier to get an overview of progress in the period-end process. The **G/L Settlement** allows bookkeepers to apply general ledger entries during reconciliation tasks.

Inventory and warehouse scenarios

We're continuing to work on various aspects of our inventory features. We've improved the set-up and demo data that we provide, and made it simpler to configure inventory features. We have a better data migration story, and we're continuing to make processes seamless in different areas. For example, we're building out our warehouse and item tracking capabilities.

Continuous customer-requested improvements

This release also contains several features and feature enhancements that we implemented in response to some great ideas that our community has submitted on our aka.ms/bcideas page.

Development
Developers are in high demand, and we want to continue to attract and raise the productivity of Business Central AL developers. We continue to focus on developing features that enable developers to work more efficiently. We also empower consultants, citizen developers, and users to do more to offload developers, increase agility, and lower cost of changes.

In this release wave, we continue the investment in our Visual Studio Code experience by adding visual abstractions on top of AL code, empowering developers and consultants to easily get an overview of, and navigate across, all the AL objects in a workspace or project. This helps understand the application boundaries better and easily jump to source or run objects. Developers are getting better compiler resource management and code analyzer performance, and the ability to attach with the normal debugger to user sessions.

We also empower AppSource publishers to release preview apps for select customers, have better runtime package handling, and monetize their apps via AppSource Marketplace. Finally, customers get the ability to add existing table fields to existing pages as no-code personalization or customization.

Service and platform
In this release we continue to relentlessly invest in the fundamentals of our service, with a focus on performance, stability, resource governance, security, and compliance. This will allow Business Central to continue to grow in scale with our customers' needs.

With this release we are working to further enhance the stability of sign-ins for interactive users and the number of user session interruptions. We also plan to further improve client-side page rendering time across all our page types and controls to make the client even more responsive. We will improve the performance of cold start OData calls, which will benefit clients based on web services, such as Teams, warehouse scanners, Dataverse apps, and other integrations. We will further optimize our language (AL) runtime to minimize database locking and tune frequently used application scenarios (country-specific regulatory reports, renumbering General Journal entries, Item Tracking, Reservation Entries, and calculating inventory availability).

Reporting and data analysis
Data first is the guiding principle for reporting in Business Central. In this wave we will release features and capabilities that will give users access to all their data in an easily consumable way. In a world of big data, predictive analytics reporting is no longer a set of predefined reports to cover a historical view of the business, but how you organize and use your data to react to key events, big and small, to optimize the business.

Getting users started with Power BI for analytics

For users wanting to get started with Power BI reporting, a set of sample Power BI Desktop files have been added to aka.ms/bctech. Users can access it directly in PowerBI.com with their Business Central, customize using data from the new API model or even enhance with other data, and then use it for reporting in PowerBI.com.

Legislation
In 2023 release wave 1, we deliver legislation updates based on the most popular requests for improvement in this area. We're providing legislation automation and features that are compliant with the various regulations set by government agencies, so users can focus on their primary business. We plan to take a step toward standardizing functionality so that all these improvements are delivered as standard capabilities across all supported countries and regions where relevant.

The main focus of the legislative effort in this release wave is on non-deductible VAT in the base application. Both features are available in some localizations but are required in almost all regions. They will be standardized and made extendable so partners can easily extend them if necessary.

Country and regional
Expansion to more countries and regions is achieved through partner-led localization. Our partners create relevant localization apps and publish them to AppSource. In combination with the built-in language offerings, Business Central is available to serve customers in more countries and regions worldwide.

More countries and regions are added to bring Business Central to more than 130 countries. Additionally, Microsoft provides all regulatory feature updates to countries where Microsoft is responsible for the localization.

Productive with Microsoft 365
People work smarter and teams perform better when business apps are combined with productivity apps. Business Central seamlessly integrates with best-in-class Microsoft 365 apps and services such as Outlook, Excel, Word, OneDrive, and Teams to bring data into the flow of work.

The current capabilities include:

- Respond to inquiries faster by attaching quotes and invoices from Outlook.
- Share, analyze, or bulk-edit records in Excel.
- Start a conversation about a record in Teams or rally the team around key datapoints.
- View, share, and co-author business documents using OneDrive for Business.
- Author beautiful reports and other templates in Word.

The 2023 release wave 1 builds upon our collaborative apps story in Microsoft Teams to drive broader product engagement and access to data across the organization.

This release will focus on:

- Enhanced adaptive cards in Teams with an optimized thumbnail view and better permission experience.
- New settings page for configuring security control for Teams Cards.

Governance and administration
We are supplying administrators of Business Central with the tools they need to manage their environment and apps. The goal is for administrators to be self-sufficient, able to solve their customer needs, and handle a wide variety of administrative scenarios.

In this release we add even more capabilities to drive self-service and automation. Administrators can transfer environments from one organization to another in a controlled way while preserving the data. We will be adding options to manage updates to ISV apps and will introduce the ability to manage per tenant extensions in the admin center in addition to ISV apps. Idle sandbox environments will expire after 45 days of inactivity to free up capacity for creating new environments. Administrators can choose to opt out of the expiration period. We will enhance the tool that performs the migration of Business Central data from on-premises to the cloud. Administrators will gain additional capabilities to deal with customizations and the ability to include or exclude tables during the migration process.

Adapt faster with Microsoft Power Platform
In 2023 release wave 1, we continue to improve the way Business Central integrates with Power Platform. We continue to offer features that make it easier for Business Central users to get started and gain efficiency working with Power Platform.

In this release it will be easier to set up approval workflows from within Business Central, helping users automate more of their processes and be more productive. Additionally, we will deliver sample apps to help all Power App makers get started faster with their Power App development. We will also make it easier to distribute enabled makers to build more portable Power Apps and Power Automate flows by allowing flexibility for environments and companies. This will enable partners and customers to experience rich Power Apps and Power Automate flows.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Business Central** below:

Check out the release plan

For application administrators

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

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

Get the most out of Business Central

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Business Central.
Product documentation	Find documentation for Business Central.
User community	Engage with Business Central experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Business Central.

What's new and planned for Dynamics 365 Business Central

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to [2022 release wave 2 plan].

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.

Adapt faster with Microsoft Power Platform

The 2023 release wave 1 improves Business Central integration with Power Platform to increase productivity.

Feature	Enabled for	Public preview	General availability
Use business events to notify and trigger external systems	Users by admins, makers, or analysts	Apr 2023	-
Get started with more sample Power Automate templates and Power Apps	Users, automatically	May 2023	-
Support dynamic environment and company in Power Platform connector	Users, automatically	Jun 2023	-
Use Power Automate to post adaptive card or link to Business Central record	Users, automatically	Mar 2023	Apr 2023
New approval workflow experience with Power Automate templates	Users, automatically	Apr 2023	May 2023

Application

Application features are added to increase productivity, create better overviews, and enable compliant accounting and reporting.

Feature	Enabled for	Public preview	General availability
Adjust exchange rates easily, replace the built-in batch job	Users by admins, makers, or analysts	-	Apr 2023
Use different general ledger accounts for payables, receivables	Users by admins, makers, or analysts	-	Apr 2023

Feature	Enabled for	Public preview	General availability
Add more columns to pages for better insight	Users, automatically	Mar 2023	Apr 2023
Avoid document number errors when you post item journals	Users, automatically	Mar 2023	Apr 2023
Catalog items use standard number series, can include in blanket sales orders	Users, automatically	Mar 2023	Apr 2023
Define content of created warehouse documents with filters	Users, automatically	Mar 2023	Apr 2023
Demo tool and data for warehouse and inventory scenarios	Admins, makers, marketers, or analysts, automatically	Mar 2023	Apr 2023
Easier to create opening balances for item tracked inventory	Users, automatically	Mar 2023	Apr 2023
Intercompany posting provides a one-stop-shop setup experience	Users, automatically	Mar 2023	Apr 2023
Post multiple transfer orders at the same time	Users, automatically	Mar 2023	Apr 2023
Preview item journals and 20 other journals and documents before posting	Users, automatically	Mar 2023	Apr 2023
Review general ledger accounts faster	Users, automatically	Mar 2023	Apr 2023
Set default dimensions on locations, inventory documents, and journals	Users, automatically	Mar 2023	Apr 2023
Set up and sync master data across companies	Users, automatically	Mar 2023	Apr 2023
Ship and receive non-inventory items on warehouse documents	Users, automatically	Mar 2023	Apr 2023
Shopify connector becomes extensible	Users, automatically	Mar 2023	Apr 2023
Undo transfer shipments	Users, automatically	Mar 2023	Apr 2023

Feature	Enabled for	Public preview	General availability
Usability improves for transfer order: select multiple items, mandatory fields	Users, automatically	Mar 2023	Apr 2023
Usability improves for warehouse, inventory, and tracking areas	Users, automatically	Mar 2023	Apr 2023
Use advanced warehouse functionality with minimal complexity	Users, automatically	Mar 2023	Apr 2023
Use statistical accounts to collect data for financial reports	Users, automatically	Mar 2023	Apr 2023
Synchronize returns, refunds from Shopify	Users, automatically	-	May 2023

Country and regional

We added more countries in 2023 release wave 1, so Business Central is available in more countries and regions globally.

Feature	Enabled for	Public preview	General availability
Save time with automatic account codes	Users, automatically	Apr 2023	May 2023
Swedish localization delivered as extension	Users, automatically	Apr 2023	May 2023
Country/regional expansion - Andorra	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Armenia	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Azerbaijan	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Bahamas	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Bermuda	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Bolivia	Users, automatically	May 2023	Jun 2023
Country/regional expansion - British Virgin Islands	Users, automatically	May 2023	Jun 2023

Feature	Enabled for	Public preview	General availability
Country/regional expansion - Cambodia	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Cameroon	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Cayman Islands	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Ethiopia	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Fiji	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Ghana	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Guernsey	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Isle of Man	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Jersey	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Kazakhstan	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Kosovo	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Liechtenstein	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Macau (SAR China)	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Madagascar	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Malawi	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Mozambique	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Namibia	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Nepal	Users, automatically	May 2023	Jun 2023
Country/regional expansion - San Marino	Users, automatically	May 2023	Jun 2023

Feature	Enabled for	Public preview	General availability
Country/regional expansion - Sao Tome & Principe	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Senegal	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Tanzania	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Uganda	Users, automatically	May 2023	Jun 2023
Country/regional expansion - Zambia	Users, automatically	May 2023	Jun 2023
Supporting more countries and regions	Users, automatically	May 2023	Jun 2023

Development

Tooling, product capabilities, and enhancements for Business Central are added in the 2023 release wave 1 to help developers be more productive.

Feature	Enabled for	Public preview	General availability
AL Explorer and AL Home in Visual Studio Code AL extension	Admins, makers, marketers, or analysts, automatically	✔ Feb 1, 2023	Apr 2023
Improved compiler resource handling and faster code analyzers	Admins, makers, marketers, or analysts, automatically	Mar 2023	Apr 2023
Provide Title and custom actions to Error dialogs	Users, automatically	Mar 2023	Apr 2023
Control database locking behavior	Admins, makers, marketers, or analysts, automatically	Apr 2023	Apr 2023

Feature	Enabled for	Public preview	General availability
Define regional settings per report using a region property	Admins, makers, marketers, or analysts, automatically	Apr 2023	Apr 2023
AL-Go for GitHub - modern DevOps for partners	Admins, makers, marketers, or analysts, automatically	Mar 2023	Apr 2023
Extensions that fail pre-upgrade validation get more detailed error insights	Admins, makers, marketers, or analysts, automatically	Apr 2023	Apr 2023
Attach AL debugger to active session or next session	Admins, makers, marketers, or analysts, automatically	May 2023	May 2023
ISVs can organize a preview for their AppSource apps	Admins, makers, marketers, or analysts, automatically	Jul 2023	Jul 2023

Governance and administration

See the new tools for Business Central admins and partners to manage environments and apps in the 2023 release wave 1.

Feature	Enabled for	Public preview	General availability
Delegated admin's job queue entries are run by user	Admins, makers, marketers, or analysts, automatically	Mar 2023	Apr 2023
Get an improved cloud migration status overview	Admins, makers, marketers, or analysts, automatically	Mar 2023	Apr 2023

Feature	Enabled for	Public preview	General availability
Manage user permissions using security groups	Users, automatically	Mar 2023	Apr 2023
Experience improved app management settings	Admins, makers, marketers, or analysts, automatically	-	Jun 2023
Include or exclude tables from cloud migration	Admins, makers, marketers, or analysts, automatically	-	Jun 2023
Transfer environments between Azure AD tenants	Admins, makers, marketers, or analysts, automatically	-	Jun 2023

Legislation

Business Central 2023 release wave 1 delivers a set of legislative capabilities to help organizations meet the regulations set by government agencies.

Feature	Enabled for	Public preview	General availability
Audit file export eases SAF-T compliance	Users, automatically	Apr 2023	May 2023
Non-deductible, partly deductible VAT expands functionality	Users, automatically	May 2023	May 2023

Productive with Microsoft 365

Further productivity improvements helping users working with Business Central and Microsoft 365 apps and services such as Outlook, Excel, Word, OneDrive and Teams.

Feature	Enabled for	Public preview	General availability
Experience enhanced adaptive cards in Teams	Users, automatically	-	Apr 2023

Feature	Enabled for	Public preview	General availability
Configure security controls for Teams cards	Admins, makers, marketers, or analysts, automatically	-	Apr 2023
Easily set up access with Microsoft 365 licenses	Admins, makers, marketers, or analysts, automatically	-	Apr 2023

Reporting and data analysis

In 2023 release wave 1, end users and data analysts can now easily access all their data from Power BI without the need for a developer or consultant.

Feature	Enabled for	Public preview	General availability
Analyze, group, and pivot data on list pages using multiple tabs	Users by admins, makers, or analysts	Apr 2023	To be announced

Service and platform

In 2023 release wave 1, users will have fewer interruptions, the UI will feel generally faster, and web services and certain scenarios in the application will be faster.

Feature	Enabled for	Public preview	General availability
Allow application and tenant databases to differ in collation	Admins, makers, marketers, or analysts, automatically	Apr 2023	Apr 2023
Business Central server runs on .NET 6	Admins, makers, marketers, or analysts, automatically	Apr 2023	Apr 2023
New telemetry events and data	Users, automatically	Apr 2023	Apr 2023

Feature	Enabled for	Public preview	General availability
Performance - OData calls are now faster	Admins, makers, marketers, or analysts, automatically	Apr 2023	Apr 2023

User experiences

The 2023 release wave 1 brings improvements to our user experiences that will help users enter, update, and analyze data across Dynamics 365.

Feature	Enabled for	Public preview	General availability
Copy and paste readable hyperlinks	Users, automatically	Apr 2023	-
Add existing table fields to optimize your pages	Users by admins, makers, or analysts	Jun 2023	-
Drag and drop files onto the file upload dialog	Users, automatically	✔ Jan 19, 2023	Apr 2023
Access actions and navigation menu efficiently with keyboard	Users, automatically	Feb 2023	Apr 2023
Get more productivity out of an optimized Action Bar on all app pages	Users, automatically	Mar 2023	Apr 2023
Tailor the action bar to fit your needs on document lines	Users, automatically	Mar 2023	Apr 2023
Improved alignment of headers in statistics pages	Users, automatically	✔ Feb 1, 2023	Apr 2023
Get unblocked using actionable error messages in select application areas	Users, automatically	Apr 2023	May 2023

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.

Adapt faster with Microsoft Power Platform

Overview

In 2023 release wave 1, we continue to improve the way Business Central integrates with Power Platform. We continue to offer features that make it easier for Business Central users to get started and gain efficiency working with Power Platform.

In this release it will be easier to set up approval workflows from within Business Central, helping users automate more of their processes and be more productive.

Additionally, we will deliver sample apps to help all Power App makers get started faster with their Power App development. We will also make it easier to distribute enabled makers to build more portable Power Apps and Power Automate flows by allowing flexibility for environments and companies. This will enable partners and customers to experience rich Power Apps and Power Automate flows.

Use business events to notify and trigger external systems

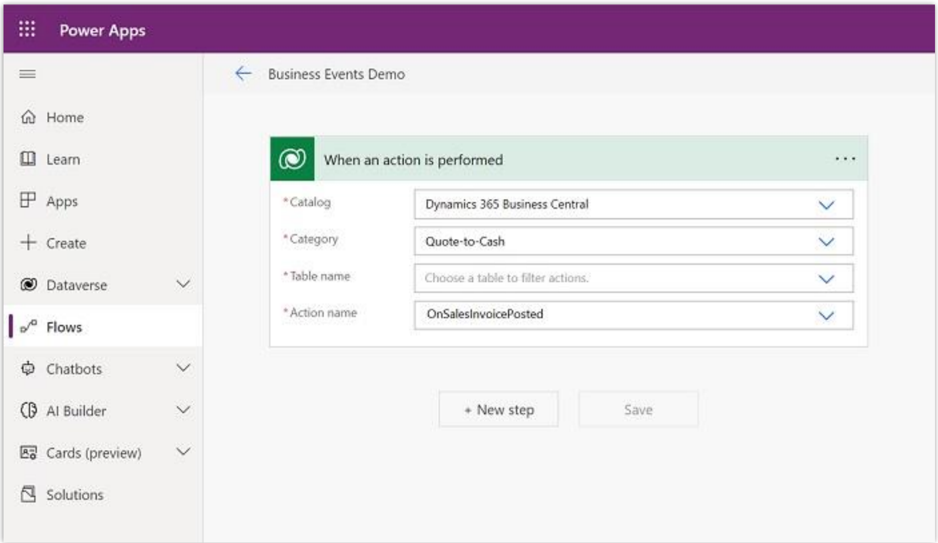
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	-

Business value

Business events provide partners and customers a mechanism for notifying and triggering their external systems from the Business Central application, so their systems can react and perform actions in response. For example, they can use Power Automate to subscribe to events on Business Central and react on other Dynamics 365 and partner (non-Microsoft) applications.

Feature details

Business events provide more business context for changes that occur or actions that are performed on Business Central. These changes and actions might involve data CUD (create/update/delete) operations. They often occur or are performed within the familiar business processes, such as “procure-to-pay,” “quote-to-cash,” and so on—the context of which makes it easier for business users and citizen developers to use Power Automate to react and perform actions on external systems in response.



Business events demo

For example, they can create a flow with a Dataverse connector and use the **When an action is performed** trigger to select the **Dynamics 365 Business Central** catalog, **Quote-to-Cash** category, and **OnSalesInvoicePosted** action/business event, so that the flow will be triggered whenever a sales invoice is posted. The next steps in the flow can then be performed to retrieve and process the invoice—for example, by sending it to a government-regulated e-invoicing service.

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.

Get started with more sample Power Automate templates and Power Apps

Enabled for	Public preview	General availability
Users, automatically	May 2023	-

Business value

Offering an easy way to get started with Power Platform integrated with Business Central is essential for partners and app makers who are new to this area.

Feature details

Power Apps

Several new sample apps that demonstrate how to access data in Business Central and how to fulfill business scenarios using Power Apps have been added to the samples gallery, which is accessible via GitHub. Partners and app makers can easily access these apps and add to their chosen Dataverse environment. These samples come with instructions about how to set up, connect, and use them.

Power Automate

Several new templates for instant Power Automate flows have been added to the flow template gallery, which is now available from within Business Central. It's now easier to get inspired or start building your own automation flows based on the Power Automate samples provided with Business Central.

Tell us what you think

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Support dynamic environment and company in Power Platform connector

Enabled for	Public preview	General availability
Users, automatically	Jun 2023	-

Business value

Building Power Apps or Power Automate flows that are easily portable and work between environments helps partners and consultants use Power Platform when adapting Business Central to the needs of small and medium-sized businesses.

Feature details

Creators can build Power Apps and Power Automate flows that are more portable between environments or companies. This allows you to build apps and flows that can be packaged in a solution and delivered to customers through Microsoft AppSource marketplace. Admins can choose which environment they'll connect to.

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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 Power Automate to post adaptive card or link to Business Central record

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

Being able to blend Power Automate flows into conversations in Microsoft Teams allows for enriching conversations with useful insights.

Feature details

We have introduced two new actions in the Business Central connector for Power Automate:

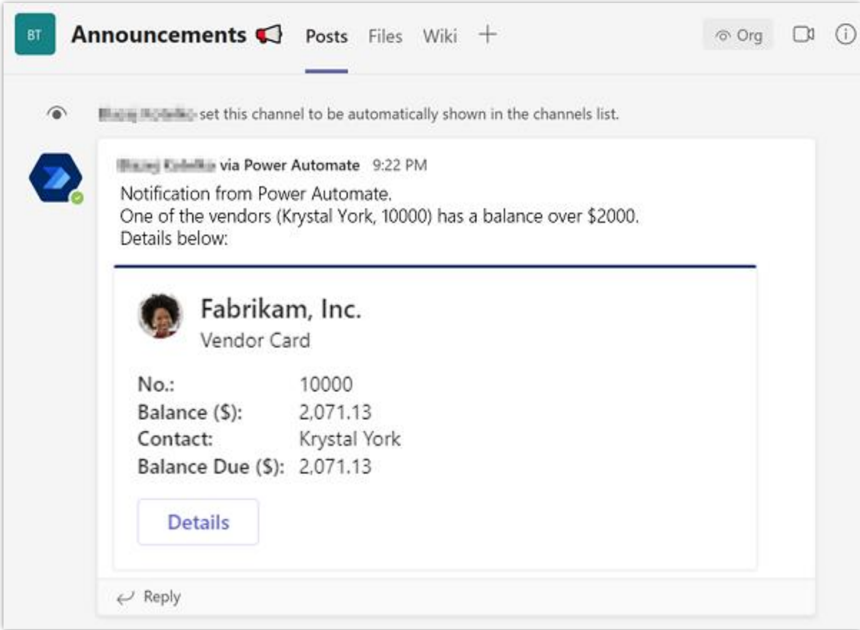
Get URL

- Generates a web client URL to a record.
- Requires standard parameters like environment, company, system ID, and the ID of the page that will be referenced in the URL.
- The generated URL can be used with the **Get Adaptive Card** action described in the next section.
- Enables scenarios in products such as Outlook and Teams where a clickable URL to a specific record in Business Central is needed. For example, you want to send an email to a colleague with actionable information and a link to a Business Central record.

Get Adaptive Card

- Creates an adaptive card for a provided URL. The card is delivered as a payload to be used with a Teams connector or elsewhere.
- Reuses the adaptive card layout, content, and customizations known from the main product.
- Respects the user permissions while accessing card details.
- Enables more scenarios for integration with Teams where a rich card displaying a Business Central record is needed. For example, you want to post information and a link to a new sales order to an internal Teams channel.

NOTE This capability applies only to Business Central online.



Power Automate action for adaptive cards

Tell us what you think

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New approval workflow experience with Power Automate templates

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	May 2023

Business value

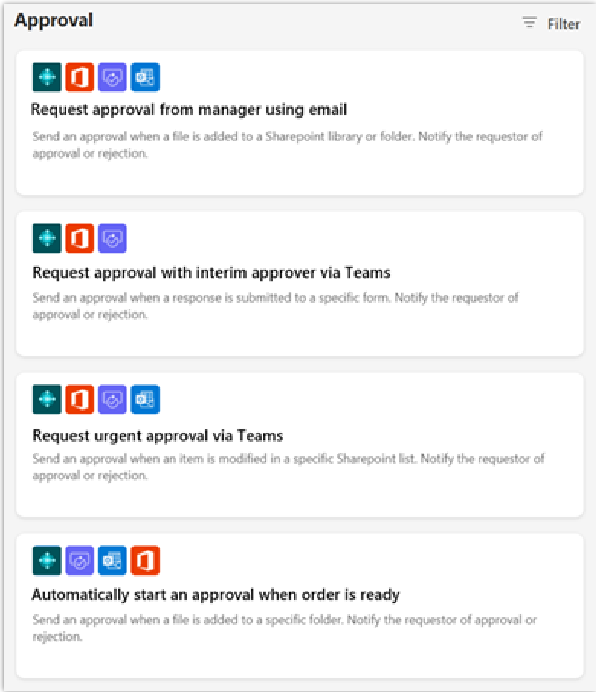
Advanced and flexible approval workflows don't need to be complex. Business owners or decision makers can choose from multiple templates when they set up approval workflows in Business Central.

Feature details

Business Central online customers who use Power Automate to run document approval workflows are able to do so easily with this release. Several actions linked to workflow approvals and Power Automate have been improved with additional support for selecting one of many templates for each document type. Users and decisions makers can use Power Automate to run approval and take advantage of the rich experience:

- Define workflows tied to a selected Business Central environment and company.
- Approve documents using mobile devices.

- Approve documents using Microsoft Teams.
- Support a chain of approvers and additional input.



New template samples for workflow approvals

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Thank you for your idea

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Application

Overview

Application spans the functional capabilities of Business Central and contains the features that help customers manage their businesses. In 2023 release wave 1, we're continuing to modernize our financial and operations processes to give our customers more advanced features as they grow their businesses.

Accounting processes for multiple companies

In the financial management area, we're focusing on making it easier to manage accounting tasks for multiple companies in an intercompany setup. The **Intercompany Postings** feature has been improved to make it easier to set up, get a better overview, and make the intercompany transaction processes more seamless and flexible.

Accounting period-end processes and analysis

In addition to dimensions, you can add data for analytics using **Statistical Accounts**. Statistical accounts let you enter numerical data for general ledger (G/L) transactions that you can use for analyses.

When you manage the accounting for businesses that have a high volume of transactions, it's now easier to get an overview of progress in the period-end process. The **G/L Settlement** allows bookkeepers to apply general ledger entries during reconciliation tasks.

Inventory and warehouse scenarios

We're continuing to work on various aspects of our inventory features. We've improved the set-up and demo data that we provide, and made it simpler to configure inventory features. We have a better data migration story, and we're continuing to make processes seamless in different areas. For example, we're building out our warehouse and item tracking capabilities.

Continuous customer-requested improvements

This release also contains several features and feature enhancements that we implemented in response to some great ideas that our community has submitted on our aka.ms/bcideas page.

Adjust exchange rates easily, replace the built-in batch job

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2023

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 update gives accountants additional control over how they adjust exchange rates. At the same time, partners can now extend and customize the exchange rate adjustment to meet the needs of specific industries or markets.

Feature details

You can now preview the effect that an exchange rate adjustment will have on posting before you actually post by choosing the **Preview** action on the **Adjust Exchange Rates** report request page. Specify if you want a detailed posting to the general ledger by entry or a summarized posting by currency. Just pick the **Summarize Entries** field on the **Adjust Exchange Rates** report. You can also specify how the adjustment will handle dimensions for unrealized gains and losses postings by choosing one of the following options in the **Transfer Dimension Values** field:

- **Source Entry**: G/L entries for unrealized gains and losses will have dimensions values transferred from the entry being adjusted.
- **By G/L Account**: G/L entries for unrealized gains and losses will have dimensions values transferred from the unrealized gains and losses G/L account's dimension settings source entry.
- **No Transfer**: G/L entries for unrealized gains and losses won't have dimensions values.

NOTE This feature is currently available only for developers and can't be turned on in production environments yet.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Use different general ledger accounts for payables, receivables

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2023

Business value

Sometimes businesses want to post payable and receivable transactions to a different general ledger (G/L) account than the one that is specified on the customer or vendor posting group—for example, in a case where a transaction is for a bad debt. Controllers can define policies for posting these nonstandard transactions, and accountants can change them during posting.

Feature details

You can enable alterations of default customer or vendor posting groups by choosing **Allow Alteration of Posting Group** on the **Sales and Receivable Setup** and **Service Mgt. Setup** pages for customer posting group changes, and the **Purchases and Payables Setup** page for vendor posting group changes.

On the **Customer Posting Groups** or **Vendor Posting Groups** pages, you can specify the posting groups to allow as substitutes by choosing **Substitutions**. Substitute posting groups can replace the default customer or vendor posting group specified for a customer or vendor.

After you set this up, you can pick among allowed substitute posting groups and change customer or vendor posting groups when posting sales or purchase documents and journals. Changed, non-default, customer or vendor posting groups are copied to posted documents and journals, and payable or receivable G/L entries are posted to the G/L accounts specified for the substitutes.

For example, when you apply an invoice and a payment that are posted with different customer or vendor posting groups, resulting in different G/L accounts, Business Central transfers amounts between the G/L accounts to balance them.

You'll also be able to run the **Suggest Vendor Payments** report using a vendor posting group as a criteria for suggesting payments.

NOTE This feature is currently available only for developers and can't be turned on in production environments yet.

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.

Add more columns to pages for better insight

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

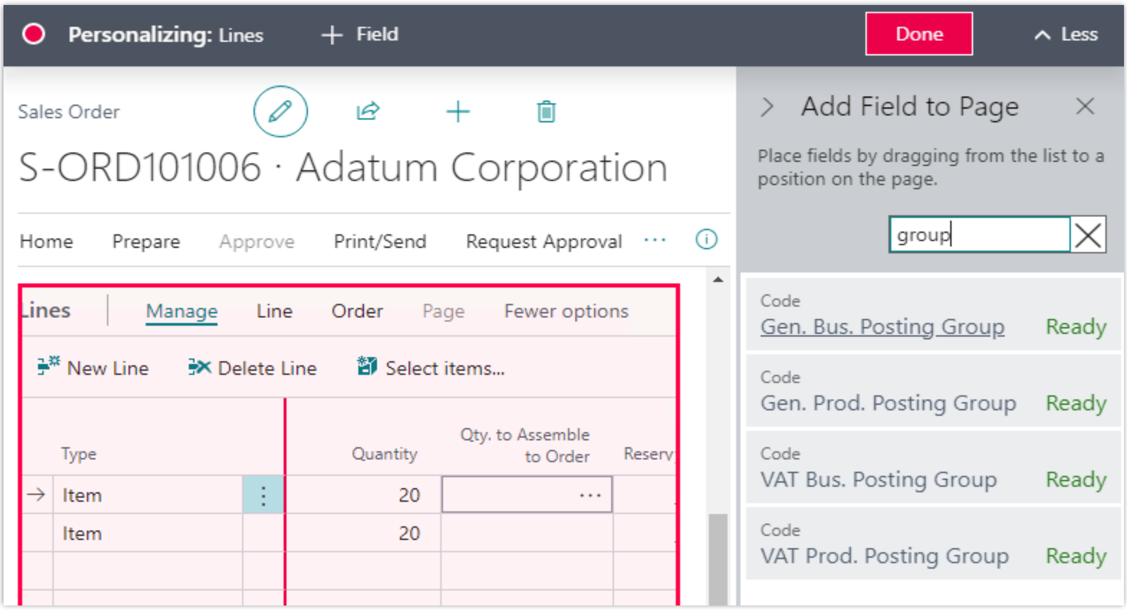
Different businesses and users need different information to complete business processes. Personalization is a powerful tool that lets people tailor the information that pages contain by dragging fields or columns from a list to the page. Based on feedback from our community, we've added more fields and columns to choose from on several pages.

Feature details

The **Gen. Bus. Posting Group**, **Gen. Prod. Posting Group**, **VAT Bus. Posting Group**, and **VAT Prod. Posting Group** fields can be added by personalizing the **Lines** FastTab on the following sales and purchase documents:

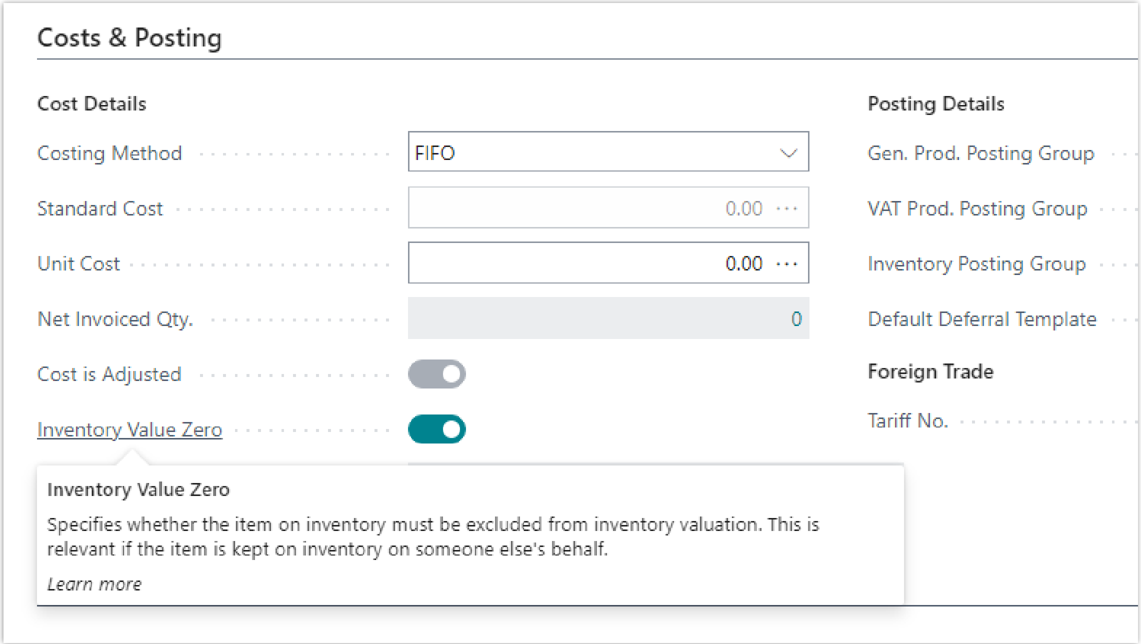
- Purchase orders
- Purchase invoices
- Purchase quotes
- Blanket purchase orders
- Purchase return orders
- Posted purchase credit memos
- Posted purchase invoices
- Purchase order archive

- Purchase quote archive
- Purchase return order archive
- Sales orders
- Sales invoices
- Sales quotes
- Sales credit memos
- Blanket sales orders
- Sales return orders
- Posted sales credit memos
- Posted sales invoices
- Sales order archive
- Sales quote archive
- Sales return order archive
- Service invoice lines
- Service invoices
- Service credit memos
- Service credit memo lines
- Posted service credit memos
- Posted service invoices



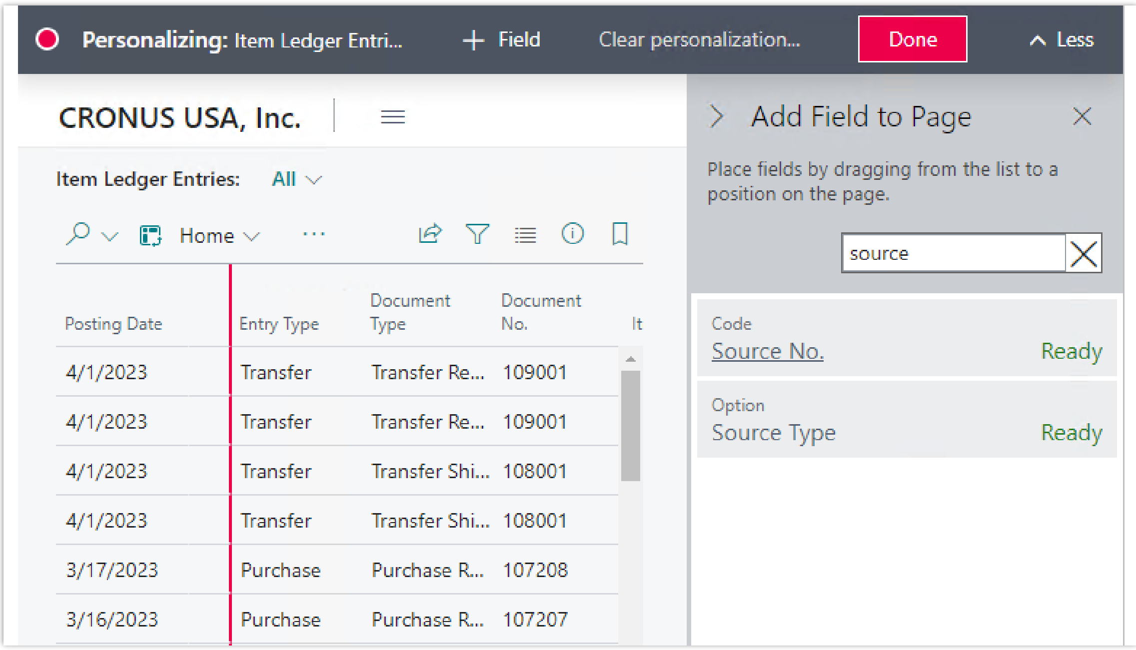
Posting groups

The **Inventory Value Zero** field is available through personalization on the **Item Template** and **Item Card** pages.



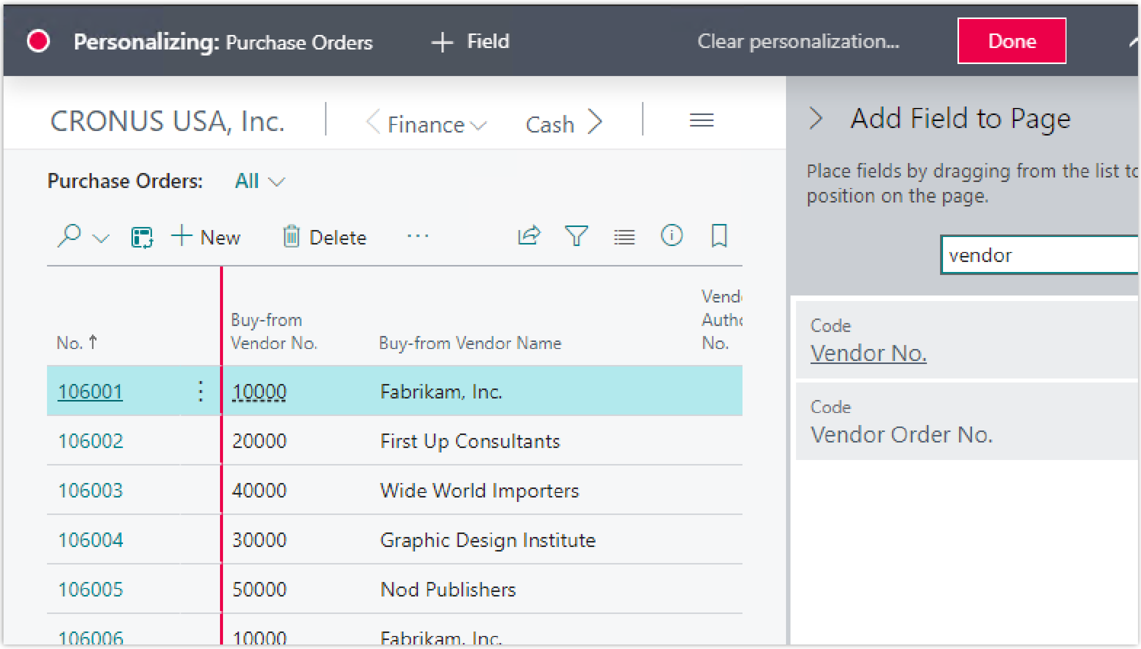
Inventory Value Zero

The **Source No.** and **Source Type** fields are available through personalization on the **Item Ledger Entries** page.



Inventory Value Zero

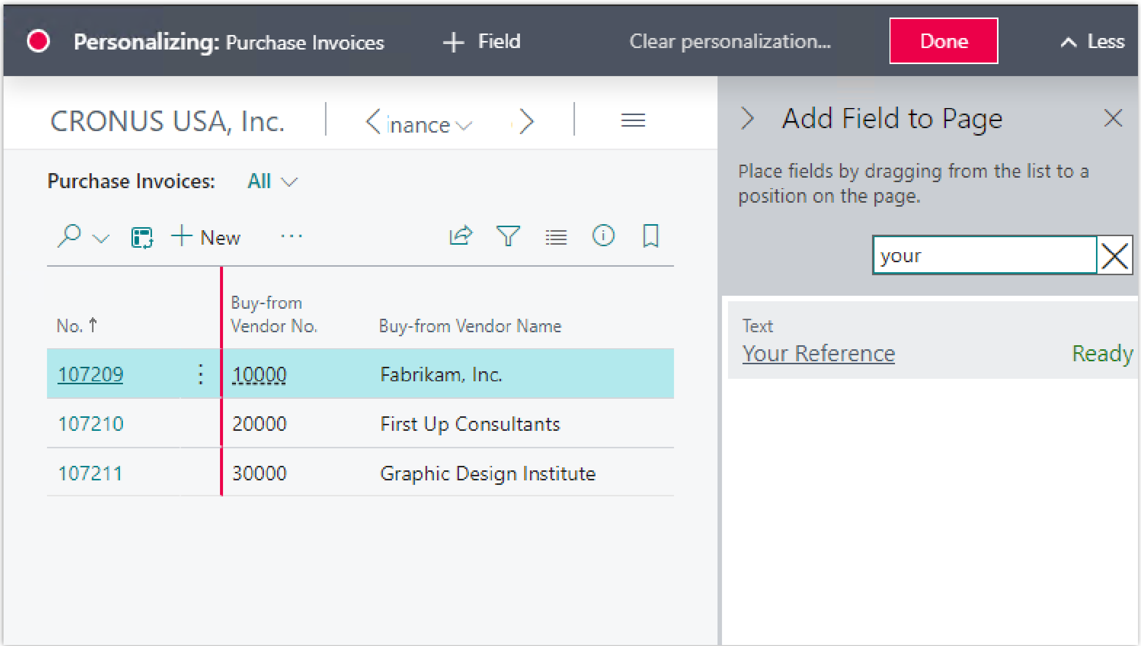
The **Vendor Order No.** field is available through personalization on the **Purchase Orders** page.



Vendor Order No.

The **Your Reference** field is available through personalization on the following sales and purchase documents:

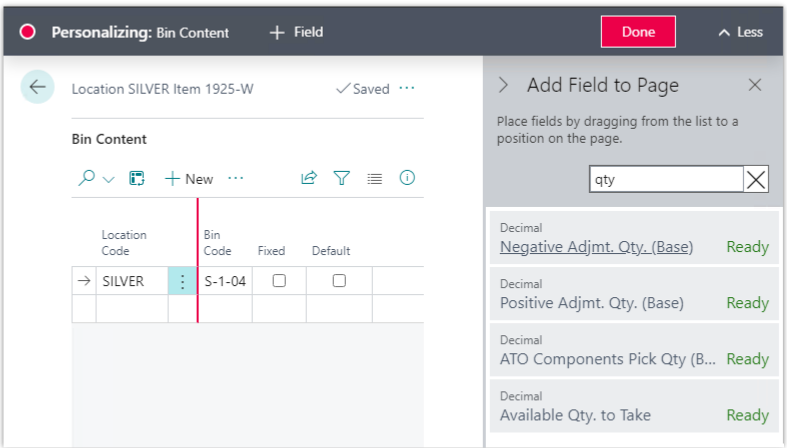
- Sales orders
- Sales invoices
- Sales quotes
- Purchase order
- Purchase orders
- Purchase invoices
- Purchase quotes



Your Reference

The following fields are available through personalization on the **Bin Content** page:

- Pick Quantity (Base)
- ATO Components Pick Qty (Base)
- Negative Adjmt. Qty. (Base)
- Put-away Quantity (Base)
- Positive Adjmt. Qty. (Base)
- Available Qty. to Take
- Cross-Dock Bin

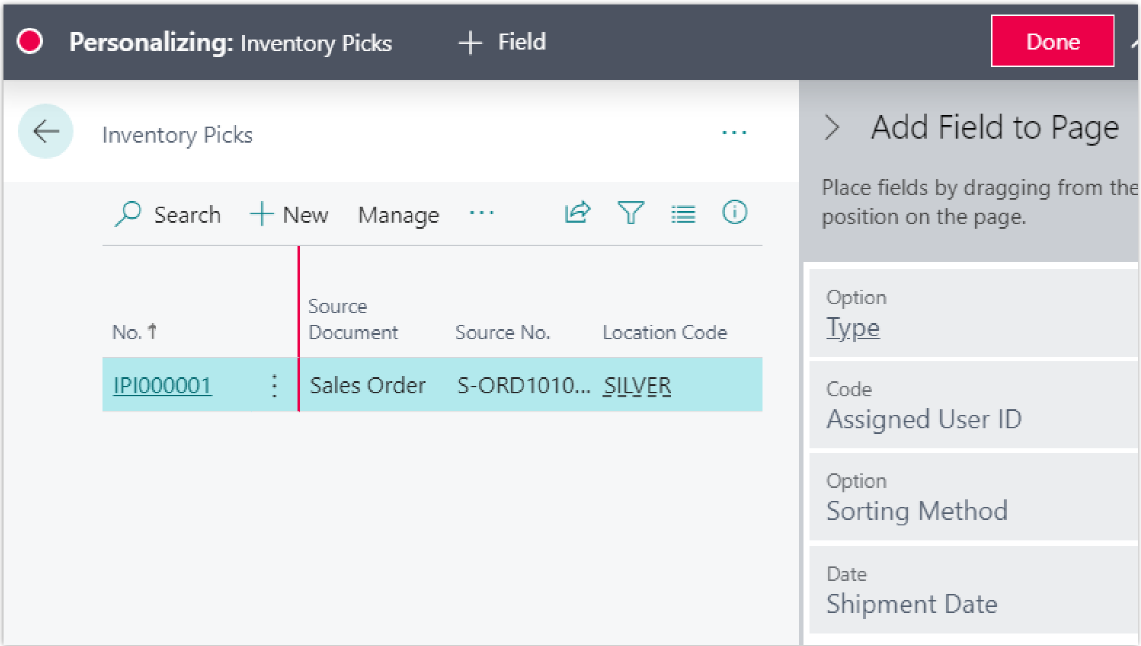


Bin Contents

The **Shipment Date** field is available through personalization on the **Inventory Picks** page.

The **Expected Receipt Date** is available through personalization on the **Inventory Put-aways** page.

The **Assigned User ID** is available through personalization on the **Inventory Picks**, **Inventory Put-away**, **Inventory Movement** pages.



Personalize inventory picks

We'd like to thank our community for your valuable contributions to Microsoft's open source BusinessCentralApps repo on GitHub.

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

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Avoid document number errors when you post item journals

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

To avoid or fix errors related to the order of document numbers when you post item journals, you can use the Renumber Document Numbers action before you post.

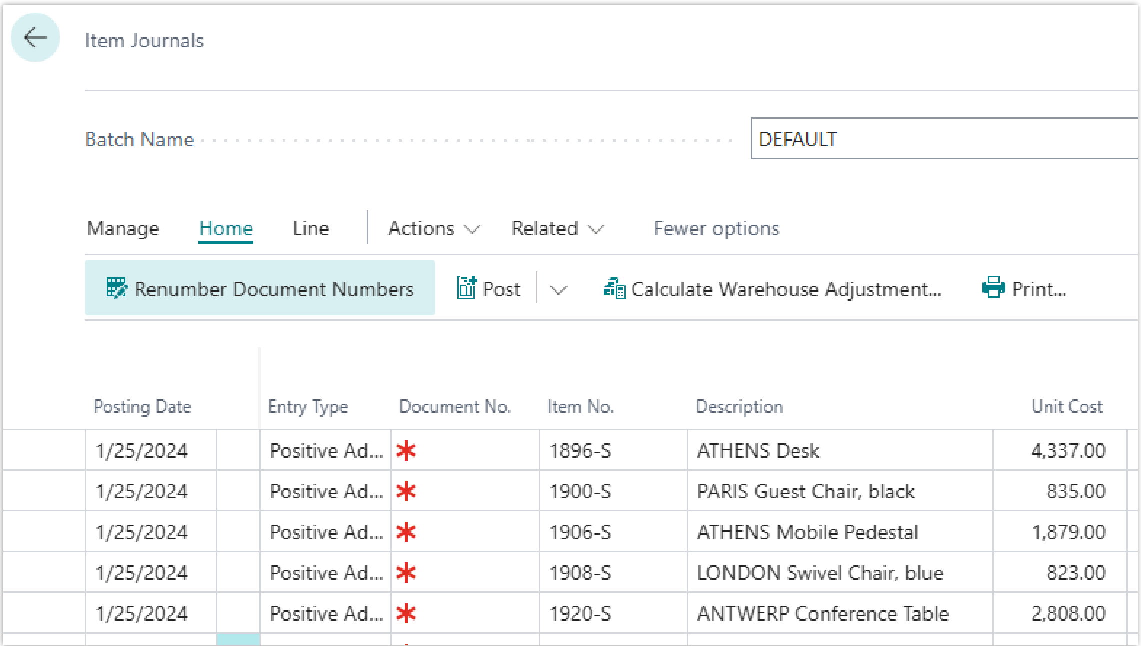
Feature details

On the **Item Journals** page, the **Document No.** field is editable so that you can specify different document numbers for different journal lines, or the same document number for related journal lines.

If a number series is specified in the **No. Series** field on the item journal batch, document numbers for individual or grouped lines must be in sequential order when you post an item journal. If they aren't, you can't post the journal. To avoid problems with posting, you can use the **Renumber Document Numbers** action on the **Item Journals** page before you post the journal. If related journal lines were grouped by document number before you used the action, they'll stay grouped but might be assigned a different document number.

The **Renumber Document Numbers** action also works on filtered views.

We'd like to thank our community for your valuable contributions to Microsoft's open source BusinessCentralApps repo on GitHub.



Renumber Document Numbers

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Catalog items use standard number series, can include in blanket sales orders

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

It's now easier for businesses to manage catalog items. In addition to adding catalog items to sales orders and quotes, you can assign them to blanket sales orders.

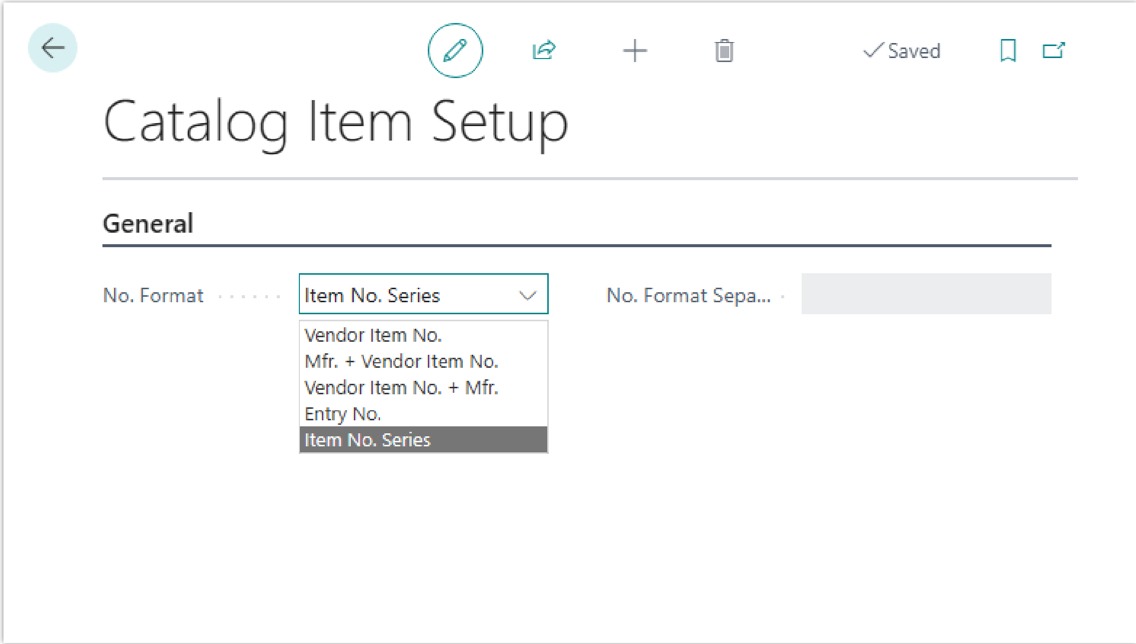
Feature details

Catalog items are items that you don't manage in Business Central until you sell them. When you use the **Select Catalog Item** action to add a catalog item to a line on a sales order, quote, and now also a blanket sales order, the catalog item is converted to a regular item.

You can decide how to convert vendor item numbers to the item numbering structure that you use. You can use the number series defined in the item template that is assigned to a catalog item, or use the number series defined in the **Item No.** field on the **Inventory Setup** page. The number series defined on the item template takes priority.

Specify how to convert catalog item numbers to your numbering system

Before you can convert a catalog item to a normal item, you must specify how to convert vendor item numbers to your item numbering system. To do that, on the **Catalog Item Setup** page, fill in the **No. Format** field with the option you prefer.

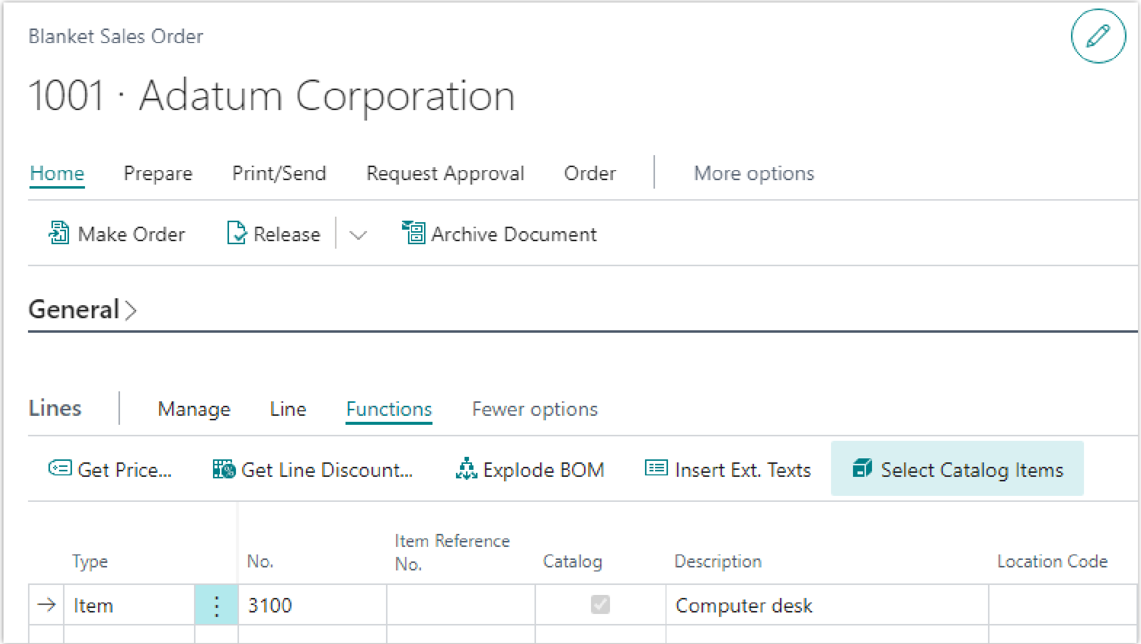


Catalog Item Setup page

Add catalog item to a blanket sales order and convert it to a normal item

1. On the **Blanket Sales Orders** page, choose the **New** action.
2. On the **General** FastTab, fill in the fields as you would for any blanket sales order.
3. On a new sales line, in the **Type** field, select **Item**, but leave the **No.** field empty.
4. Choose the **Line** action, and then choose the **Select Catalog Items** action.
5. On the **Catalog Items** page, select the catalog item that you want to sell, and then select **OK**.

The catalog item is converted to a normal item. A new item card prefilled with information from the catalog item and a relevant item template is created.



Blanket Sales Order page

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Define content of created warehouse documents with filters

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

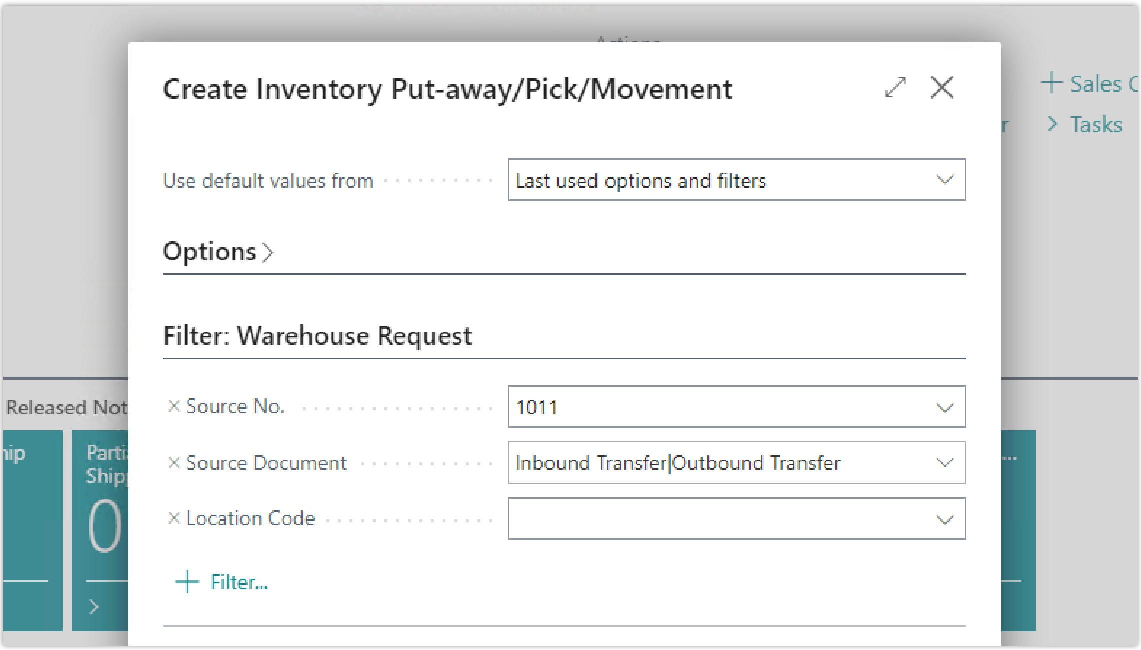
You can provide more information for your warehouse team by defining filters on fields on source document lines when you create inventory put-away, pick, and movement documents. The additional information lets you be more specific about the actions to take in the warehouse.

Feature details

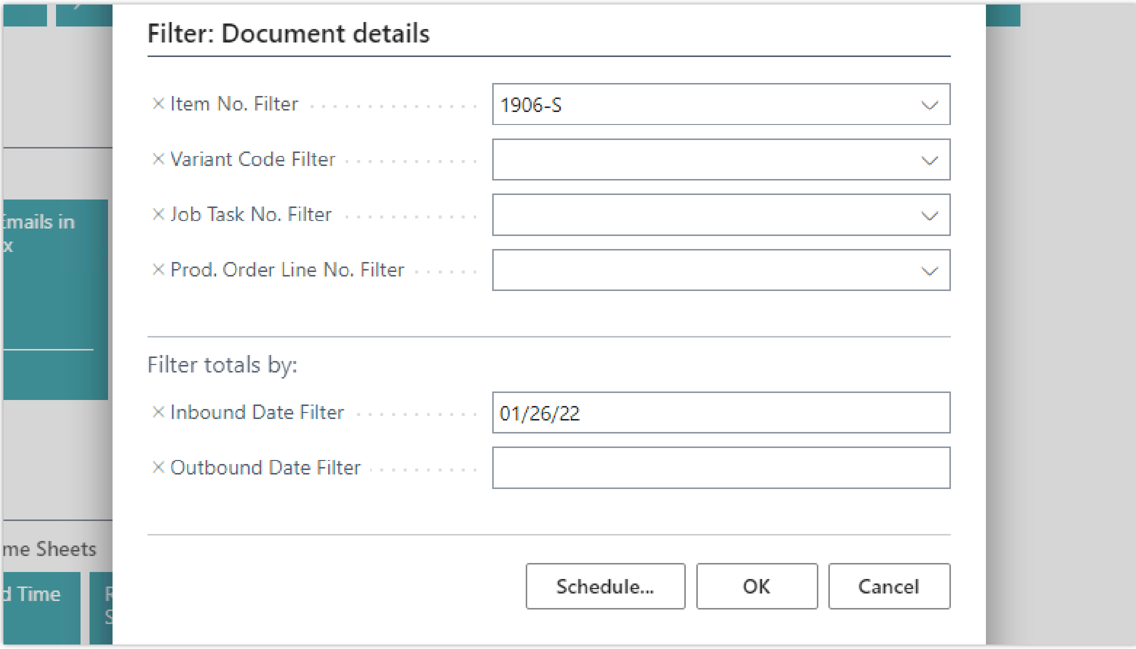
We've added more filters to the **Create Inventory Put-away/Pick/Mvt** batch job. In addition to the source document type and number, you can filter by location, item, job task, and production order line. The extra filters let you be more specific when you create inventory pick and put-away documents for the team in your warehouse.

You can also filter source document lines by date.

- Purchase orders and purchase return orders: The **Planned Receipt Date** of the purchase line.
- Sales orders and sales return orders: The **Shipment Date** of the sales line.
- Job usage: The **Planning Date** of the job planning line.
- Outbound transfer orders: The **Shipment Date** of the transfer line.
- Inbound transfer orders: The **Receipt Date** of the transfer line.
- Production output: The **Due Date** of the production order line.
- Production consumption: The **Due Date** of the production order component line.
- Assembly consumption: The **Due Date** of the assembly line.



Create Inventory Put-away/Pick - Location filter



Create Inventory Put-Away/Pick - additional filters

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Thank you for your idea

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Demo tool and data for warehouse and inventory scenarios

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2023	Apr 2023

Business value

To help partners demonstrate the advanced capabilities of Business Central, we're making a demo tool that provides setup and data for warehouse and inventory scenarios.

Feature details

The Contoso Coffee app provides a demo tool and a related set of demo data for warehousing scenarios. You can install the extension in any environment. Presales specialists can run the tool on Cronus or MyCompany and get the setup and demo data needed to demonstrate various scenarios. For Business Central on-premises, the demo tool and data are available on the product media as source code.

The Contoso Coffee app provides three locations that are optimized for different scenarios:

- **SILVER**: This location is configured to use bins. It can be easily configured to support basic or advanced warehouse flows.
- **YELLOW**: This location uses the advanced warehouse configuration, but doesn't use bins. It can be reconfigured to support basic configurations.
- **WHITE**: This location uses the advanced warehouse configuration with directed put-aways and picks. Directed put-aways and picks let businesses use rules to control how items move throughout a warehouse.

Scenarios

The Contoso Coffee warehousing demo data supports the following scenarios for testing and training:

- Walkthrough of inbound and outbound flow in basic warehouse configurations.
- Walkthrough of inbound and outbound flow in mixed warehouse configurations.
- Walkthrough of inbound and outbound flow in advanced warehouse configurations with directed put-away and pick.

To learn more about the Contoso Coffee extension, go to Introduction to Contoso Coffee Demo Data.

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.

Easier to create opening balances for item tracked inventory

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

Businesses can easily move the inventory they track with serial and batch numbers into Business Central.

Feature details

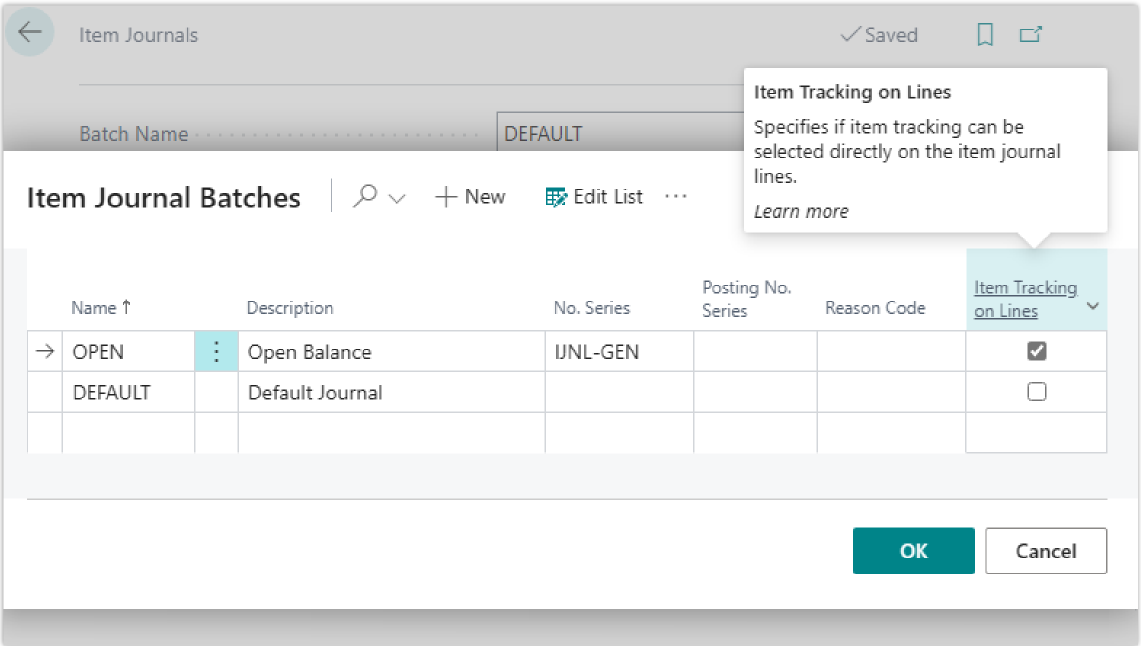
As the flow of goods in today's supply chain becomes more complex, keeping track of items is increasingly important for businesses. For example, monitoring an item's transaction flow is a legal requirement in the medical and chemical supply industries. Other businesses might want to monitor products with warranties or expiration dates for customer service reasons.

In this release wave, we've simplified the first steps, such as creating opening balances for items where item tracking is required. Because you can choose different warehouse configurations, there are two new options:

- You can enable specific batches on the **Item Journal** page to let people enter serial, lot, and package data directly on journal lines.
- For locations where the **Directed Put-away and Pick** toggle is turned on, you can use the **Warehouse Physical Inventory Journal** page to make all item tracking fields available. The fields that are available now include the **Warranty Date** and **Expiration Date** fields.

Item journal

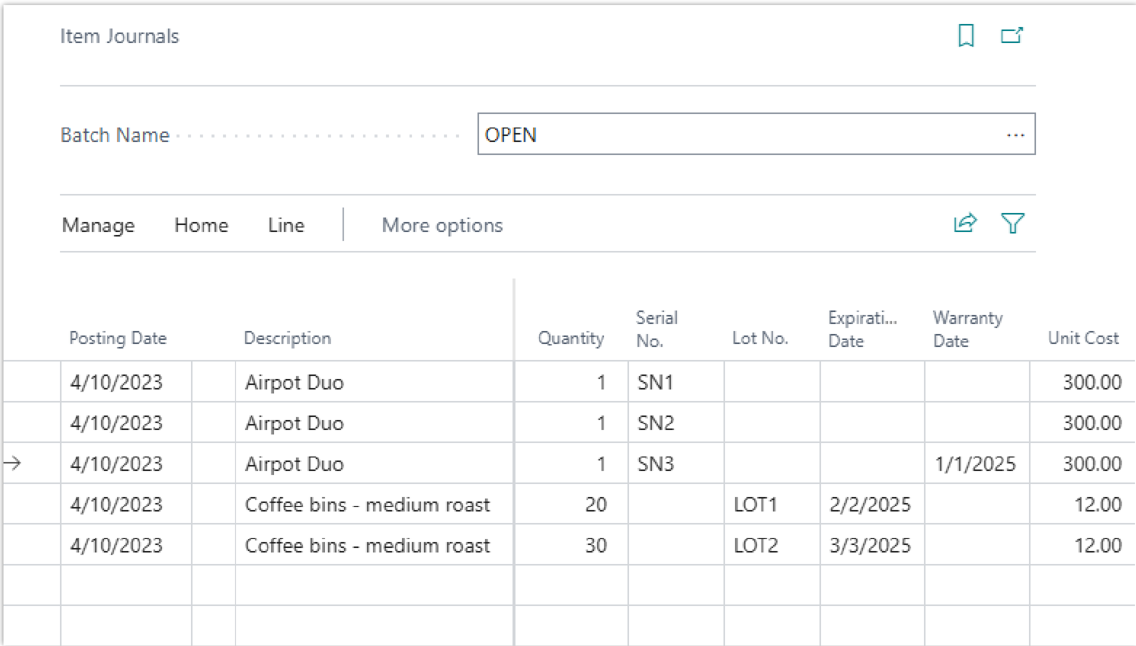
1. Search for the **Item Journals** page, and then choose the related link.
2. Choose the **Name** field to open a list of item journal batches.
3. Choose **New** to create a new batch, and then turn on the **Item Tracking on Lines** toggle.



Item Journal Batch

4. Choose **OK** to select the batch you created.
5. Fill in the fields on the item journal line as necessary. Notice that the **Lot No.**, **Serial No.**, **Expiration Date**, **Warranty Date**, and **Package No.** fields are available (if the feature is enabled).

6. Choose the **Post** action to adjust inventory.

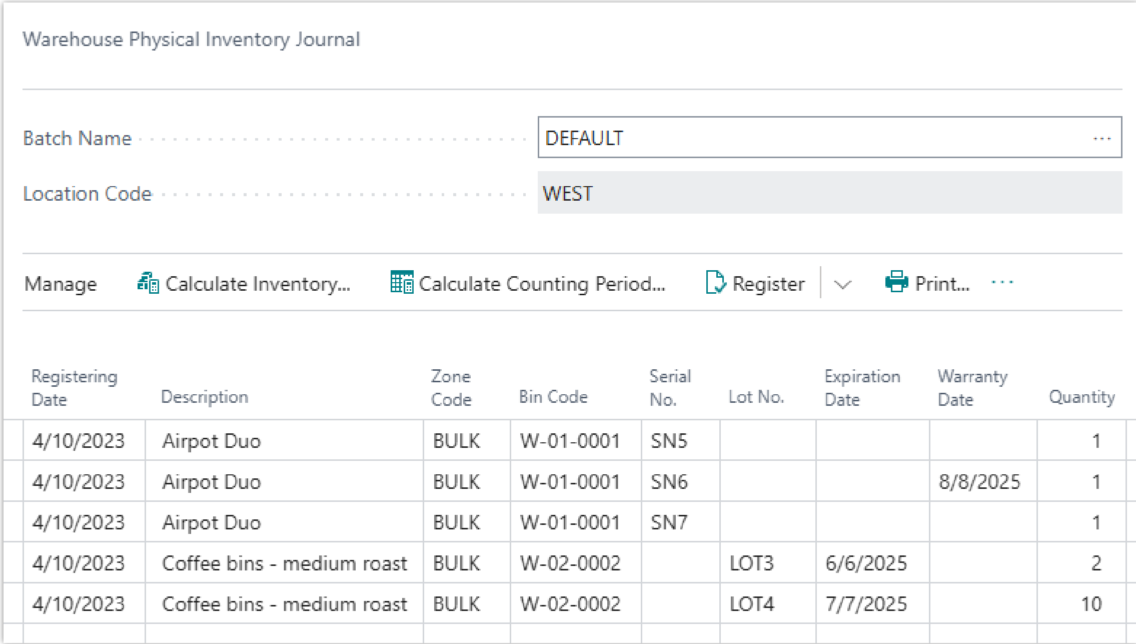


Item Journal

NOTE Business Central does a few minor validations when you enter or import data. A more comprehensive check happens when you post or transfer data from journal lines to the **Item Tracking Window**. The latter happens automatically when you open the **Item Tracking Window** from the item journal line or if you choose the **Update Item Tracking Lines** action.

Warehouse physical inventory journal for locations where directed pick and put-away is turned on

1. Search for the **Warehouse Physical Inventory Journal** page, and then choose the related link.
2. Fill in the fields on the item journal line as necessary. Notice that the **Lot No.**, **Serial No.**, **Expiration Date**, **Warranty Date**, and **Package No.** fields are available (if the feature is enabled).
3. Choose the **Register** action to make the inventory adjustments. Remember that you'll need to synchronize the adjusted warehouse entries with the related item ledger entries. To learn more, go to synchronize the adjusted warehouse entries.



Warehouse Physical Inventory Journal

For bulk import, you can use configuration packages to import data to the journals.

You can't use **Edit in Excel** to create journal lines with tracking information.

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.

Intercompany posting provides a one-stop-shop setup experience

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

Intercompany posting lets you manage accounting activities for a group of companies. Setting up the workflows and relationships between the companies can be complicated, so to make it easier to get started we've consolidated the various steps into a single page. Plus, we've added a validation that helps you find things you might have missed in your setup.

Feature details

Intercompany posting has a new **Intercompany Setup** page that gives you an improved overview of your setup, and gives you fast access to various setup and task pages. In the online version of Business Central, you can validate your intercompany posting setup to determine whether you've missed any settings across partner companies.

We've improved intercompany posting in the following ways:

- Manage your intercompany setup on one page that includes intercompany partners, an intercompany chart of accounts, and intercompany dimensions.
- Handle bank transactions on the IC General Journals page.
- IC general journals are included on the G/L Register page.
- The experience when working with the intercompany inbox and outbox is smoother, and the Handled Inbox now lets you open documents.
- Role Center cues are added to give an overview.

New Business Central customers can search for **Intercompany Setup** to find the new setup page. Existing customers with upgraded tenants can turn on **Feature Update: Automatically accept intercompany general journal transactions** on the **Feature Management** page to make the page available.

Tell us what you think

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Post multiple transfer orders at the same time

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

Instead of posting individual transfer orders one by one, you can select multiple non-posted documents in a list to post them immediately or in a batch according to a schedule, such as at the end of the day. For example, this can be useful if only a supervisor can post documents created by other users, or to avoid system performance issues that might happen if you post during work hours.

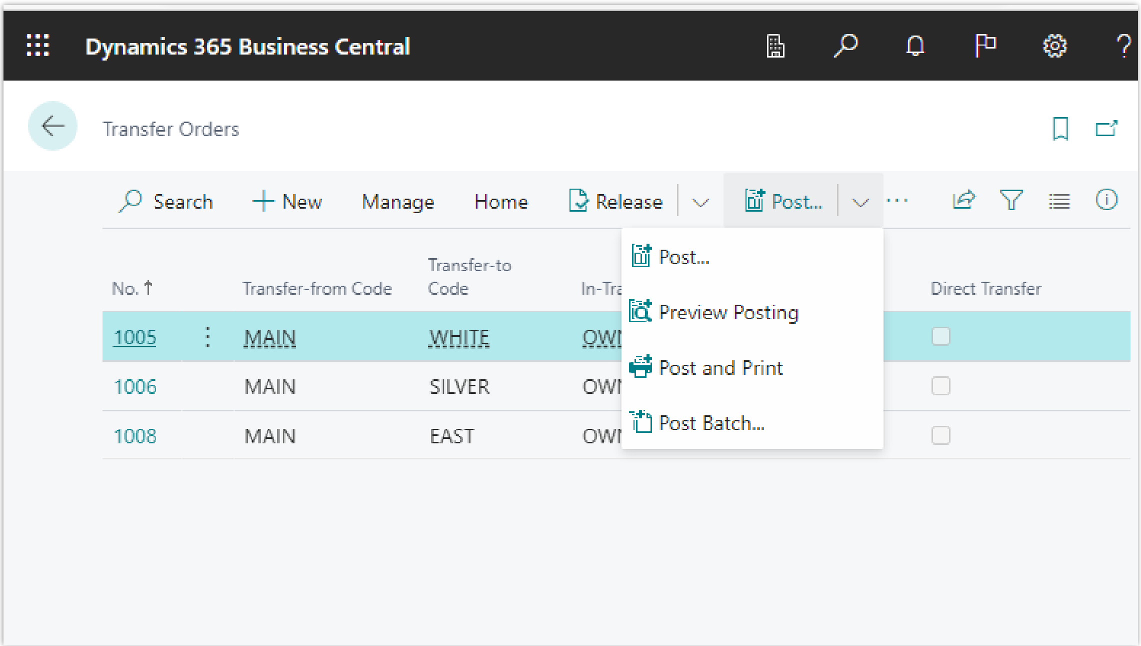
Feature details

The following procedure explains how to post transfer orders in a batch.

1. Search for the **Transfer Orders** page, and then choose the related link.
2. On the **Transfer Orders** page, select the orders to post.
3. In the **No.** field, open the context menu and choose **Select More**.
4. Select the checkbox for the lines for each order that you want to post.
5. Choose the **Posting** action, and then choose **Post Batch**.
6. On the **Batch Post Transfer Order** page, fill in the fields as necessary.

   For transfer orders that use an in-transit location, you can choose either **Ship** or **Receive**. Repeat this step if you need to do both. For orders where Direct Posting is turned on, both options work in the same way and post the order completely.
7. Select **OK**.
8. To view potential issues, open the **Error Message Register** page.

NOTE Posting multiple documents might take some time and block other users. Consider enabling background posting. For more information, see [Use Job Queues to Schedule Tasks](#).



Post Batch action

To create a job queue entry for batch posting of sales orders

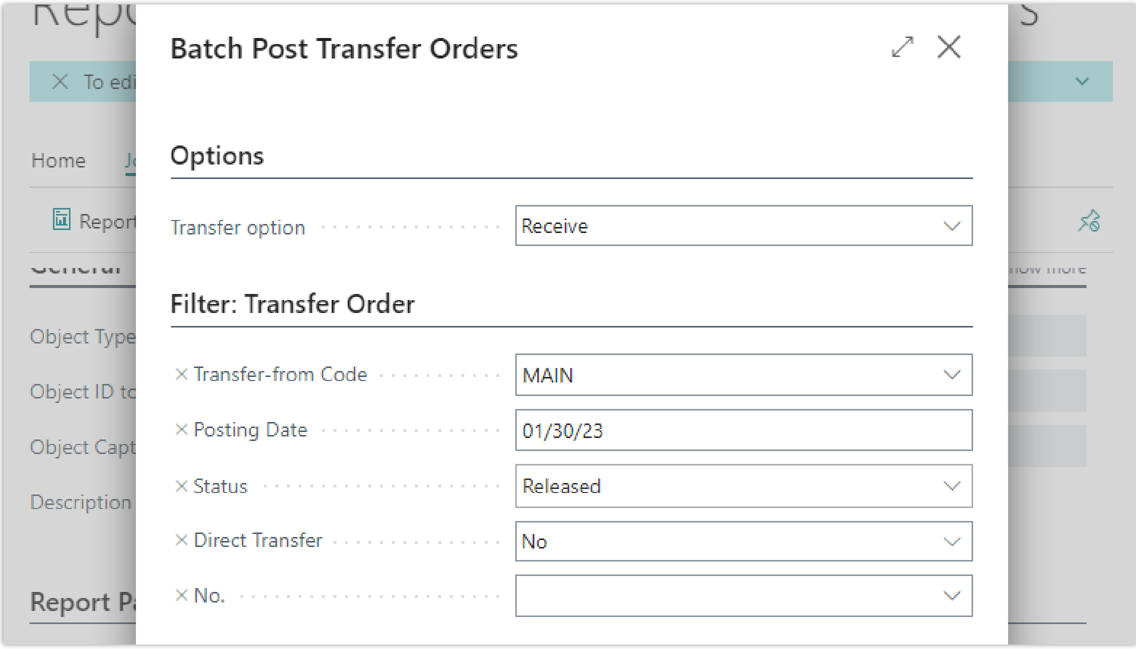
Alternatively, you can use the job queue to schedule posting to happen at a time that's convenient for your organization. For example, it might make sense for your business to run certain routines when most of the data entry is done for the day.

The following procedure shows how to set up the **Batch Post Transfer Orders** report to automatically post direct transfer orders at 4 PM on weekdays.

1. Search for the **Job Queue Entries** page, and then choose the related link.
2. Choose the **New** action.
3. In the **Object Type to Run** field, select **Report**.
4. In the **Object ID to Run** field, select **5707, Batch Post Transfer Orders**.
5. Select the **Report Request Page** checkbox.
6. On the **Batch Post Transfer Orders** request page, choose the **Ship** option, filter on **Direct Transfer**, and then select **OK**.

   IMPORTANT It's important to set filters. Otherwise, Business Central will post all documents, even if they aren't ready. Consider setting a filter on the **Status** field for the value **Released**, and a filter on the **Posting Date** field for the value **..today**. For more information, see Sorting, Searching, and Filtering.
7. Select all checkboxes from **Run on Mondays** to **Run on Fridays**.
8. In the **Starting Time** field, enter **4 PM**.
9. Choose the **Set Status to Ready** action.

Transfer orders that are within defined filters will now be posted every weekday at 4 PM.



Batch Post Transfer Order

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Preview item journals and 20 other journals and documents before posting

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

The Preview Posting action helps you avoid mistakes by giving you the chance to review the types of entries that will be created when you post item journals or other inventory documents before you commit the changes to your database.

Feature details

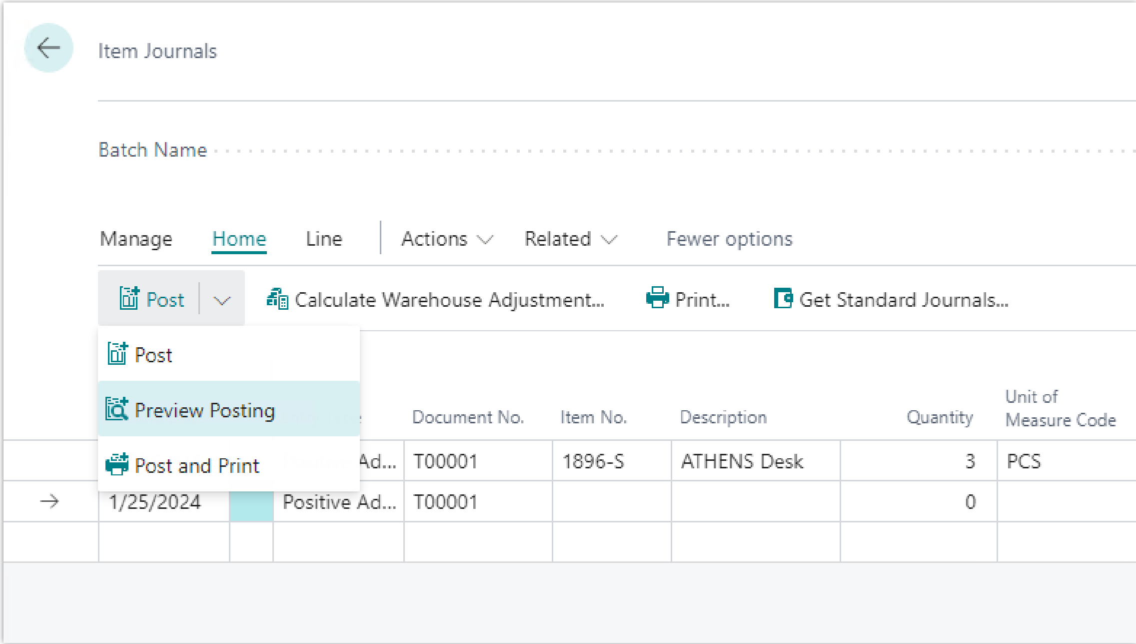
When you post item journals or other warehouse documents, such as inventory picks and put-aways and warehouse shipments and receipts, you create different types of G/L entries. The following are examples:

- Item entries
- G/L entries
- Value entries
- Warehouse entries

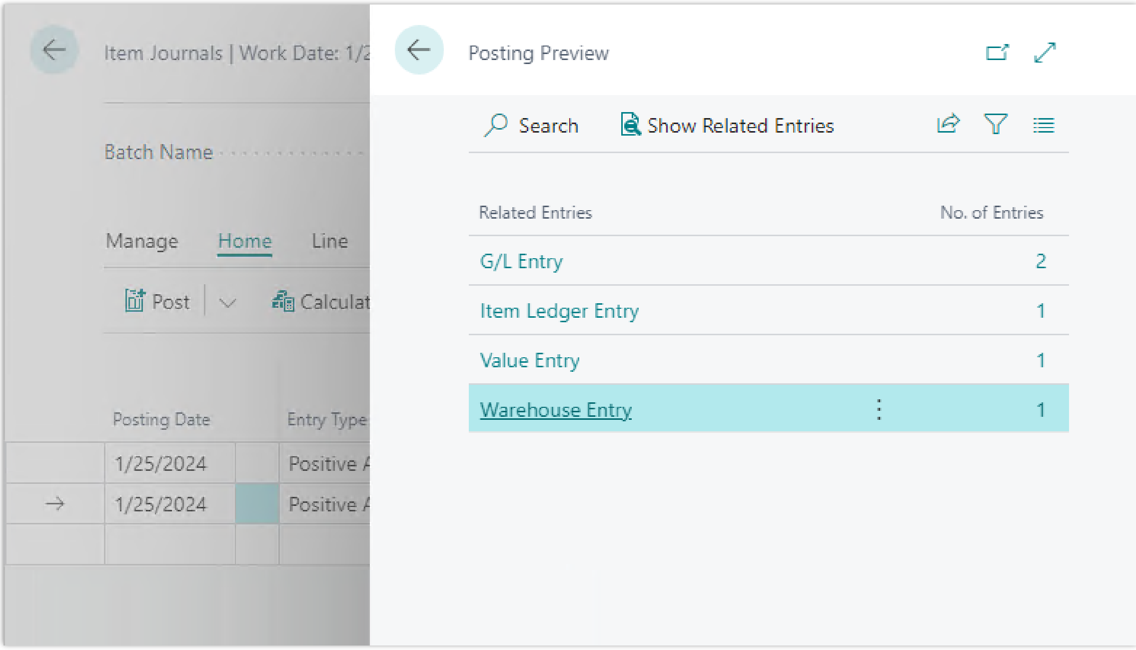
To avoid mistakes upfront, use the **Preview Posting** action on journals and documents to review the types of entries that you'll create before you post them.

List of pages where Posting Preview was added:

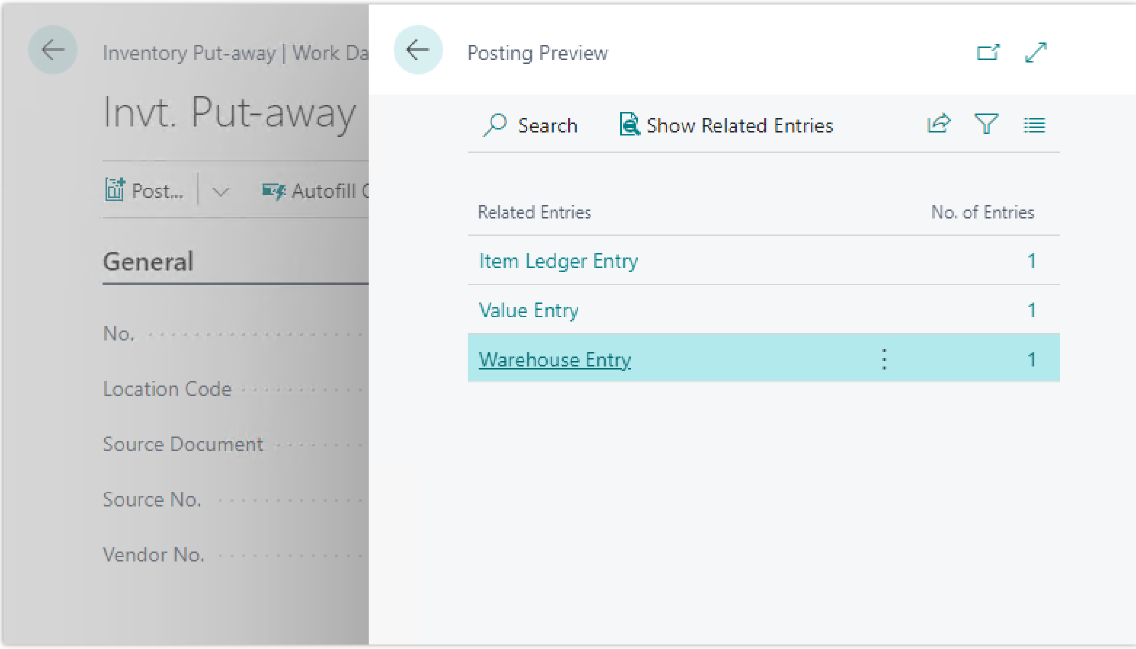
- Warehouse Shipment
- Transfer Order
- Assembly Order
- Production Journal
- Warehouse Receipt
- Item Journal
- Inventory Pick
- Item Reclass. Journal
- Job Journal
- Phys. Inventory Journal
- Output Journal
- Inventory Put-away
- Consumption Journal
- Physical Inventory Order
- Revaluation Journal
- Invt. Shipment
- Invt. Receipt
- Recurring Job Jnl.
- Capacity Journal
- Recurring Consumption Journal
- Recurring Capacity Journal



Item Journal - Posting Preview Action



Item Journal - Posting Preview page



Inventory Put-Away - Preview

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Review general ledger accounts faster

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

During the process of closing a period it's often necessary to go through all transactions for a G/L account to ensure they're correct. The G/L Review action makes the review process faster and easier.

Feature details

To speed up the period-end process of reviewing and reconciling G/L accounts, you can review the G/L entries for a given G/L account and mark the entries as **Reviewed**.

On the **General Ledger Entries** page, use the **G/L Review** action to review the entries. If you're upgrading or have migrated a large number of G/L entries, you can limit the number of entries to review. On the **General Ledger Setup** page, specify the date from which to show entries in the **G/L Reviewed Date** field. Entries before that date are considered as already reviewed. If you have a small number of old G/L entries that you don't need to review, you can run the **Set old G/L entries to reviewed** background job to mark them as reviewed in bulk.

The G/L Review action doesn't require double-entry bookkeeping to review all entries for a given transaction, which makes it a flexible capability. You can also remove the review setting if you've made a mistake.

NOTE To use the feature you must be assigned to the **D365 GL REVIEW** permission set.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Set default dimensions on locations, inventory documents, and journals

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

Dimensions are values that categorize entries so you can track and analyze them using various reporting tools. For example, dimensions can indicate the department or project an entry came from. Having default dimensions on entities helps people avoid making mistakes and having to enter dimensions manually on the transaction level if all goods come from a single location and department.

Feature details

In this release we're completing the **Default Dimension on Location** feature that we introduced several releases ago.

You can set default dimensions for a location on the **Location Card** page by choosing the **Dimensions** action. When you choose the location on a line in one of the following documents, its default dimensions are copied to the document:

- **Transfer Order**
- **Physical Inventory Order**

- **Inventory Shipment**
- **Inventory Receipt**
- **Item Journals**

If needed, you can delete or change the dimension on the line.

You can require that people specify dimensions for specific locations before they can post an entry. You can also include location dimension values in **Default Dimension Priorities** and **Dimension Combinations** for combinations of priority and dimension rules.

Because transfer order documents and reclassification journals deal with more than one location, the order in which you enter data is important. Default dimensions are copied from the last location field (In-Transit Location is ignored). The following examples illustrate the default dimension that will be used.

You have the following dimension settings:

- Location EAST. Department dimension is ADM
- Location WEST. Department dimension is PROD

You specify the location on a transfer order as follows:

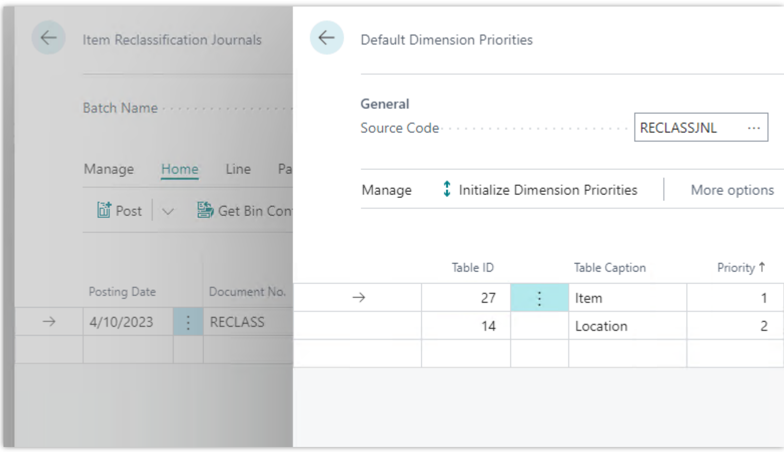
1. From Location = EAST
2. To Location = WEST

The PROD dimension will be copied from location WEST.

You fill in the fields in the opposite order, as follows:

1. To Location = WEST
2. From Location = EAST

The ADM dimension will be copied from location EAST.



Default Dimension Priorities

Tell us what you think

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Thank you for your idea

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Set up and sync master data across companies

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

Business Central makes it easy to move one company's setup to another company in the same environment. You can also synchronize master data between the companies.

Feature details

Master data management is intended for scenarios where you want to move the setup in one company to another company in the same environment. It's also built as a data synchronization engine that lets you keep data in the companies synchronized after the initial move.

The following capabilities are added for managing master data:

- Moving master data works when a company subscribes to data from another company.
- You can define the tables and fields to synchronize. For more control over the synchronization, you can filter on table records. You can also set up more advanced synchronization couplings.
- Changes in the main company are immediately pulled to the receiving companies by the job queue.
- Users in the receiving company can review synchronization logs.

You enable the master data management feature from the **Master Data Management Setup** page, where you can also access the synchronization tables and logs, and can initiate synchronizations.

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.

Ship and receive non-inventory items on warehouse documents

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

Warehouse employees can ship and receive non-inventory items, such as insurance or cost, on sales or purchase orders along with the physical goods on the orders.

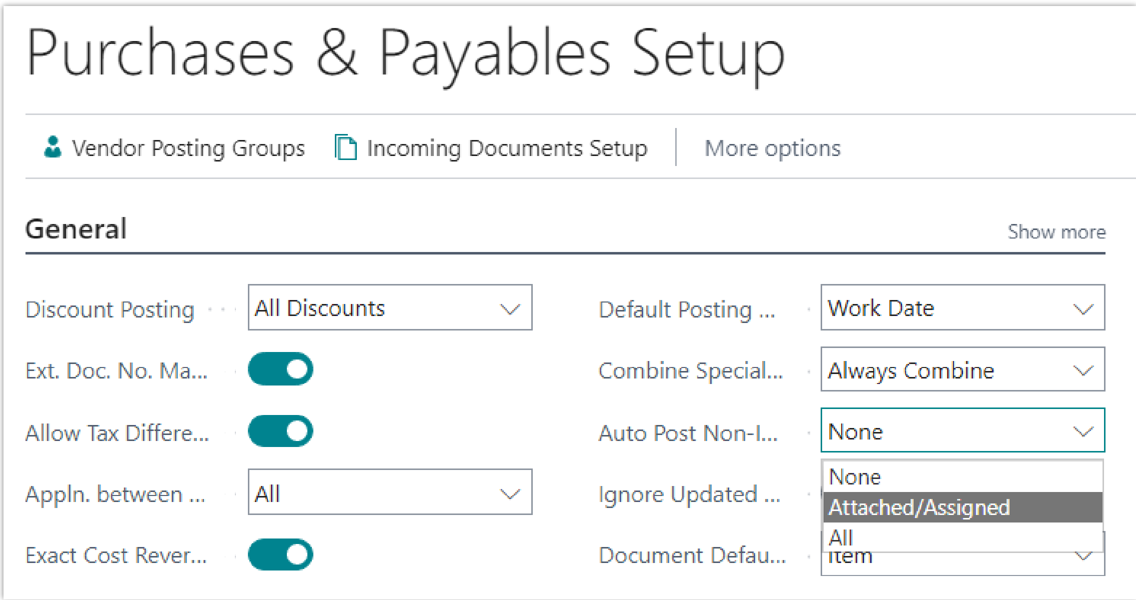
Feature details

Sales and purchase orders often have various types of things on their lines. For example, they might have general ledger items, accounts, and fixed assets. For configurations where you handle physical goods in warehouse documents, such as inventory put-aways, warehouse receipts, inventory picks, or warehouse shipments, you can also post some types of non-inventory items. In the previous version, you had to post non-inventory items separately.

We've added two capabilities:

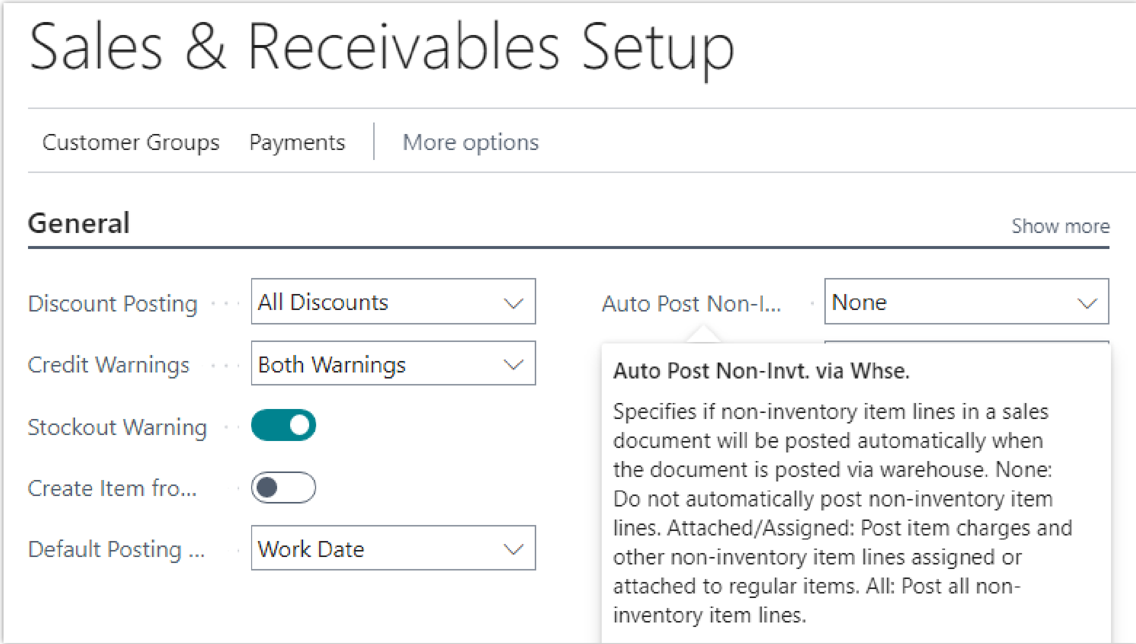
- Post all non-inventory lines on the source document as soon as at least one item is posted by the warehouse document.
- Post non-inventory lines of the source document linked to the item through the **Attached to Line No.** field when the item is posted by a warehouse document.

To start using this feature in the inbound warehouse flow, fill in the **Auto Post Non-Invt. via Whse.** field on the **Purchase & Payables Setup** page.



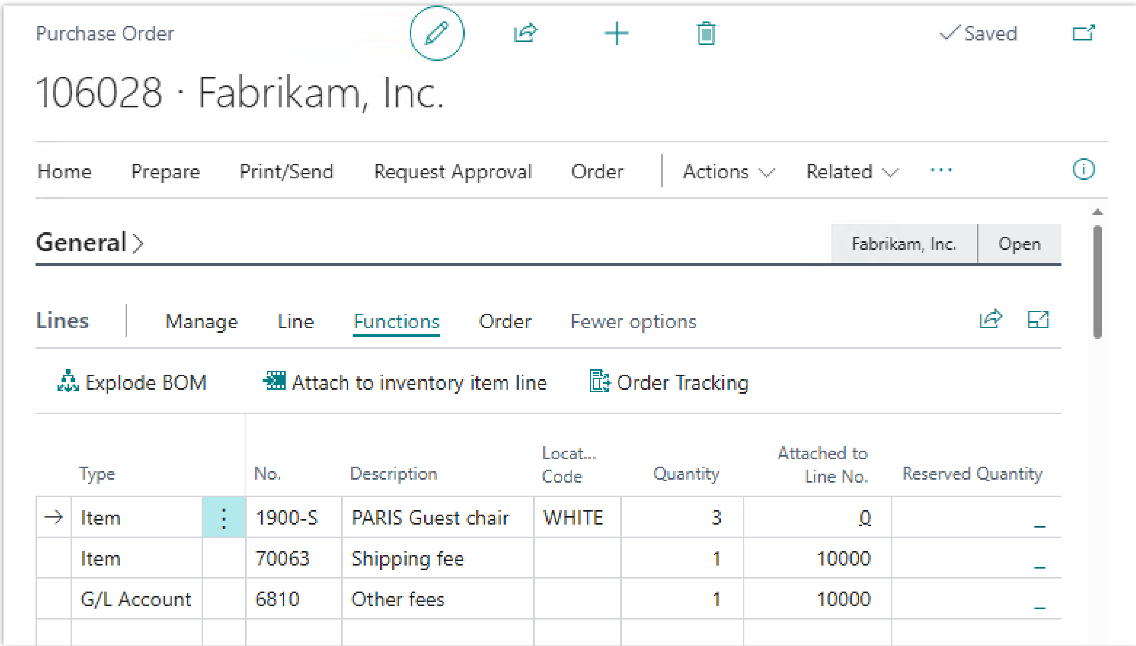
Purchase & Payables Setup page

To start using this feature in the outbound warehouse flow, fill in the **Auto Post Non-Invt. via Whse.** field on the **Sales & Receivables Setup** page.



Sales & Receivables Setup page

For the attach scenario, you must attach non-inventory lines to physical items in the sales or purchase document by using the **Attach to inventory line** action.



Purchase order

NOTE The **Complete** option in the **Shipping Advice** field of the sales order has priority over the selection in the **Auto Post Non-Invt. via Whse.** field on the **Sales & Receivables Setup** page.

Tell us what you think

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Shopify connector becomes extensible

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

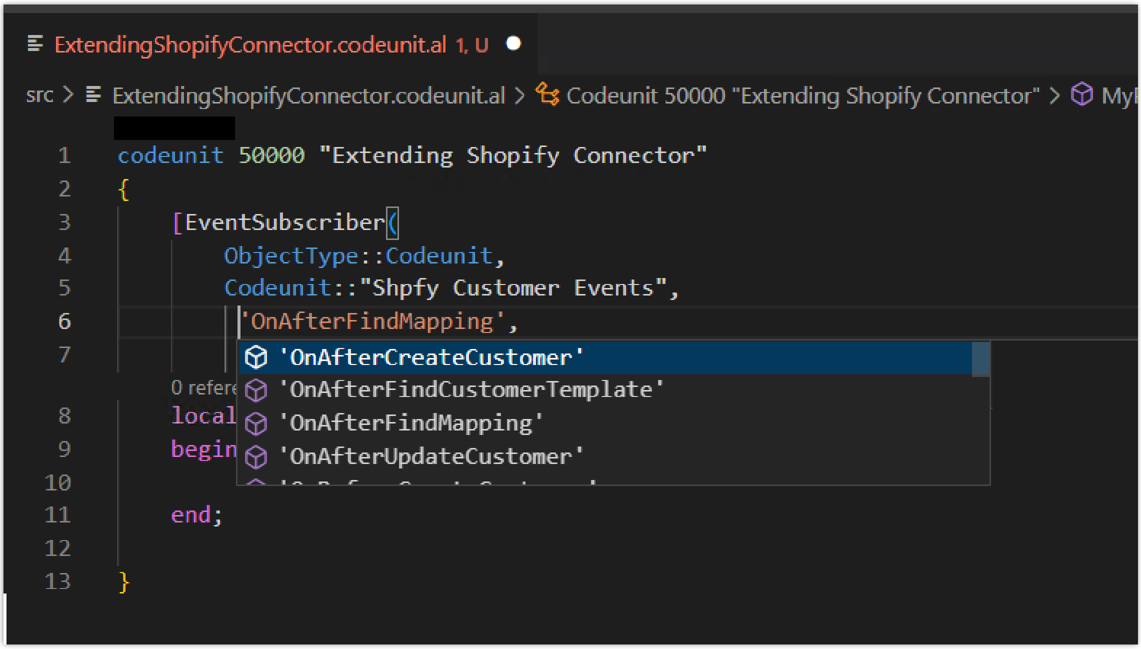
Tailor Shopify Connector to address the specific needs of your business.

Feature details

Shopify Connector has been nonextensible, but we're changing that. We're offering a few points of extensibility. We'll keep the number of points to a minimum so that we can follow the rapid development on the Shopify side without introducing breaking changes.

We're opening for extensibility for specific scenarios, based on feedback from our partners and customers. Please share your scenarios as comments to the following product suggestion: Allow extensibility of the new Shopify Connector Extension.

For more details, please follow this repository on GitHub. Note that even though extensibility is limited, you can submit improvements directly.



Event subscriber

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.

Undo transfer shipments

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

Sometimes people post incorrect quantities on transfer orders. For example, you may have made a transfer order with the incorrect number of items and then posted it as shipped, but not received. This feature lets you undo the quantity posting, make the necessary corrections, and then post the correct quantity.

Feature details

If you discover a mistake in a quantity after you've posted a transfer order, as long as the shipment isn't received you can easily correct the quantity. On the **Posted Transfer Shipment** page, the **Undo Shipment** action creates corrective lines:

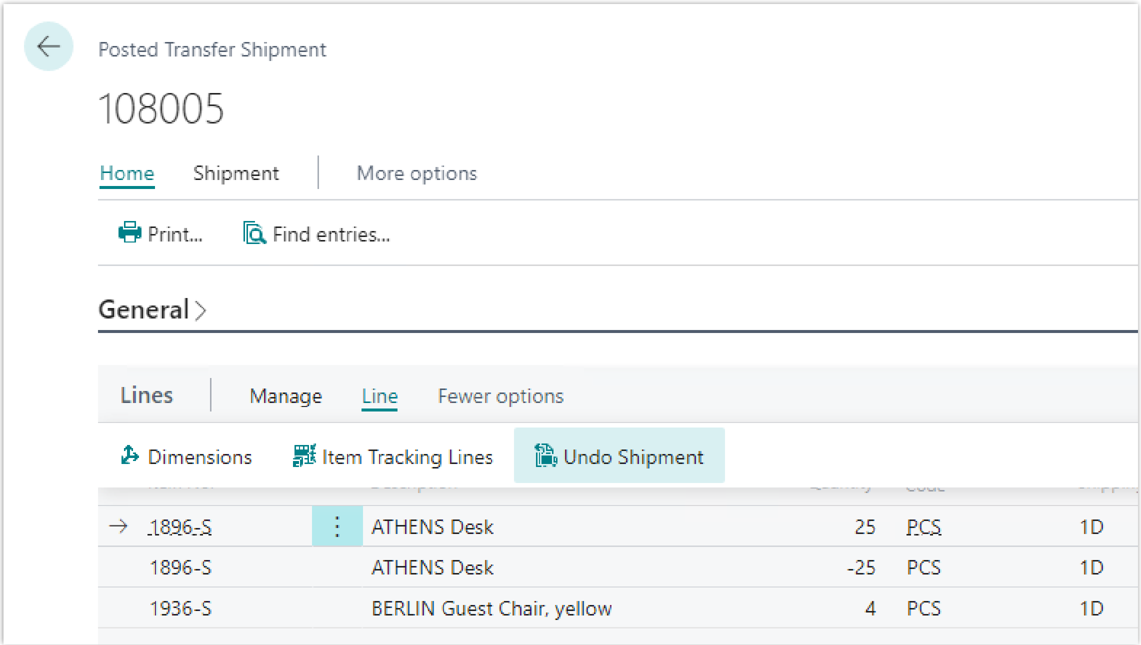
- The value in the **Quantity Shipped** field is decreased by the quantity you've undone.
- The **Qty. to Ship** is increased by the quantity you've undone.
- The **Correction** checkbox is selected for the lines.

If the quantity was shipped in a warehouse shipment, a corrective line is created in the posted warehouse shipment.

To complete the correction, reopen the transfer order, enter the correct quantity, and then post the order. If you're using a warehouse shipment to ship the order, create and post a new warehouse shipment.

NOTE

- You can't undo a posted transfer shipment if the item is reserved. To do that, you'll have to cancel the reservation.
- You can't undo a transfer shipment line if there were receipts associated with the related transfer order line. Therefore, you can't undo transfer shipments for transfer orders that allow direct transfers.



Undo transfer 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.

Usability improves for transfer order: select multiple items, mandatory fields

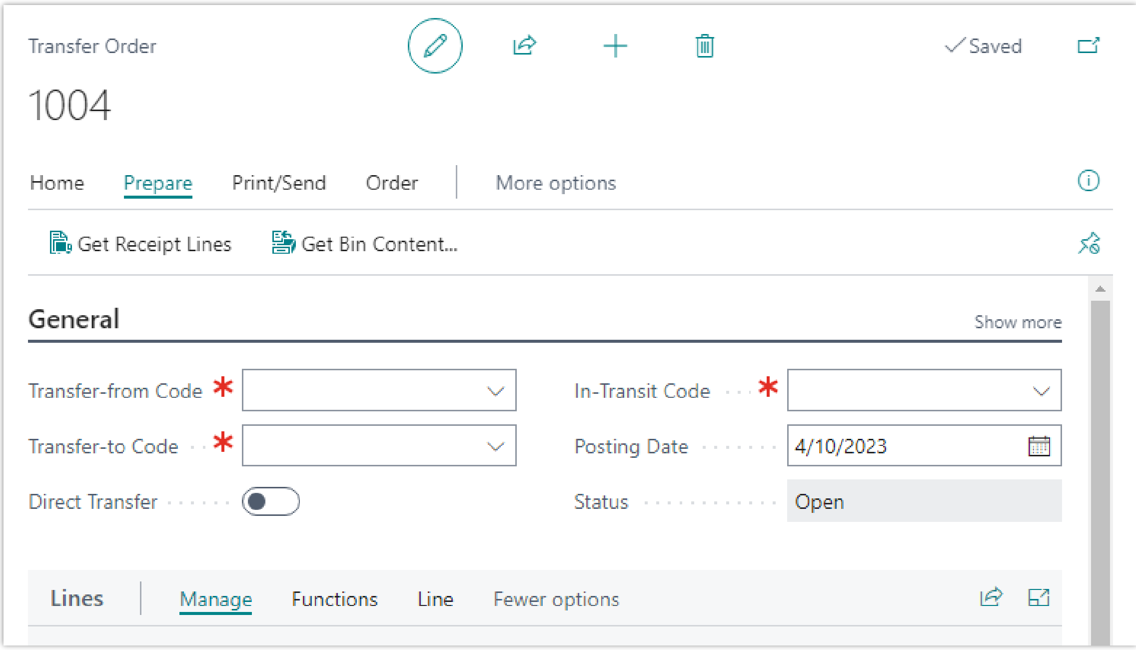
Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

Productivity increases when processes run smoothly, so we've improved the usability of transfer orders. For example, you can save a step by adding multiple items to the document.

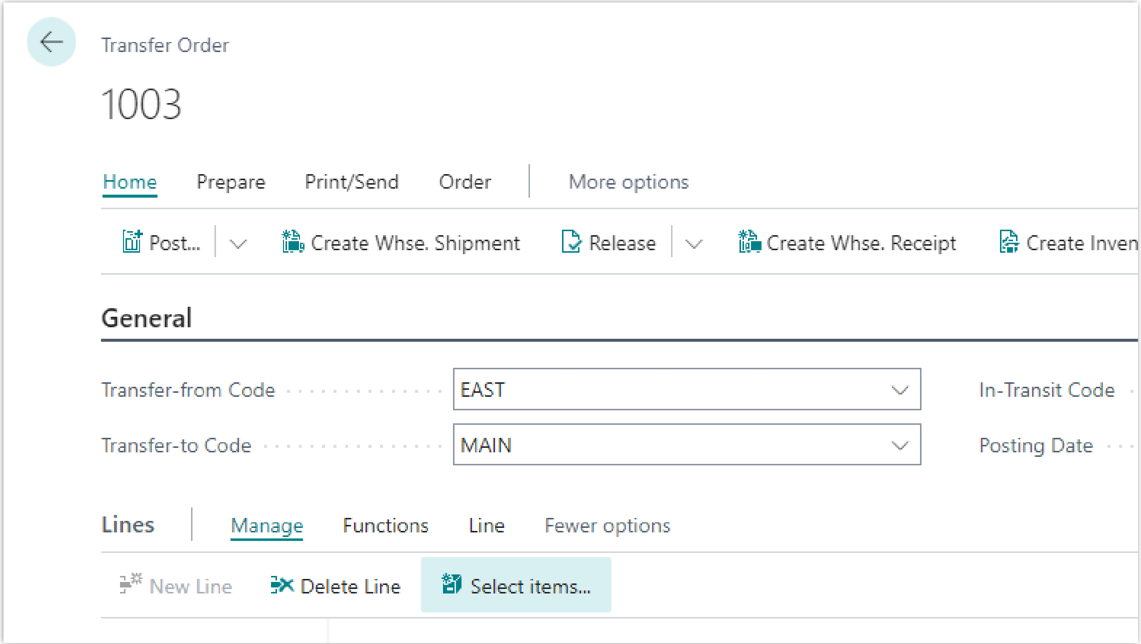
Feature details

The mandatory fields in the header on transfer orders help clarify how to work with the document.

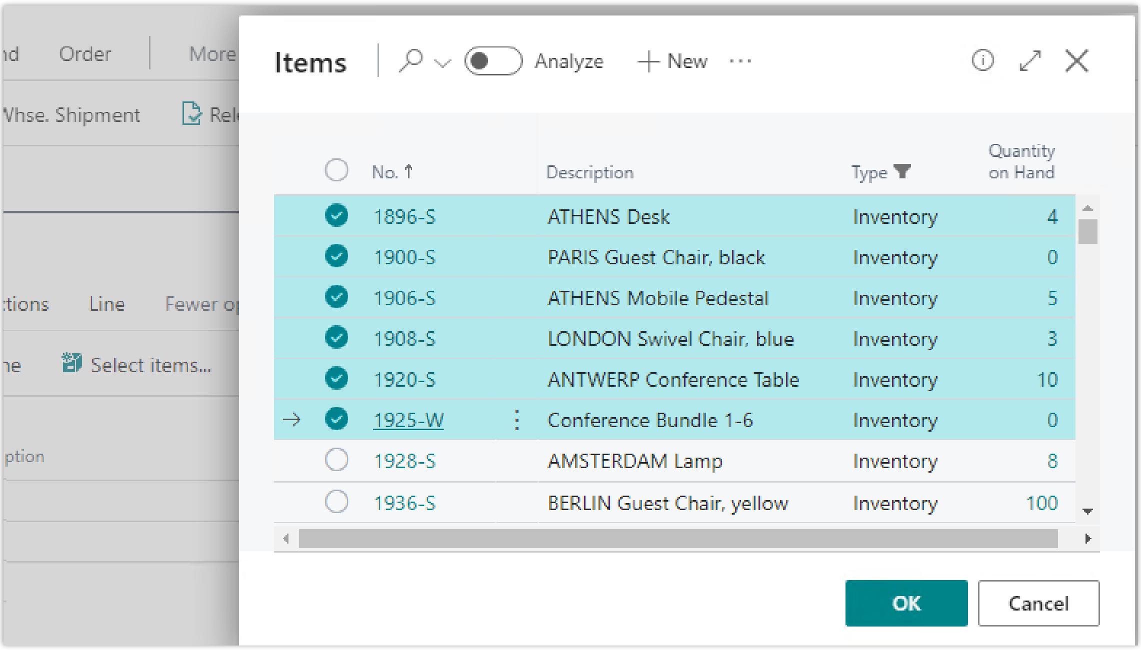


Mandatory fields in transfer order

When you're creating a transfer order, you can use the **Select items** action on the **Lines** FastTab to select and add multiple items to the order.



Select items



Items

We'd like to thank our community for making valuable contribution through our [Base Application open-source repo on GitHub]"

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.

Usability improves for warehouse, inventory, and tracking areas

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

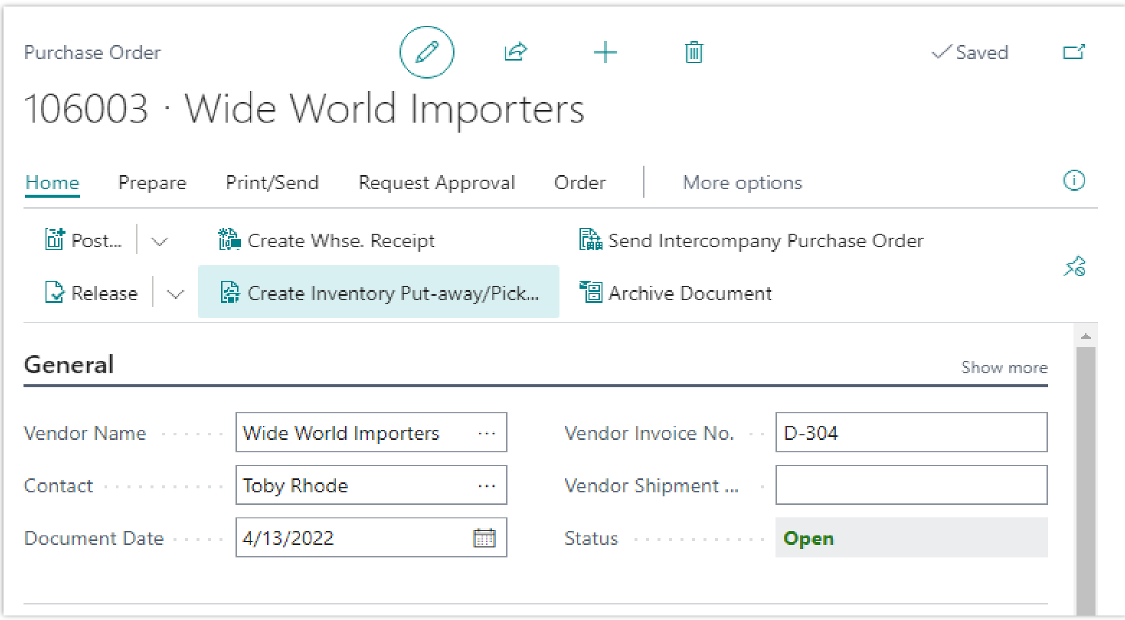
Productivity increases when processes are easy, so we've improved the usability of several areas within inventory and warehouse management. For example, you can save a step by automatically releasing source documents, and in several places data is easier to access and digest.

Feature details

Based on feedback from our customers, we've made it easier to complete several business processes.

Automatically release documents

Source documents, such as sales orders, purchase orders, and transfer orders, are released automatically when you choose the **Create Warehouse Receipt**, **Create Warehouse Shipment**, or **Create Inventory Put-away/pick** actions on source documents. This saves unnecessary clicks.



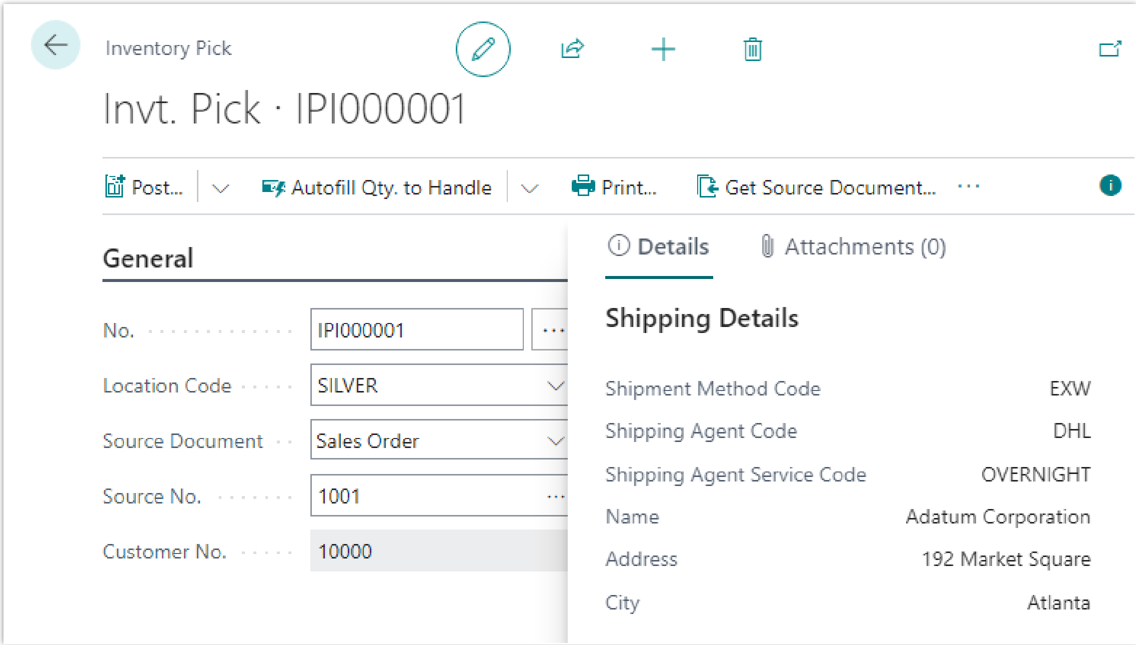
Screenshot of Release line

These actions are available on the following source documents:

- Sales orders
- Sales return orders
- Purchase orders
- Purchase return orders
- Assembly orders
- Service orders

Shipping Details FactBox

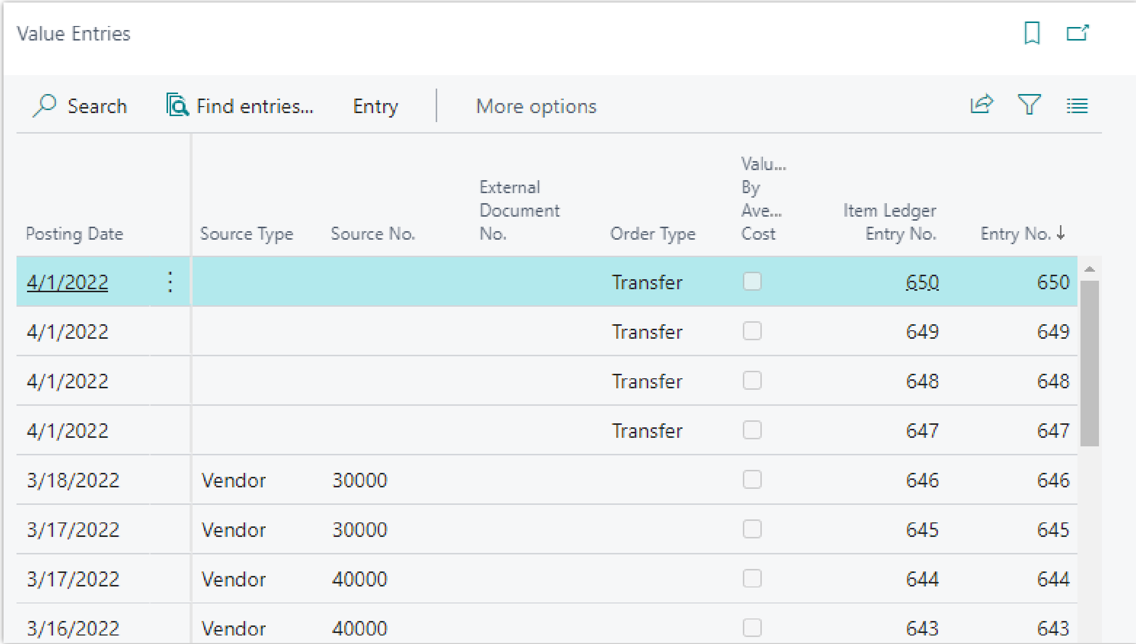
The new **Shipping Details** FactBox on **Inventory Pick** documents provides details about the shipping address and shipping agent.



Screenshot of Shipping Details FactBox

Improved experience in warehouse and value entries

The default sorting of data in the **Warehouse Entries** and **Value Entries** reports aligns with the **Item Ledger Entries** report, in that the latest entries display at the top.

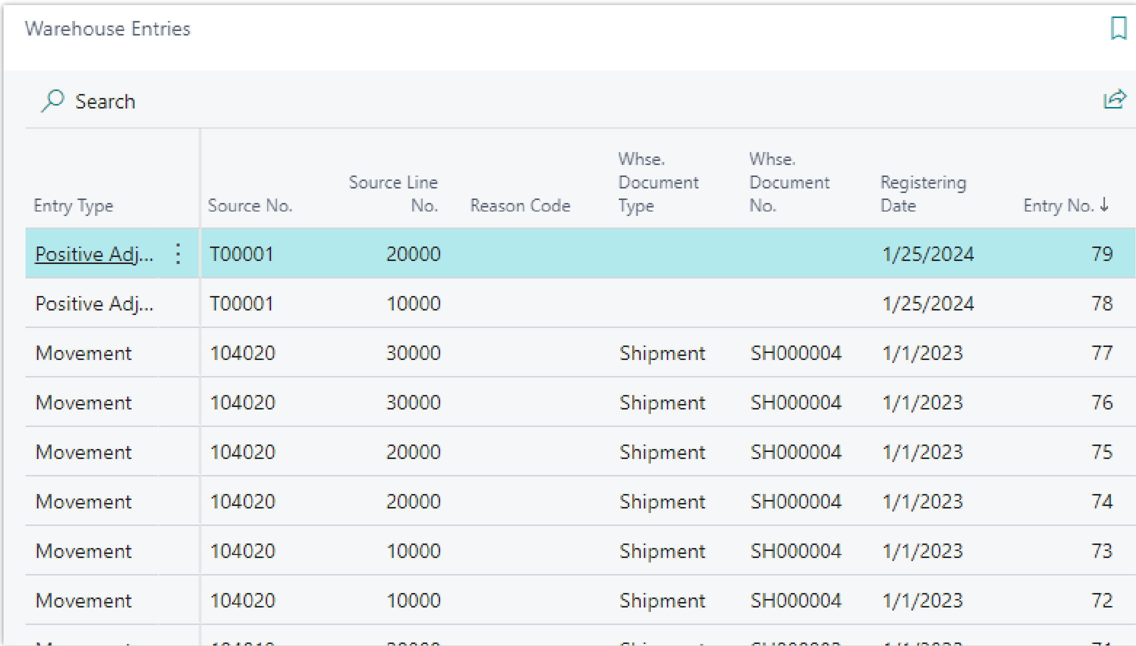

Value Entries

Search | Find entries... | Entry | More options

Posting Date	Source Type	Source No.	External Document No.	Order Type	Valu... By Ave... Cost	Item Ledger Entry No.	Entry No. ↓
4/1/2022				Transfer		650	650
4/1/2022				Transfer		649	649
4/1/2022				Transfer		648	648
4/1/2022				Transfer		647	647
3/18/2022	Vendor	30000				646	646
3/17/2022	Vendor	30000				645	645
3/17/2022	Vendor	40000				644	644
3/16/2022	Vendor	40000				643	643

Screenshot of Sorted Value Entries

On the **Warehouse Entries** page, the **Location Code** field is available by default.

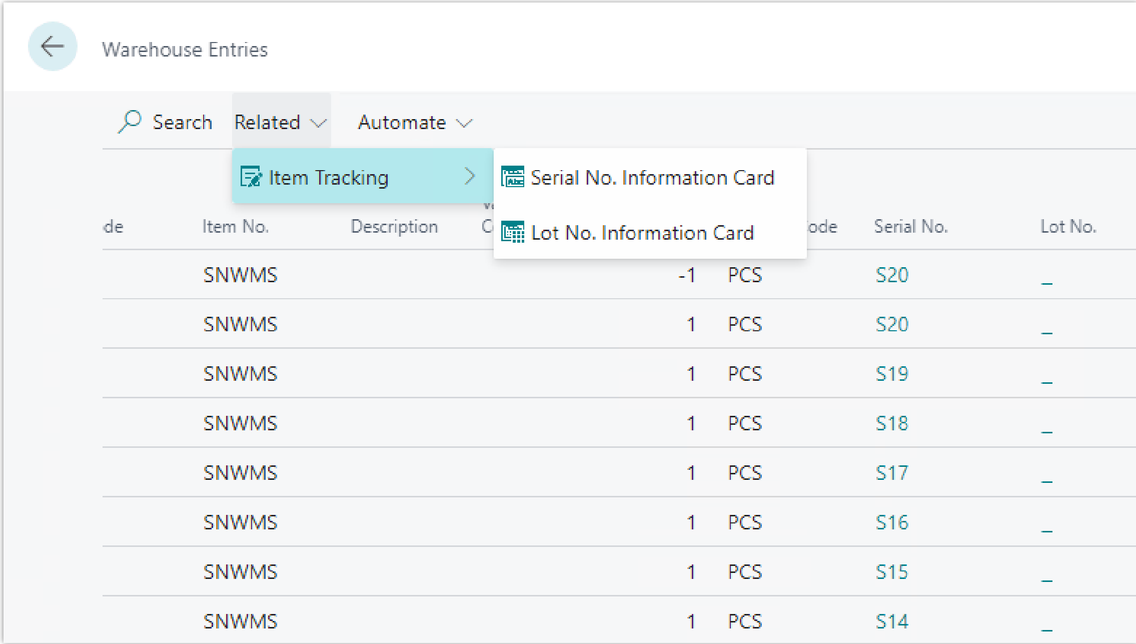

Warehouse Entries

Search

Entry Type	Source No.	Source Line No.	Reason Code	Whse. Document Type	Whse. Document No.	Registering Date	Entry No. ↓
Positive Adj...	T00001	20000				1/25/2024	79
Positive Adj...	T00001	10000				1/25/2024	78
Movement	104020	30000		Shipment	SH000004	1/1/2023	77
Movement	104020	30000		Shipment	SH000004	1/1/2023	76
Movement	104020	20000		Shipment	SH000004	1/1/2023	75
Movement	104020	20000		Shipment	SH000004	1/1/2023	74
Movement	104020	10000		Shipment	SH000004	1/1/2023	73
Movement	104020	10000		Shipment	SH000004	1/1/2023	72

Screenshot of Sorted Warehouse Entries

The **SN No.**, **Lot No.**, and **Package No.** fields on the **Warehouse Entries** page open the **Serial No. Information Card**, **Lot No. Information Card**, or **Package No. Information Card** pages, respectively. You can also use new actions that will open related pages.

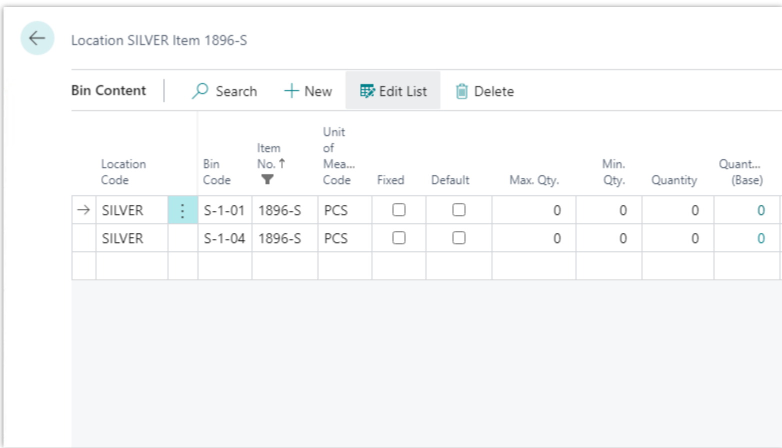


Screenshot of Warehouse Entries - Serial No. Information Card

Improved Bin Contents page

The **Bin Contents** page replaces the **Item Bin Contents** page to unify the experience and give access to more fields. You can add more fields to the **Bin Contents** page by personalizing it. Regardless of how you get to the page, for example, from the list of bins or from the list of items or item cards, you can do the following:

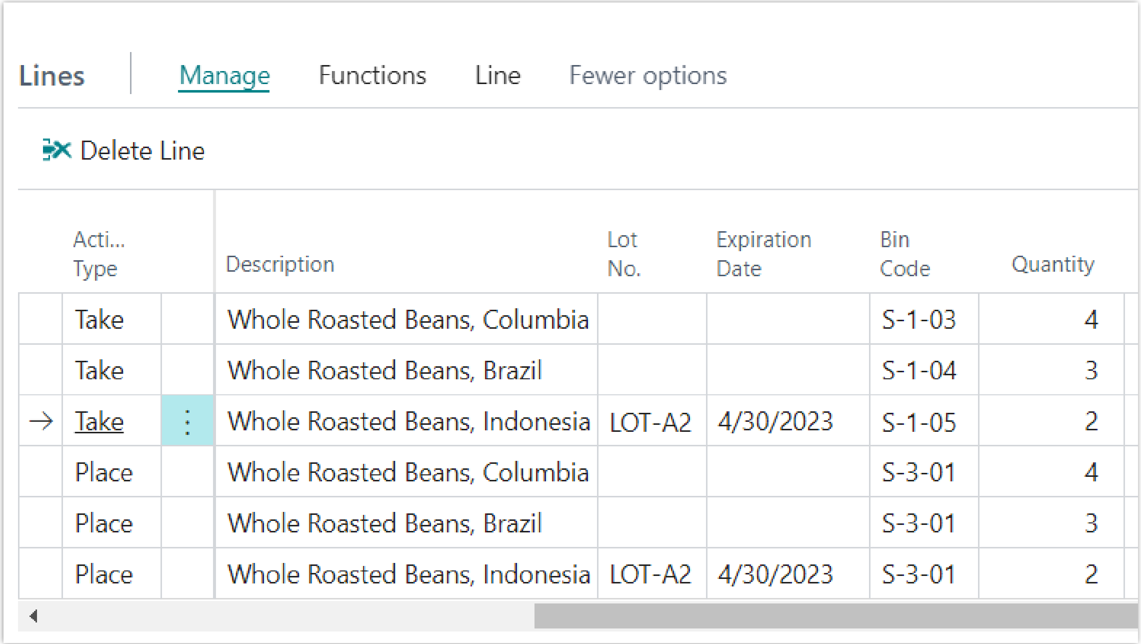
- Define bin contents.
- Set up default or fixed bins.
- Select units of measure.
- Update minimum and maximum quantities.



Screenshot of Bin Content

Automatically populate tracking details in warehouse pick documents

When selecting serial, lot, or package numbers on a *Take* line, Business Central updates the tracking details in the related *Place* line. The related line is identified based on the source document line and quantity.



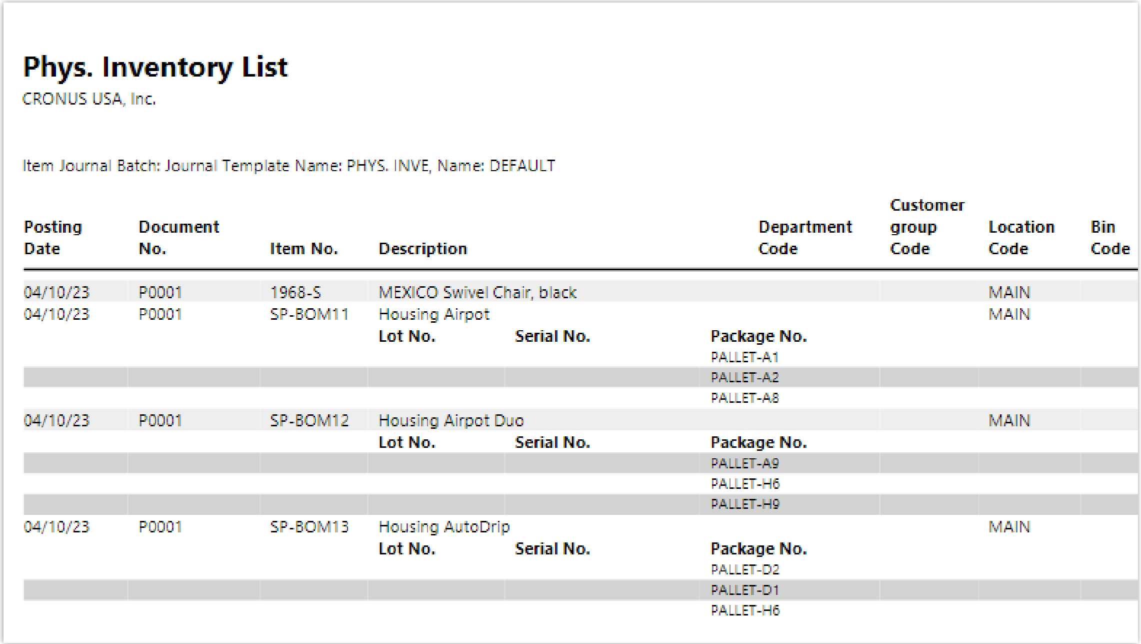
Acti... Type		Description	Lot No.	Expiration Date	Bin Code	Quantity
Take		Whole Roasted Beans, Columbia			S-1-03	4
Take		Whole Roasted Beans, Brazil			S-1-04	3
Take	⋮	Whole Roasted Beans, Indonesia	LOT-A2	4/30/2023	S-1-05	2
Place		Whole Roasted Beans, Columbia			S-3-01	4
Place		Whole Roasted Beans, Brazil			S-3-01	3
Place		Whole Roasted Beans, Indonesia	LOT-A2	4/30/2023	S-3-01	2

Screenshot of Warehouse pick lines

Package No. field is available on the Physical Inventory List report

The **Phys. Inventory List** report shows the lines that you have calculated on the **Phys. Inventory Journal** page. Use this report during physical inventory counts to record the actual quantities on hand in the warehouse and compare them to what's recorded in Business Central. Turn on the **Show Item Tracking Numbers** toggle to show lot, serial, and, starting with this release, package numbers.

To work with package numbers, enable the **Use tracking by package number in reservation and tracking system** feature update on the **Feature Management** page.



Phys. Inventory List

CRONUS USA, Inc.

Item Journal Batch: Journal Template Name: PHYS. INVE, Name: DEFAULT

Posting Date	Document No.	Item No.	Description			Department Code	Customer group Code	Location Code	Bin Code
04/10/23	P0001	1968-S	MEXICO Swivel Chair, black					MAIN	
04/10/23	P0001	SP-BOM11	Housing Airpot					MAIN	
			Lot No.	**Serial No.**	**Package No.**				
					PALLET-A1				
					PALLET-A2				
					PALLET-A8				
04/10/23	P0001	SP-BOM12	Housing Airpot Duo					MAIN	
			Lot No.	**Serial No.**	**Package No.**				
					PALLET-A9				
					PALLET-H6				
					PALLET-H9				
04/10/23	P0001	SP-BOM13	Housing AutoDrip					MAIN	
			Lot No.	**Serial No.**	**Package No.**				
					PALLET-D2				
					PALLET-D1				
					PALLET-H6				

Screenshot of Physical Inventory List

Tell us what you think

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Use advanced warehouse functionality with minimal complexity

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

You can use several features that were previously available only for locations that use directed put-away and pick, which added advanced processes, without adding unneeded complexity.

Feature details

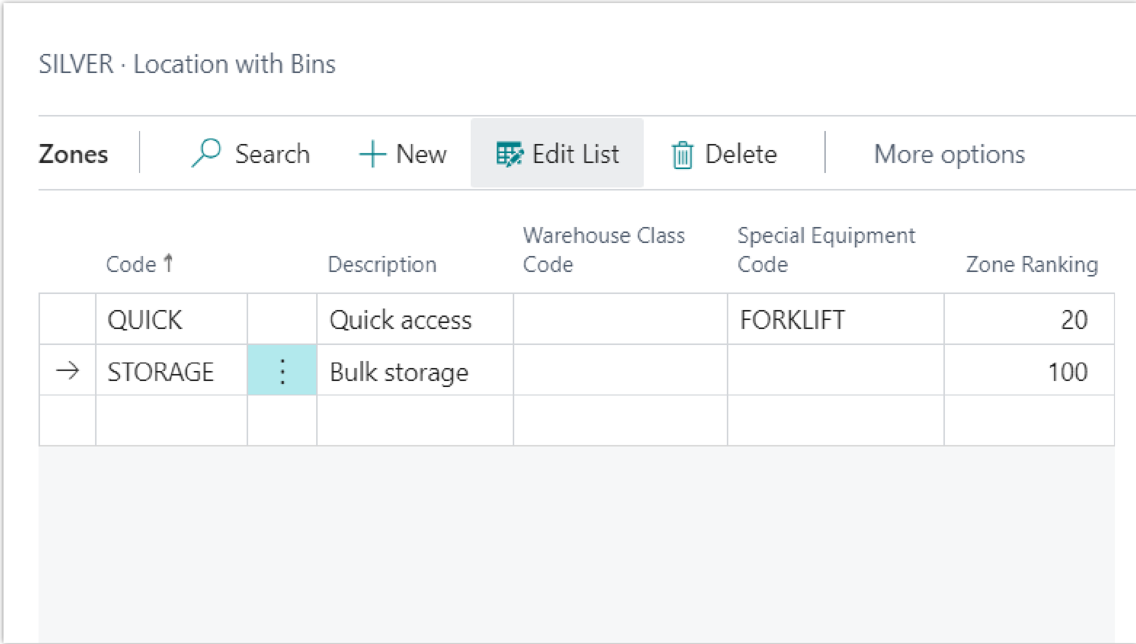
While the complete set of warehouse features has been available in the Essential license for a long time, to use it you needed to enable directed put-away and pick for selected locations. Enabling directed put-away and picks makes advanced warehouse processes available, which might add more complexity than the business needed. In this release, we're making various features available:

- Zones
- Movement worksheet

- Calculate Bin Replenishment task
- Bin Capacity Policy
- Warehouse class check
- Special equipment in warehouse documents

Zones

In warehousing, bins can be grouped in zones. Each zone can consist of one or more bins. Most properties assigned to a zone will be assigned by default to bins that are created for the zone.

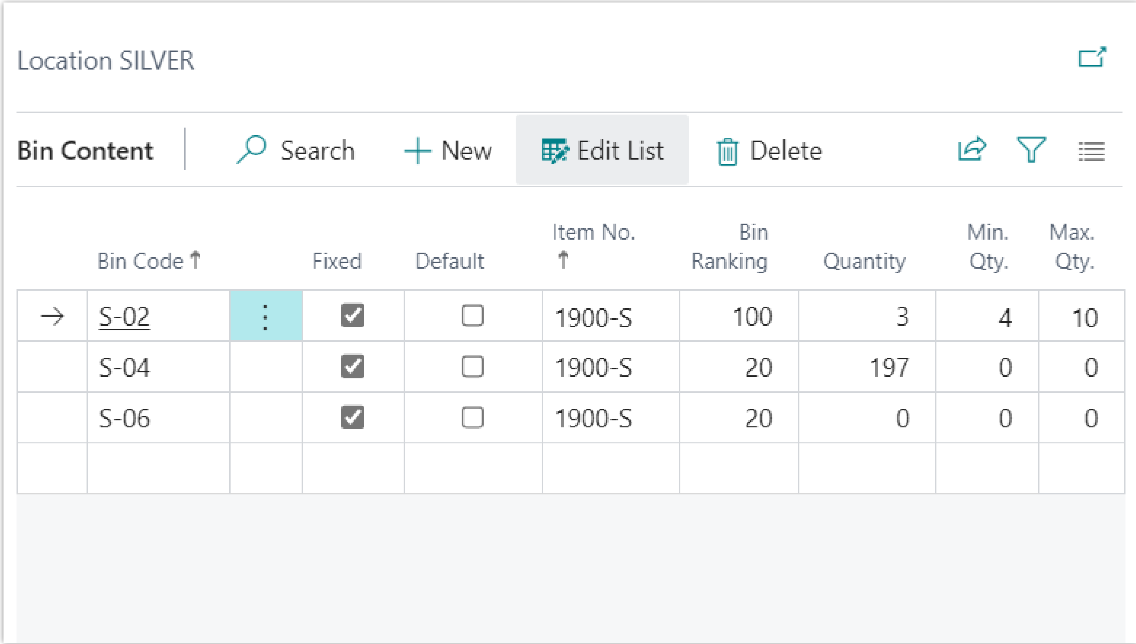


Screenshot of a zone

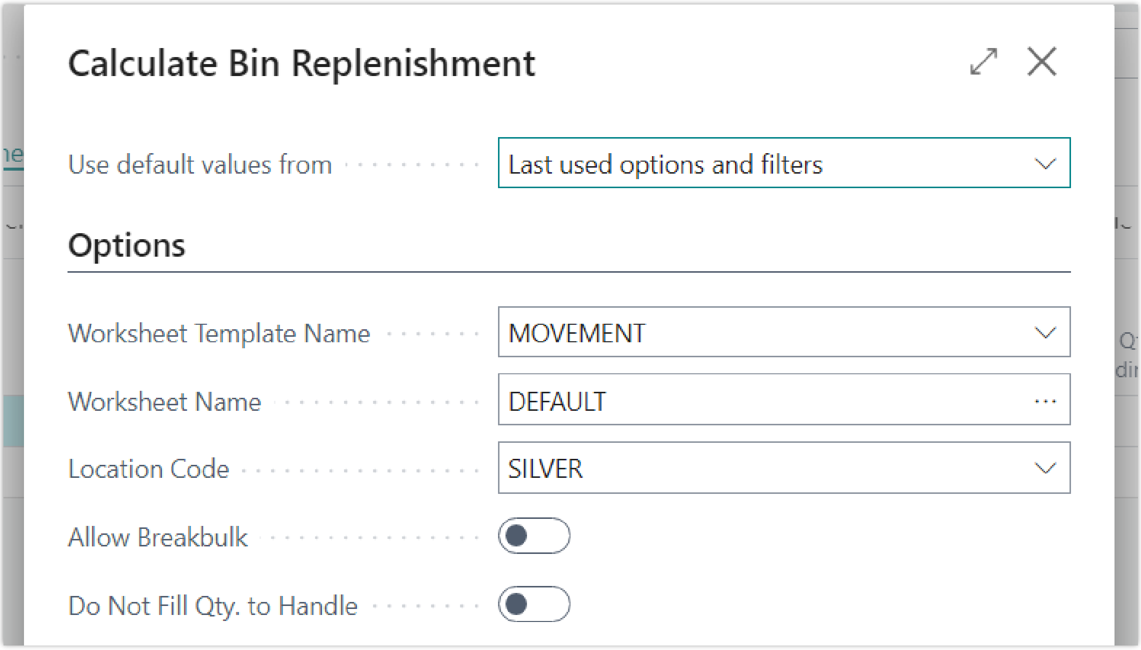
Movement worksheet

Use movement worksheets to plan movements of inventory in your warehouse.

Routine movements are the movements you plan to replenish the bins with the fastest moving inventory. When you calculate bin replenishment, Business Central finds bins with a higher bin ranking that must be replenished from lower ranking bins and creates lines for the movements. You can decide to create movement instructions for all suggested replenishments, or you can delete some of the lines before you create instructions. You might do this if you know that your employees only have time to perform a limited number of movements before the warehouse closes for the day.



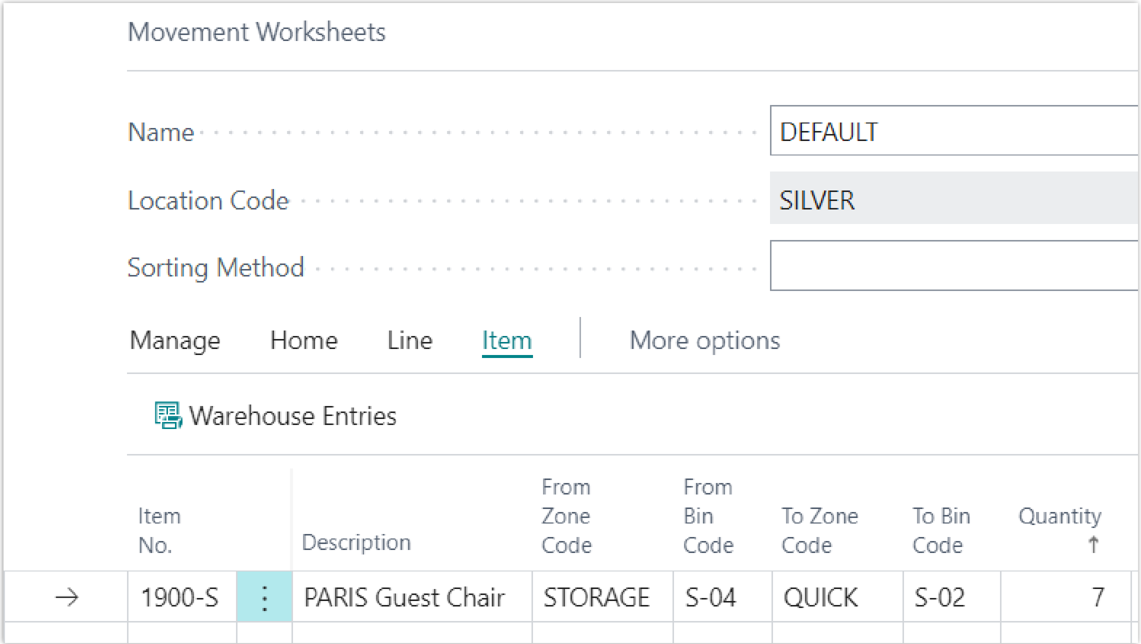
Screenshot of Bin Content



Screenshot of Calculate Bin Replenishment

Plan movements that wouldn't usually be suggested. For example, if you want to sample random items from several bins for a quality check or move items to the **Open Shop Floor Bin**.

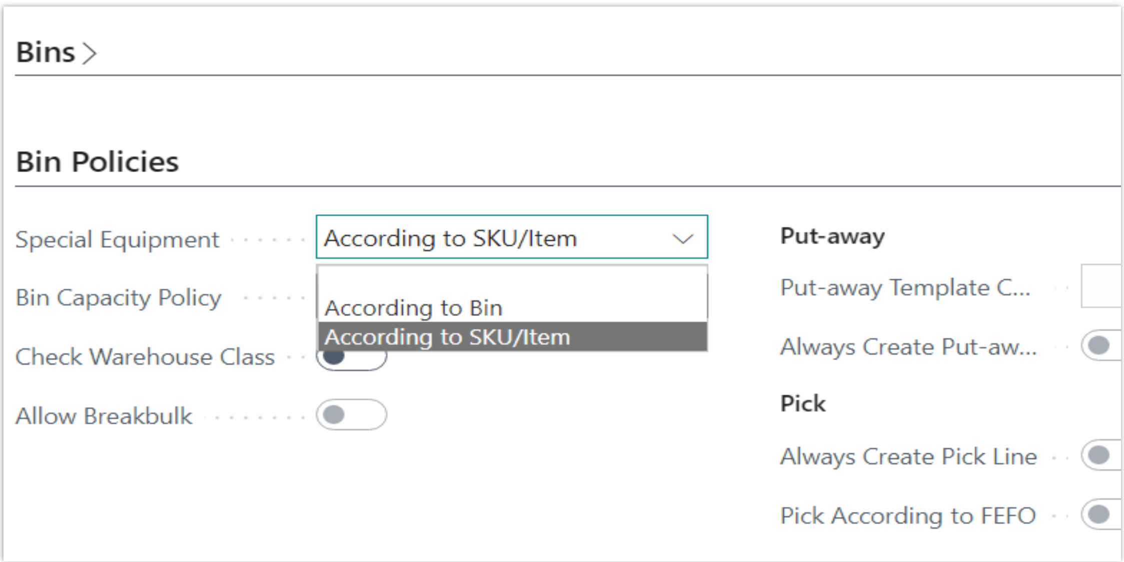
After you plan an inventory movement, or edit the suggested replenishments, you can create a movement to send the lines to a warehouse employee so they can take action. For directed put-away and pick locations, Business Central creates a **Warehouse Movement** document. For others, Business Central creates **Inventory Movement** documents (which is new).



Screenshot of Movement Worksheet

Special equipment

For locations with bins, you can specify the equipment that you want employees to use when they work with a particular zone, bin, item, or SKU. In the **Special Equipment** field on the **Location Card**, choose where Business Central should look for special equipment to be used in warehouse activities such as warehouse put-aways, picks, or movements.

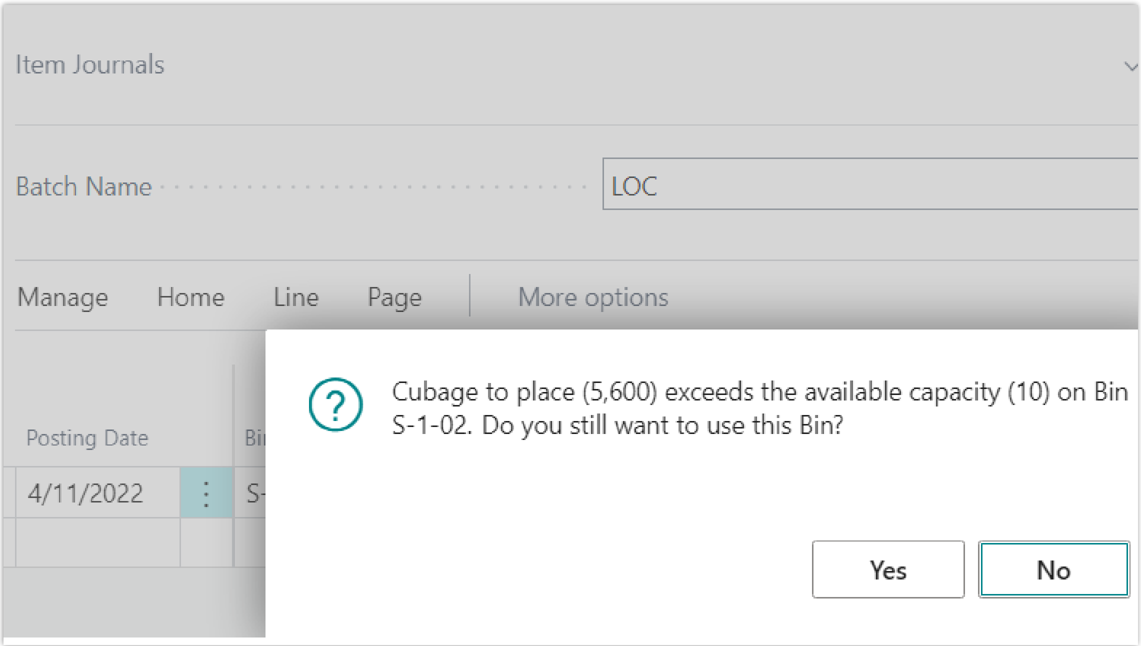


Screenshot of Special Equipment

Bin capacity policy

Bin capacity policies define how Business Central handles bin capacity in cubage and weight. You can define the **Max Cubage** and **Max weight** on the bin. For item units of measure, Business Central calculates cubage based on the **Length**, **Width**, and **Height** fields, and the weight based on value in the **Net Weight** and **Qty. per Unit of Measure** fields on the **Item Card** page.

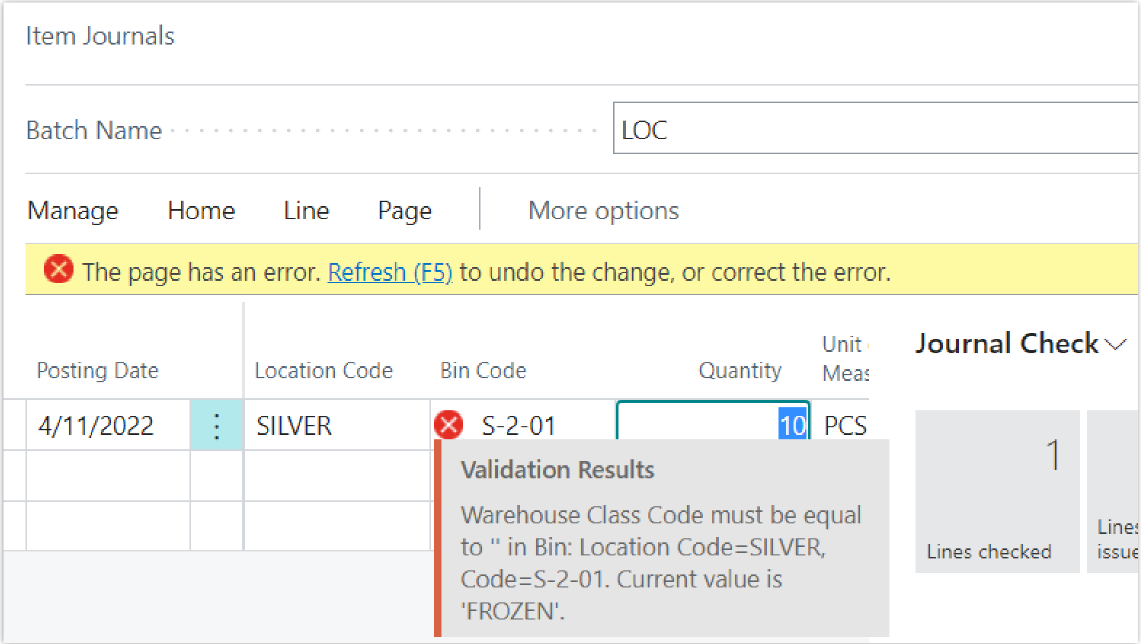
Option	Description
Never Check Capacity	This is the default value for locations with bins where **Directed Put-away and Pick** isn't enabled. This option is similar to the original behavior, where Business Central doesn't check capacity.
Prohibit More Than Max. Cap.	If you select this option, a positive item journal, warehouse receipt, put-away, or incoming movement can't be processed if the quantity exceeds the maximum capacity of the assigned bin.
Allow More Than Max. Capacity	Business Central shows warning but allows you to register the increase.



Screenshot of Cubage exceeds capacity message

Warehouse class

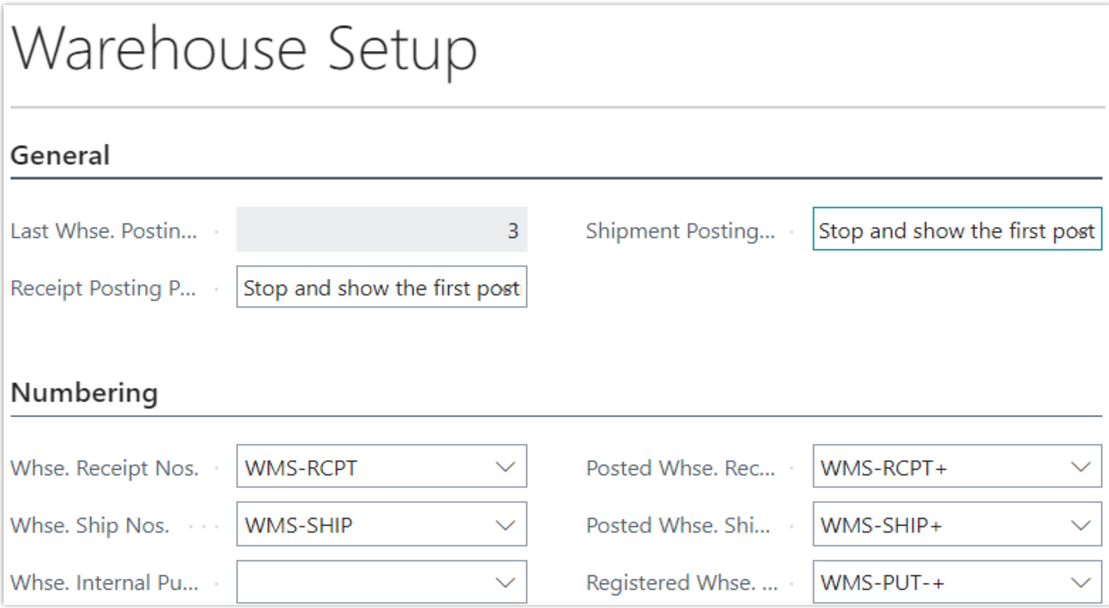
You can assign a warehouse class code to a zone, bin, or item. You can turn on the **Check Warehouse Classes** toggle on the **Location Card** page for any location that uses bins. Business Central ensures that each item is stored only in bins that have the same warehouse class.



Screenshot of Warehouse class validation

Warehouse setup

We gave the **Warehouse Setup** page a hidden improvement. The **Require Shipment**, **Require Receipt**, **Require Pick**, **Require Put-away** toggles are removed from the page, making sure the user focuses on the important fields. The fields allow warehouse handling with a blank location, which provides fewer capabilities and less flexibility compared to a normal location. They can also become a blocker if a company decides to use multiple locations. Our recommendation is to always use a location code.



Screenshot of Warehouse Setup

The logic behind the fields is still in the product, so you can turn it back on. However, the fields will be removed in a future release.

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.

Use statistical accounts to collect data for financial reports

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

Businesses can significantly improve their analyses on G/L data by using additional statistical metrics. You can define statistical values and register them in a separate ledger so that you can analyze the data.

Feature details

When posting G/L transactions, the Quantity field alone doesn't provide much data for statistics and data analysis for the transactions. More data is often needed to increase the relevance of reports.

Statistical accounts improve analyses and progress tracking by letting you add a number-based statistical value to a separate ledger. For example, you might want to add the following information to clarify values on reports:

- Square meters in your building for tracking rental expenses.
- Number of full-time employees.
- Customers served for a given marketing spend.

You register the values for the statistical account in **Statistical Accounts Journals**, and then find the values in the statistical accounts ledger entries page or by going to the ledger entries for an account from the Statistical Accounts 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.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Synchronize returns, refunds from Shopify

Enabled for	Public preview	General availability
Users, automatically	-	May 2023

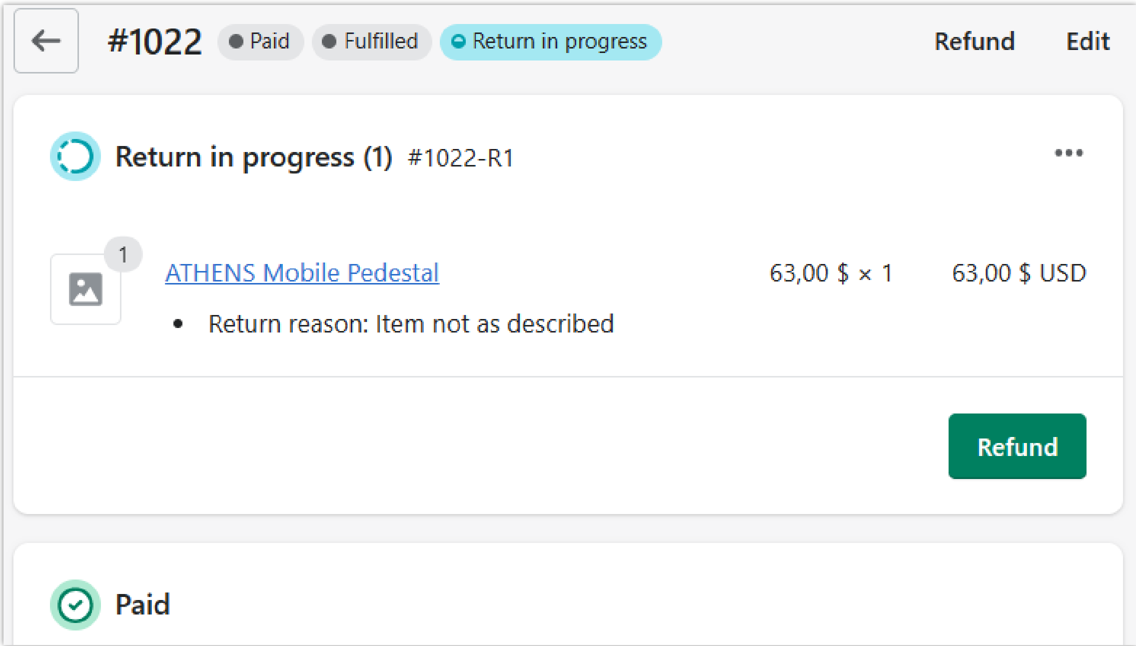
Business value

In an integration between Shopify and Business Central, it's important to be able to synchronize as much business data as possible. That makes it easier to keep your financials and inventory levels up to date in Business Central. We've expanded the data you can synchronize to include returns and refunds that were recorded in Shopify Admin or Shopify POS.

Feature details

The returns and refunds that you record in Shopify are imported to Business Central when you synchronize orders.

The details about the feature are not yet defined. You can add your comments to the product suggestion Shopify Refunds sync to Business Central.



Shopify return

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

Overview

Expansion to more countries and regions is achieved through partner-led localization. Our partners create relevant localization apps and publish them to AppSource. In combination with the built-in language offerings, Business Central is available to serve customers in more countries and regions worldwide.

More countries and regions are added to bring Business Central to more than 130 countries. Additionally, Microsoft provides all regulatory feature updates to countries where Microsoft is responsible for the localization.

Save time with automatic account codes

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	May 2023

Business value

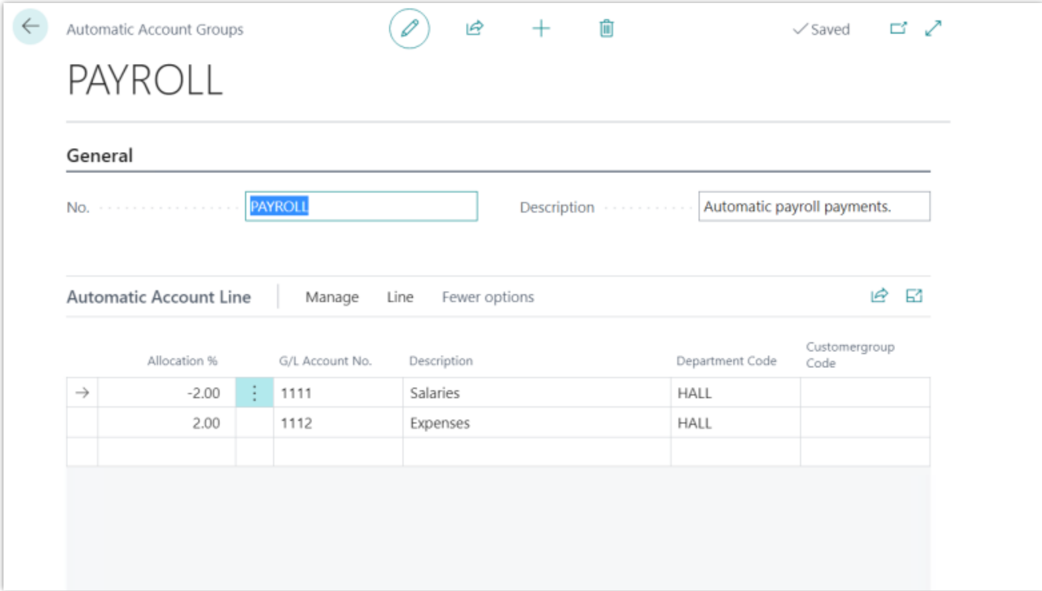
People who work with documents can save time by using automatic account codes to allocate recurring transactions in a faster way.

Feature details

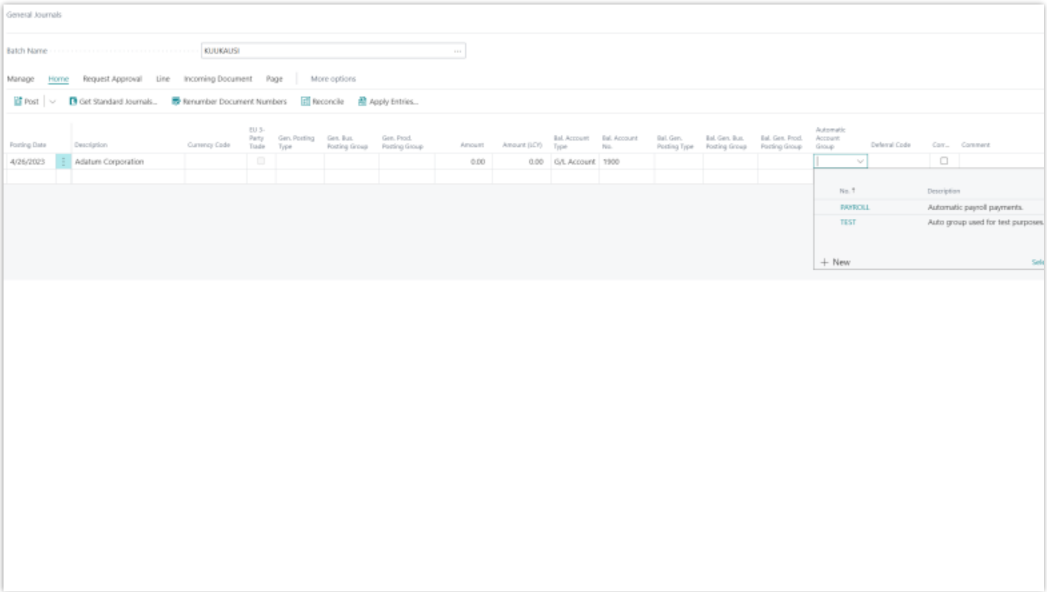
You can use customized posting groups to automate recurring transactions in journals, sales documents, or purchase documents. These posting groups can be used throughout Business Central to trigger automatic postings and allocations across different accounts or dimensions. The following are examples of where to use automatic account codes:

- Automate postings related to payroll overhead. When you post total salary expenses at the end of the month, you can use automatic account codes to assign a percentage of the total salary to automatically post as overhead expenses.
- Trigger cost or revenue allocations across different dimensions. For example, you can set up an automatic account group to split total expenses across three departments when you post an invoice.

The automatic account codes feature is available as local functionality only for **Sweden** and **Finland**. Previously it was part of BaseApp, but now it is delocalized and is available as an app.



Automatic account code setup



Use of automatic account codes in 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.

Swedish localization delivered as extension

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	May 2023

Business value

With 2023 release wave 1, Swedish localization will be delivered as an extension.

Feature details

Swedish localization will be delivered as an extension. The solution will offer a data upgrade from the old localization to the new one. This release is a step toward delocalization where ISVs will be able to release their apps for a broader market.

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/regional expansion - Andorra

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Andorra 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, Business Central is then available to serve customers in Andorra.

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/regional expansion - Armenia

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Armenia 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, Business Central is then available to serve customers in Armenia.

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/regional expansion - Azerbaijan

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Azerbaijan 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, Business Central is then available to serve customers in Azerbaijan.

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/regional expansion - Bahamas

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Bahamas 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, Business Central is then available to serve customers in Bahamas.

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/regional expansion - Bermuda

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Bermuda 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, Business Central is then available to serve customers in Bermuda.

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/regional expansion - Bolivia

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Bolivia 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, Business Central is then available to serve customers in Bolivia.

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/regional expansion - British Virgin Islands

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to British Virgin Islands 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, Business Central is then available to serve customers in British Virgin Islands.

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/regional expansion - Cambodia

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Cambodia 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, Business Central is then available to serve customers in Cambodia.

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/regional expansion - Cameroon

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Cameroon 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, Business Central is then available to serve customers in Cameroon.

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/regional expansion - Cayman Islands

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Cayman Islands 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, Business Central is then available to serve customers in Cayman Islands.

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/regional expansion - Ethiopia

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Ethiopia 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 Ethiopia.

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/regional expansion - Fiji

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Fiji 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, Business Central is then available to serve customers in Fiji.

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/regional expansion - Ghana

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Ghana 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, Business Central is then available to serve customers in Ghana.

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/regional expansion - Guernsey

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Guernsey 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, Business Central is then available to serve customers in Guernsey.

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/regional expansion - Isle of Man

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Isle of Man 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, Business Central is then available to serve customers in Isle of Man.

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/regional expansion - Jersey

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Jersey 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, Business Central is then available to serve customers in Jersey.

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/regional expansion - Kazakhstan

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Kazakhstan 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, Business Central is then available to serve customers in Kazakhstan.

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/regional expansion - Kosovo

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Kosovo 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, Business Central is then available to serve customers in Kosovo.

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/regional expansion - Liechtenstein

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Liechtenstein 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, Business Central is then available to serve customers in Liechtenstein.

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/regional expansion - Macau (SAR China)

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Macau (SAR China) 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, Business Central is then available to serve customers in Macau (SAR China).

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/regional expansion - Madagascar

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Madagascar 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, Business Central is then available to serve customers in Madagascar.

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/regional expansion - Malawi

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Malawi 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, Business Central is then available to serve customers in Malawi.

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/regional expansion - Mozambique

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Mozambique 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, Business Central is then available to serve customers in Mozambique.

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/regional expansion - Namibia

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Namibia 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, Business Central is then available to serve customers in Namibia.

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/regional expansion - Nepal

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Nepal 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, Business Central is then available to serve customers in Nepal.

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/regional expansion - San Marino

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to San Marino 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, Business Central is then available to serve customers in San Marino.

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/regional expansion - Sao Tome & Principe

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Sao Tome & Principe 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, Business Central is then available to serve customers in Sao Tome & Principe.

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/regional expansion - Senegal

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Senegal 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, Business Central is then available to serve customers in Senegal.

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/regional expansion - Tanzania

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Tanzania 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, Business Central is then available to serve customers in Tanzania.

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/regional expansion - Uganda

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Uganda 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, Business Central is then available to serve customers in Uganda.

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/regional expansion - Zambia

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

Expanding Business Central to new markets across the globe.

Feature details

Expanding Business Central to Zambia 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, Business Central is then available to serve customers in Zambia.

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.

Supporting more countries and regions

Enabled for	Public preview	General availability
Users, automatically	May 2023	Jun 2023

Business value

More countries and regions are added to bring Business Central to approximately 130 countries and regions.

Feature details

We're expanding to more countries/regions through partner-led localization. Our partners create the relevant localization apps and publish them to AppSource. In combination with the built-in language offerings, we are making Business Central online available to serve customers in 130-plus countries and regions worldwide. In this release, we are planning to expand Business Central to the following countries and regions:

- Andorra
- Armenia
- Azerbaijan
- Bahamas
- Bermuda

- Bolivia
- British Virgin Islands
- Cambodia
- Cameroon
- Cayman Islands
- Ethiopia
- Fiji
- Ghana
- Guernsey
- Isle of Man
- Jersey
- Kazakhstan
- Kosovo
- Liechtenstein
- Macau SAR
- Madagascar
- Malawi
- Mozambique
- Namibia
- Nepal
- San Marino
- Sao Tome & Principe
- Senegal
- Tanzania
- Uganda
- Zambia

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

Developers are in high demand, and we want to continue to attract and raise the productivity of Business Central AL developers. We continue to focus on developing features that enable developers to work more efficiently. We also empower consultants, citizen developers, and users to do more to offload developers, increase agility, and lower cost of changes.

In this release wave, we continue the investment in our Visual Studio Code experience by adding visual abstractions on top of AL code, empowering developers and consultants to easily get an overview of, and navigate across, all the AL objects in a workspace or project. This helps understand the application boundaries better and easily jump to source or run objects. Developers are getting better compiler resource management and code analyzer performance, and the ability to attach with the normal debugger to user sessions.

We also empower AppSource publishers to release preview apps for select customers, have better runtime package handling, and monetize their apps via AppSource Marketplace. Finally, customers get the ability to add existing table fields to existing pages as no-code personalization or customization.

AL Explorer and AL Home in Visual Studio Code AL extension

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Feb 1, 2023	Apr 2023

Business value

Over the last several releases we have made a remarkable transformation of our development tools, to align them with the expectations of the worldwide community of developers. Visual Studio Code, GitHub, and Application Insights are the tools used by millions of developers worldwide, and they can now join the Business Central developer community much easier, with less ramp-up time needed.

On the other hand, regardless of our efforts in scaling the developer community, the broader trend shows that we won't be able to keep up with the demand in that area, so we need to focus our efforts on increasing pro developer productivity as well as re-enabling consultants to do more on their own, like in the classic C/SIDE RAD experience, with little to no dependency on scarce pro developer resources or need to work directly in source code, and still abiding to proper quality and continuous integration and continuous delivery (CI/CD) processes.

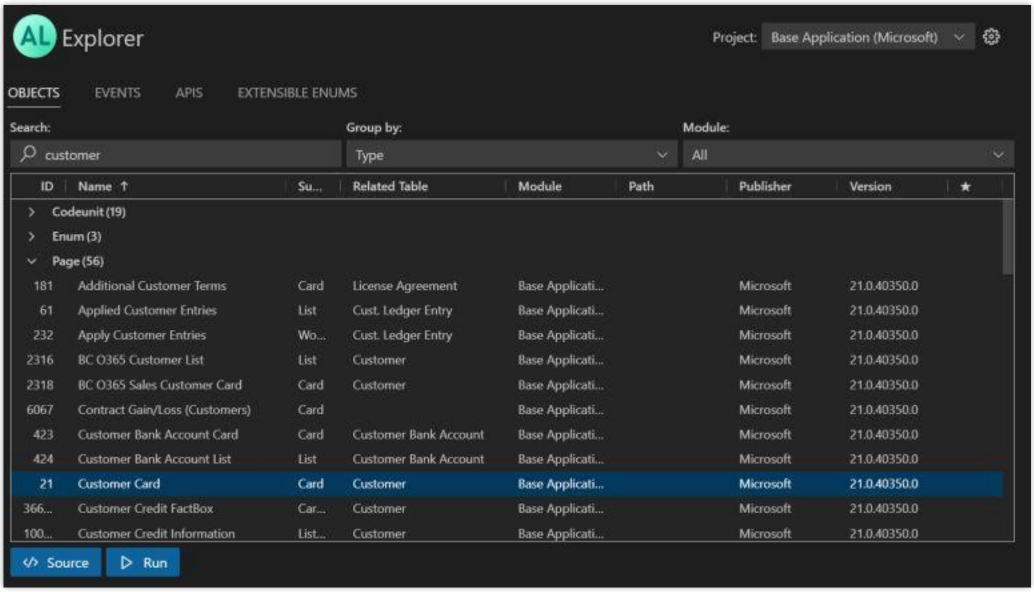
Feature details

With the introduction of the **AL Explorer**, we are bringing a powerful tool to the hands of pro developers and technical consultants, allowing both roles to explore, navigate, and better understand objects in extensions, including object details, dependencies, and extension points, without looking at the code. This increases daily productivity for developers and allows technical consultants to understand high-level structures of extensions in order to specify new features, or even do light troubleshooting.

It also introduces a foundation for future visual editors that can further improve productivity and lower ramp-up time for new developers. In addition, it empowers technical consultants to perform mock-ups and light modifications to Business Central without having to work directly in code, but still be part of integrated CI/CD processes including pro developer reviews, approvals, and automated test and deployment.

View, search, and filter objects

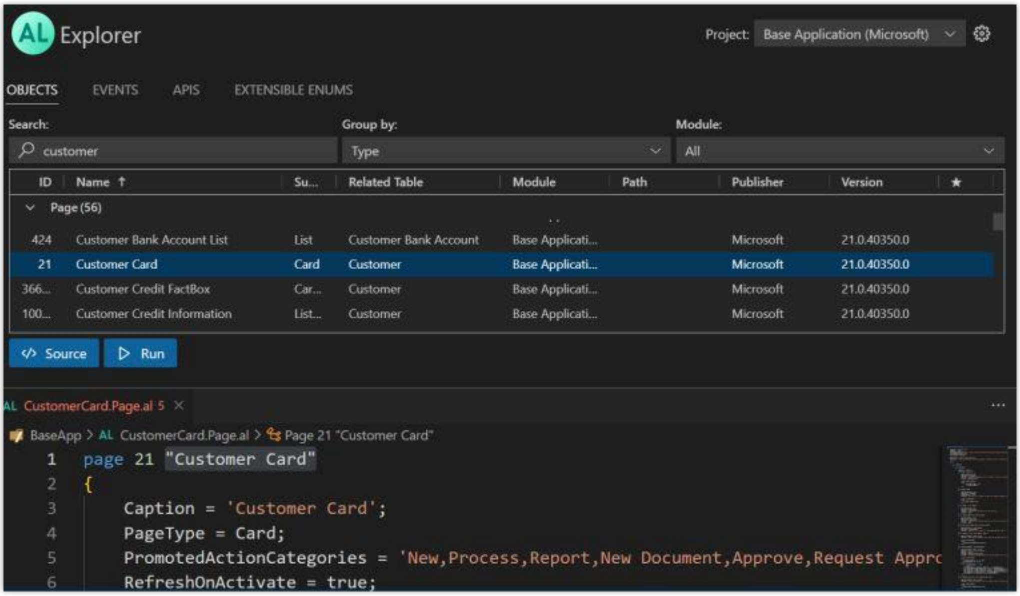
You can easily see an overview of all objects in a given app scope—for example, a whole workspace or selected project—and you can search in object names, and group objects by type.



View of all objects in selected app scope

Go to source code

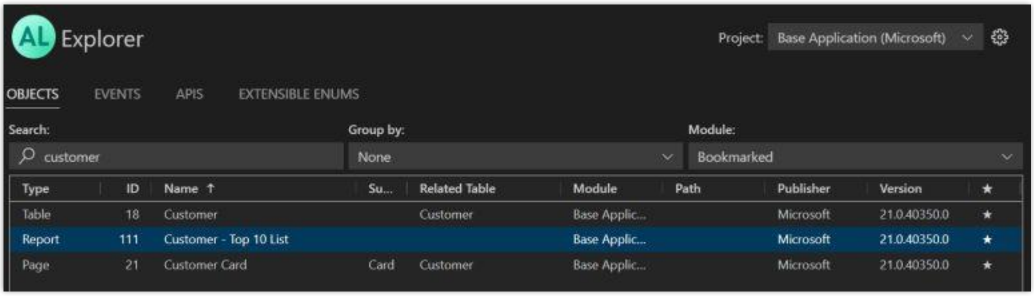
For a selected object, you can quickly jump to source code, whether it's to develop, read, and understand it, or whether it's to add breakpoints as part of troubleshooting.



Easily navigate to source for a given object in AL Explorer

Bookmark

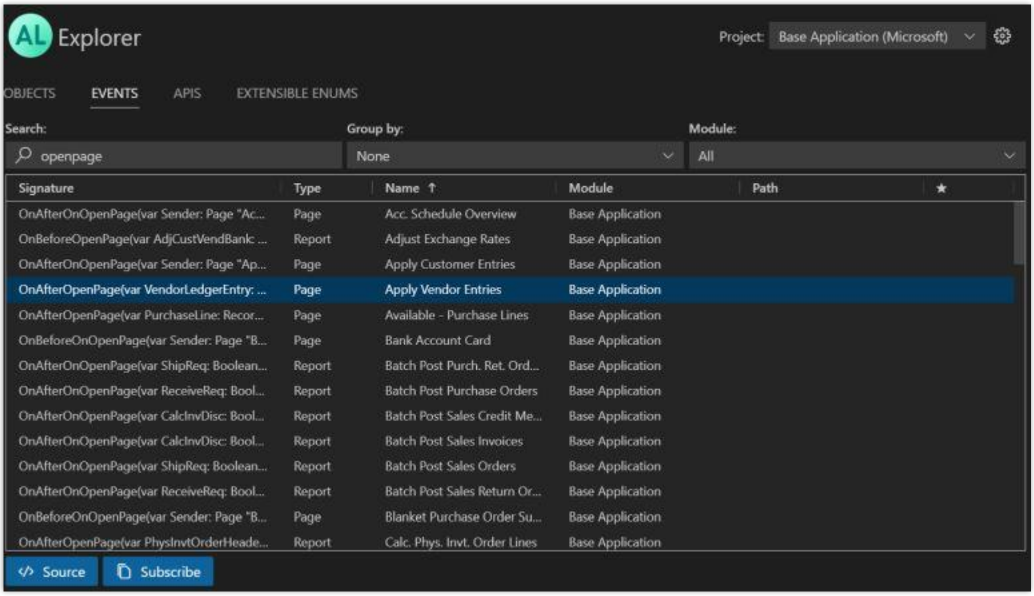
You can bookmark objects used frequently to easily filter a list of objects to only the bookmarked ones—for example, when navigating between those you currently work on.



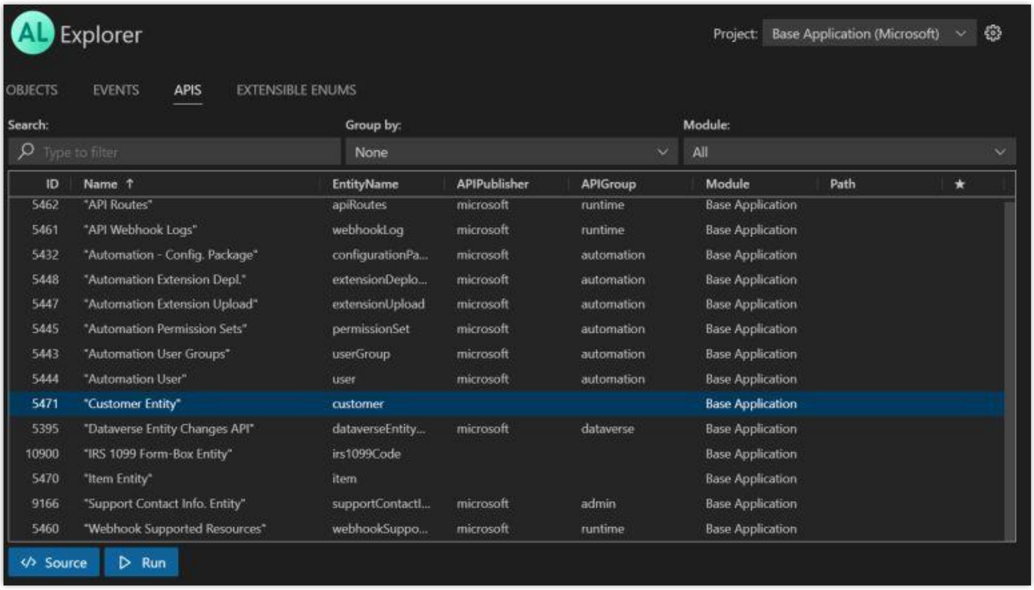
Bookmarked objects in selected app scope

View extension points - events, APIs, and enums

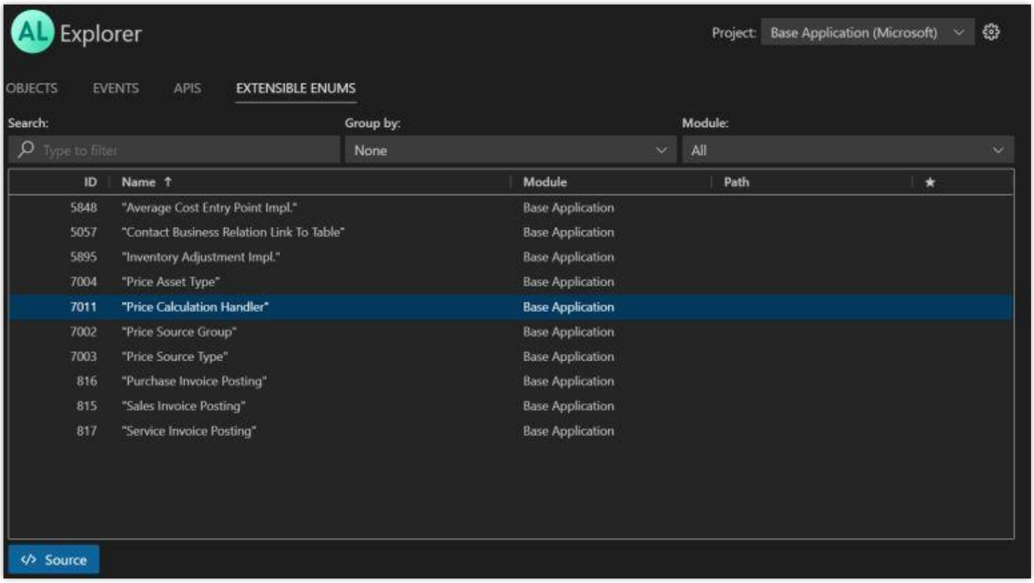
To ease creating extension points and to extend existing ones, AL Explorer also allows fast overview of all events and API pages as well as extensible enums that implement interfaces.



Overview of events in selected app scope



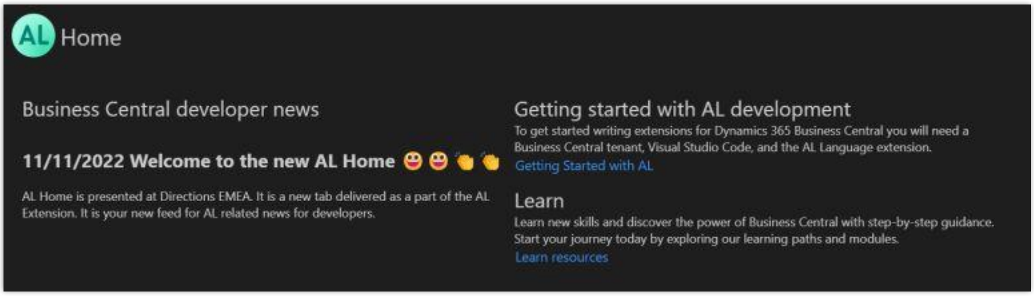
Overview of all API pages in selected app scope



Overview of all enums controlling interface implementations in the selected app scope

AL Home

Finally, the new **AL Home** startup page introduces a new communication channel, allowing Business Central R&D to efficiently share news, best practices, upcoming events, urgent information and status, learning content, and more to all users of the AL Visual Studio Code extension.



AL Home allows Business Central R&D to efficiently share news, best practices, events, and messages

Improved compiler resource handling and faster code analyzers

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2023	Apr 2023

Business value

Boost productivity of Business Central developers by improving performance of compilation, code analyzing, and individual code analyzer rules.

Feature details

Developers often experience reduced responsiveness and delayed results when using static code analysis tools (AL cops) to find diagnostic issues. This can be annoying and affect their productivity, as they cannot react faster on the issues detected in the code. With this release we're planning to improve the performance of the compiler and code analyzer framework, as well as optimize inefficient code analyzer rules—all to boost developer productivity.

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.

Provide Title and custom actions to Error dialogs

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

To help users get unblocked from issues when working with Business Central, we've introduced the capability to allow developers to unblock users when they encounter issues right away by choosing a corrective action. Making error messages more user-friendly helps build trust in Business Central while at the same time saving time in correcting common issues.

Feature details

Developers can now set the **Title** property on Error dialogs that are presented to the user to enrich issue description. On top of that, using the ErrorInfo object, developers can add up to three custom actions that will be displayed on the Error dialog to provide users with corrective actions. This can be achieved by calling the **AddAction** method on the ErrorInfo object, which can be passed to AL methods that support ErrorInfo such as Error, TestField, FieldError, and others.

The **AddAction** method accepts three parameters:

- **Caption**: The text string that appears as the caption of the action in the error UI.
- **CodeunitID**: The ID of the Codeunit to run when the action is initiated from the error UI. The codeunit should contain at least one global method to be called by the error action. The global method must have an ErrorInfo data type parameter for accepting the ErrorInfo object.
- **Method Name**: The name of the method in the Codeunit, which is specified by the CodeunitID parameter, that you want to run for the action.

Tell us what you think

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Control database locking behavior

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	Apr 2023

Business value

Database locking is one of the main root causes for performance issues. When AL code takes fewer locks, it increases the performance of the system for users.

Feature details

By default, the runtime of Business Central automatically determines the isolation levels used when querying the database. AL developers can now explicitly control the database isolation level on individual reads on a record instance.

A new **ReadIsolation** method has been introduced on the record data type. The method has the following syntax:

al

```
rec.ReadIsolation := IsolationLevel::<enum value>
```

The method can also be invoked using property access syntax.

The following table describes the possible IsolationLevel values:

Value	Description
Default	Follows the table's isolation level for reads; same behavior as not setting an IsolationLevel.
ReadCommitted	Allows reads on committed data only; not data that's been modified by other transactions but not yet committed.
ReadUncommitted	Allows the record to read data that has been modified by other transactions but not yet committed (also called dirty reads). A ReadUncommitted transaction takes no locks and ignores locks from other transactions.
RepeatableRead	Ensures that reads stay stable for the life of the current transaction. Until the current transaction completes, the record can't read data that has been modified but not yet committed by other transactions and other transactions can't modify data that has been read by the current transaction.
UpdLock	Ensures that reads stay consistent for the life of the current transaction. Until the current transaction completes, the record can't read data that has been modified but not yet committed by other transactions and other transactions with the same isolation level can't read data that was read by the record.

Define regional settings per report using a region property

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	Apr 2023

Business value

Until this release, report formats for date and numerical types depended on client settings for region and couldn't be configured on the report level. This was confusing because sometimes dates and numbers were formatted incorrectly.

Therefore, we added the ability for the tenant admin to set formatting of date and numerical types of a report object on the tenant, and also added the ability for users to override the setting when running a report.

Feature details

In this release, we've added the ability for developers and tenant administrators to set formats for dates and numerical types on report objects on the tenant. If needed, users can change the format when they run a report.

- We've added a new compiler property to give AL access to the property and set a metadata default value in the object. This allows the report developer to define region settings.
- We've added a new per-tenant configuration using a new region field on the **Report Settings** table. This can override the setting from AL report metadata.
- We've enhanced the **Advanced** FastTab on the report request page to allow end users to override region setting at report runtime.

AL-Go for GitHub - modern DevOps for partners

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2023	Apr 2023

Business value

With AL-Go for GitHub, DevOps becomes a tool instead of an investment area. The target for AL-Go for GitHub is to have 100 percent of the functionality needed by 90 percent of our partners. These partners should be able to use AL-Go for GitHub as their DevOps solution without the need to hire a DevOps engineer.

Feature details

AL-Go is a collection of GitHub templates and actions that turn professional DevOps processes for Business Central AL projects into a commodity for our partners. The initial release of AL-Go has been a success with the partner community, with over 500 repositories created over the first three months, offering an easy path to continuous integration and continuous delivery (CI/CD), quality assurance, change and performance tracking, code consistency, collaboration, managing updates, and more.

With this release we will extend AL-Go with further capabilities:

- Analyze code coverage when running automated tests.
- Verify compatibility with the upcoming releases of Business Central and third-party dependencies (AppSource apps).
- Support Azure-hosted Docker development environments (as an alternative to running Docker locally), to improve developer productivity, when working with the online sandbox environments is not an option. (Online sandboxes are a scarce resource and development tasks often require more powerful hardware.)
- Support for GitHub variables.
- Performance enhancements.
- Branching strategy enhancements.
- Pull request process enhancements.

- Enhanced support for multiple projects.

We are listening to partner feedback to reach our goal in supporting 100 percent of the functionality needed by 90 percent of our partners.

New functionality is released monthly, meaning that many of the things listed above will be available before April 1.

The full roadmap can be found on https://aka.ms/algoroadmap.

Extensions that fail pre-upgrade validation get more detailed error insights

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	Apr 2023

Business value

When Business Central prepares a tenant upgrade, all extension versions that will be installed as part of the upgrade go through a prevalidation. To ensure a better understanding of failures as part of the prevalidation process, errors messages will contain more information about incompatible extensions.

Feature details

Error messages from application validation ahead of upgrade will list all incompatible extension IDs, names, and publishers, which ensures a better understanding of any extensions that aren't compatible with the new version.

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.

Attach AL debugger to active session or next session

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2023	May 2023

Business value

The legacy C/AL debugger supported attaching to an existing session or to the next session for a specific user. While this has been possible with the AL snapshot debugger for some time, the standard, more powerful AL debugger in Visual Studio Code is still missing this capability, and it's been a partner ask to fill this gap for a while. With the introduction of service-to-service (S2S) authentication, this has become more important, since it's now much harder to debug important web service scenarios, which are only possible with snapshot debugger.

Feature details

Just as with the snapshot debugger, attach the standard AL debugger to either an existing running session or to the next session for the specific user. In both cases, this is set up by defining a session ID or user ID in the launch.json configuration file for publish and debug.

The following image shows a mock-up of how this might be supported similar to snapshots, by allowing you to specify a session ID to attach to an existing session, or a user ID to attach to the next session for that user.

launch.json > Launch Targets > {} Attach: Microsoft cloud sandbox

```
{
    "version": "0.2.0",
    "configurations": [
        {
            "name": "Attach: Microsoft cloud sandbox",
            "type": "al",
            "request": "attach",
            "environmentType": "Sandbox",
            "environmentName": "sandbox",
            "breakOnError": "All",
            "breakOnRecordWrite": "None",
            "enableSqlInformationDebugger": true,
            "enableLongRunningSqlStatements": true,
            "longRunningSqlStatementsThreshold": 500,
            "numberOfSqlStatements": 10,
            "breakOnNext": "WebServiceClient",
            "tenant": "default",
            "sessionId": 100,
            "userId": "johndoe"
        },
```

Use launch.json to attach to specific session ID or next session for specific user ID

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.

ISVs can organize a preview for their AppSource apps

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2023	Jul 2023

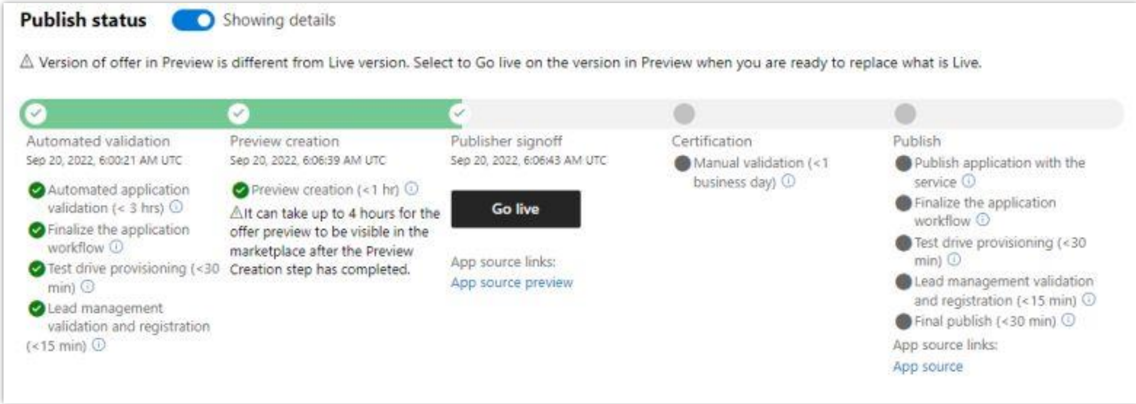
Business value

Allow AppSource ISV publishers to test and collect early feedback on the new version of their app by organizing a private preview with a select group of their customers.

Feature details

AppSource ISVs will be able to test and collect early feedback on the new versions of their apps by organizing a private preview with a select group of their customers.

When uploading an app to AppSource, publishers will be able to keep the app in preview mode. This will provide publishers with a link to the preview app that includes a custom "flightcode," which can be sent to selected customers. Customers who opt into the preview can then install and test that app in their environments and provide feedback to the ISV.



Use preview ability for your AppSource submission in Partner Center

As a publisher, you can choose the flightcode, or have one generated automatically.

You can specify a flight code manually in Partner Center

Governance and administration

Overview

We are supplying administrators of Business Central with the tools they need to manage their environment and apps. The goal is for administrators to be self-sufficient, able to solve their customer needs, and handle a wide variety of administrative scenarios.

In this release we add even more capabilities to drive self-service and automation. Administrators can transfer environments from one organization to another in a controlled way while preserving the data. We will be adding options to manage updates to ISV apps and will introduce the ability to manage per-tenant extensions in the admin center in addition to ISV apps. Idle sandbox environments will expire after 45 days of inactivity to free up capacity for creating new environments. Administrators can choose to opt out of the expiration period. We will enhance the tool that performs the migration of Business Central data from on-premises to the cloud. Administrators will gain additional capabilities to deal with customizations and the ability to include or exclude tables during the migration process.

Delegated admin's job queue entries are run by user

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2023	Apr 2023

Business value

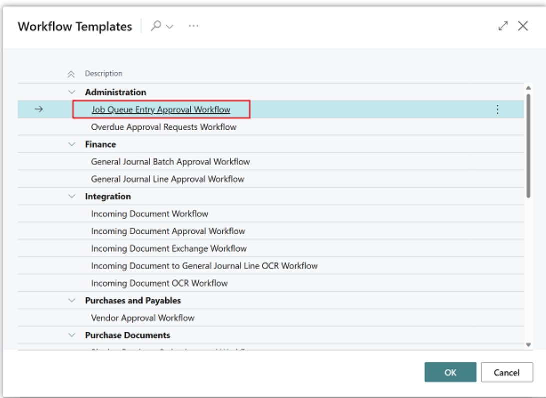
Microsoft partners use the delegated admin role to set up and manage certain aspects of Business Central on behalf of their customers. However, the role is restricted in some ways. In earlier release waves, one of these restrictions was the ability to create job queue entries and set them as ready to 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 to run them.

Feature details

For Business Central online, people who are not employed by the customer, typically Microsoft partners, can use the delegated admin role to set up and configure business processes for the customers. However, the delegated admin role is not 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.

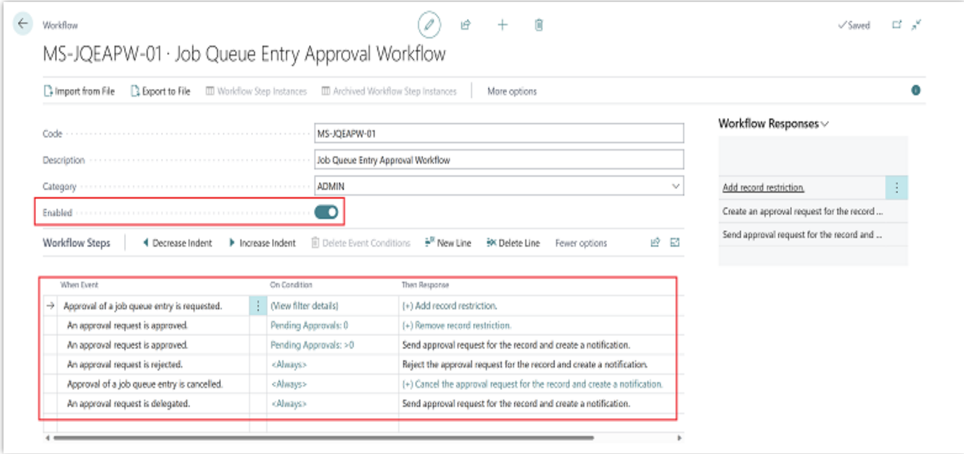
Job queue entries are a useful tool for running setup and configuration processes in Business Central, and delegated admins must be able to create and run them in their customer's tenant. This release wave adds support for the delegated admin to create job queue entries and set them as ready to run. Then, a licensed user from the customer can start the job queue entry to complete the process that the delegated admin created.

You can now use the **Job Queue Entry Approval Workflow** template to create a workflow that a delegated admin can use to ask for approval to run job queue entries through the credentials of a licensed user.



Shows new Job Queue Approval Workflow template in list of Workflow Templates

Choosing **Job Queue Entry Approval Workflow** on the **Workflow Templates** page creates a new workflow.



Shows Job Queue Approval Workflow created from Job Queue Approval Workflow Template.

After a workflow is enabled, and delegated admin is set on the **Approval User Setup** page, and the delegated admin can create a job queue entry. However, they can't start it until a licensed user has approved it. The job queue entry is in the **On Hold** state until a licensed user approves it. When that happens, the job queue entry runs using the licensed user's credentials.

Get an improved cloud migration status overview

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2023	Apr 2023

Business value

The cloud migration pages in the application will be improved to create a better overview of the status of the data migration. The improvements will make it easier to surface any failures or tables that were skipped during migration.

Feature details

The cloud migration status details in the application help you stay informed on the execution of your data migration. In this wave, we make errors more discoverable, warnings more helpful, and it's easier to get an overview of what data was moved, overwritten, or missed.

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.

Manage user permissions using security groups

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

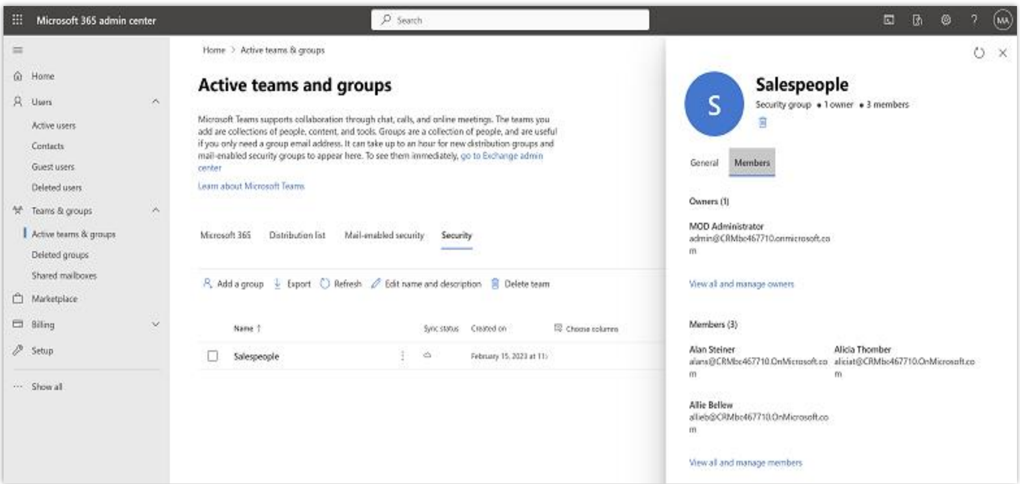
Business value

As businesses grow and change, managing permissions can become increasingly complex. Security groups can simplify the process by allowing administrators to group users by department, job function, or other criteria, and assign permissions to the group as a whole. Using security groups to manage permissions can save time and reduce the risk of human error. Security groups allow for easier management of access control, ensuring that users only have access to the resources they need. This can also streamline the process of onboarding new employees or contractors, as they can be quickly added to the appropriate security groups.

Feature details

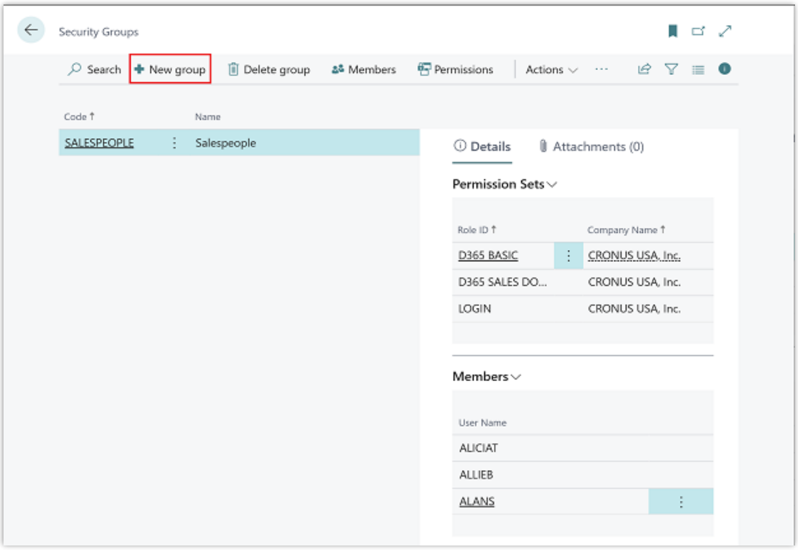
You can now use Azure Active Directory security groups to manage the permissions users have to access various parts of Business Central.

A prerequisite for using security groups in Business Central is that you must create Azure Active Directory security groups and add members to them either in the Microsoft 365 admin center or in the Azure Active Directory portal.



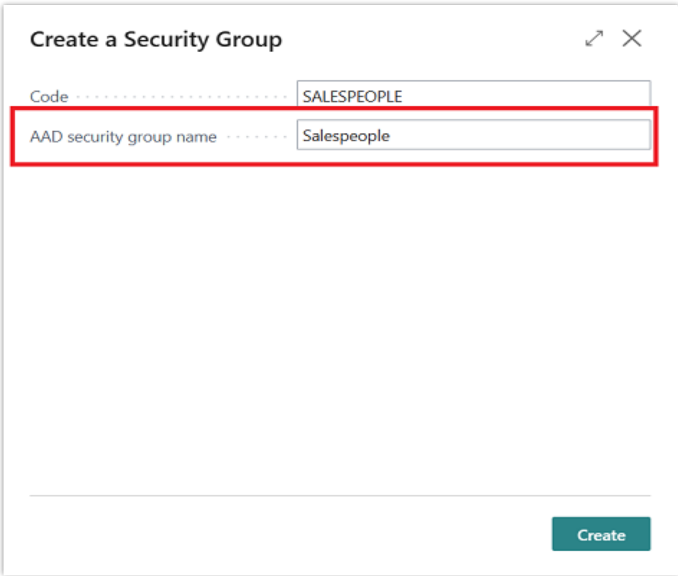
Shows security group creation pages in Microsoft 365 admin center

After you create Azure Active Directory security groups, you can link them to security groups in Business Central on the **Security Groups** page.



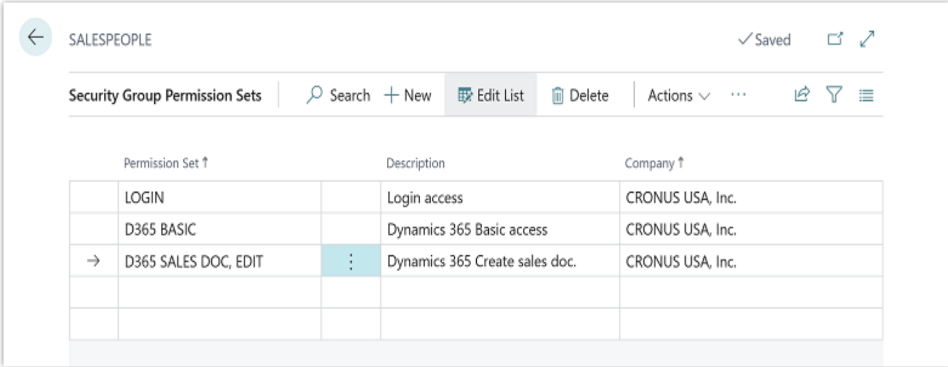
Shows new Security Groups list page.

Create the link by entering a **Code** and **Name** that match the Azure Active Directory security group. The **Members** FactBox shows the members of the Azure Active Directory security group.



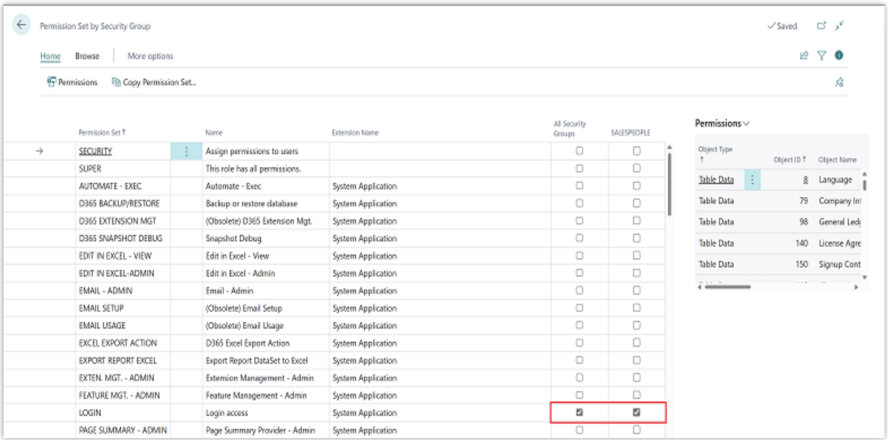
Shows new Create a Security Group page in Business Central

Assign permissions to security groups by choosing the **Permissions** action in **Security Groups** page.



Shows new Security Group Permission Set page

Manage permission sets for security groups by choosing **Related**, **Permissions Set by Security Group** on the **Security Groups** page.



Shows new Permission Set by Security Group page.

Copy security group permissions to a new security group by choosing the **Copy Security Group** action. Alternatively, you can share security group settings by choosing the **Export Security Groups** action to export them to an XML file, and then the **Import Security Groups** to import the XML file.

NOTE You must have the **Feature Update: Manage User Permissions using Security Groups** feature enabled in the Feature Management page to use this capability or click Try it out to try for your session only.

Tell us what you think

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Experience improved app management settings

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Jun 2023

Business value

With this release wave, it'll be easier to make sure that apps that are installed in an environment are always updated to the latest version.

Feature details

Already today, you can update individual apps that are installed in your environments from the **App Management** page in the Business Central admin center. With this release wave, we're adding new settings to manage apps from the admin center. For example, it'll be possible to specify when updates for apps can be installed automatically, or to update all apps that have available updates in one go.

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

Managing Apps (docs)

Include or exclude tables from cloud migration

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Jun 2023

Business value

Explicitly including or excluding certain tables from cloud migration runs will make it easier to specify what data you want to migrate to the cloud.

Feature details

Some customers have specific needs to explicitly include or exclude certain tables when migrating their data to the cloud. We now make it possible to specify whether any table—as long as it's accessible by AL code and not marked as internal or on-premises only—is included or excluded as part of the cloud migration.

Tell us what you think

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Thank you for your idea

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Transfer environments between Azure AD tenants

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Jun 2023

Business value

In some cases, administrators may want to transfer their Dynamics 365 Business Central environment to another Azure Active Directory (Azure AD) tenant—for example, to consolidate environments belonging to the same company in a single tenant when one company is acquired by another, or for partners to transfer a demo environment to their customer to test with. Until now, this scenario was supported through service requests that required paperwork to ensure consents from all involved parties were in place.

Feature details

In 2023 release wave 1, the process for transferring a Business Central environment to a different Azure AD tenant will be a self-service scenario. Internal administrators can request an environment transfer from the source tenant, then accept the transfer from the target tenant.

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.

Legislation

Overview

In 2023 release wave 1, we deliver legislation updates based on the most popular requests for improvement in this area. We're providing legislation automation and features that are compliant with the various regulations set by government agencies, so users can focus on their primary business. We plan to take a step toward standardizing functionality so that all these improvements are delivered as standard capabilities across all supported countries and regions where relevant.

The main focus of the legislative effort in this release wave is on non-deductible VAT in the base application. Both features are available in some localizations but are required in almost all regions. They will be standardized and made extendable so partners can easily extend them if necessary.

Audit file export eases SAF-T compliance

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	May 2023

Business value

Exporting general ledger or VAT data is a common requirement in many countries/regions. The required formats, however, can be different—for example, SIE or SAF-T. This app will cover multiple formats.

Feature details

Many countries/regions require reporting financial data and providing a set of SAF-T exports. The new **Audit file export** extension makes it easy to set up, generate, and export SAF-T in Business Central.

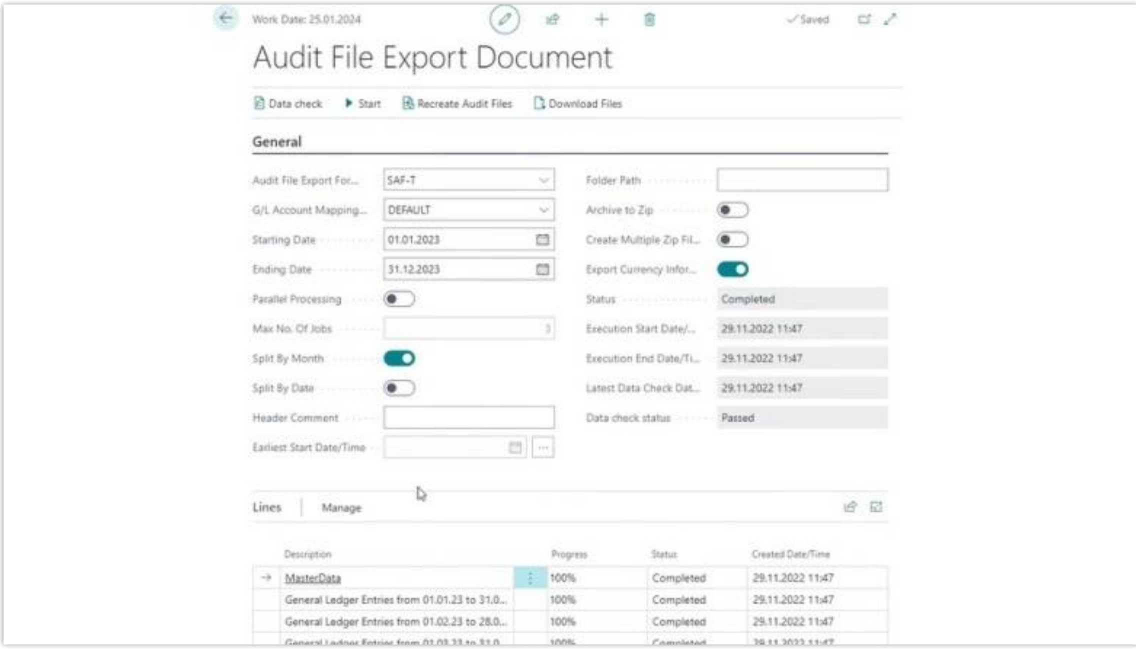
This extension enables future extension to additional audit files exports, so you can easily set up what you want to report to auditors. This version supports SIE and SAF-T formats.

- **SIE** (Standard Import and Export) is an open standard for transferring accounting data between different software produced by different software suppliers used in Sweden.
- **SAF-T** (Standard Audit File for Tax) is an international standard for the electronic exchange of accounting data from organizations to a national tax authority or external auditors. As such, it's required in many countries/regions worldwide as a standard feature.

The extension provides the following capabilities:

- Setup and mapping of the chart of accounts to SIE or SAF-T standard accounts.
- Mapping VAT setup to SIE or SAF-T VAT/Tax codes.

- Control to which extent dimensions are exported in SIE or SAF-T files.
- Export of SIE or SAF-T files, either directly or by using the Job Queue.
- Import SIE file format.



Audit file export

Tell us what you think

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Non-deductible, partly deductible VAT expands functionality

Enabled for	Public preview	General availability
Users, automatically	May 2023	May 2023

Business value

Users in all relevant regions have improved VAT functionality with non-deductible and partly deductible VAT enabled.

Feature details

Business Central lets businesses calculate deductible and non-deductible VAT amounts. You can configure VAT so that it isn't deducted for purchases under certain conditions:

- The type of goods or services purchased. VAT is fully or partially non-deductible by the provision of the law on goods.

- Partially deductible prorated VAT. VAT is prorated according to the ratio between sales operations for which VAT is owed and all operations performed. VAT exceeding this ratio can't be deducted.

Configure deductions in VAT (percentage and G/L account) on the **VAT Posting Setup** page. You can configure full or partial deductions for combinations of VAT posting groups.

Before you post a document, the details are available in statistics. When you post a purchase document, the results are available on the G/L entries and VAT entries. Non-deductible VAT also works with Reverse Charge VAT and Deferrals.

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.

Productive with Microsoft 365

Overview

People work smarter and teams perform better when business apps are combined with productivity apps. Business Central seamlessly integrates with best-in-class Microsoft 365 apps and services such as Outlook, Excel, Word, OneDrive, and Teams to bring data into the flow of work.

The current capabilities include:

- Respond to inquiries faster by attaching quotes and invoices from Outlook.
- Share, analyze, or bulk-edit records in Excel.
- Start a conversation about a record in Teams or rally the team around key datapoints.
- View, share, and co-author business documents using OneDrive for Business.
- Author beautiful reports and other templates in Word.

The 2023 release wave 1 builds upon our collaborative apps story in Microsoft Teams to drive broader product engagement and access to data across the organization.

This release will focus on:

- Enhanced adaptive cards in Teams with an optimized thumbnail view and better permission experience.
- New settings page for configuring security control for Teams Cards.

Experience enhanced adaptive cards in Teams

Enabled for	Public preview	General availability
Users, automatically	-	Apr 2023

Business value

Sharing Business Central records as cards in Microsoft Teams adds context to every conversation and helps people make data-driven decisions. Business Central offers multiple ways to share a record as a card, such as the Share to Teams feature in the web client, pasting a deep link to any page or record in Teams chat, or searching for business contacts directly from within Teams. Our research indicates that the multiple steps required to include a card in a chat message often slows down the pace with which people communicate in chat. This update includes multiple enhancements that make adding a card easier than ever.

Feature details

- When Business Central users share a message that includes a Business Central card, the card itself now doesn't require additional sign-in prompts and simply uses the current identity signed in to Teams to also sign in to Business Central.
- Access denied errors, such as missing permissions to a record or environment, are more seamlessly integrated into the Teams experience.
- Cards with a thumbnail image now consume less vertical space, allowing more surrounding content to show in the Teams chat or compose area. The card layout has been redesigned so that thumbnails are shown in a smaller size alongside fields.

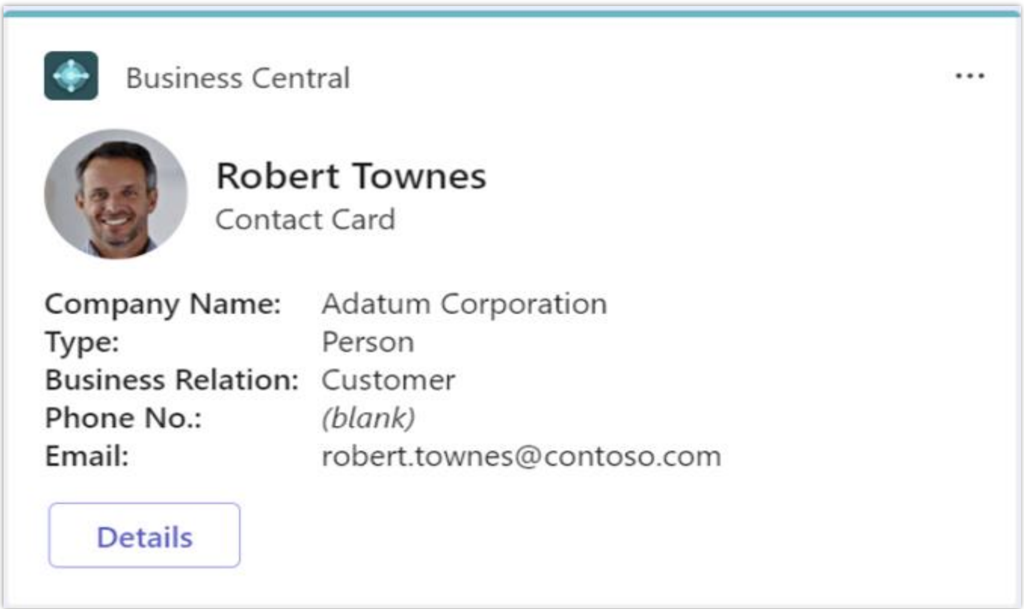


Illustration of an adaptive card with reduced height

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.

Configure security controls for Teams cards

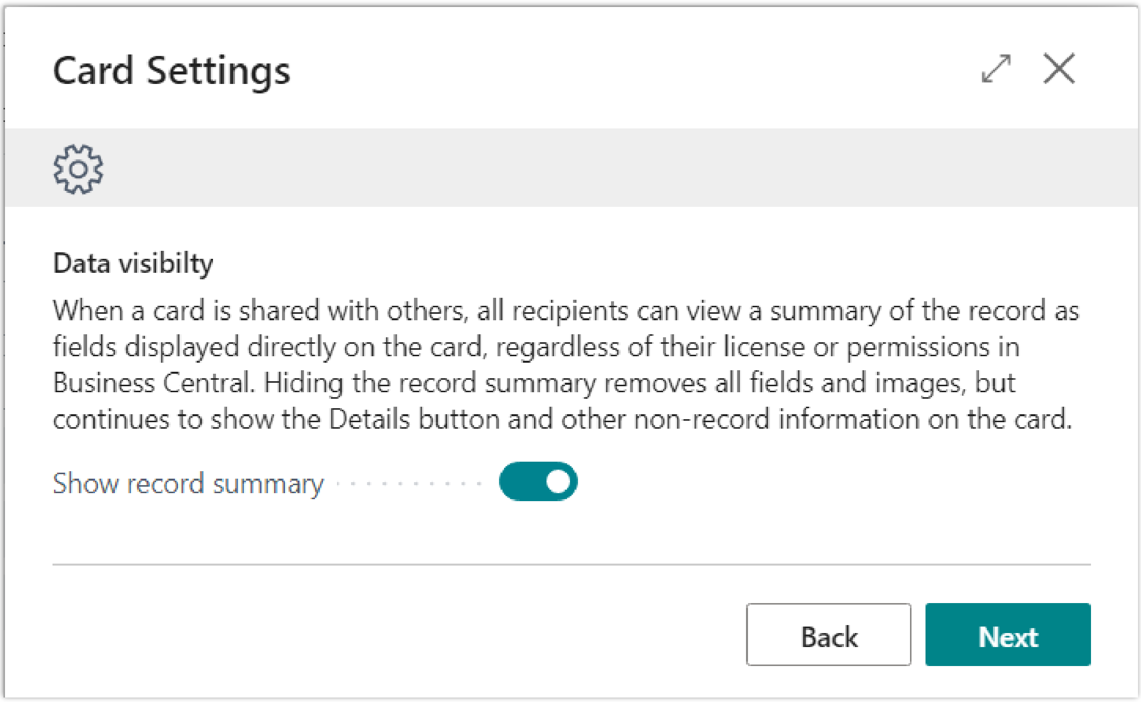
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2023

Business value

The Microsoft Cloud delivers uncompromising security and privacy controls for administrators to govern organizational data. When users collaborate on business data by sharing Business Central records as cards in Microsoft Teams, the record is summarized as a set of fields that others can read to quickly gain context. Administrators in organizations that need elevated security can now configure security for all cards originating from Business Central.

Feature details

The new card settings page allows administrators to configure cards per environment. From this page, administrators use a simple switch to hide the record summary shown on the card, effectively removing all fields including thumbnail images. Increasing card security affects newly shared cards from any user, but doesn't affect cards that were previously shared.



The adaptive card security wizard.

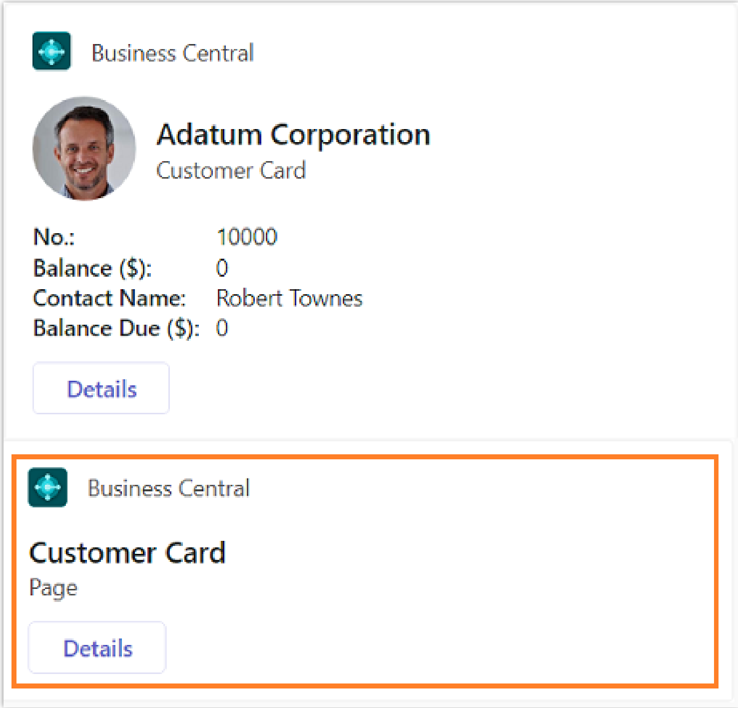


Illustration of a card before and after applying additional security.

Tell us what you think

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Easily set up access with Microsoft 365 licenses

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2023

Business value

At Microsoft, we're building the next generation of collaborative applications that help people work together to achieve their goals. Business Central leverages ContextIQ to bring data into the flow of work, helping our customers work smarter and increase team performance. However, the efficacy of collaboration within a team, across departments, or on large projects is often impaired by lack of group access to mission-critical data that drives decisions.

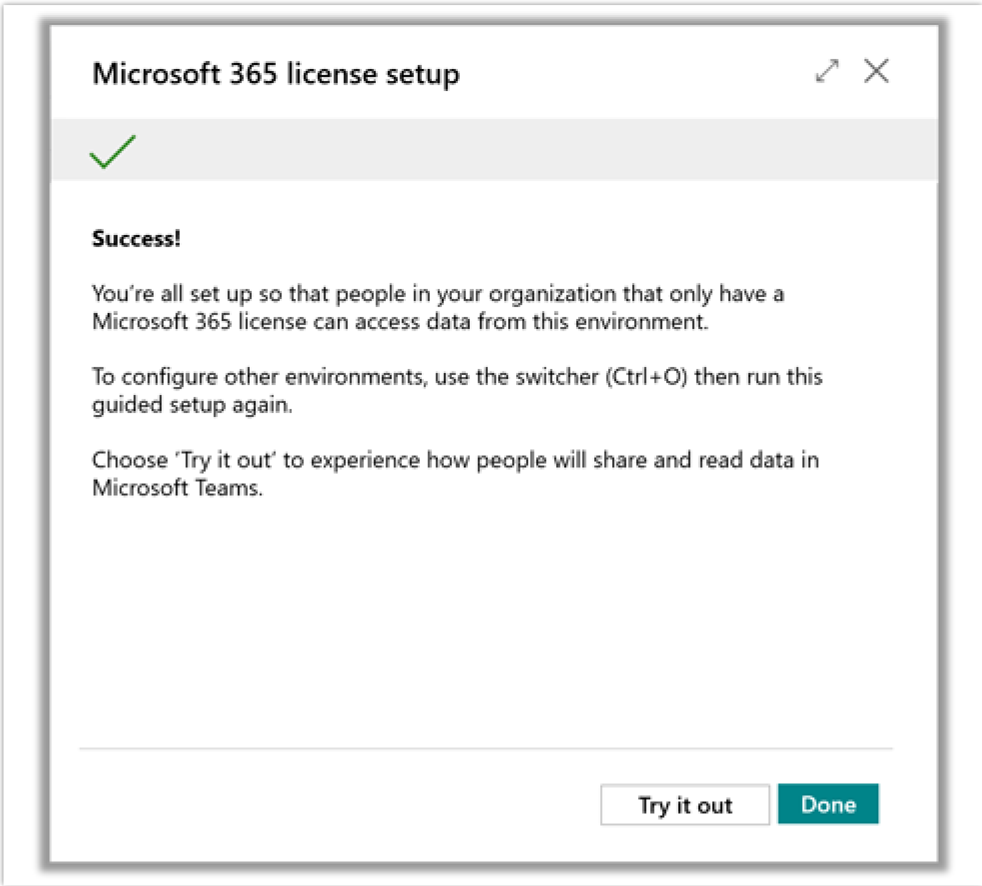
Building upon capabilities made generally available in November 2022, Business Central now makes it easier than ever for administrators to set up access with Microsoft 365 licenses, so that they can choose which employees can view specific business data shared with them in Microsoft Teams, without requiring a Business Central license.

Feature details

Business Central provides a guided experience for administrators to configure access with Microsoft 365 licenses.

New guided setup

- A step-by-step wizard explains and accelerates setting up Business Central, Microsoft Teams, and the Business Central admin center.
- Recommends security settings to improve data governance.
- Provides quick tips and assistance for admins to verify their setup immediately.
- The page is discoverable from within the Business Central web client, such as through **Tell Me** search and **Role Explorer**.



The wizard that assists administrators with configuring access with Microsoft 365 licenses.

Enhancements to License Configuration pages

Convenient actions on the **License Configuration** list and card pages to quickly navigate to related tasks in the Business Central admin center, Microsoft 365 admin center, and users 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.

Reporting and data analysis

Overview

Data first is the guiding principle for reporting in Business Central. In this wave we will release features and capabilities that will give users access to all their data in an easily consumable way. In a world of big data, predictive analytics reporting is no longer a set of predefined reports to cover a historical view of the business, but how you organize and use your data to react to key events, big and small, to optimize the business.

In this release we focus on:

Getting users started with Power BI for analytics.

For users wanting to get started with Power BI reporting, a set of sample Power BI Desktop files have been added to aka.ms/bctech. Users can access it directly in PowerBI.com with their Business Central, customize using data from the new API model or even enhance with other data, and then use it for reporting in PowerBI.com.

Analyze, group, and pivot data on list pages using multiple tabs

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	To be announced

Business value

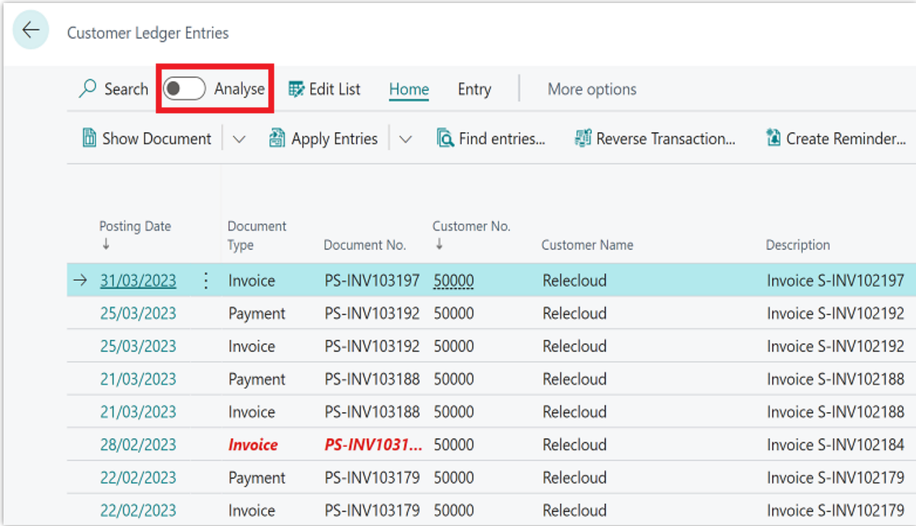
End users and data analysts can analyze data from list pages directly in the client without the need to open the page in Excel or run a report.

The ability to analyze data directly in list pages raises the bar for what you can do without having to switch applications, while still allowing customers and partners to do more in report objects, Excel, Power BI, or other data analysis applications.

Feature details

Analysis mode is a new way of interacting with data on list pages. Instead of running reports using different options and filters, you can simply add multiple tabs that represent different tasks or views on the data. Examples could be "My customers," "Follow-up items," "Recently added vendors," "Sales statistics," or any other view you want.

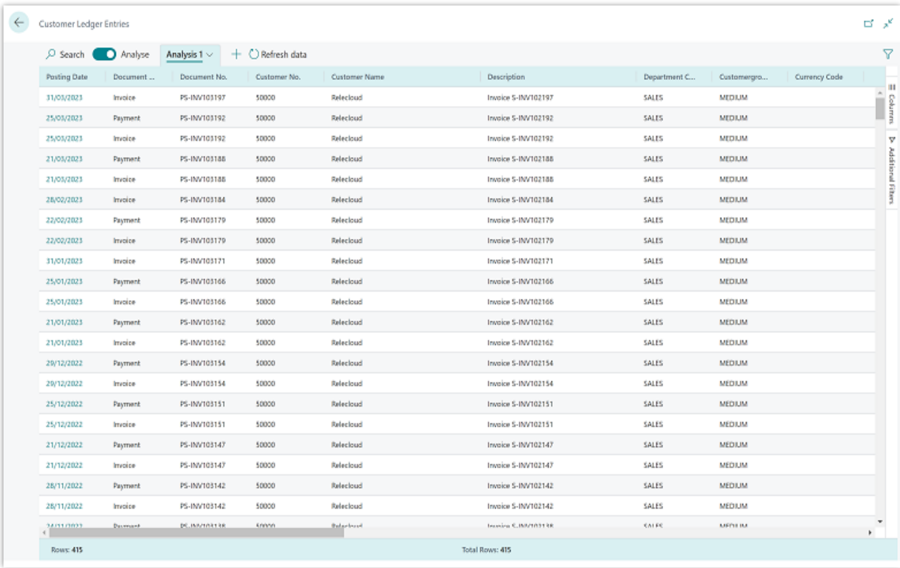
When you're ready to analyze data on a list page (where you might have filtered data using a view or filter pane), simply switch to analysis mode:



Shows how to enable analysis mode on list pages.

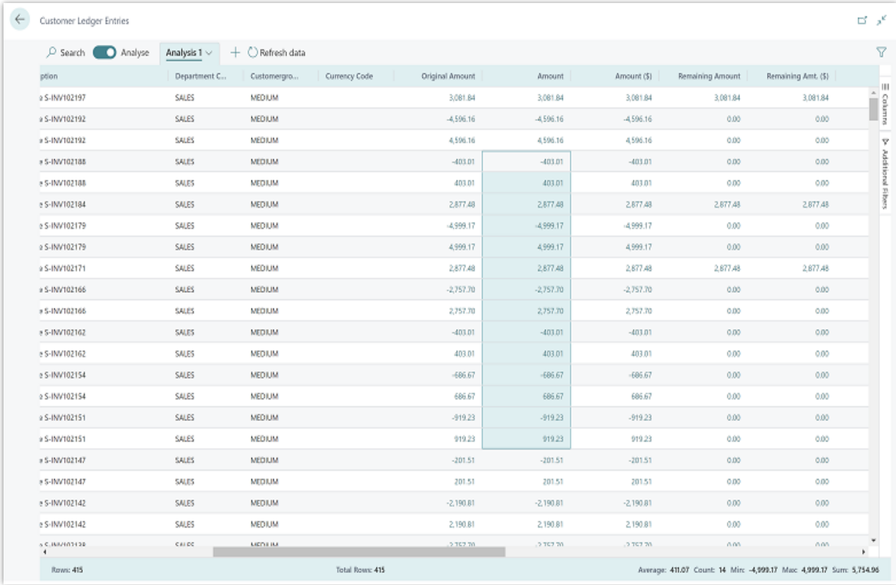
Analysis mode opens the data in a new experience that's optimized for data analysis. When a page is in analysis mode, it's split into two areas:

- The main *data area* (including a Tabs pane)
- The field modifier area



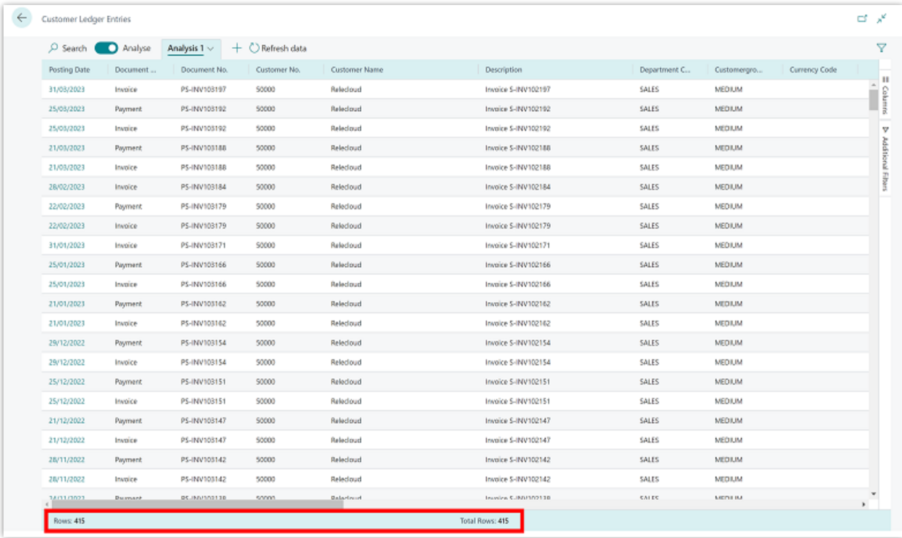
Explains the parts that are available in analysis mode.

Use the *data area* to interact with the data. For columns that are summable, you can easily get descriptive statistics on a set of fields by marking them.



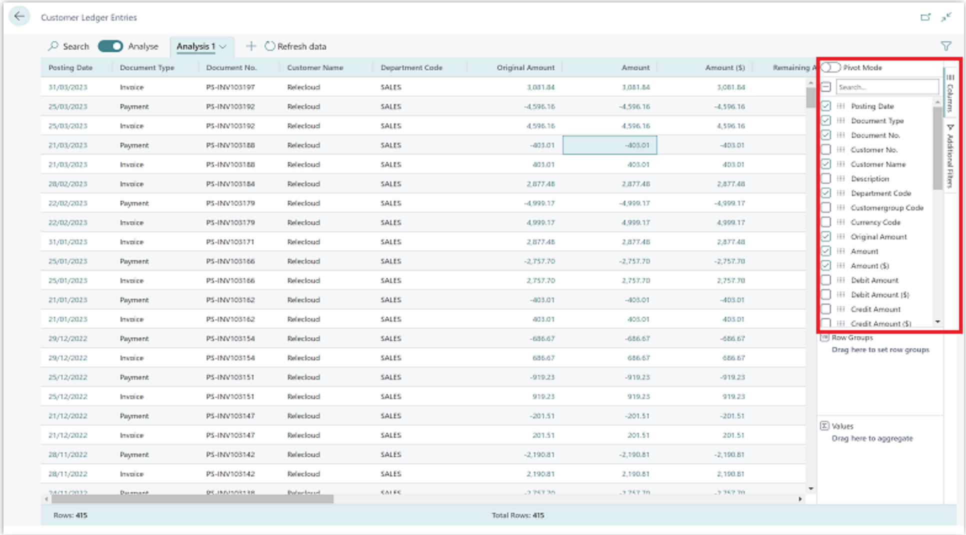
Shows the cell statistics.

The bottom of the data area shows the total row count on the column.



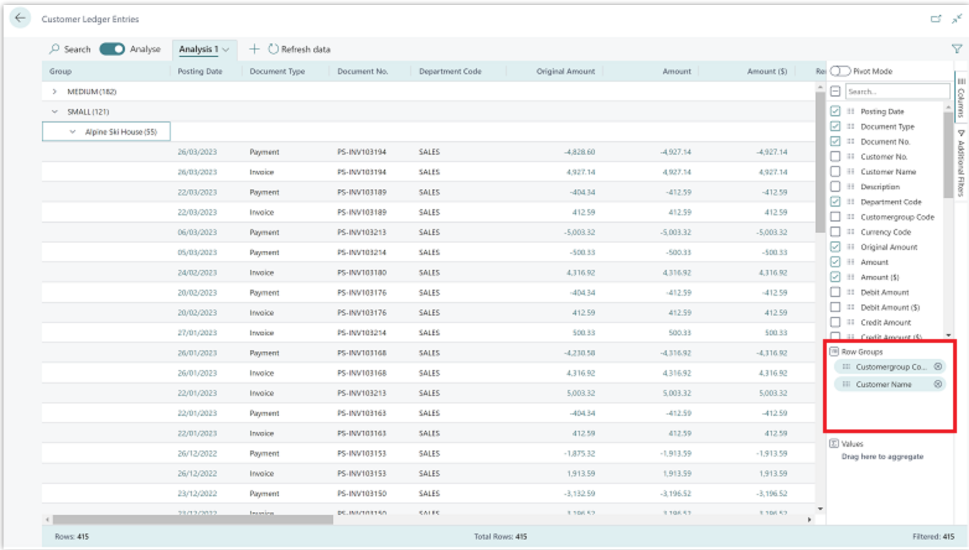
Shows the row count in analysis mode.

Use the *field modifier* area to control the data to show and its format. On the menu, you choose the fields to show or hide.



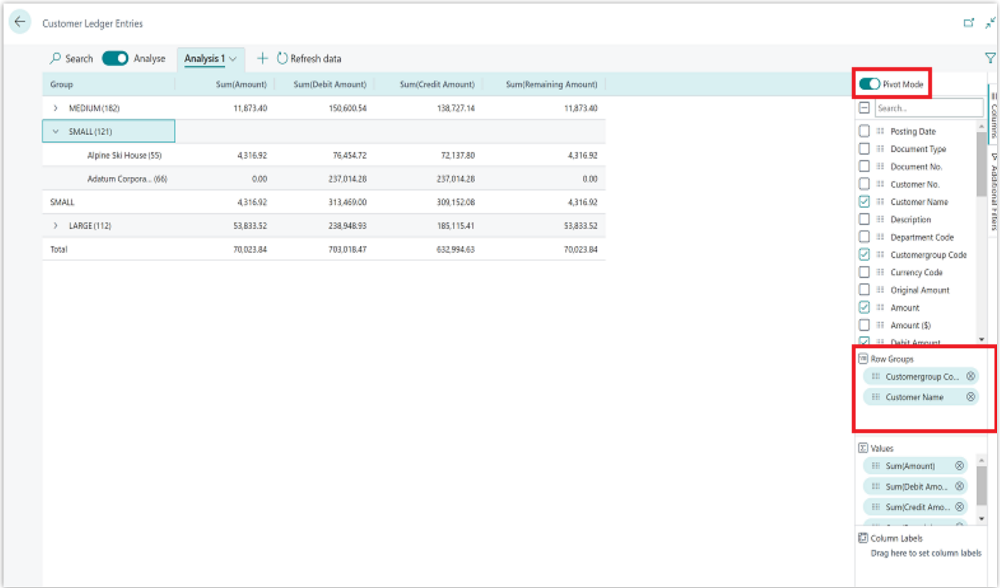
Shows the Field Modifier area in analysis mode.

You can group data by dragging fields to the **Grouping** part of the **Columns** menu. This lets you explore data grouped by one or more fields to the left of the data area.



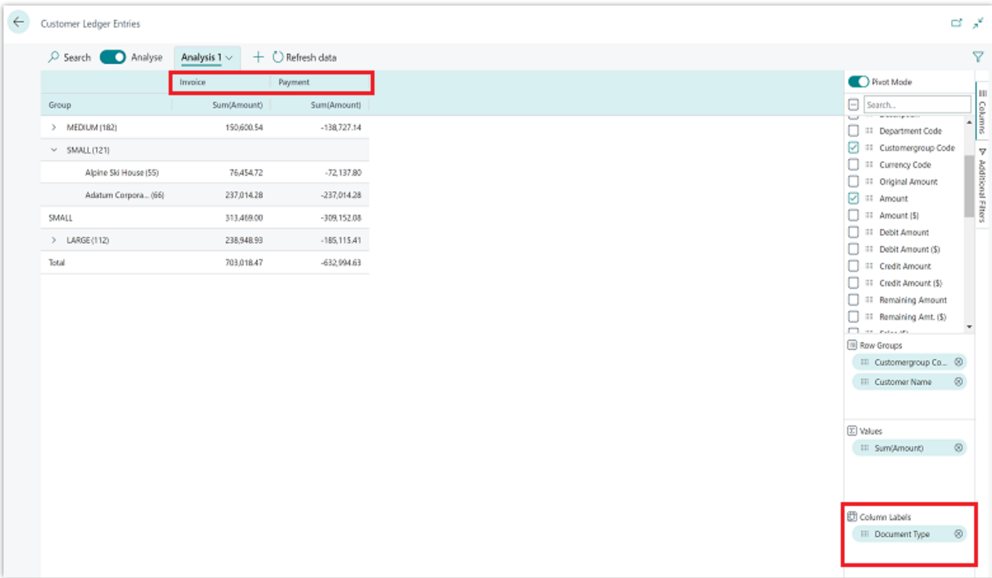
Shows row groups in the Field Modifier area in analysis mode.

Grouping works great in *pivot mode*. To enable pivot mode, turn on the **Pivot Mode** toggle switch and then drag fields that are to be summed to the **Values** part.



Shows pivot row groups in analysis mode.

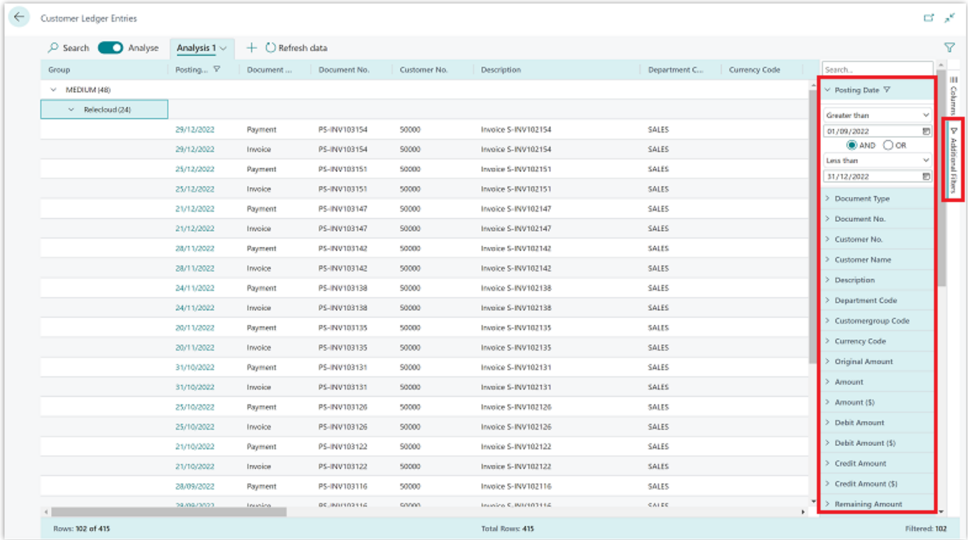
In pivot mode, you can define groups that show up in the column part of the data area. Do this by dragging fields to the **Column Labels** part of the **Columns** menu.



Shows pivot row and column groups in analysis mode.

Column grouping works best if the grouping field only contains a few values.

Use the **Additional Filters** menu of the field modifier area to apply more filters to the dataset. In this part of an analysis, you might want to focus on a specific customer or period of time.

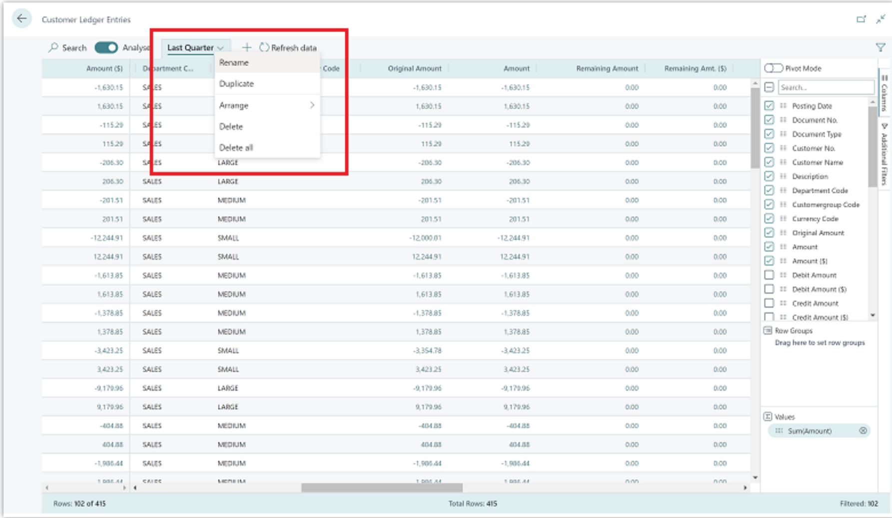


Shows additional filter options in analysis mode.

The data area gives you rich control of the layout of columns.

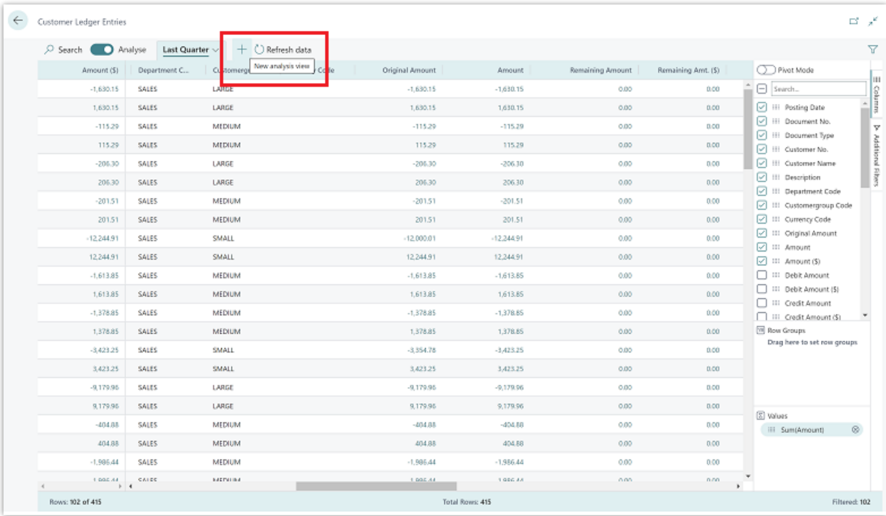
- Drag columns to where they make the most sense in your analysis.
- Pin a column to the left or right side of the column part.
- Define data filters directly on the column definition instead of going to the field modifier area. You can still peek in on details about related data and for each line and open the card to learn more about a given entity.

Business Central can save multiple column setups and filters. The next time you switch to analysis mode you can dive straight in to analyzing data. On the **Tabs** pane, you can rename or remove a tab.



Shows the Rename tab in analysis mode.

The **Tabs** pane also lets you add new tabs.



Shows the New tab in analysis mode.

Using tabs allows you to save different setups that you frequently use to analyze a dataset. For example, you might have tabs for analyzing data with pivot mode, and other tabs that filter to a subset of rows. Some tabs might show a detailed view with many columns, and others only display a few key columns.

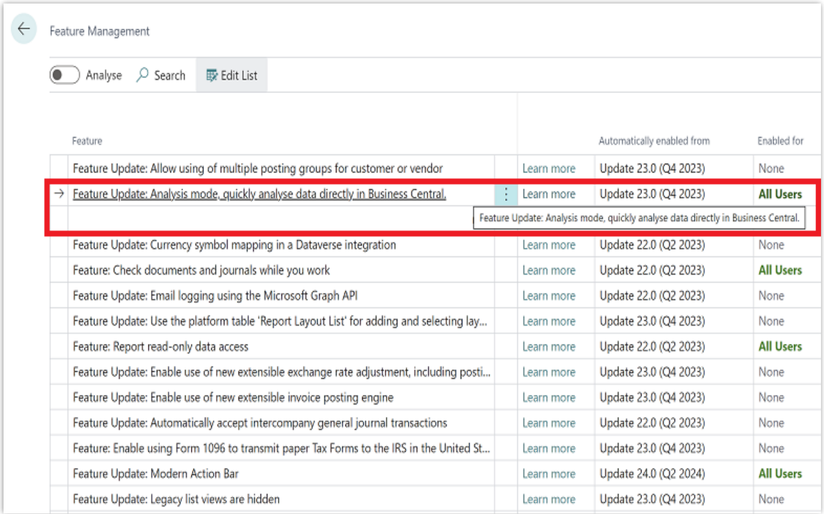
NOTE These tabs are saved for your use only.

How much data can I analyze?

On a list page, as a starting point you can set filters to limit the data. Maybe you want to analyze a certain group of customers, or maybe you want data from the current year only. You can also choose a page view to perform this action. You don't have to do this prefiltering step, but going to analysis mode will load all data into your browser, so it might be needed for larger datasets (currently above 100,000 rows).

How do I get started with analysis mode?

The feature is in public preview, which means your administrator must turn it on before you can try it out. If you decide it isn't for you, your administrator can turn it off again. To try it out, go to the **Feature Management** page and enable **Analysis mode**.



Shows how to enable analysis mode on the Feature Management page.

One major fix that we want to make before the feature becomes generally available is a way to control on which list pages the analysis mode is enabled. We're also working on ways to increase the data set size above 100,000 rows.

Where can I give feedback?

As a Business Central partner, you can give feedback on the feature in this Yammer group: https://www.yammer.com/dynamicsnavdev/#/threads/inGroup?type=in_group&feedId=119944077312&view=all

Service and platform

Overview

In this release we continue to relentlessly invest in the fundamentals of our service, with a focus on performance, stability, resource governance, security and compliance. This will allow Business Central to continue to grow in scale with our customers' needs.

With this release we are working to further enhance the stability of sign-ins for interactive users and the number of user session interruptions. We also plan to further improve client-side page rendering time across all our page types and controls to make the client even more responsive. We will improve the performance of cold start OData calls, which will benefit clients based on web services, such as Teams, warehouse scanners, Dataverse apps, and other integrations. We will further optimize our language (AL) runtime to minimize database locking and tune frequently used application scenarios (country-specific regulatory reports, renumbering General Journal entries, Item Tracking, Reservation Entries, and calculating inventory availability).

Allow application and tenant databases to differ in collation

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	Apr 2023

Business value

On-premises customers can use many different collations for their environment, driven by different requirements for country or different ordering/strings operations. In a multitenant setup, until now it wouldn't be possible to cohost tenant databases with different collations served by the same Business Central server (NST). With this release, you can easily cohost these databases on the same setup, and therefore administer such multitenant/multilanguage setups more efficiently.

Feature details

The collation of a database controls the ordering and equality operations of strings. In earlier versions of Business Central, a multitenant installation required the application database and the tenant databases to have the same database collation. In this release, the Business Central server (the NST) will work even though the application and tenant databases use a different database collation.

Business Central server runs on .NET 6

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	Apr 2023

Business value

The Business Central server now runs on Microsoft .NET 6. This improves performance and resource consumption on all AL code execution.

Feature details

We have moved the Business Central server to run on .NET 6 instead of .NET Framework 4.8.

Performance measurements suggest an improvement of 30 percent when executing AL code.

For on-premises installations, any existing .NET add-ins will need to be converted to .NET Standard before the Business Central environment can be upgraded to this release.

For more information, go to [Migrating from .NET Framework to .NET Standard].

In the Microsoft base and system applications, all .NET add-ins have been converted to .NET Standard, except in the localized versions for the Netherlands and Mexico. In these versions, we encountered uses of .NET Framework where no .NET Standard options were available. The .NET add-ins in these two cases are hosted as Azure Functions. If you need to do the same for your on-premises solutions, refer to our source code to find out how it's done.

New telemetry events and data

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	Apr 2023

Business value

Telemetry events on incoming and outgoing calls to web services, long-running AL methods, and error dialogs have been enhanced to make it even easier to troubleshoot performance and stability issues.

Feature details

The following events have been improved in telemetry:

- Incoming web service calls (eventId RT0008) now include the time spent waiting in the throttling queue on the Business Central server. This allows you to track whether web services performance issues are due to throttling/queueing on the Business Central server.
- Incoming web service calls (eventId RT0008) now include the error message for OData/API calls when a failure occurs. This allows you to better troubleshoot web services issues.
- Outgoing web service calls (eventId RT0019) now include clientType and AL stack trace. This allows you to find places in your code where outgoing web service calls block the UI.
- Long-running AL methods (eventId RT0018) now include details about SQL statements on the Business Central database. This allows you to better understand the performance of your AL code.
- Error dialogs (eventId RT0018) now include the English error text instead of the localized version. This allows you to monitor error messages no matter which language the user has chosen in their client.

The following events are new in telemetry:

- Metadata permission set changes due to extensions installed/updated (eventId to be determined). This allows you to monitor permission changes, and also if they are introduced by an extension.
- File blocked from upload due to possible malware (eventId to be determined). This allows you to monitor potential security issues from user.

- Changes made in **Feature Management**. This allows you to track configuration changes done by the administrator.

Learn more about Business Central telemetry at Monitoring and Analyzing Telemetry.

Performance - OData calls are now faster

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	Apr 2023

Business value

Most integrations to Business Central from external systems and services use the OData technology to read and write data. We've optimized this part of the Business Central server so that OData calls run faster and consume less resources. For customer integrations that use OData, this means better throughput (more calls per minute).

Feature details

Most integrations to Business Central from external systems and services use the OData technology to read and write data.

In this release, we've optimized these parts of the OData layer on the Business Central server:

- It's up to 40 percent faster to open an OData session and be ready to run logic.
- Opening an OData session no longer runs OnOpenCompany when accessing metadata. For customers with expensive AL logic that runs this trigger, this can greatly improve performance for OData calls.
- For web services on a Business Central online environment, we've optimized code in a name lookup service that will put performance on par with similar on-premises hardware setups.

User experiences

Overview

Business Central offers a broad portfolio of user interfaces enabling our customers to work with their data, from anywhere and on any device, including an installable desktop app, browser web application, and mobile apps. Whether users need to enter data at high speed, casually update their entries or analyze relational data, Business Central offers numerous features that are easy to get started with and powerful when needed.

Every release includes enhancements to usability, accessibility, performance, and reliability. In 2023 release wave 1, we boost efficiency when working with actions and lists of records. We also empower customers and consultants to personalize the fields on a page by choosing from existing table fields, reducing the time and effort to optimize their workspace.

Copy and paste readable hyperlinks

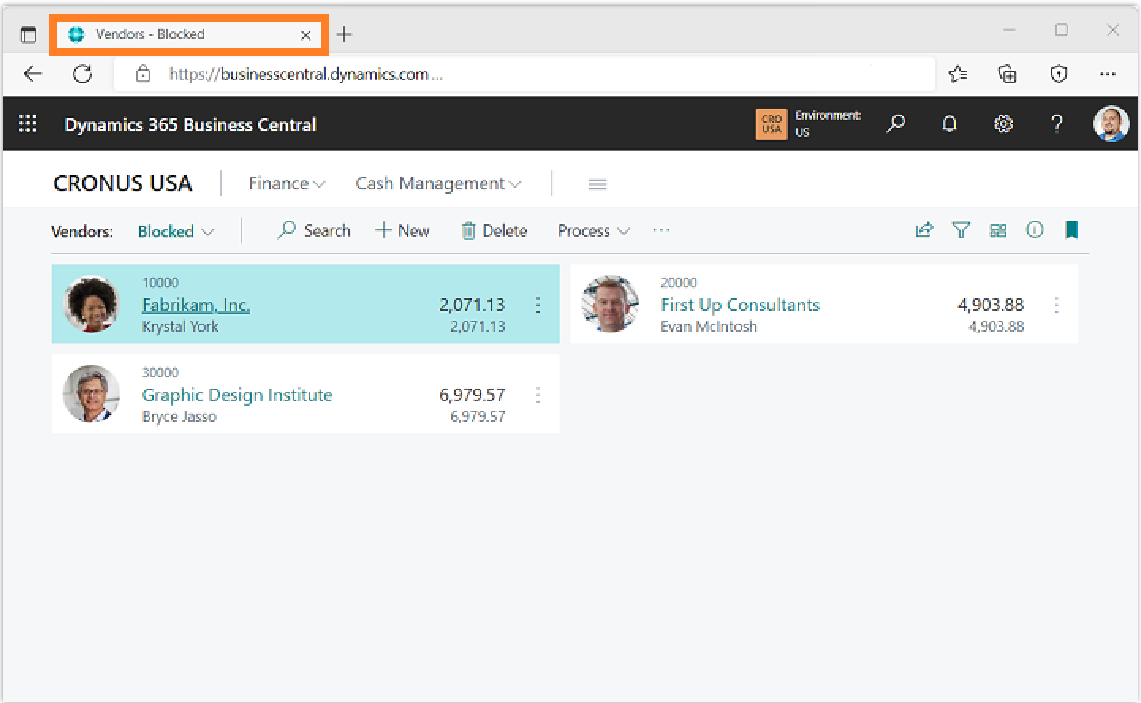
Enabled for	Public preview	General availability
Users, automatically	Apr 2023	-

Business value

Working productively with Business Central often requires multi-tasking across windows or capturing links to records that are shared with others. Each of these needs links or windows to clearly distinguish themselves from the next, making it easy to switch contexts.

Feature details

Business Central now uses a simple and clear schema for link and window captions that is automatically updated as you navigate within the web client. As a result, copying a link to any Business Central page or record and pasting that in a rich-text editor, such as an Outlook email, Microsoft Teams chat, or your project OneNote, will display a more meaningful hyperlink that is consistent no matter how or where you copy the link. Similarly, using modern browser features such as collections in Microsoft Edge allows you to capture a more readable collection of records. When managing multiple streams of work during your workday, switching across windows using Alt+Tab now clearly indicates which page or record you are about to switch to.



A Business Central tab in Microsoft Edge showing the revised document title.

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.

Add existing table fields to optimize your pages

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2023	-

Business value

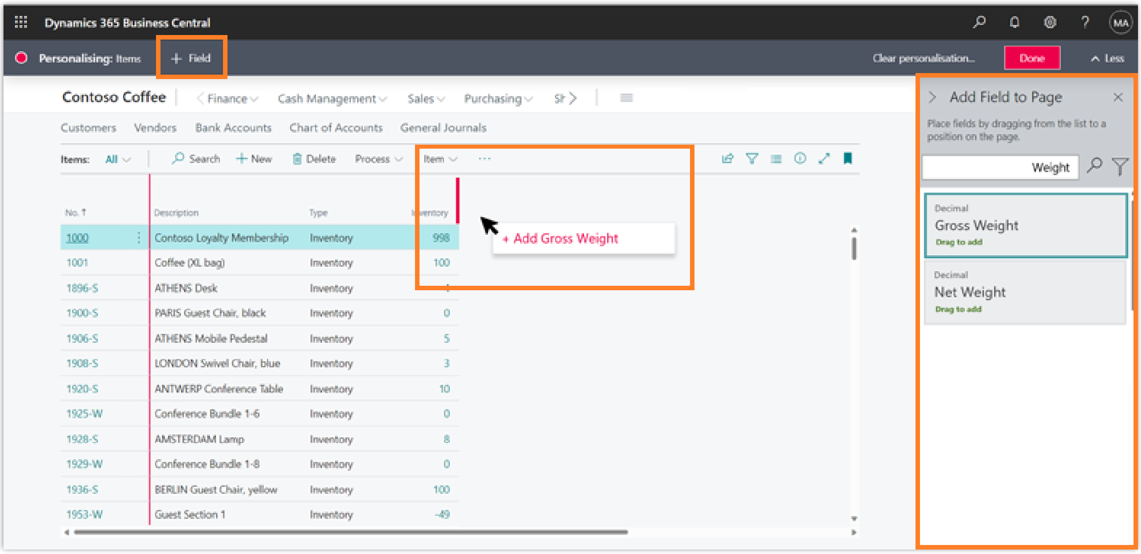
The Microsoft Cloud empowers SMBs to adapt quickly to changing conditions. Workers and entire departments often need to customize their workspace for optimal data entry and viewing, and Business Central already provides a rich toolbox to hide, show, or move various UI elements.

In this wave, we're unlocking all table fields so that users can add them to their pages to personalize their workspace, without having to resort to extensions. By adding existing table fields to a page, customers can self-serve and reduce time to value while cutting implementation costs. Conversely, this frees up time for pro developers to focus on more rewarding implementation.

Feature details

From the Business Central web client, users can:

- Add fields to card pages, lists, and most other page types.
- Choose from existing fields on the source table that powers that page, including fields from table extensions.
- Drag and drop fields or columns into place, adjusting the content around them for an optimal experience.
- Apply customizations for themselves or for anyone in a specific role.
- Understand which fields are hidden on the page and which fields can be newly added from the table.
- Apply the change for themselves or for anyone in a specific role.



An illustration of adding a field from the table to a list.

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Drag and drop files onto the file upload dialog

Enabled for	Public preview	General availability
Users, automatically	✔ Jan 19, 2023	Apr 2023

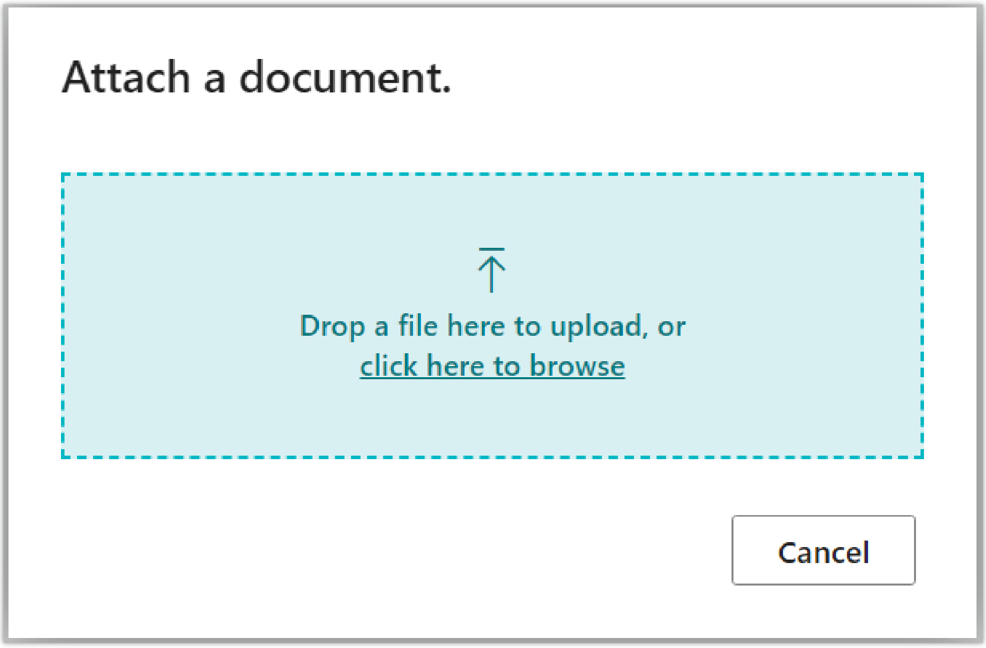
Business value

Business processes often require documents or other files to be captured as part of the system of record. When your file is already at hand, you can save time by dragging that file onto the file upload dialog in Business Central, instead of the more cumbersome navigating through folders in a file picker window. Drag-and-drop experiences are essential to working efficiently. While this enhancement provides a minor boost to productivity and is a convenient alternative, it also puts Business Central on a path toward broader file upload experiences in future release waves.

Feature details

Improved user experience

- The file upload dialog in Business Central has been enhanced with a clear drop area where users can drag and drop a single file.
- No matter which business process requires uploading of documents, users can choose between dragging a file or using the more traditional file picker.



The file upload dialog, enhanced with a new drop area for convenient drag-drop of files.

Effortless for developers

- This enhancement applies only to the file upload dialog, and therefore doesn't introduce any new controls that AL developers can work with to create custom file drop areas on the page.
- There are no changes to the file handling contract. No matter how a file is uploaded, the same validation, size, and format constraints continue to apply, including allowing only one file at a time to be uploaded and processed by AL code.

Tell us what you think

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Access actions and navigation menu efficiently with keyboard

Enabled for	Public preview	General availability
Users, automatically	Feb 2023	Apr 2023

Business value

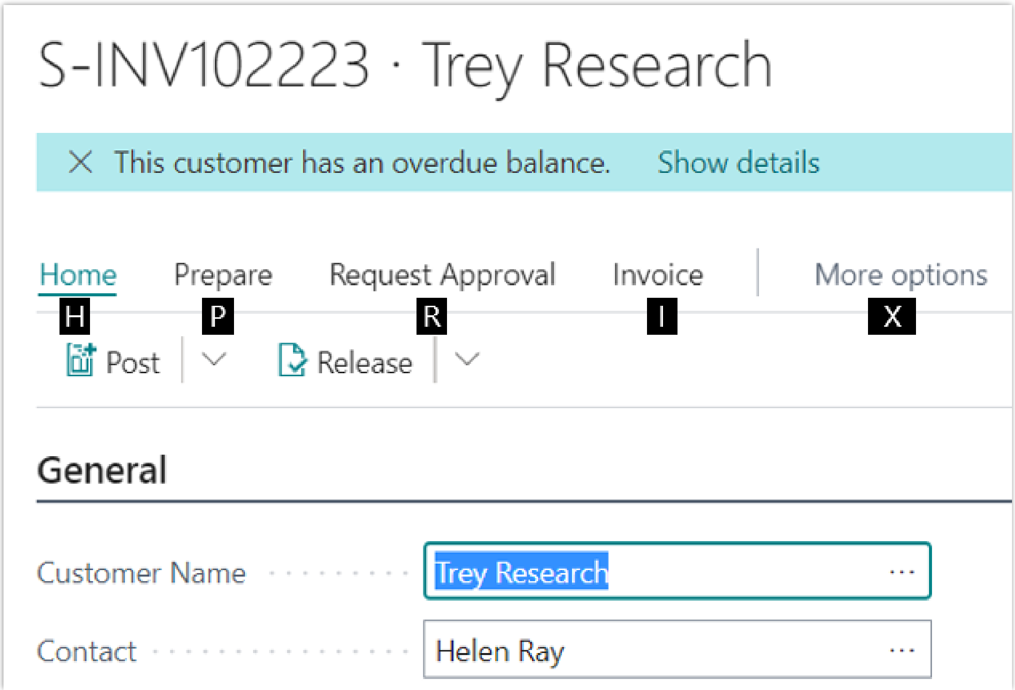
Organizations are looking to streamline their operations through AI, automation, and empowering workers with productivity tools. When time to enter data is critical, every keystroke and mouse click counts. Business Central adopts the familiar experience from Microsoft 365 applications, such as Excel and Word, to boost efficiency for keyboard users.

Access keys with key tips help users quickly explore, navigate, and activate any action in the action bar, navigation menus, and other user interface (UI) elements.

Feature details

When pressing the Alt key in the Business Central web client, the following features become available:

- Key tips are revealed alongside UI elements that indicate the next keystroke.
- Sequences of keystrokes can be used to navigate the user interface and activate UI elements, without leaving your current focused element.
- Actions become reachable, regardless of whether they are assigned a specific shortcut key.
- Access keys will be available for actions in the action bar and links in the navigation menu for users who experience Business Central in English.



An illustration of key tips displayed on a Sales Invoice 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.

Get more productivity out of an optimized Action Bar on all app pages

Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

A promoted section of the Action Bar can help you learn how to use the product. You can tailor it to fit the needs of your industry, company, or yourself. Add actions that you want to make available in an easily discoverable and consistent way across the product to help new users get started quickly, or tailor it to your business-specific needs for proficient users.

Feature details

In 2022 release wave 2 we delivered the Modern Action Bar. That release brought optimizations to the most prominent 180 pages in the application.

Based on user feedback and statistics on how pages are used, we've put certain often-used actions in more prominent places in the Action Bar across all application pages. This reduces the number of clicks to reach actions that people frequently use and generally makes relevant actions more discoverable.

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.

Tailor the action bar to fit your needs on document lines

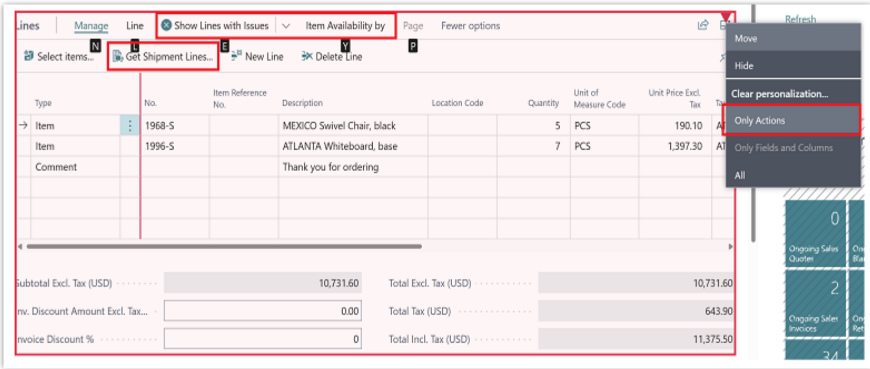
Enabled for	Public preview	General availability
Users, automatically	Mar 2023	Apr 2023

Business value

Personalizing actions can improve productivity, reduce noise and distractions, and save new users time when they're getting started with Business Central. Personalized actions can make Business Central fit the needs of your industry, company, or your people.

Feature details

We've added flexibility to the ways you can personalize menus to suit your preferences. In addition to the action bar at the top of pages, you can also personalize actions on subparts in the content area. For example, you can personalize the action bar for document lines. This gives you extra opportunities to work in Business Central in ways that suit you best. Personalizing pages is just a matter of choosing **Personalize** on the **Settings** menu in the upper right corner of Business Central, and then making your change.



Shows personalization and keytips in subpart's action bar.

- Subpart action bars show more actions (More options) by default with the **Manage** group pinned by default, allowing you to access the most important actions with one click.
- You can now move actions between groups. For example, the **Get Shipment Lines** action can be moved from the **Functions** action group by using personalization.
- You can move action groups and split buttons between groups and into the root of a subpart's action bar—for example, the **Show Lines with Issues** group has been converted to split button and promoted to the root of a subpart's action bar. Also, the **Item Availability** action group has been promoted to the root of a subpart's action bar.
- Pressing the ALT key on a keyboard allows you to access keytips for actions on a subpart's action bar, which enables easy keyboard access to actions that are used the most.
- The **Clear personalization** menu on subparts now contains options to clear personalization for **Only actions**, **Only Fields and Columns** or **All** personalizations.

NOTE You must have the **Feature Update: Modern Action Bar** feature enabled in the [Feature Management](#) page to use this capability or select **Try it out** to try for your session only.

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.

Improved alignment of headers in statistics pages

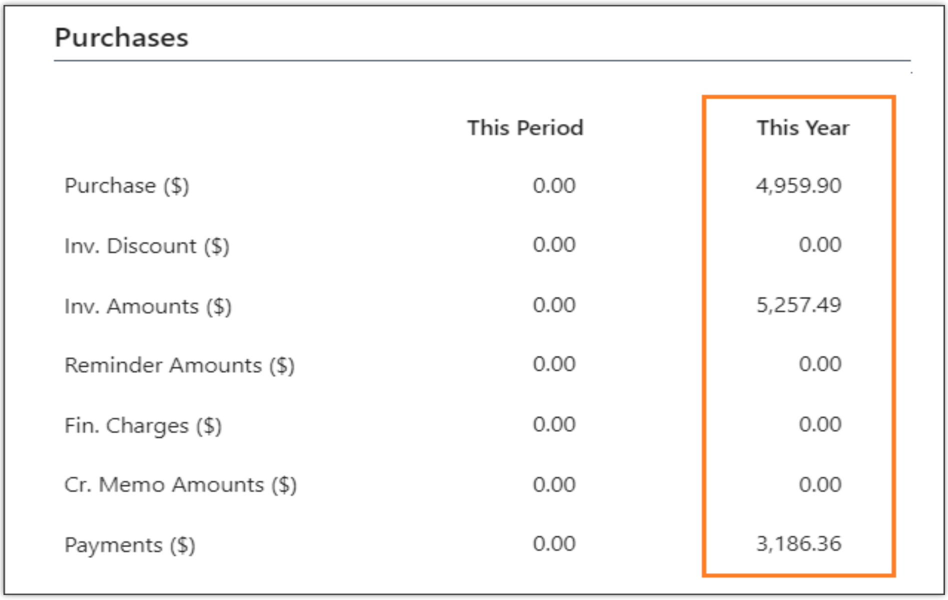
Enabled for	Public preview	General availability
Users, automatically	✔ Feb 1, 2023	Apr 2023

Business value

The default behavior across Business Central is to right align numeric fields and left align text fields. However, when pages display fields arranged in special tabular layouts, such as customer statistics or on most journal footers, the mixed data types often result in column headers being misaligned with their data. With this update, users benefit from improved readability of data with automatically aligned headers.

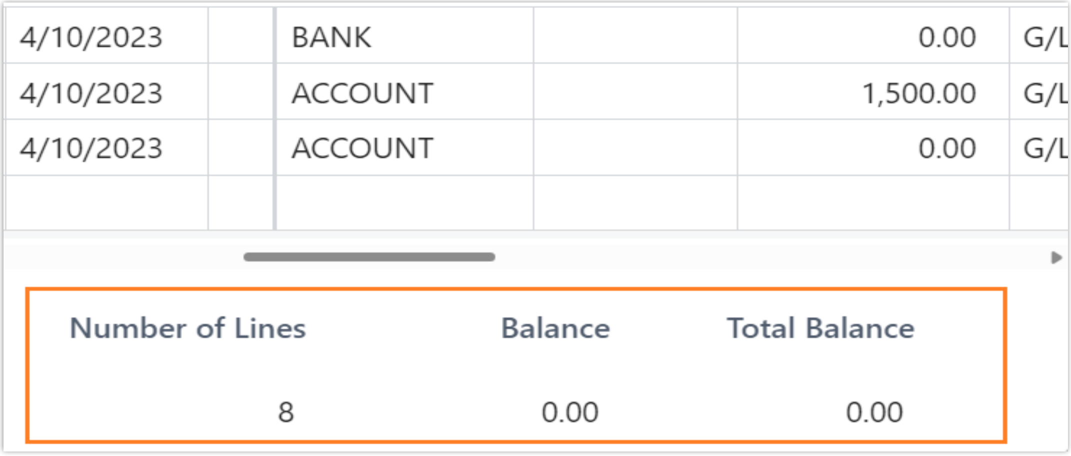
Feature details

- **Improved readability**: When a fixed layout group control is used on a page, Business Central automatically detects the first visible value in a column, and the header is left-aligned or right-aligned accordingly.
- **Just works**: No additional effort is required from developers to specify alignment.


Purchases

	This Period	This Year
Purchase ($)	0.00	4,959.90
Inv. Discount ($)	0.00	0.00
Inv. Amounts ($)	0.00	5,257.49
Reminder Amounts ($)	0.00	0.00
Fin. Charges ($)	0.00	0.00
Cr. Memo Amounts ($)	0.00	0.00
Payments ($)	0.00	3,186.36

The vendor statistics page, illustrating the improved alignment.



A Journal footer, illustrating the improved alignment

Get unblocked using actionable error messages in select application areas

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	May 2023

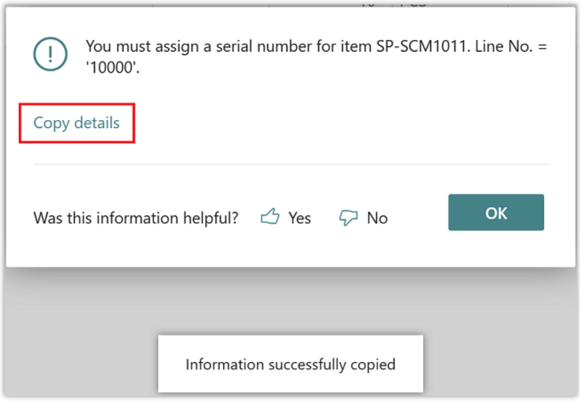
Business value

To help you resolve issues when working with Business Central, we've added actions to error messages. Making error messages more user friendly helps build trust in Business Central and saves time by making it easier to correct issues.

Feature details

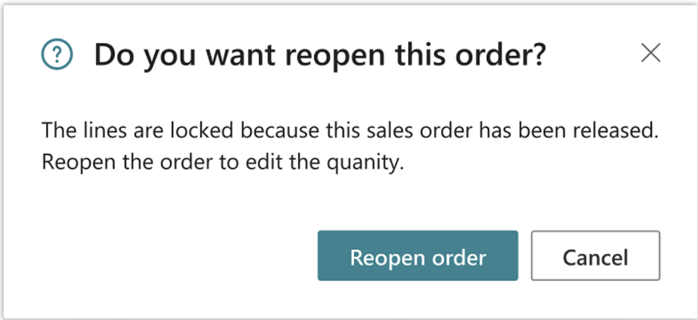
Error messages can get in the way of completing a task. For example, if the task you're performing requires a setting that's missing on another page. Sometimes the fix is easy, but not obvious. To help you get unblocked and back to work, we've updated our messages for typical issues:

- Improved the information and guidance that error messages provide so that it's easier to understand what went wrong.
- Replaced expandable advanced troubleshooting information with a **Copy details** link to make error dialogs less alarming to end users while maintaining the level of detail needed for advanced troubleshooting.



Shows new Copy details link in error dialog that allows users to copy troubleshooting information.

- Added actions that can make it easy to go to the problem and fix it yourself.



Shows actionable error dialog with action and title.

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.

Connected Spaces

Plan and prepare for Dynamics 365 Connected Spaces in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Connected Spaces**.

Overview

Dynamics 365 Connected Spaces is a computer-vision AI solution that uses cloud and edge topologies to extract unique insights from a physical space by using video cameras. Connected Spaces uses AI skills to continuously get insights from any space. Customers use data from video cameras to get real-time actionable alerts and analytics to make physical spaces more efficient or improve the customer, front-line worker, or employee experience. Connected Spaces is easy to set up, configure, and manage, with a responsible-AI assurance.

Connected Spaces uses the following hybrid approach:

- **Intelligent edge**: A managed on-premises gateway converts camera streams into observational data inferences sent to the cloud.
- **Intelligent cloud**: A multitenant software as a service (SaaS) solution correlates observational signals from the edge and customer insights to provide an analytics dashboard and actionable real-time alerts.
- **Prebuilt AI models**: Out-of-the-box and ready-to-use AI models apply computer vision and AI to reason within any physical space.

For 2023 release wave 1, we enable you to manage spaces occupied by vehicles. You can design and deploy skills, such as getting alerted when a vehicle parks in a no-stopping zone, or when the percentage occupancy of a parking lot exceeds a threshold, and more. In addition, we extend edge support for Azure Stack HCI, a hyperconverged infrastructure (HCI) cluster solution combining on-premises infrastructure with Azure Cloud Services. Azure Stack HCI allows you to manage edge devices you are already familiar with, with a predictable CapEx model with existing vendor agreements.

Get the most out of Connected Spaces

Helpful links	Description
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Connected Spaces.
Product documentation	Find documentation for Connected Spaces.
User community	Engage with Connected Spaces experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Connected Spaces.

Guides

Plan and prepare for Dynamics 365 Guides in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Guides**.

Overview

Microsoft Dynamics 365 Guides is a mixed-reality application that displays step-by-step holographic instructions right where the work happens, enabling employees to learn and execute complex tasks quickly. Dynamics 365 Guides help reduce errors, increase safety, close knowledge gaps, and strengthen skills. You can improve training and processes because it adapts to your work in real time.

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.

In this release wave, we invest in improving the collaboration capabilities that are powered by Teams. Collaboration capabilities include updates like the ability to take an incoming call, configuring the settings when joining a call/meeting, and improved mixed reality annotations on HoloLens 2. Additionally, we release new holographic workflows, like manipulating holograms while operating a guide, taking photos, and adding text labels to a guide. Finally, Guides will be available on mobile devices in a public preview and you'll be able to see work instructions alongside image and video content.

Investment areas

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Guides** below:

Check out the release plan

For application administrators

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

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

Get the most out of Guides

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.

Helpful links	Description
Licensing	Improve your understanding of how to license Guides.
Product documentation	Find documentation for Guides.
User community	Engage with Guides experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Guides.

What's new and planned for Dynamics 365 Guides

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

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
Improved annotation stability	Users by admins, makers, or analysts	-	Apr 2023
Improvements to the calling experience on HoloLens	Users by admins, makers, or analysts	-	Apr 2023
Receive incoming calls on HoloLens	Users by admins, makers, or analysts	-	Jun 2023
Start a call or meeting from a shared chat or email link	Users by admins, makers, or analysts	-	Jun 2023
Take a picture of mixed-reality content	Users by admins, makers, or analysts	-	Jun 2023

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.

Improved annotation stability

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2023

Business value

With improvements to the stability and accuracy of annotations in Dynamics 365 Guides, holograms get more stable for both HoloLens users and Teams desktop users.

Feature details

HoloLens users and Teams Desktop users get meaningful improvements to remote expert inking scenarios, building confidence in remote experts that ink placed better aligns with the physical geometry of the world. The ink strokes are more reliably shown on irregular and complex surfaces. Furthermore, there's increased stability for existing annotations both for remote experts and the HoloLens operator.

Improvements to the calling experience on HoloLens

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2023

Business value

Customers using Dynamics 365 Guides on HoloLens will have the ability to turn off their video and/or audio feeds. In cases where protecting intellectual property is important, this will enable operators to confidently enter a meeting, knowing that their video feed will not potentially reveal sensitive information.

By labeling guests on the call as guest or external, HoloLens operators will be more aware of which meeting participants are outside of their organization. This will help operators have a better collaborative session, knowing the status of the meeting participant.

Feature details

Before joining a call, the user will be able to turn their video and mic feed on or off. Operators will be able to turn video and audio on or off for both scheduled meetings and incoming calls.

Video will automatically switch to the dominant speaker in group calls, and the HoloLens user will be able to switch their video and mic on or off before joining a call, as they do on Teams desktop or Teams mobile.

Guest or external labels will be added to the participant and chat lists to make it clear whether a participant is outside the organization. A guest attendee is someone who has been given a one-time-call link and doesn't have a Microsoft Teams account. An external attendee has a Microsoft Teams account but is outside of the organization.

Receive incoming calls on HoloLens

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jun 2023

Business value

Call participants can spontaneously add Dynamics 365 Guides HoloLens users to any conversation. HoloLens users won't have to join a scheduled meeting to collaborate effectively with remote participants.

Feature details

When HoloLens users receive a call, they get a call dialog where they can choose to accept or ignore the call. Taking the call allows them to attend while still doing their work within Guides. If they accept the call, and the HoloLens user chooses to share their video feed, remote participants can see what the HoloLens user sees to better collaborate with annotations and calling capabilities within Guides.

Start a call or meeting from a shared chat or email link

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jun 2023

Business value

Make collaboration efficient and effective by inviting collaborators into a call or meeting by creating a link and sharing it via chat or email.

Feature details

This feature enables a Dynamics 365 Guides user to seamlessly invite collaborators to a call or meeting through a shared chat or email link.

Take a picture of mixed-reality content

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jun 2023

Business value

Customers will be able to share high-quality images of their environment overlayed with mixed-reality content. This will enable HoloLens operators in poor connectivity situations to send a snapshot to remote collaborators so collaborators can see intricate parts of machinery or tags with small characters.

Feature details

While on a call, a HoloLens user will be able to select the Take Photo button to snap a photo of their environment, including the holograms in view. The photo will automatically be shared as an image file in the meeting chat for that session. The user will also be able to take a photo by using a voice command.

Customer Insights

Plan and prepare for Dynamics 365 Customer Insights in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Insights**.

Overview

Video: [Learn about this product's new capabilities]

Customers' expectations have changed. In the present era, customers do business with companies that demonstrate they care about and understand them. They trust companies know them and provide offers and recommendations that speak to them and solve their problems. To earn their loyalty, it is critical that every customer interaction, digital or in person, exceeds expectations.

To do so, companies need to break down silos between departments to connect the dots, unify data, and act as one in delivering valued-based experiences. They also need to leverage and analyze large amounts of data coming from a variety of sources, optimize the quality of the data, and build a real-time and universal picture of their customers, including their needs and behaviors, along with predicting their next actions.

With Customer Insights, data across digital and physical interactions is unified, both in terms of "who that customer is" as well as "what that customer is doing," and through the use of AI inherently empowers companies to understand customers like never before. Customer Insights provides you with a solution that connects what would otherwise be a set of disconnected and impersonal interactions with a company. With this release, we help you get the most out of your data to drive better business outcomes. You and your entire organization are empowered with limitless customization capabilities through embedded low-code tools made for citizen developers.

AI capabilities also help you unlock advanced insights and use predictive models to proactively engage customers. Customer Insights guided assistance, out of the box ML, and custom models enable you to understand the quality of your data, determine factors influencing things such as churn, customer lifetime value and sentiment as well as conduct advanced analytics that leverages both customer and business operations data.

Our guiding principles are to make your job easier, simplify data management, turn data into insights, and make them available across applications and departments to fuel your personalized experiences and delight your customers in new ways.

For this release, we continue to invest in the following feature themes:

- **Customer understanding** to help businesses deeply and accurately know their customers.
- **Ubiquitous insights** to enable data governance and interoperability.

Investment areas

Ubiquitous insights
Businesses can deliver exceptional experiences by driving influence across all touchpoints with a fully integrated and privacy-compliant data flow across Microsoft Dataverse, Dynamics 365, and Power Platform applications.

Customer understanding
Accelerate time to value by expediting the process to understand your customers deeply and accurately.

By combining quicker out-of-the-box insights, predictions, segments, and measures with seamless extensibility and custom purpose-built machine learning, you can provide collaborative intelligence and deeper insights across the organization.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Customer Insights** below:

Check out the release plan

For application administrators

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

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

Get the most out of Customer Insights

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Customer Insights.
Product documentation	Find documentation for Customer Insights.
User community	Engage with Customer Insights experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Customer Insights.

What's new and planned for Dynamics 365 Customer Insights

This topic lists features that are planned to release from April 2023 through September 2023. 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](#).

For a list of the previous wave's release plans, go to [2022 release wave 2 plan](#).

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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.

Customer understanding

Get value out of Customer Insights quicker with guided experiences to leverage your data.

Feature	Enabled for	Public preview	General availability
[Connect to custom machine learning models](#)	Admins, makers, marketers, or analysts, automatically	Apr 2023	
[Easily connect to custom prediction models with guided steps](#)	Admins, makers, marketers, or analysts, automatically	Apr 2023	
[Understand data quality deeply to unlock better insights](#)	Admins, makers, marketers, or analysts, automatically	Apr 2023	-
[Automatically see which predictions apply to your imported data](#)	Admins, makers, marketers, or analysts, automatically	Sep 2023	

Ubiquitous insights

Enable a fully integrated data flow across Microsoft Dataverse, Dynamics 365, and Power Platform applications to enable seamless personalized customer experiences.

Feature	Enabled for	Public preview	General availability
[Add insights to Sales workflow to increase seller effectiveness](#)	Users by admins, makers, or analysts	Apr 2023	

Feature	Enabled for	Public preview	General availability
Display Customer Insights activities in a Dynamics 365 activity timeline	Users by admins, makers, or analysts	Apr 2023	
Do more with advanced application lifecycle management	Users by admins, makers, or analysts	Apr 2023	
Govern data access with role-based access control	Admins, makers, marketers, or analysts, automatically	May 2023	
Use Power Automate to export segments to any third-party service	Admins, makers, marketers, or analysts, automatically	Sep 2023	

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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.

Customer understanding

Overview

Accelerate time to value by expediting the process to understand your customers deeply and accurately.

By combining quicker out-of-the-box insights, predictions, segments, and measures with seamless extensibility and custom purpose-built machine learning, you can provide collaborative intelligence and deeper insights across the organization.

Connect to custom machine learning models

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-

Business value

Take advantage of Azure Synapse Analytics custom models to predict customer behavior with limitless scale, powerful insights, and unmatched security and privacy to safeguard your data.

Feature details

Quickly and easily establish a connection to custom models in Azure Synapse Analytics workspaces.

Use regularly refreshed, high-quality, unified customer profile and transaction data from Dynamics 365 Customer Insights to power your existing custom prediction models in Azure Synapse Analytics.

Easily connect to custom prediction models with guided steps

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-

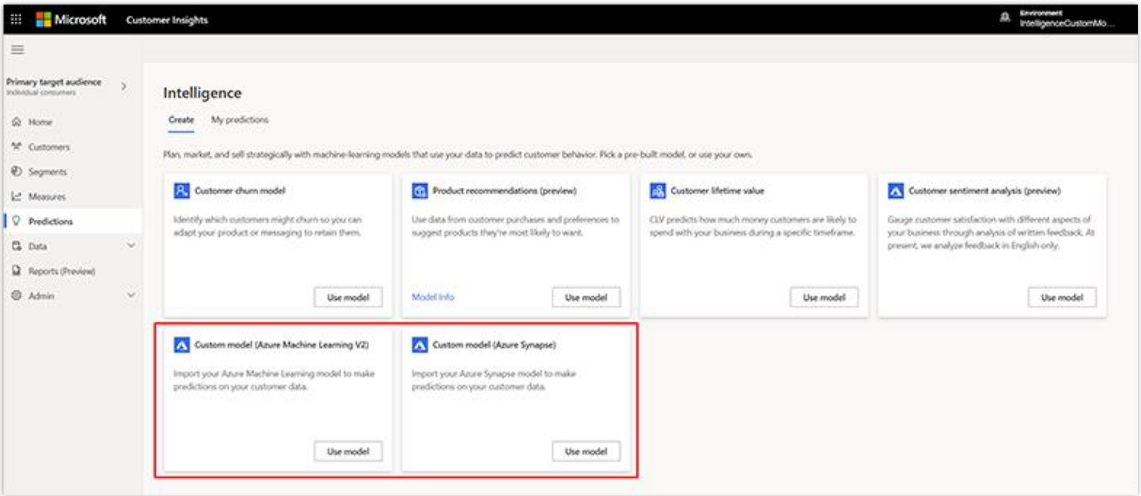
Business value

Quickly and seamlessly connect to custom models in Azure Synapse Analytics or Azure Machine Learning with business-user friendly, step-by-step guidance.

Feature details

Connect to custom models Azure Synapse Analytics and Azure Machine Learning workspaces with five simple and guided steps:

1. Configure the connection.
2. Name the custom model.
3. Add the required data.
4. Review the configuration.
5. Run the model.



Access custom model connections from the Predictions page in Dynamics 365 Customer Insights.

Understand data quality deeply to unlock better insights

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-

Business value

Quality of data drives quality of insights. Find out if your data quality makes the grade.

The AI-generated data quality report in Customer Insights is key to understanding imported data—what's good, what's not so good, and where and how to improve it. The report helps activate insights that drive effectiveness in marketing campaigns, sales support, and customer service engagements.

Feature details

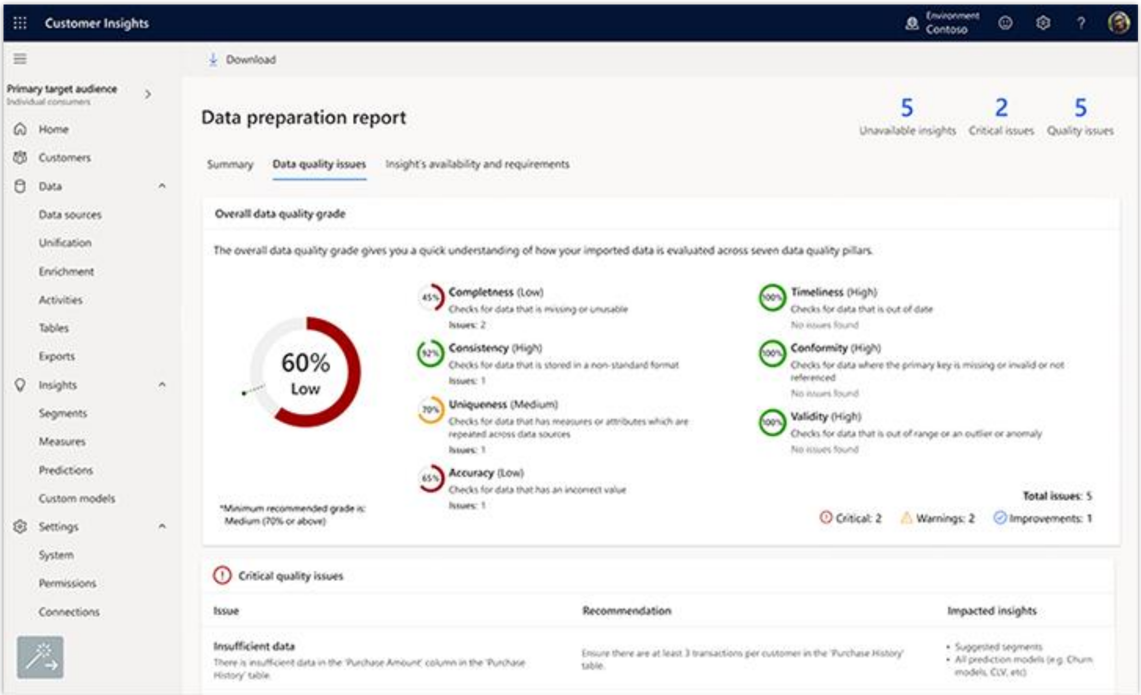
The data quality report shows an overall grade based on imported data and proposed improvements. The report:

- Automatically analyzes your imported data and assigns an overall data quality grade.
- Provides detailed information on data quality issues categorized by seven comprehensive data quality pillars, with severity of impact and impacted insights (segments, measures, or predictions).
- Offers suggestions to improve data quality to leverage all the insights offered in Customer Insights.

For example, imported data may receive a low grade due to insufficient or missing columns, or because of a data accuracy issue based on an incorrect value.

The easy-to-read data quality report precisely shows data quality issues and provides tips on how to improve those issues.

After addressing the findings, the reevaluated score usually results in a better overall data quality grade, which creates confidence that the data can drive successful insights.



Data quality report showing the overall data quality grade and details across data quality pillars.

Automatically see which predictions apply to your imported data

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2023	-

Business value

Out of the box, AI-powered prediction models in Customer Insights include customer lifetime value, product recommendations, subscription churn, transactional churn, and sentiment analysis.

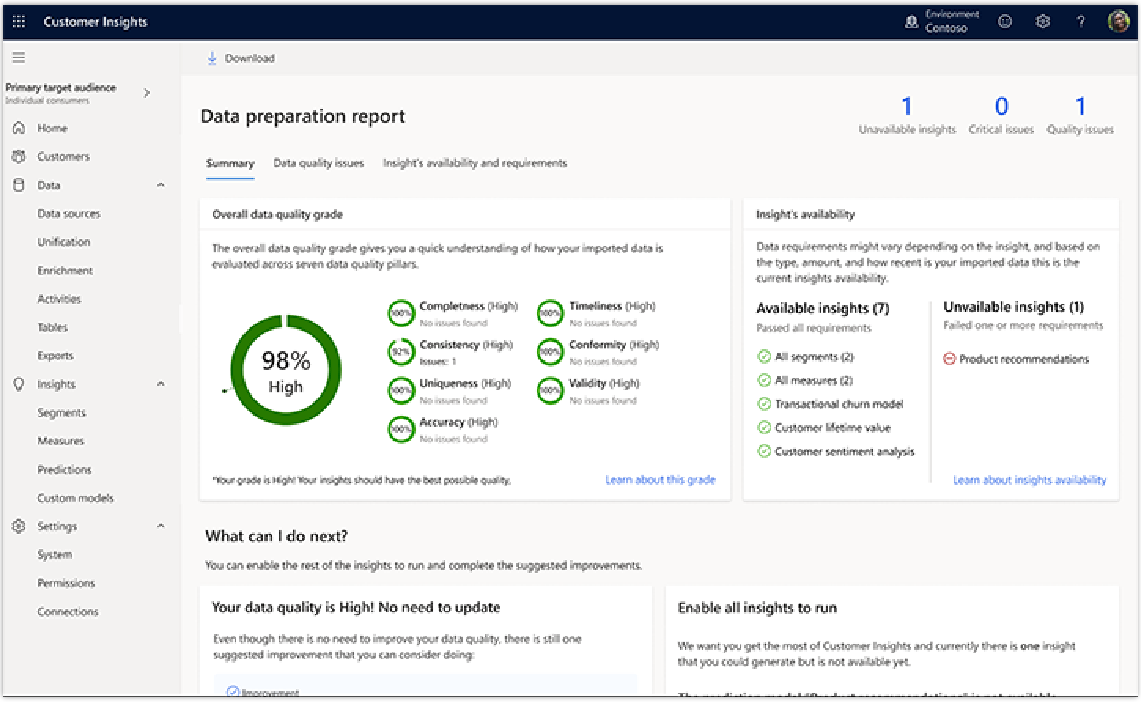
These predictions bring remarkable benefits to your business. Each prediction uniquely understands different customer facets that once activated, drive better business outcomes. To use these models, data must meet data prerequisites specific to each model.

This AI-powered, data detection experience analyzes your imported data and confirms which insights and out-of-the-box prediction models the data can support, thus expediting time to value.

Feature details

The data detection experience automatically analyzes and provides upfront clarity on which predictions are suitable based on imported data and the unique data prerequisites for each out-of-the-box prediction model.

For example, if your data includes customer feedback data, including feedback text, customer IDs, and timestamps, it will suggest that the data supports the customer sentiment prediction model, to drive experiences that result in higher customer satisfaction and loyalty.



Data report showing which out-of-the-box prediction models your data can enable.

Ubiquitous insights

Overview

Businesses can deliver exceptional experiences by driving influence across all touchpoints with a fully integrated and privacy-compliant data flow across Microsoft Dataverse, Dynamics 365, and Power Platform applications.

Add insights to Sales workflow to increase seller effectiveness

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	-

Business value

Sellers require a more holistic customer view to improve engagement and accelerate deal closure. Customer Insights provides a rich platform for generating deep customer insights that can be used by sellers to more effectively close deals.

By enabling valuable data from Customer Insights to be embedded directly within the *Contact*, *Account*, and *Lead* forms within Dynamics 365 Sales, sellers get a more complete picture of their customer. Embedding this information on sales forms makes rich insights available to sellers in their flow of work.

Feature details

Dynamics 365 Sales administrators can configure *Contact*, *Account*, and *Lead* forms to show Customer Insights data like segment membership, customer measures, and predictions.

Rich customer insights such as average transaction amount, total sales, loyalty reward points, customer lifetime value, and churn risk inform sellers how to best engage individual customers with additional points of relevance to personalize the conversation.

Detail of Customer Insights data embedded on a Dynamics 365 Sales form.

Display Customer Insights activities in a Dynamics 365 activity timeline

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	-

Business value

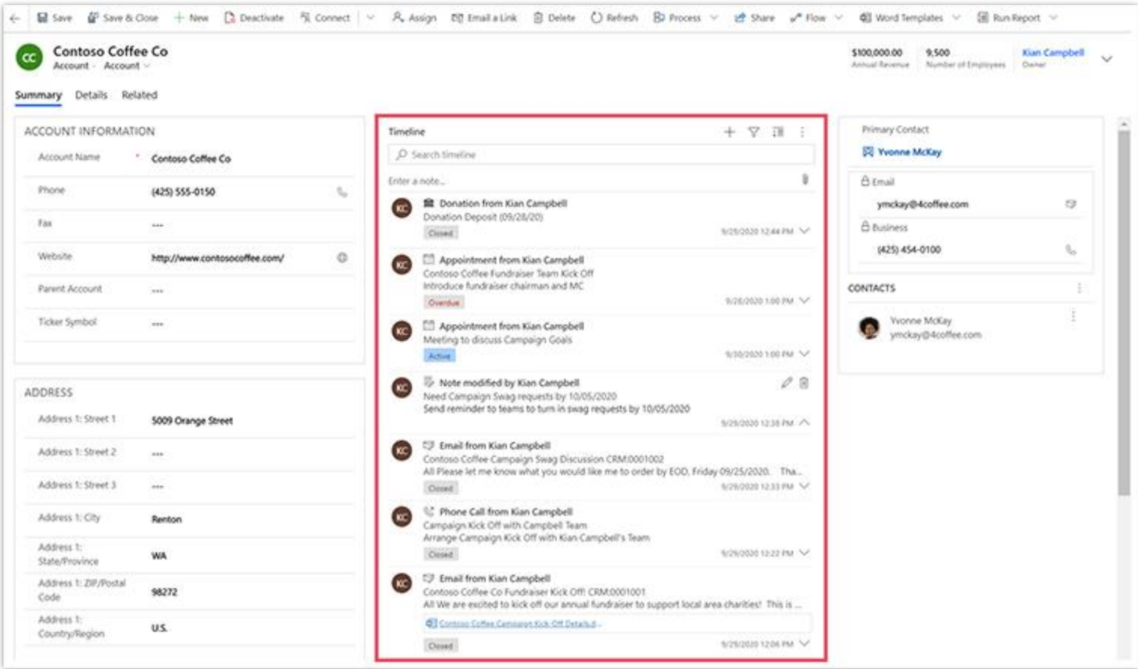
A single view of all interactions enables a complete understanding of customer activity. With that context, sellers and representatives can create deeply personalized experiences for digital and non-digital channels. In Dynamics 365 Sales, Customer Service, and Marketing, users can see all Customer Insights activities in the unified activity timeline.

Feature details

Once enabled by a Dynamics 365 administrator, sellers and representatives can view Customer Insights activities directly in the activity timeline. Dynamics 365 apps and Customer Insights must share a Dataverse instance.

Customer Insights activity data can appear within the same activity timeline already used today to add or view activities such as notes, posts, emails, and appointments. The unified activity timeline will be available across *Accounts*, *Contacts*, and *Leads*.

Customer Insights activities within the Dynamics 365 activity timeline can be filtered, searched, and updated dynamically.



Account contact card highlighting the activity timeline.

Do more with advanced application lifecycle management

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	-

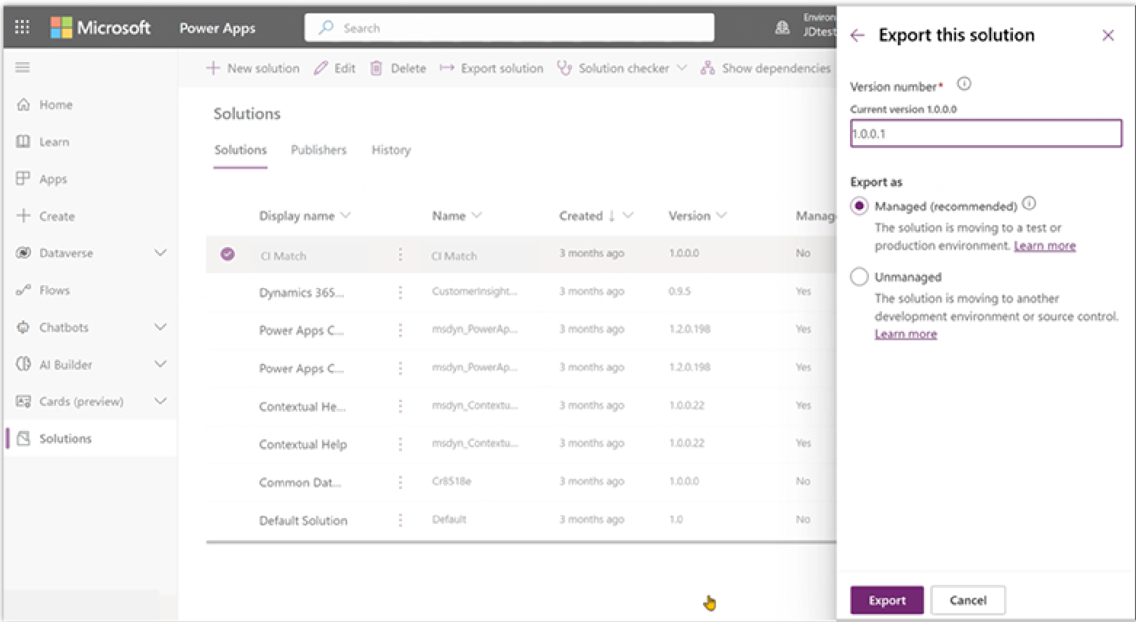
Business value

Responding to rapidly evolving business requirements requires quick iteration, including updates to rules for data import, unification, and segmentation activities. With advanced application lifecycle management, environment administrators can work at scale across multiple environments to handle simple or complex administration scenarios to migrate configurations quickly and easily.

Feature details

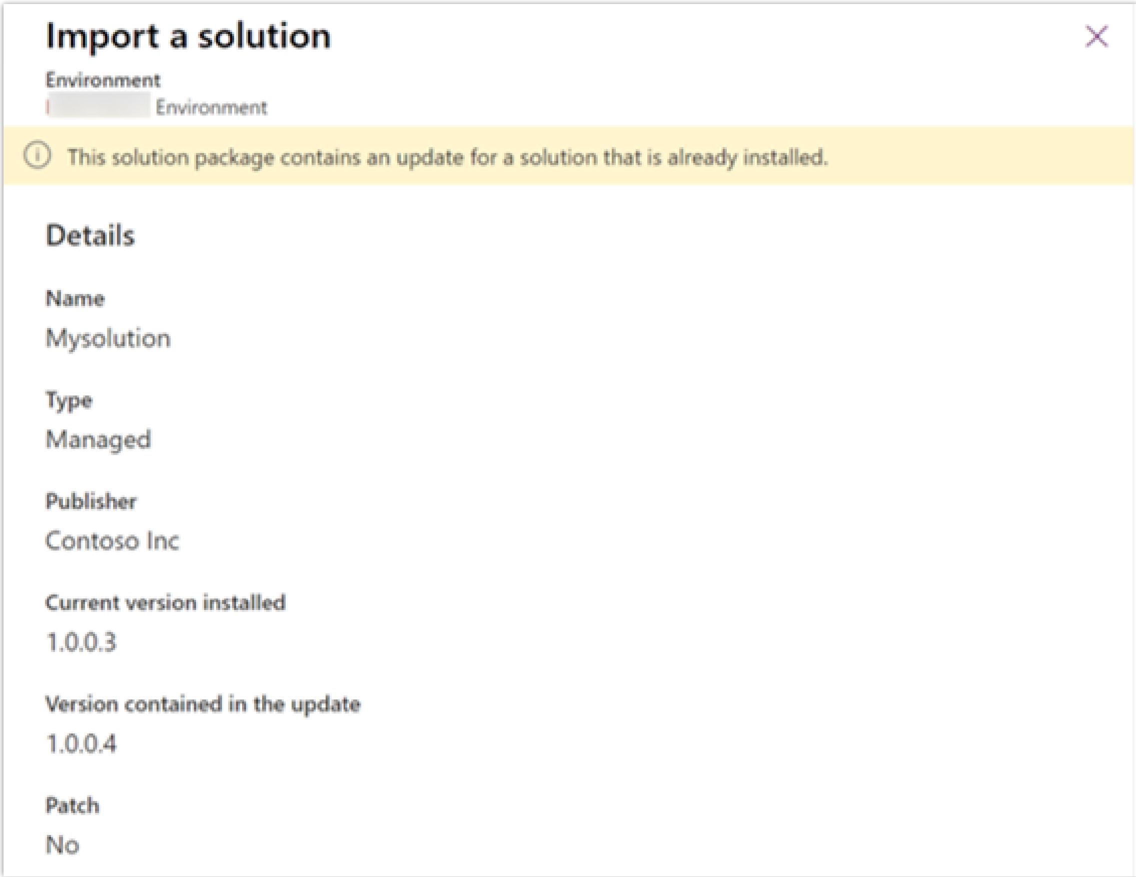
In addition to copy, reset, and delete capabilities, advanced application and environment lifecycle management allows:

- Configuration migration from **sandbox to production** environments, enabling quick validation updates to your Customer Insights configuration in a sandbox, before deploying changes to production.
- Configuration migration from **production to sandbox** environments, ensuring that development environments accurately reflect production. Consider this path to back up your production work to quickly restore it if an update on the production system causes issues.
- Performing operations across all Dynamics 365 and Power Apps environments so when resetting, changing, or deleting an environment those changes are propagated in other applications as well.
- Restoration of earlier versions of configurations and environments in case a business activity didn't produce the desired outcome.



Export solution to a production environment via Power Apps.

Because Customer Insights environments are associated with a Dataverse environment, they are always in sync. Environment owners have access to these capabilities from the Power Platform admin center solutions page and can delegate these permissions.



Import a Dynamics 365 Customer Insights solution.

Govern data access with role-based access control

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2023	-

Business value

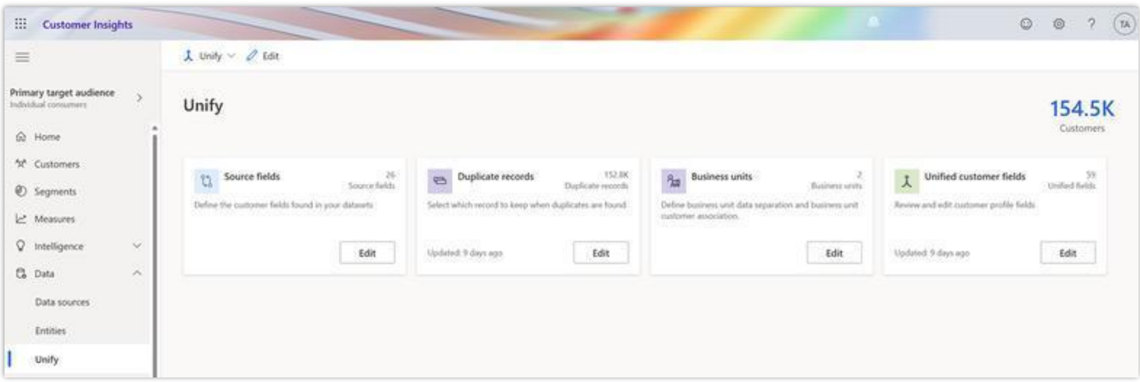
Implementing data access controls is important in many situations, including multi-geo and multi-brand scenarios. Role-based access control (RBAC) allows administrators to regulate access to customer profiles, segments, and measures based on business units. Because these controls are applied to the data in Microsoft Dataverse, the integrity of those controls propagates to all other Dynamics 365 and Power Platform applications automatically. This functionality allows admins to execute rules quickly and easily for complex data management. It not only saves valuable implementation time, but also ensures that data is available only for the intended users, which increases security and control over data.

Feature details

Data access definitions are made in Dataverse and therefore flow into other applications built on top of Dataverse, such as Dynamics 365 Marketing, or any Dynamics 365 or Power Platform application as well. Depending on the user role, administrators and business users have different permissions and access rights.

Administrators:

- Own and manage the global data estate of an organization.
- Configure business units (logical groupings of related business activities) in the Power Platform admin center.
- Configure deduplication and unification of customer data within business units (not across business units).
- Define data mappings to assign business unit ownership based on identifiers such as associated brand or geographic location.
- Have access to segments and measures created for global and business unit usage.

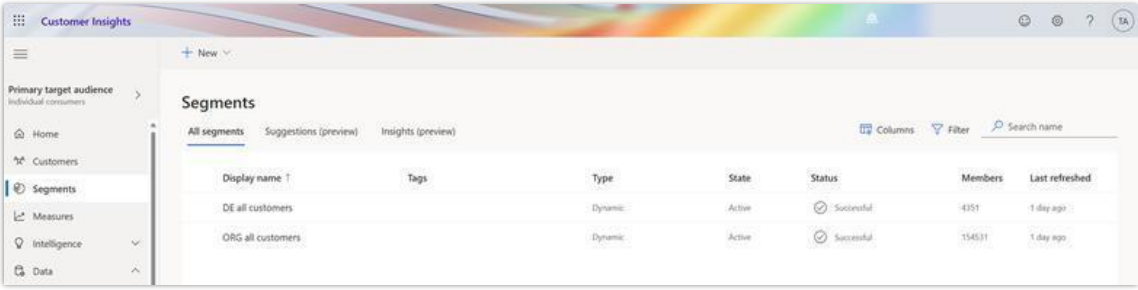


Unify screen with business unit step.

Business users:

- Have access to records belonging to their business unit and can’t access or share data from other business units.
- Have access to and control of Dynamics 365 Customer Insights segments and measures in their business unit.
- Can activate or export segments and measures for use in other Dynamics 365, Power Platform, or third-party applications.

Segments view for an admin across business units:



Screenshot of segments screen as seen by admin.

Segments view for a user in a business unit:

Screenshot of segments screen as seen by a business user.

Use Power Automate to export segments to any third-party service

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2023	-

Business value

Go beyond the current Customer Insights AdTech and MarTech exports connectors and take advantage of the limitless export benefits that Dataverse and Power Platform provide.

Data exports from Customer Insights allow you to optimize the effectiveness of your marketing and advertising operations and enable hyper-personalized persona targeting in campaigns, customer journeys, and omnichannel marketing to any Dynamics 365 or third-party service.

Feature details

Configure triggers from Customer Insights and Dataverse to power business rules and Power Automate workflows, which activate third-party actions of your choice.

By connecting Customer Insights through Power Automate using any Power Platform connector, you can send segments and other relevant data to destination services for further actions.

Customer Voice

Plan and prepare for Dynamics 365 Customer Voice in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Voice**.

Overview

Dynamics 365 Customer Voice is an easy-to-use, scalable feedback management solution empowering organizations to collect, analyze, and track real-time feedback. With Dynamics 365 Customer Voice, organizations can easily personalize customer engagement with real-time surveys and analyze unified views of the customer so that you can close the loop in the moments that matter. We've seen great momentum, gathered insightful feedback with the current product, and are in the early planning phases of future investment areas.

We are introducing the following new features to enable key scenarios for our customers for this release along with the continued architecture evolution and stability fixes:

- Sharing and coauthoring surveys in a seamless way.
- Allowing an external file upload option for external survey responders.

Investment areas

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Customer Voice** below:

Check out the release plan

For application administrators

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

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

Get the most out of Customer Voice

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Customer Voice.
Product documentation	Find documentation for Customer Voice.

Helpful links	Description
User community	Engage with Customer Voice experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Customer Voice.

What's new and planned for Dynamics 365 Customer Voice

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

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
Transfer projects when owner leaves organization	Admins, makers, marketers, or analysts, automatically	Apr 2023	-
Allow survey responders to record partial survey response	Admins, makers, marketers, or analysts, automatically	Jun 2023	-

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.

Transfer projects when owner leaves organization

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-

Business value

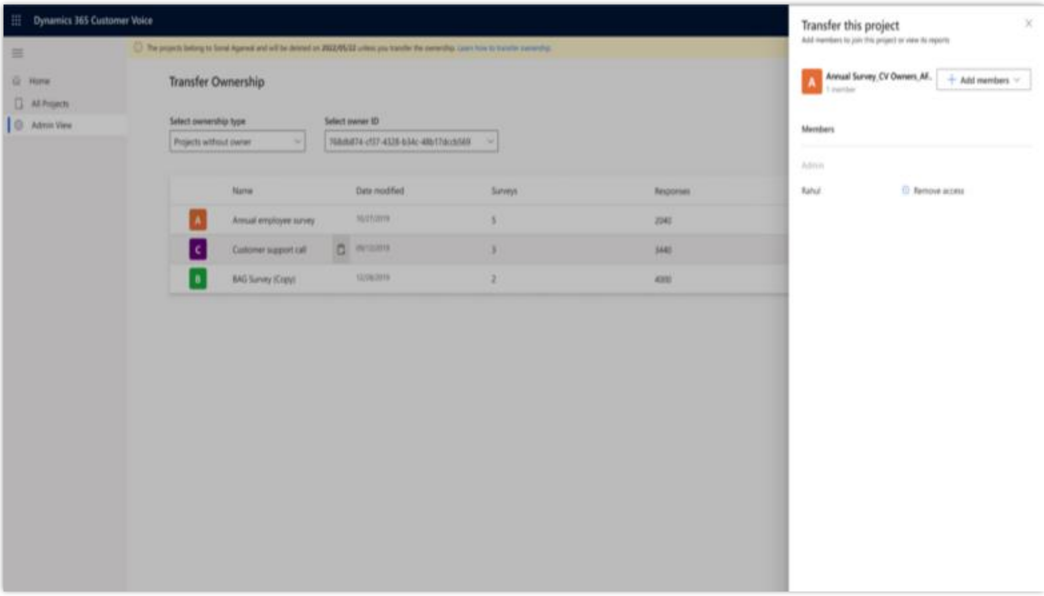
Survey owners often don't share their projects with team members. In such cases, if the survey owner leaves the organization, the projects they owned get lost because there's no way to retrieve them. This capability will provide an option to the tenant administrator to retrieve such projects and assign them to other members of the team. This helps to:

- Prevent loss of data and ensure critical surveys and projects that were orphaned can continue to be used after being assigned to relevant owners.
- Allow the new survey owner to update or modify the survey or project as relevant.

Feature details

The feature is designed for the tenant administrators of your organization, who will have the following capabilities:

- View all the projects and surveys belonging to owners who have left the organization. Only those projects are displayed that are less than 30 days old from the time the owner has left the organization.
- Add orphan projects to new or existing Microsoft 365 groups based on the permission of the respective organization.
- Add other relevant members to the group for them to continue using the project or survey.



Transfer project ownership

Allow survey responders to record partial survey response

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jun 2023	-

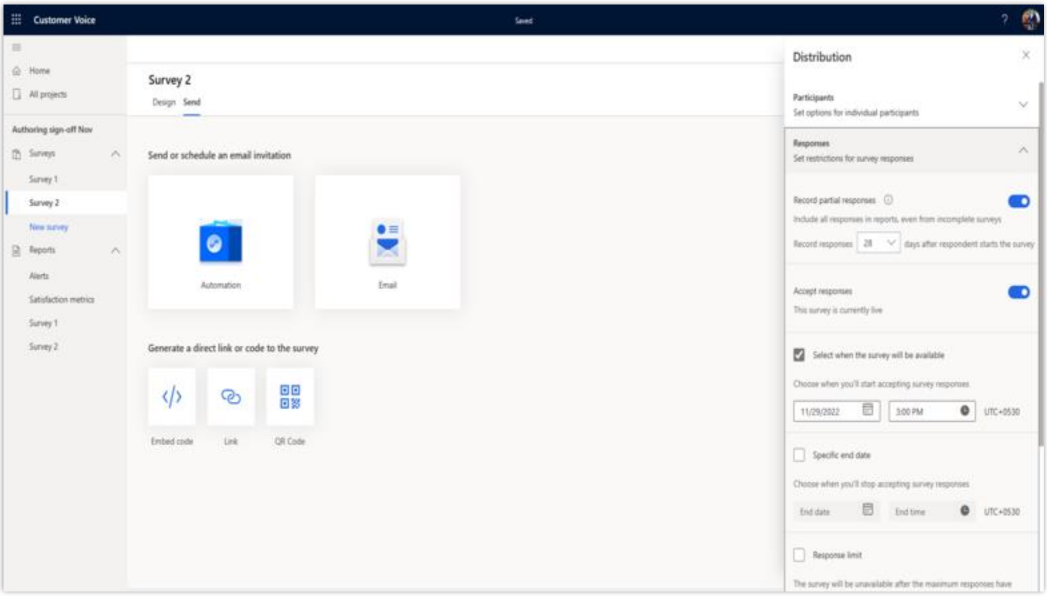
Business value

Survey respondents sometimes answer a few questions and then close the web browser without submitting the responses. This results in a partially completed survey and leads to loss of valuable user feedback. With this feature, partial responses can now be recorded.

Feature details

This capability will allow survey owners to capture responses and insights even from partially completed surveys. It provides the ability to:

- Define survey settings to turn on the partial survey capability.
- Specify the number of days after which the partial responses should be recorded. By default, the value is set at 28, but can be modified to be set between 1 and 28 days.



The settings page for partial responses.

Supply Chain Center

Plan and prepare for Microsoft Supply Chain Center in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Microsoft Supply Chain Center**.

Overview

Video: Learn about this product's new capabilities

The Microsoft supply chain platform provides the building blocks across Microsoft Azure, Microsoft Dynamics 365, Microsoft Teams, and Microsoft Power Platform for you to develop or independently adopt capabilities for your specific supply chain needs. With Microsoft Dataverse, you can create thousands of connectors to gain visibility across your supply chain, develop custom workflows with low-code solutions in Power Platform, and enable secure collaboration both internally and externally through the power of Microsoft Teams.

The core of the supply chain platform is the Microsoft Supply Chain Center, now available in preview. Supply Chain Center provides a command center experience for practitioners to harmonize data from across existing infrastructure, like data from ERP providers including Dynamics 365, SAP, and Oracle, along with standalone supply chain systems. Data Manager in Supply Chain Center enables data ingestion and orchestration to provide visibility across the supply chain and drive action back into systems of execution.

Supply Chain Center also includes prebuilt modules to address supply chain disruptions across supply and order fulfillment, including:

- The supply and demand insights module leverages advanced Microsoft Azure AI models to predict upstream supply constraints and shortages through supply intelligence. Combined with smart news insights, which provides relevant news alerts on external events, supply chain practitioners can make decisions and plan with real-world event information and historical insights for product demands.
- The order management module in Supply Chain Center enables organizations to intelligently orchestrate fulfillment and automate it with a rules-based system using real-time omnichannel inventory data, AI, and machine learning. Organizations can adapt quickly to meet future order volumes and fulfillment complexities by extending their capabilities with prebuilt connectors to the best-of-breed of specialized technology partners for order intake, delivery, and third-party logistics services. Existing Dynamics 365 Intelligent Order Management customers will automatically get access to Supply Chain Center and the order management module at launch.

- With secure, built-in Teams integration, you can mitigate supply constraints by collaborating with external suppliers in real time, to secure new supply sources, troubleshoot transportation issues, and communicate up and downstream impacts based on changes.

Investment areas

Dynamics 365 Intelligent Order Management
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. Companies can fulfill those orders from their own warehouses, third-party logistics 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 to give real-time recommendations for each order to fulfill orders accurately and cost-effectively, 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.

Upcoming new features for 2023 release wave 1 include:

- New support for business to business (B2B) order management scenarios.
- Extensible and configurable fulfillment optimizations.
- Enhanced integration with Dynamics 365 Commerce and Advanced Warehousing.
- Real-time shipping and costs provided to customers on multiple e-commerce platforms.
- Continued expansion of providers.

NOTE Dynamics 365 Intelligent Order Management will continue to be sold standalone until Microsoft Supply Chain Center is generally available.

Supply and demand insights
The **Supply and demand insights** module uses advanced Azure AI models to predict upstream supply constraints and shortages through supply intelligence. Organizations can perform simulations using data from their supply chain network to predict being out of stock, over-stocking, or missed-order lines. Combined with smart news insights, which provides relevant news alerts in the Supply Chain Center on external events, supply chain practitioners can make decisions and plan with real-world event information and historical insights for product demands.

Data Manager
This feature helps you ingest and orchestrate your data to provide visibility across the supply chain and drive action back into systems of execution. The Supply Chain Center provides a “command center” experience for practitioners to harmonize data from across existing supply chain systems, like Dynamics 365 and other ERP providers including SAP and Oracle, along with standalone supply chain systems.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Microsoft Supply Chain Center** below:

[Check out the release plan]

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Get the most out of Microsoft Supply Chain Center

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What's new and planned for Microsoft Supply Chain Center

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Data Manager

Data Manager in Supply Chain Center enables data ingestion and orchestration to provide visibility across the supply chain and drive action back into systems of execution.

Feature	Enabled for	Public preview	General availability
Data collaboration with suppliers and customers at scale	Users, automatically	Apr 2023	To be announced
Set up your tenant using a streamlined onboarding user experience	Users, automatically	Apr 2023	To be announced
Ingesting data from customers systems	Users, automatically	Jun 2023	To be announced

Dynamics 365 Intelligent Order Management

Dynamics 365 Intelligent Order Management on Microsoft Supply Chain Center allows you to capture and fulfill orders from an omnichannel source while using flexible fulfillment options.

Feature	Enabled for	Public preview	General availability
Create a purchase order from a sales order	Users, automatically	Apr 2023	To be announced

Feature	Enabled for	Public preview	General availability
Enable flexible DOM constraints and processing strategies for effective fulfillment	Users, automatically	Apr 2023	To be announced
Enable orchestration of purchase orders	Users, automatically	Apr 2023	To be announced
Enable orchestration of transfer orders	Users, automatically	Apr 2023	To be announced
Enhance e-commerce carting experience with FedEx estimated dates and rates	Users, automatically	Apr 2023	To be announced
Expose Inventory capabilities as microservices	Users, automatically	Apr 2023	To be announced
Integrate Intelligent Order Management with advanced warehouse management	Users, automatically	Apr 2023	To be announced
Support to create a transfer order from a sales order	Users, automatically	Apr 2023	To be announced
Use post-purchase features with store fulfillment orders	Users, automatically	Apr 2023	To be announced

Supply and demand insights

The Supply and demand insights module uses advanced Azure AI models to predict upstream supply constraints and shortages through supply intelligence.

Feature	Enabled for	Public preview	General availability
Create new KPIs and customize out-of-box analytics	Users, automatically	Apr 2023	To be announced
Minimize supply chain disruptions with AI-driven KPIs and recommendations	Users, automatically	Apr 2023	To be announced

Description of **Enabled for** column values:

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Data Manager

Overview

This feature helps you ingest and orchestrate your data to provide visibility across the supply chain and drive action back into systems of execution. The Supply Chain Center provides a "command center" experience for practitioners to harmonize data from across existing supply chain systems, like Dynamics 365 and other ERP providers including SAP and Oracle, along with standalone supply chain systems.

Data collaboration with suppliers and customers at scale

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	To be announced

Business value

Supply chain planners can use business-critical information and build reports such as projected inventory, purchase order commit, procurement contracts, advanced shipment schedules, and so on, seamlessly through the supplier portal, thus enabling their business to be more agile and predict potential disruptions.

Feature details

Supply chain planners use emailed Excel files to request and share data with suppliers. This is an error-prone and time-intensive solution to reconcile. Initially, we are building Supplier Portal to solve for use cases of all suppliers—customer collaboration scenarios like projected inventory, purchase order commit, procurement contracts, advanced shipment schedules, and more.

- Automation of collaboration requests from customers to suppliers on information sharing on Forecast, Prod. Schedules, Purchase Order, Delivery Commitments, Contract lifecycle management, and Advanced Shipment Notices.

- Streamline supplier contact management with import and merge into Supply Chain Center.
- Standard UI to collaborate on specific records.
- Analytics KPIs for supplier portal scenarios.
- Connectivity to various source systems.
- Notification on status updates.

Set up your tenant using a streamlined onboarding user experience

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	To be announced

Business value

A frictionless trial and onboarding experience lets you spend less time setting up your tenant, so you can rapidly realize the value of the solution.

Feature details

A streamlined process guides you throughout deployment and configuration. Once onboard, you can access short videos showing you how to use the product and how its functionality can provide better visibility of your supply chain to enhance supply chain resiliency. Preloaded demo data allows you to interact with analytics, so you can envision how those will add value to your business once you connect your data. After you have gained some proficiency with the product, you can replace the preloaded data with your own. This data-loading experience is easy to follow and tells you what data you need for each analytics and KPI. In addition to loading your company's data, you can also upload your supplier's data to view your supply chain across constituents comprehensively.

Ingesting data from customers systems

Enabled for	Public preview	General availability
Users, automatically	Jun 2023	To be announced

Business value

Bring data from disparate systems into Microsoft Supply Chain Center to generate a single source of truth for the health of the supply chain. With data in a single location, you can easily get insights from previously disconnected data sources.

Feature details

Through Power Query Online connectors, you can ingest your data and your supply chain constituents' data into Microsoft Supply Chain Center. Data can come via a CSV file, Excel, databases, ERP systems, and more. Once ingested, Supply Chain Center modules can use that data to create insights to gain visibility of your supply chain.

We will focus on connectors that bring data to support SAP ECC customers looking to leverage supply and demand insights and our Intelligent Order Management capabilities within Microsoft Supply Chain Center.

Dynamics 365 Intelligent Order Management

Overview

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. Companies can fulfill those orders from their own warehouses, third-party logistics 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 to give real-time recommendations for each order to fulfill orders accurately and cost-effectively, 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.

Upcoming new features for 2023 release wave 1 include:

- New support for business to business (B2B) order management scenarios.
- Extensible and configurable fulfillment optimizations.
- Enhanced integration with Dynamics 365 Commerce and Advanced Warehousing.
- Real-time shipping and costs provided to customers on multiple e-commerce platforms.
- Continued expansion of providers.

NOTE Dynamics 365 Intelligent Order Management will continue to be sold standalone until Microsoft Supply Chain Center is generally available.

Create a purchase order from a sales order

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	To be announced

Business value

Intelligent Order Management enables you to create a purchase order from a sales order. With this functionality, you can fulfill a sales order by raising a purchase order to a supplier and consuming the stock for the sales order.

Feature details

This feature will provide the following capabilities:

- An action to create a purchase order based on a policy or rule in the sales order orchestration flow, and then process the purchase order in the supply chain app.
- Linkage to the purchase order and the purchase order status at the **Sales order product** level.
- Release the sales order line to fulfillment and change the state based on receipt of the linked purchase order product.
- Display the related sales order product from the **Purchase order product** page.

Enable flexible DOM constraints and processing strategies for effective fulfillment

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	To be announced

Business value

This feature in Intelligent Order Management enables business users to configure multiple rules that enhance their fulfillment strategies and enable priority rule-based constraints that can be reprocessed for better optimization.

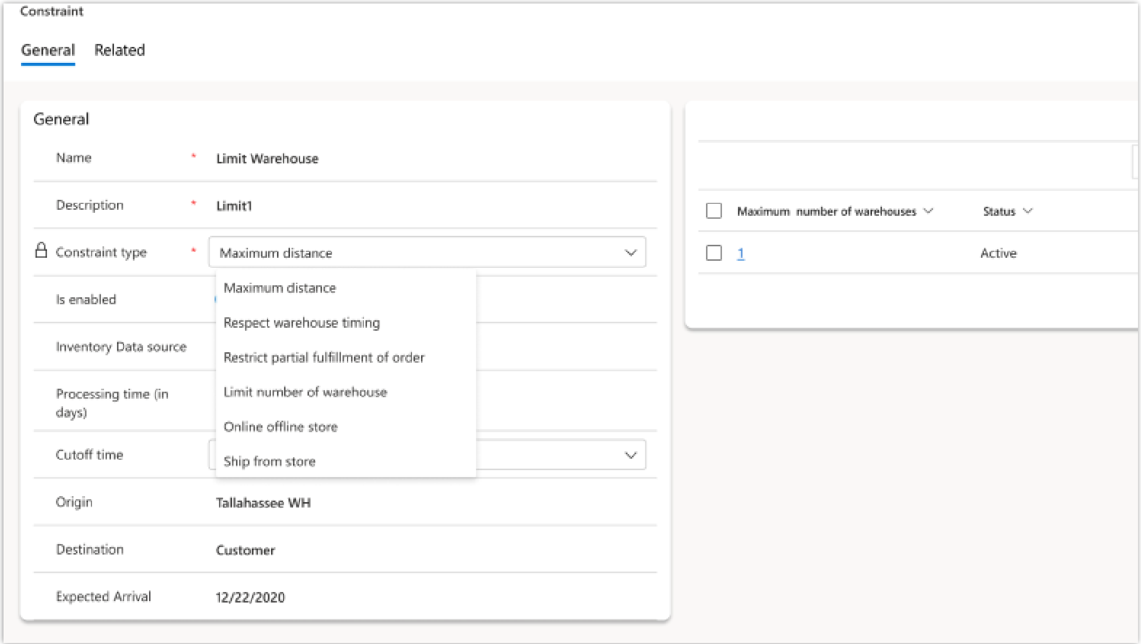
Feature details

Dynamics 365 Intelligent Order Management will enable customers to configure the prioritization for fulfillment options. The new capability will allow customers to define constraints as soft or hard, providing more flexibility to distributed order management (DOM) processing.

Customers will also be able to split deliveries and set order amount restrictions on fulfillments.

This feature enhances DOM with the following additional constraints:

- DOM constraints for maximum rejects, minimum inventory levels
- Maximum order constraints
- Time-based optimization
- Online/offline stores
- Ship from store eligibility



Enable flexible DOM constraints and processing strategies for effective fulfillment

Enable orchestration of purchase orders

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	To be announced

Business value

This feature provides purchase order orchestration so customers can incorporate basic rules such as validation prior to fulfillment in their supply chain app. Customers can also manage states for a purchase order within Intelligent Order Management as they flow back from Dynamics 365 Supply Chain Management and custom provider integrations with suppliers and supplier portal or the transportation management carriers.

Feature details

The following capabilities will be added for purchase order orchestration:

- Provide an **Orchestrate** function for purchase orders that will allow creation of actions and policies as part of the journey.
- Enable state entity for purchase orders and transfer orders.
- Light up purchase order dashboards to represent key measures such as **In-transit**, **Delayed**, and **Received**.

B2B inbound orchestration

The following capabilities will be added for business to business (B2B) inbound orchestration:

- Integrate with the **Load** entities from Supply Chain Management to create an entity to support inbound orchestration with transport management system (TMS) carriers.
- Support integration with TMS systems to bring in real-time transportation status for purchase orders, with the introduction of **Load** entities.
- Light up basic dashboards on load statuses to provide visualizations of the inbound transportation statuses.

Enable orchestration of transfer orders

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	To be announced

Business value

This feature enables you to orchestrate transfer orders by incorporating basic rules such as validation prior to fulfillment in a supply chain app. You can also manage states for transfer orders within Intelligent Order Management.

Feature details

This feature will provide the following capabilities:

- The ability to orchestrate transfer orders so basic validation policies can be set up prior to fulfillment in a supply chain app.
- Management of the states of transfer orders by mapping the states from the supply chain app for shipping and receiving.

Enhance e-commerce carting experience with FedEx estimated dates and rates

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	To be announced

Business value

This feature in Intelligent Order Management provides a set of API libraries that help determine the best possible fulfillment option (store/distribution center) for customers during their experience using the cart.

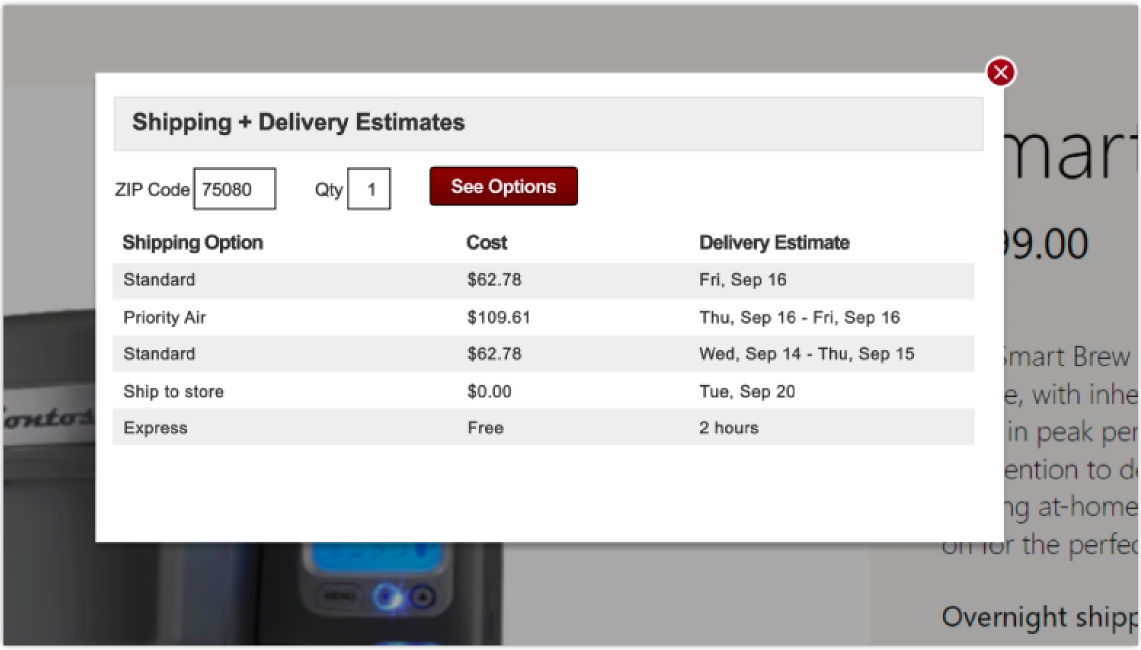
The new APIs will be platform-agnostic for e-commerce platforms and provide a plug-and-play solution for e-commerce channels.

Feature details

Factors such as store/distribution center cutoff time, pickup schedule, working calendars of the store and distribution center, and the distance from the customer's address are processed by the APIs.

Customers can integrate this generic API in their e-commerce channels. The API will closely integrate with FedEx to determine the estimated delivery dates and rates for the services.

The feature will incorporate distributed order management (DOM) flexibility of constraints to determine the best possible fulfillment source and integrate with FedEx APIs to determine estimated fulfillment dates and their rates of fulfillment.



Enhance e-commerce carting experience with FedEx estimated delivery dates and dynamic rates integration

Expose inventory capabilities as microservices

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	To be announced

Business value

Enable inventory capabilities as microservices to get updates from different e-commerce systems or ERPs.

Feature details

These microservices allow updates from different e-commerce systems or ERPs for the following areas:

- Inventory Query
- Inventory reservation
- Inventory ATP
- Inventory allocation
- Inventory On hand schedule changes

Integrate Intelligent Order Management with advanced warehouse management

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	To be announced

Business value

By enabling a tight integration between advanced warehouse management in Dynamics 365 Supply Chain Management, Intelligent Order Management provides customers the ability to use the distributed order management (DOM) engine to determine the optimal fulfillment source for orders. You can use the advanced warehouse management capabilities in Supply Chain Management to process fulfillment. Intelligent Order Management also provides visibility into transactions by representing order statuses and last-mile carrier status.

Feature details

With this feature, Intelligent Order Management will provide the following capabilities:

- Represent picking, packing, and shipping statuses from Supply Chain Management, and update the statuses in the **State** entity on sales orders and fulfillment orders in Intelligent Order Management. **State** and **State reasons** in Intelligent Order Management will be expanded to represent the individual warehouse management statuses on sales and fulfillment orders in real time and will show the most updated view of the transaction in a single pane.

- Represent the **Line quantity view** for picking, packing, and shipping from Supply Chain Management and update the value in the **Sales order** entity in Intelligent Order Management. This value will show the ordered quantity versus the shipped quantity for each sales order product and can help customers drill into any exception or partial shipment scenarios.

Support to create a transfer order from a sales order

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	To be announced

Business value

Intelligent Order Management enables you to configure orchestration to create a transfer order that transfers inventory from another source when it is not available at a certain fulfillment location so the orders can be fulfilled. This provides support for scenarios such as ship to store when store inventory needs to replenish from a DC to support customer order scenarios.

Feature details

As part of this feature, an action is created in Intelligent Order Management to create a transfer order from sales order orchestration using an inventory rule or policy. The transfer order is attached to the sales order line and is also dual written to Microsoft Dynamics 365 Finance for processing. The updates on the transfer order will flow back to Intelligent Order Management and are available and navigable from sales order product views. The sales order status may be held until the transfer is complete.

Use post-purchase features with store fulfillment orders

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	To be announced

Business value

To support scenarios such as buy online, pick up in store (BOPIS), buy online, return in store (BORIS), and ship from store, Dynamics 365 Intelligent Order Management will use its distributed order management (DOM) functionality to find the most suitable retail store for fulfillment before the customer synchronizes their online store order to the Retail Cloud Scale Unit (RCSU) and Commerce headquarters. Customers can also print shipping labels for packages using the new Intelligent Order Management and FedEx API integration feature.

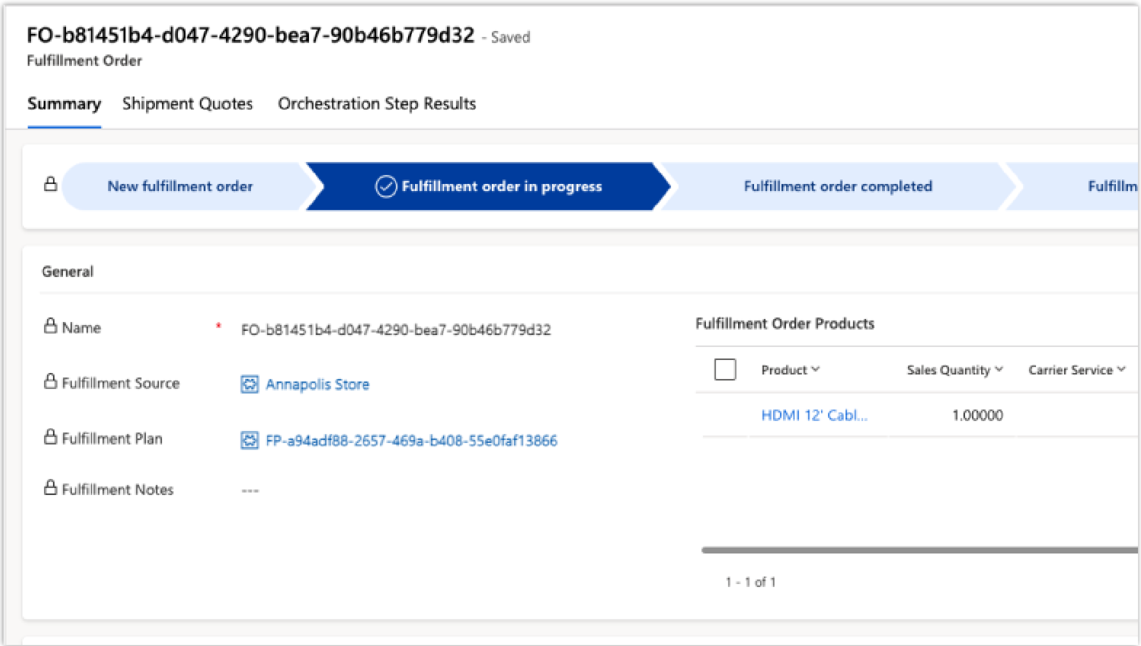
Status updates for store transactions will be displayed so that Intelligent Order Management can be used as a single source of truth for orders.

Feature details

The following functionality will be enabled with this feature:

- Synchronize the online store orders to RCSU and Commerce headquarters after performing fulfillment optimization through the Intelligent Order Management DOM engine. This will allow customers who don't use the carting experience to call the DOM API service to determine the most optimal fulfillment source before syncing orders to RCSU and Commerce headquarters.
- Represent the post-purchase status of retail store orders in real time with the **State** entity in Intelligent Order Management. This will allow customers to view the status of retail orders in one pane, without switching applications.
- Enable the generation of a shipping label through FedEx integration with API call from the point of sale (POS) app. This will allow customers to take advantage of the integration with FedEx shipping labels and last-mile tracking of shipments.

The post-purchase experience will be automatically enabled for all customers using an Intelligent Order Management instance with dual-write enabled.



Use post-purchase features with store fulfillment orders

Supply and demand insights

Overview

The **Supply and demand insights** module uses advanced Azure AI models to predict upstream supply constraints and shortages through supply intelligence. Organizations can perform simulations using data from their supply chain network to predict being out of stock, over-stocking, or missed-order lines. Combined with smart news insights, which provides relevant news alerts in the Supply Chain Center on external events, supply chain practitioners can make decisions and plan with real-world event information and historical insights for product demands.

Create new KPIs and customize out-of-box analytics

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	To be announced

Business value

You can leverage the full extent of data in Microsoft Supply Chain Center to build rich analytics that suits your business/industry-specific needs.

Feature details

Create custom KPIs using the data from multiple data sources and modules in Microsoft Supply Chain Center using a custom KPI builder. Create calculated measures using a calculation expression builder. Support basic calculations and data visualization options, as well as customize existing out-of-the-box analytics.

Minimize supply chain disruptions with AI-driven KPIs and recommendations

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	To be announced

Business value

With AI-driven insights you can measure the health of your supply chain and be prepared to respond to potential disruptions, which in turn can minimize the impact of those events on your business and your customer satisfaction.

Feature details

Bring together data from your transactional systems, along with the data that your supply chain constituents share with you, to generate KPIs that show the health of your supply chain. An intelligent inventory AI model brings together historic data with your defined parameters to recommend when and how much to reorder stock for a given item and warehouse location. You can always see the parameters that go into the AI model, understand how it generates the recommendations, and adjust if needed.

Dynamics 365 Implementation Portal preview

IMPORTANT Some of the functionality described on this release plan has not yet been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy).

NOTE This portal experience is in preview. Share your feedback and help us improve.

Overview

Dynamics 365 Implementation Portal is a tool to help customers and partners drive their Dynamics 365 implementations toward a successful launch. The portal provides contextual implementation guidance and risk mitigation practices for a project's different workloads and apps. You may have already used it as part of one of the FastTrack for Dynamics 365 programs, but we are now making it available as a unified self-service experience for all customers.

By onboarding a project to the implementation portal, customers will get access to direct guidance aligned with the Success-by-Design implementation framework, recommended by the FastTrack and product engineering teams.

In 2023 release wave 1, we focus on bringing value and improvements to several areas.

In project user experiences, we:

- Simplified sign-in and onboarding experience for any user, using work or personal accounts.
- Improved project portfolio and summary/detail views.
- Added ability to profile projects by products, features, and characteristics.
- Added new ability to consume generated implementation guidance.

In tenant admin experiences:

- A customer tenant administrator can onboard Dynamics 365 projects for customer engagement apps and existing finance and operations apps to the portal. New projects for finance and operations apps are automatically onboarded from Dynamics 365 Lifecycle Services.

In project admin user experiences:

- Project admins can onboard new project users and new project admins to the portal.

Additional updates include:

- As the project evolves through the phases, and products, features, or characteristics are updated, the implementation guidance is incrementally added to the context of the project.
- Different users in the same project can customize their experience and read, pin, or dismiss guidance topics. They can set filters and use search functions to help focus their reading.

See also

Dynamics 365 Implementation Portal documentation

Microsoft Dynamics 365 Implementation Guide

Success By Design for Dynamics 365

Deprecation of Dynamics 365 apps

A feature or capability that's deprecated is one that we intend to remove in a future release. The feature or capability will continue to work and will be fully supported until it's officially removed. After it's removed, the feature or capability will no longer work. Deprecation notifications can span a few months or years.

We encourage you to use this information, along with the release plans, to prepare for future releases. This notice is intended to give you sufficient time to plan and update your code before a deprecated feature or capability is removed.

- A deprecated feature is not in active development and may be removed in a future update.
- A removed feature is no longer available in the product.

For the current lists of Dynamics 365 deprecations, visit:

- Sales
- Customer Service
- Field Service
- Finance and Operations apps
- Universal Resource Scheduling
- Healthcare accelerator
- Financial services accelerator

Other deprecations

For the lists of other deprecations, visit:

- Important changes (deprecations) coming in Power Apps and Power Automate

See also

- Microsoft Power Platform 2022 release wave 2 plan
- Dynamics 365 and Microsoft Power Platform release plans
- Microsoft Lifecycle Policy

2023 release wave 1 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning **February 6, 2023**. 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 2023 release wave 1 updates.

IMPORTANT Other early access features may impact your users. To learn more about these features visit:

- Dynamics 365 2023 release wave 1 features available for early access

Power Apps

For a complete list of the Power Apps features, go to What's new and planned for Power Apps.

Feature	Enabled for	Early access	General availability
Improved UX for sharing records	Users, automatically	Jan 30, 2023	Apr 2023
Look up records easily with modern advanced find	Users, automatically	✔ Jan 5, 2023	Apr 2023
Power BI quick reports in Power Apps enabled by default	Users, automatically	✔ Jan 5, 2023	Apr 2023
See which colleagues are viewing the same records as you	Users, automatically	Jan 30, 2023	Apr 2023
View offline sync icon in the navigation bar	Users, automatically	✔ Jan 9, 2023	Apr 2023

Power Apps

Plan and prepare for Power Apps in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Power Apps**.

Overview

Video: Learn about this product's new capabilities

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 worldwide. Power Apps dramatically lowers the cost, complexity, and time of software development through powerful low-code development tools, a robust and secure data platform in Microsoft Dataverse, and hundreds of connectors to common business data sources.

Power Apps is investing in several areas as part of Microsoft Power Platform 2023 release wave 1:

- **Reduce risk** with advanced governance of low code to increase visibility and control while supporting low code adoption.
- **Accelerate app modernization** and reduce costs by doing more with existing systems, connecting Power Apps with existing or legacy sources of data.
- **Efficient and productive experiences** for makers and users to build higher quality apps, quickly and efficiently.

For official product documentation and training for Power Apps, go to:

- Power Apps docs
- Power Apps training on Microsoft Learn

Investment areas

Efficient maker experiences
Power Apps and Dataverse enable organizations to build apps that use data from multiple sources, including data from Microsoft Dataverse, and third-party sources. In 2023 release wave 1, we'll continue to simplify the experience for makers building apps, working with data and logic to ensure makers are as efficient as possible, while supporting scale to more advanced scenarios.

Modern user experiences
Power Apps will continue to modernize the user experience supporting modern and intuitive controls and experiences for users to work with across apps and Microsoft products in a consistent and productive way.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Power Apps** below:

Check out the release plan

For application administrators

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

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

Get the most out of Power Apps

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Power Apps.
Product documentation	Find documentation for Power Apps.
User community	Engage with Power Apps experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Power Apps.

What's new and planned for Power Apps

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

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.

Efficient maker experiences

Makers can build higher quality apps more efficiently.

Feature	Enabled for	Public preview	Early access*	General availability
Enable canvas apps to work offline when using Power Apps mobile apps	Users by admins, makers, or analysts	May 2023	-	
Run automated tests for custom pages and model-driven apps	Users by admins, makers, or analysts	May 2023	-	
Test Power Apps in CICD pipelines	Admins, makers, marketers, or analysts, automatically	May 2023	-	
Reuse Power Fx formulas with user defined functions	Admins, makers, marketers, or analysts, automatically	Jun 2023	-	-
Enhance delegation for UpdateIf and RemoveIf	Admins, makers, marketers, or analysts, automatically	Apr 2023	-	Apr 2023
Coauthor with other makers in the modern app designer	Users by admins, makers, or analysts	✓ Sep 29, 2022	-	Apr 2023
Add table columns to forms and views automatically	Admins, makers, marketers, or analysts, automatically	Mar 2023	-	Apr 2023

Feature	Enabled for	Public preview	Early access*	General availability
Turn existing artifacts into working apps with Express design in Figma	Users by admins, makers, or analysts	✓ May 8, 2022	-	Apr 2023
Be more productive with modern app designer improvements	Users by admins, makers, or analysts	-	-	Apr 2023
Create virtual tables easily in Maker Portal	Admins, makers, marketers, or analysts, automatically	✓ Jan 5, 2023	-	Sep 2023
Drag and drop to build responsive pages more easily	Users by admins, makers, or analysts	Jul 2023	-	Sep 2023

Modern user experiences

Modern and easy user experiences promote maximum productivity.

Feature	Enabled for	Public preview	Early access*	General availability
Look up records easily with modern advanced find	Users, automatically	-	✓ Jan 5, 2023	Apr 2023
Power BI quick reports in Power Apps enabled by default	Users, automatically	-	✓ Jan 5, 2023	Apr 2023
Improved UX for sharing records	Users, automatically	-	Jan 2023	Apr 2023
See which colleagues are viewing the same records as you	Users, automatically	-	Jan 2023	Apr 2023
View offline sync icon in the navigation bar	Users, automatically	-	✓ Jan 9, 2023	Apr 2023
Enjoy the new look and feel for model-driven Power Apps	Users by admins, makers, or analysts	✓ Jan 5, 2023	-	Apr 2023

Feature	Enabled for	Public preview	Early access*	General availability
Build canvas apps by using new and refreshed controls	Users by admins, makers, or analysts	Mar 2023	-	Jun 2023

* You are able to opt into some features as part of early access on February 6, 2023, 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.

Efficient maker experiences

Overview

Power Apps and Dataverse enable organizations to build apps that use data from multiple sources, including data from Microsoft Dataverse, and third-party sources. In 2023 release wave 1, we'll continue to simplify the experience for makers building apps, working with data and logic to ensure makers are as efficient as possible, while supporting scale to more advanced scenarios.

Enable canvas apps to work offline when using Power Apps mobile apps

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	May 2023	-	-

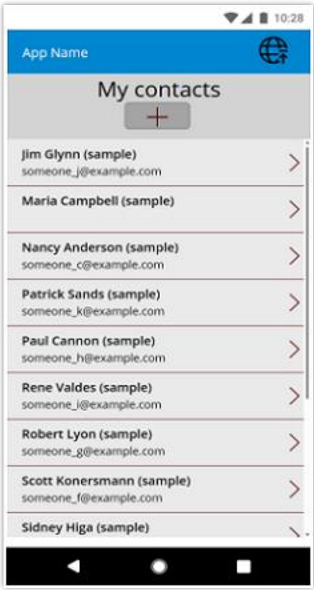
Business value

Make it easy for both low-code canvas app developers who have basic offline needs and professional canvas app developers who require advanced offline functionalities. They can both enable their apps to function in remote areas with little to no network connectivity.

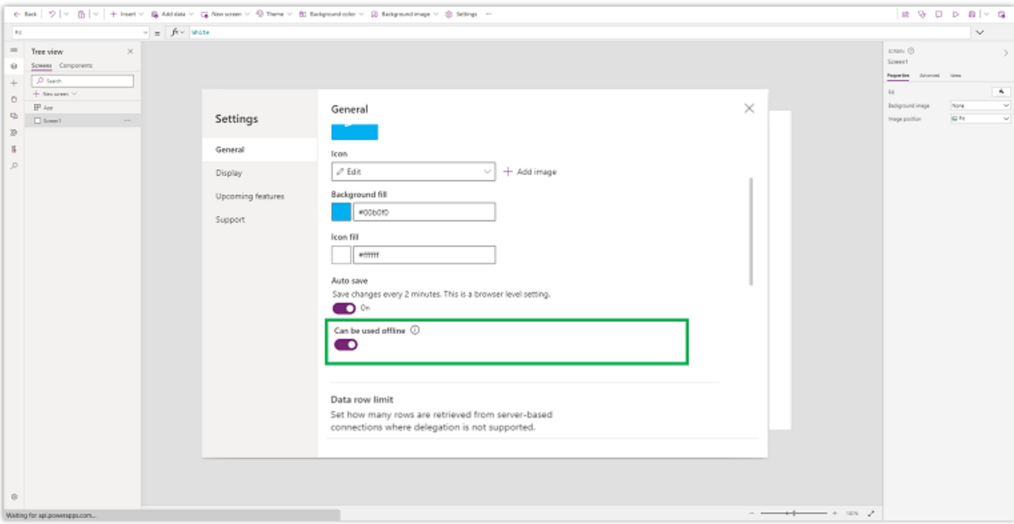
Feature details

You can now enable offline mode for your canvas apps, which allows users to continue using their canvas apps even without an internet connection on mobile devices when using the Power Apps mobile app. The Power Apps sync service relies on an offline profile, which determines the data to download to the device. You can either create a custom offline profile or have one generated automatically.

If a user is working in offline mode, the sync service will operate in the background to maintain synchronization between Dataverse and the device. There's no need to use the Power FX LoadData or SaveData functions anymore.



Example of a canvas app with the offline sync icon shown at the top of the page.



Setting in the maker experience to enable a canvas app for offline mode.

Run automated tests for custom pages and model-driven apps

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	May 2023	-	-

Business value

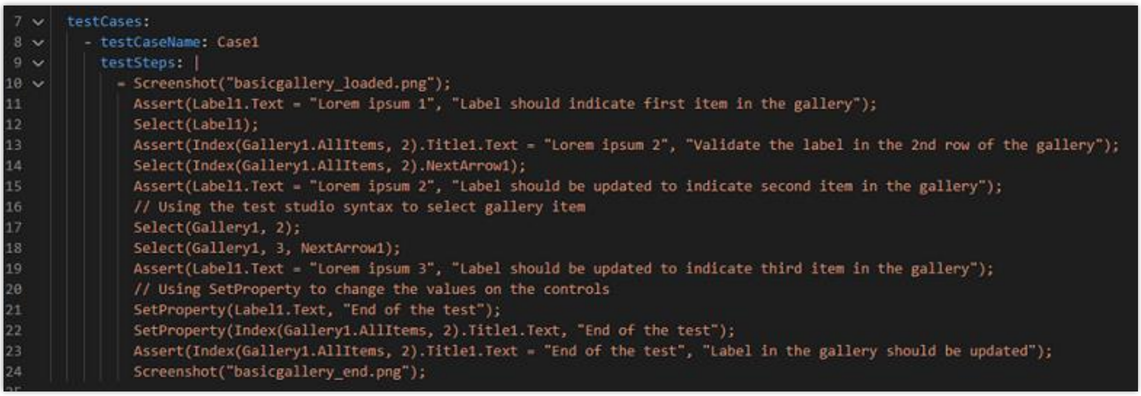
Test Engine is the future of testing Power Apps. With its initial launch in late 2022, the open-source Test Engine project took the first step in realizing a unified testing solution for Power Platform, provided makers the capability to write tests in Power Fx for their canvas apps and run them locally. We're enhancing Test Engine, to ensure makers have the tools they need to ensure the quality of their apps, with support for local testing of model-driven apps and custom pages, providing one way to test Power Apps of all types.

Feature details

Testing is an important part of the software development life cycle. Adequate functional testing of applications helps to ensure that business processes stay unblocked, helps to reduce support costs, and helps to build trust in your applications. As apps grow and become more complex, the ability to ensure that changes do not break or alter the app experience becomes even more critical. Our mission is to empower all app makers to easily create robust tests that can be seamlessly integrated into your organization's application lifecycle management (ALM) practices.

Test Engine is an evolution of our Power Apps testing tools. Test Engine builds upon the key use cases of Test Studio but takes it in a new, powerful direction through open-source collaboration and use of the Playwright browser testing platform. The goals of Test Engine are to provide customers with a robust testing platform for all types of Power Apps and to make it super easy to integrate automated testing into your app development processes.

This feature builds upon the existing release of Test Engine by adding support for model-driven apps and custom pages. Now, makers can use one unified tool to write and execute tests for all types of Power Apps.



```
testCases:
  - testCaseName: Case1
    testSteps: |
      = Screenshot("basicgallery_loaded.png");
        Assert(Label1.Text = "Lorem ipsum 1", "Label should indicate first item in the gallery");
        Select(Label1);
        Assert(Index(Gallery1.AllItems, 2).Title1.Text = "Lorem ipsum 2", "Validate the label in the 2nd row of the gallery");
        Select(Index(Gallery1.AllItems, 2).NextArrow1);
        Assert(Label1.Text = "Lorem ipsum 2", "Label should be updated to indicate second item in the gallery");
        // Using the test studio syntax to select gallery item
        Select(Gallery1, 2);
        Select(Gallery1, 3, NextArrow1);
        Assert(Label1.Text = "Lorem ipsum 3", "Label should be updated to indicate third item in the gallery");
        // Using SetProperty to change the values on the controls
        SetProperty(Label1.Text, "End of the test");
        SetProperty(Index(Gallery1.AllItems, 2).Title1.Text, "End of the test");
        Assert(Index(Gallery1.AllItems, 2).Title1.Text = "End of the test", "Label in the gallery should be updated");
        Screenshot("basicgallery_end.png");
```

YAML and Power Fx based test plan definition.

Test Power Apps in CICD pipelines

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	May 2023	-	-

Business value

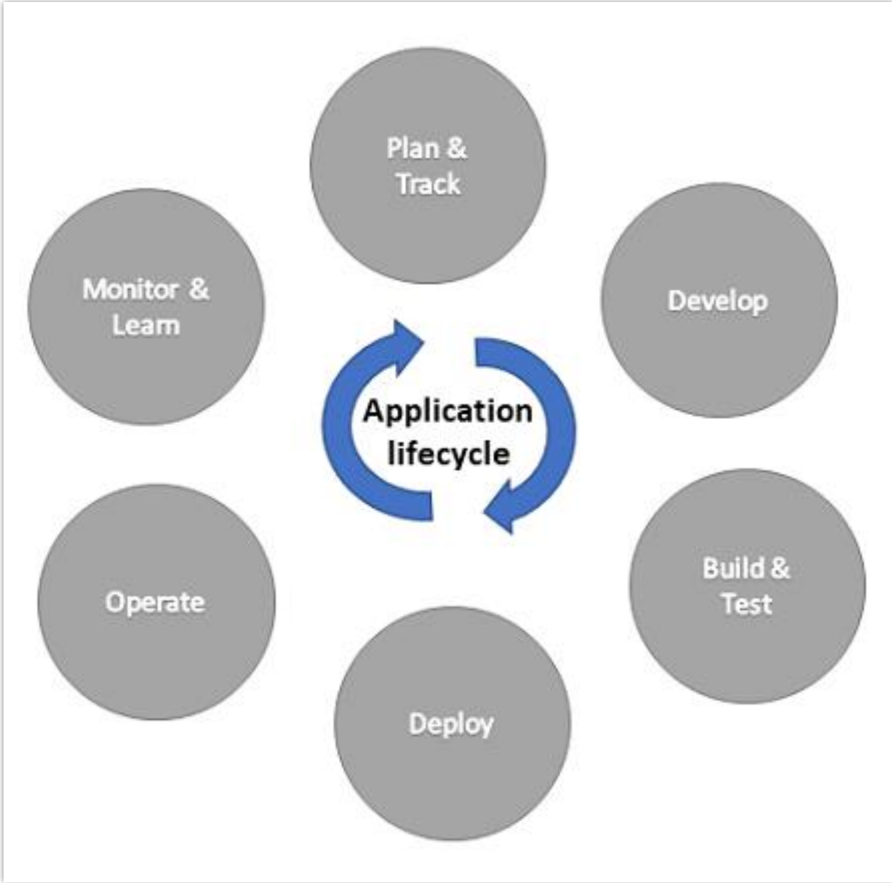
Test Engine is the future of testing Power Apps. With its initial launch in late 2022, the open-source Test Engine project took the first step in realizing a unified testing solution for Power Platform provided makers with the capability to write tests in Power Fx for their canvas apps and run them locally. We're enhancing Test Engine to enable test automation with Power Platform CLI, Azure DevOps tasks, or GitHub Actions, enabling organizations to run test passes as part of their ALM strategy.

Feature details

Testing is an important part of the software development lifecycle. Adequate functional testing of applications helps to ensure that business processes stay unblocked, helps to reduce support costs, and helps to build trust in your applications. As apps grow and become more complex, the ability to ensure that changes don't break or alter the app experience becomes even more critical. Our mission is to empower all makers of Power Apps to easily create robust tests that can be seamlessly integrated into your organization’s application lifecycle management (ALM) practices.

Test Engine is an evolution of our Power Apps testing tools. Test Engine builds upon the key use cases of Test Studio, but it takes it in a new, powerful direction through open source collaboration and use of the Playwright browser testing platform. The goals of Test Engine are to provide customers with a robust testing platform for all types of Power Apps and to make it super easy to integrate automated testing into your app development processes.

This feature builds upon the existing release of Test Engine by adding support that makes it easy for makers to integrate automated testing into CI/CD processes. With this feature set, Test Engine is now part of the Power Platform CLI and makers can now execute tests with a single command without having to build a GitHub project. With GitHub and Azure DevOps integration, it's now easy for makers to make automated testing part of their ongoing processes.



Add automated app testing into your Power Apps ALM processes.

Reuse Power Fx formulas with user defined functions

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jun 2023	-	-

Business value

Organize and reuse formulas by encapsulating logic into functions.

Feature details

Power Fx now supports user defined functions. Large formulas can be split into smaller parts, which is easier to understand, test, and reuse across an app. Functions can be recursive and can be imperative with side effects.

```
// table of employees with manager (Named Formula)
Employees = Table( { Employee: "Charles" }, { Employee: "Sandra", Manager: "Charles" },
    { Employee: "John", Manager: "Sandra" }, { Employee: "Tina", Manager: "Sandra" },
    { Employee: "Julia", Manager: "Charles" }, { Employee: "Fred", Manager: "Julia" },
    { Employee: "Kim", Manager: "Sandra" }, { Employee: "Jane", Manager: "Fred" } );

// user defined function (UDF) to recursively walk the organization and tally reports
TotalReports( ThisEmployee: String ): Number =
    Sum( Filter( Employees, Manager = ThisEmployee ), 1 + TotalReports( Employee ) );

// evaluate UDF for each employee and add a new column to the table
EmployeesWithRepors = AddColumns( Employees, "Total Reports", TotalReports( Employee ) );
```

Power Fx user defined function and formula.

Enhance delegation for UpdateIf and RemoveIf

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-	Apr 2023

Business value

Customers can ensure that their apps are more performant and can execute actions that affect more than 500/2000 records correctly.

Feature details

This feature will allow Power Fx to delegate the **UpdateIf** and **RemoveIf** functions to be executed on Dataverse. They won't be subject to delegable limits. It will allow the delegation of greater than 2,000 records.

Coauthor with other makers in the modern app designer

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Sep 29, 2022	-	Apr 2023

Business value

With the coauthoring feature, makers can edit together in the modern model-driven app designer. Teams can collaborate simultaneously and see the results in real time.

Feature details

Coauthoring in the modern model-driven app designer allows multiple makers—whether pro or citizen developers—to make changes to the app at the same time and see those changes in real time. As a result, teams can innovate together and build stronger connections between professional developers and business domain experts, a critical ingredient to maximizing low-code development.

See also

Coauthoring in model-driven apps (docs)

Add table columns to forms and views automatically

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2023	-	Apr 2023

Business value

One of the biggest friction points for Microsoft Dataverse makers today is that when creating table columns, the forms and views to be used for their model-driven apps aren't automatically updated. As a result, every time a new column is created, makers will need to manually update their forms and views. With this feature, makers can update their forms and views on the fly as they work on their table schema in the table designer or table hub.

Feature details

Makers will be able to add table columns to selected forms and views through the table designer and table hub. An **Update forms and views** button will show up as the entry point of the feature in the table hub, full-page table designer, and inline table designer in the model-driven app designer. Selecting the button will allow makers to configure what table columns to add to the forms and views for the table.

The feature will be automatically enabled for all makers when generally available.

Turn existing artifacts into working apps with Express design in Figma

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ May 8, 2022	-	Apr 2023

Business value

Express design is a new way to quickly get started with Power Apps by instantly transforming your visual design into an app. With Express design, makers can quickly turn existing design artifacts (including paper forms, whiteboard sketches, and Figma files) directly into a working app. The ability to create apps directly from Figma design files helps bridge the gap between design and development by accelerating the app UI development process. It allows developers and designers to collaborate effectively and efficiently to deliver great user experiences with low cost and effort.

Feature details

Designers can create designs in Figma using the **Create Apps from Figma UI Kit**, which provides supported components for Power Apps and includes detailed instructions for how to use the kit. Once the designs are created, simply provide the link to the Figma design file, and Power Apps will generate a new canvas app based on those designs. The design frames are automatically converted into screens in Power Apps. Once the app UI is ready, you can extend this app by connecting to data, adding app logic, and adding more screens and controls.

Convert your Figma designs into pixel perfect Power Apps using Express design.

See also

Express design (docs)

Be more productive with modern app designer improvements

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2023

Business value

Based on the feedback we've received from makers, we're making it easier for makers to create and edit views and forms within the modern app designer. These incremental improvements will help makers be more productive.

Feature details

The modern model-driven app designer will now open all component designers (forms, views, and custom page designers) directly inline, with the option to open in a new tab. This allows makers to be more productive when authoring the components of their model-driven apps.

The modern app designer will also have a new navigation pane. This is an improvement made to the current sitemap editor to be more intuitive and discoverable. Makers will be more productive when editing the contents of their apps using the new maker navigation interface.

Create virtual tables easily in Maker Portal

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jan 5, 2023	-	Sep 2023

Business value

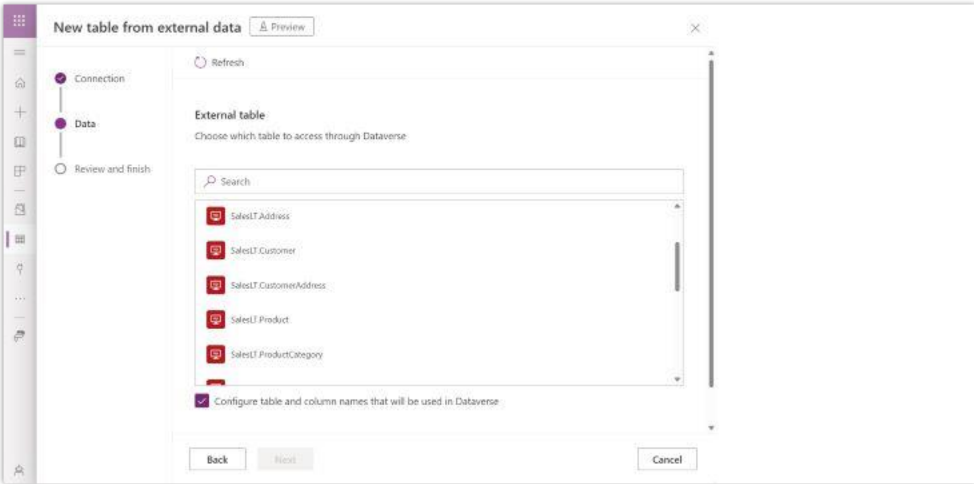
Virtual tables allow makers to use existing data from sources like SQL and SharePoint in Dataverse. The data can continue to live in the source, without being migrated into Dataverse. Once virtualized, the tables act like standard Dataverse tables. For example, makers can create relationships between virtual tables and other Dataverse tables. In addition, makers can use virtual tables to work with data from SQL directly in a model-driven app.

Feature details

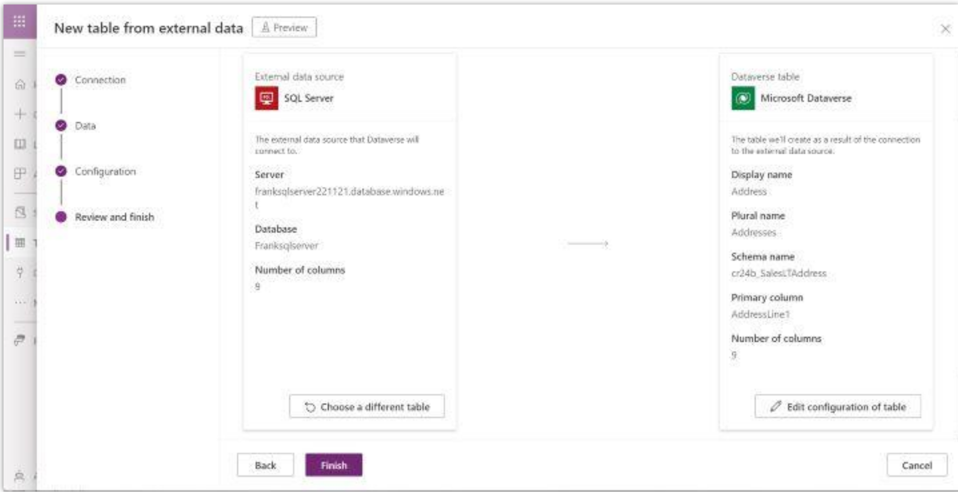
Although virtual tables have been available, the creation process has been difficult, requiring users to rely on documentation and other sources of guidance. The experience to date has been reserved for advanced users who are proficient in coding.

By introducing a guided, step-by-step wizard in Power Apps, all makers can quickly and easily create virtual tables in minutes. Existing virtual table users will find a dramatic decrease in clicks, time, and resources needed to create virtual tables.

Virtual tables will give makers new ways to use Dataverse to read and update data sourced in SQL and SharePoint. They can bring these datasets into model-driven apps and create new relationships with existing data.



Screenshot of creation wizard pick a table.



Finish and create with creation wizard.

See also

[Create virtual tables using the virtual connector provider](#) (docs)

Drag and drop to build responsive pages more easily

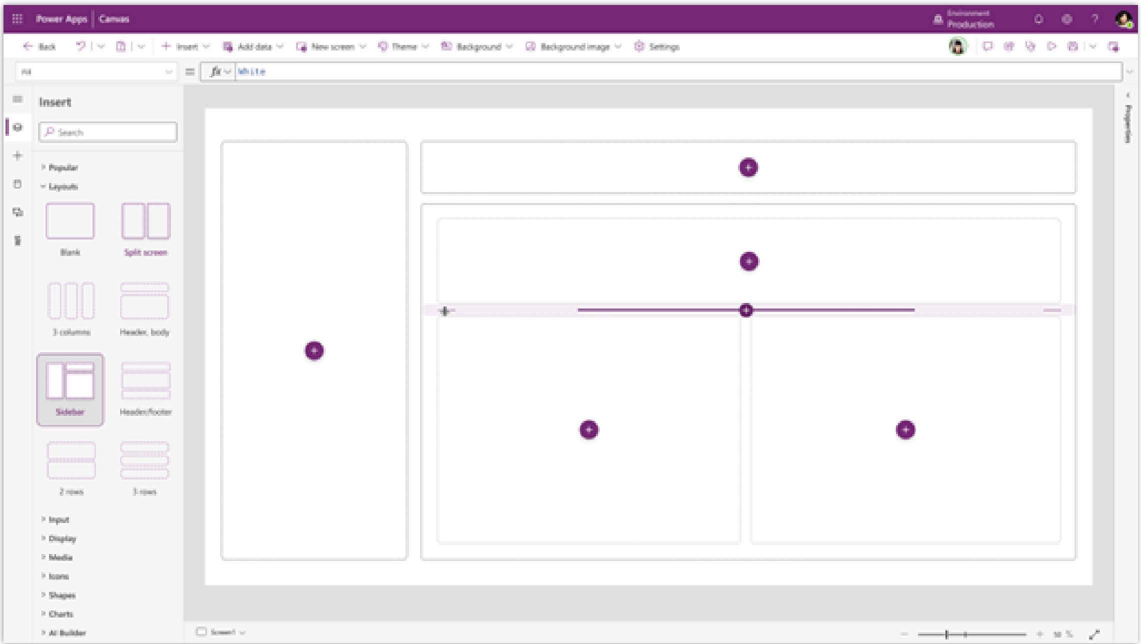
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Jul 2023	-	Sep 2023

Business value

The introduction of the responsive layout containers unlocked the ability for makers to create one app for multiple form factors. Now, we're making the responsive layout containers easier than ever to use with drag and drop.

Feature details

The new layout configuration allows makers to add and easily reorder controls within responsive layout containers. Makers can resize controls and adjust the spacing between them right in the authoring canvas.



Screenshot of the Power Apps Canvas studio and responsive layouts with spacer tools.

Modern user experiences

Overview

Power Apps will continue to modernize the user experience supporting modern and intuitive controls and experiences for users to work with across apps and Microsoft products in a consistent and productive way.

Look up records easily with modern advanced find

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jan 5, 2023	Apr 2023

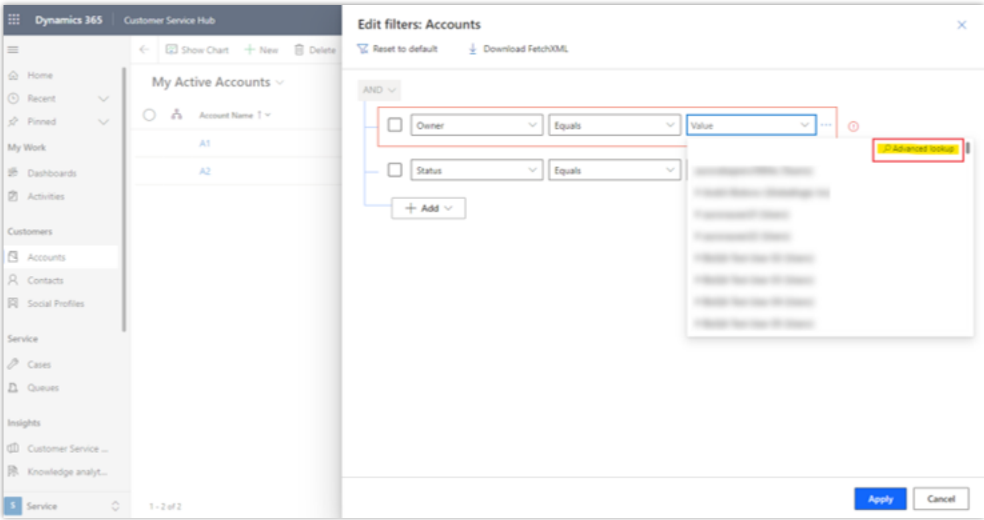
Business value

With modern advanced find enabled by default, you can be more productive in filtering data based on specific records on all grid pages in an app.

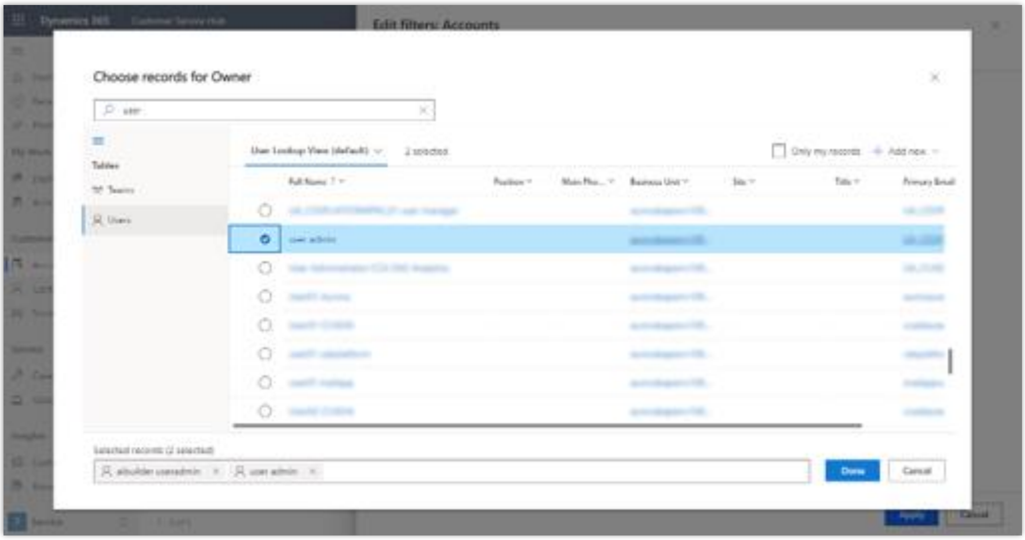
Feature details

Adding a condition or editing an existing condition on lookup columns in the **Edit filters** pane on grid pages is easier with the **Advanced lookup** option. You can see more fields per record and search for records within a specific view to choose the right record to filter against.

Admins can disable this capability in Power Platform admin center by toggling the setting **Show advanced lookup in lookup fields within Edit filters**.



Advanced lookup option in Edit filters.



Advanced lookup in Edit filters.

Power BI quick reports in Power Apps enabled by default

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jan 5, 2023	Apr 2023

Business value

Create reports in the Power BI service starting with a view in a model-driven app. Power BI automatically generates the visuals for you, so you can start exploring the data with just a few clicks.

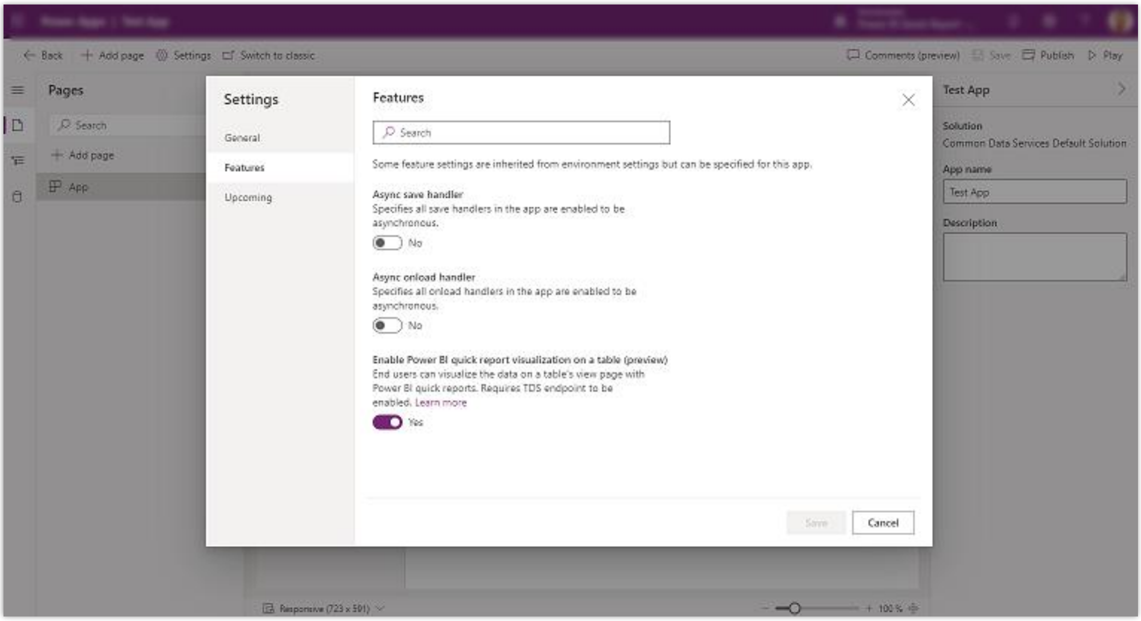
Feature details

The capability to enable Power BI quick report visualization on a table is available on all grid pages. All apps have this capability enabled by default, with the app setting still available for makers to disable per app.

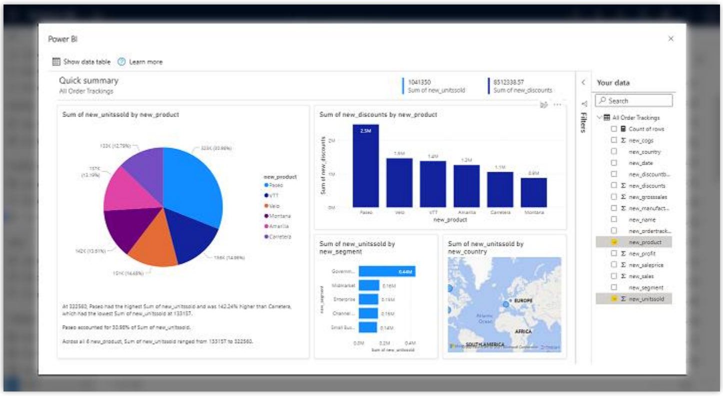
With the **Visualize this view** option on all grid pages, you can:

- Create a Power BI quick report, starting from a view with just a one button-click. The Power BI service generates visuals and a layout intelligently based on the underlying data.
- Make any necessary modifications to visuals, filters, or columns (or any combination of all three) using the display name of the columns on the quick report.
- Save the Power BI report to a workspace of your choice, so you can access it anytime and customize it for your needs.

All of these capabilities have already been generally available and enabled by default for new apps.



Screen of app settings.



Power BI quick report

See also

[Manage model-driven app settings in the app designer](docs) (docs)

Improved UX for sharing records

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Jan 2023	Apr 2023

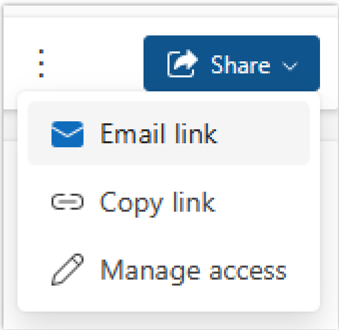
Business value

Record owners now need fewer clicks to share a record and send a link to their colleagues.

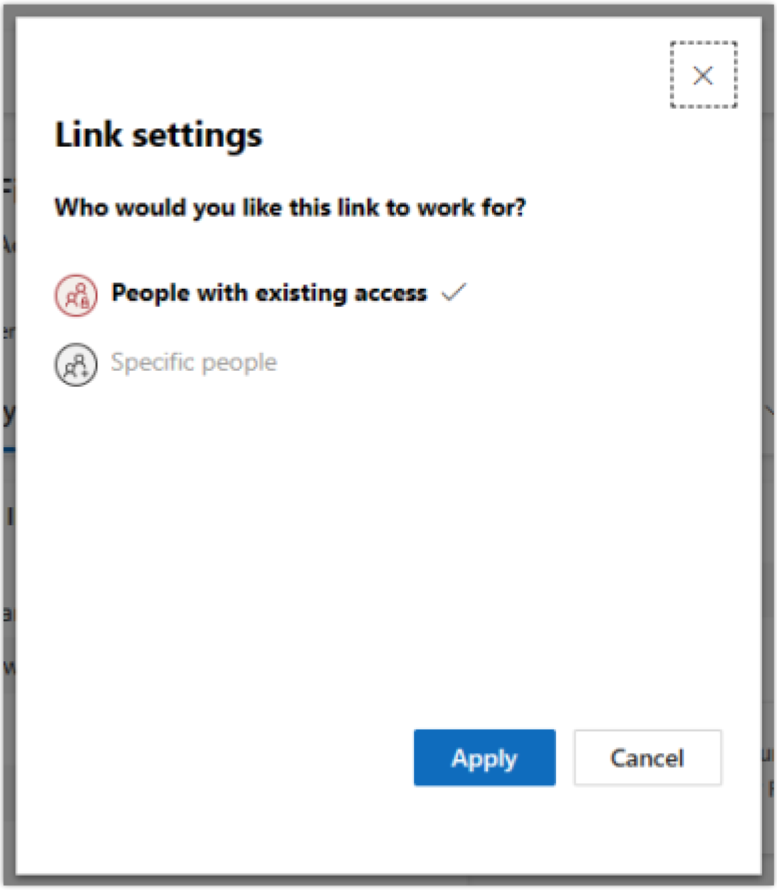
Feature details

Record owners can now share a record more easily using the **Share** > **Email link** option by modifying the link settings to select **Specific people**. When you share the link to the record with someone, the recipient is given read-only access to the record.

- Only users with **Share** privilege on the record will have the option to select the **Specific people** option when emailing links. Users with no share privilege will have this option disabled and won't be able to select it.
- Access can be revoked by selecting **Share** > **Manage access**, which allows you to remove access for the user.



Showing dropdown options when selecting modern share button.



Link settings dialog

See which colleagues are viewing the same records as you

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Jan 2023	Apr 2023

Business value

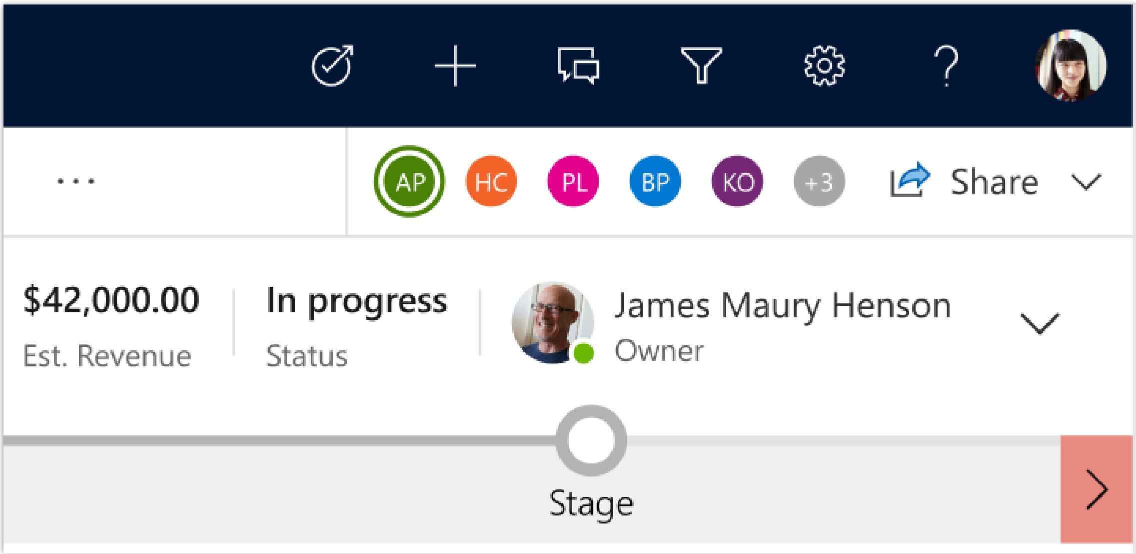
This feature allows users to see which colleagues are viewing the same records as them. This makes it easy to collaborate and work with others to accomplish business goals.

Feature details

This feature applies to all entities, including custom tables, and is enabled by default.

This feature uses the Azure Fluid Relay Service (FRS), which must be available in your region. For more information, go to [Azure Fluid Relay Service availability](#).

NOTE An admin can turn this feature off in the Power Platform admin center by going to the environment settings, viewing the features, and turning off the **Show other people when they're using the same form** feature, which is found under **Collaboration**.



Screen showing multiple users viewing the same record.

View offline sync icon in the navigation bar

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jan 9, 2023	Apr 2023

Business value

The offline sync icon is now always visible in the mobile navigation bar. The icon provides contextual information, such as if the app is connected, if data is currently refreshing, whether there are pending user updates that haven't synchronized yet, and whether the sync has an error or warning. The icon still allows access to the sync status page, which has been improved with details related to pending changes.

Feature details

The offline sync icon is now visible in the main navigation on iOS and Android devices. The icon has several badges that represent sync states:

- Connected
- Not connected
- Syncing data
- Pending changes
- Error
- Warning

The sync status page has also been improved to provide more details. These details help users take effective actions in regards to the status of the data available on their devices.

See also

View offline sync status (docs)

Enjoy the new look and feel for model-driven Power Apps

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Jan 5, 2023	-	Apr 2023

Business value

Model-driven Power Apps now have an updated user interface aligning to the latest Microsoft Fluent Design System. This provides makers with beautiful controls and experiences to delight their users.

Feature details

The new look and feel for model-driven Power Apps include new controls, layouts, fonts, colors, and more. The updated user interface is a per app, opt-in feature. When enabled, model-driven apps will use the latest Microsoft Fluent Design-based elements as they're released.

Microsoft Fluent is an open-source, cross-platform design system to create engaging product experiences—accessibility, internationalization, and performance included.

See also

Modern, refreshed look for model-driven apps (docs)

Build canvas apps by using new and refreshed controls

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Mar 2023	-	Jun 2023

Business value

Power Apps now have an updated user interface aligning to the latest Microsoft Fluent Design System. This provides makers with beautiful controls and experiences to delight their users.

Feature details

The new look and feel for canvas apps will be an opt-in feature for makers that will enable Fluent-based designs, theme, and updated styling like fonts, colors, borders, shadows, and more.

Power Automate

Plan and prepare for Power Automate in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Power Automate**.

Overview

Video: Learn about this product's new capabilities

Microsoft Power Automate provides the tools that you can use to improve productivity in your organization by automating repetitive, time-consuming tasks. Power Automate provides a better way to get things done across your organization through cloud flows and robotic process automation (RPA). It's deeply integrated with the Microsoft 365 ecosystem and the rest of Microsoft Power Platform.

Power Automate is investing in several areas as a part of Microsoft Power Platform 2023 release wave 1 around the following three themes:

- **Driving organization-wide low code adoption**: Our focus is on making sure IT leaders in every organization are ready and resourced to broadly scale Power Platform across the entirety of their organizations.
- **Achieving experience excellence**: We'll provide simpler, modern authoring experiences infused with intelligent assistance at every step. The experience will feel more like the rest of the Microsoft cloud, including seamless collaboration throughout a user's workday.
- **Enabling flagship solutions with high scale**: Users are increasingly betting on Power Platform to drive critical business processes across the enterprise. The professional developers and fusion teams driving these flagship solutions have needs that extend beyond traditional no-code citizen development.

For official product documentation and training for Power Automate, go to:

- Power Automate docs
- Power Automate training on Microsoft Learn

Investment areas

Desktop flows

Desktop flows is the Robotic Process Automation (RPA) solution within Power Automate. Desktop flows provides automation for Windows desktop applications, services, and experiences for orchestration and deployment within Power Platform. In 2023 release wave 1, we'll invest in desktop flows in the following ways:

- Drive adoption within large and small enterprises, delivering features that enable organizations to deploy their automations at scale.
- Provide citizen developers with delightful first run experiences with high ease of use and fast access to hosted resources so they can build or run their automations.
- Enable ISV integrations, opening new options for partners to build RPA solutions based on desktop flows decoupled from cloud flows.

Cloud flows

Cloud flows is a core automation capability in Power Automate that allows customers to focus on what matters and automate the rest. Cloud flows capabilities include:

- Integration with applications like Microsoft Teams, SharePoint, OneDrive, Dynamics 365 suite of applications, and more.
- Integration with the rest of Microsoft Power Platform, including the ability to invoke workflows from an app created using Power Apps, when a data alert is triggered in Power BI, or to take an action in Power Virtual Agents.
- Mobile applications that help customers receive notifications, perform approvals, and invoke and monitor automation runs on the go.

In 2023 release wave 1, we're focusing on making it easier to build and share automations and help organizations drive adoption with confidence through deeper governance and privacy controls.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Power Automate** below:

Check out the release plan

For application administrators

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

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

Get the most out of Power Automate

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Power Automate.
Product documentation	Find documentation for Power Automate.

Helpful links	Description
User community	Engage with Power Automate experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Power Automate.

What's new and planned for Power Automate

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

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

Cloud flows

Use the new cloud flows features to automate tasks across hundreds of connectors.

Feature	Enabled for	Public preview	Early access*	General availability
Flows created with natural language can now understand parameters	Admins, makers, marketers, or analysts, automatically	May 2023	-	-
Get explanations and suggestions when you create a flow with natural language	Admins, makers, marketers, or analysts, automatically	May 2023	-	-
Push cloud flow execution data into Application Insights	Users by admins, makers, or analysts	Jun 2023	-	-

Feature	Enabled for	Public preview	Early access*	General availability
Make changes in draft mode for solution cloud flows	Admins, makers, marketers, or analysts, automatically	Jun 2023	-	
Use versioning for solution cloud flows	Admins, makers, marketers, or analysts, automatically	Jun 2023	-	
Monitor performance for cloud and desktop flow activities	Admins, makers, marketers, or analysts, automatically	Sep 2023	-	-
Store cloud flow execution history in Microsoft Dataverse	Admins, makers, marketers, or analysts, automatically	Sep 2023	-	-
Use natural language to create flows	Admins, makers, marketers, or analysts, automatically	-	-	May 2023
Generate expressions from examples	Admins, makers, marketers, or analysts, automatically	✔Oct 10, 2022	-	May 2023
Define sequential approvals in Power Automate	Admins, makers, marketers, or analysts, automatically	-	-	May 2023
Use native integration for flows in Excel	Admins, makers, marketers, or analysts, automatically	Mar 2023	-	May 2023

Feature	Enabled for	Public preview	Early access*	General availability
Connect to other environments from the Microsoft Dataverse connector	Admins, makers, marketers, or analysts, automatically	Apr 2023	-	Aug 2023

Desktop flows

Use the new desktop flows features to automate tasks on your Windows PC.

Feature	Enabled for	Public preview	Early access*	General availability
Create desktop flow connections without passwords	Admins, makers, marketers, or analysts, automatically	Apr 2023	-	
Monitor ROI performance in desktop flows	Admins, makers, marketers, or analysts, automatically	Sep 2023	-	
Pass complex data between parent and child desktop flows	Admins, makers, marketers, or analysts, automatically	Sep 2023	-	
Support direct connectivity with Power Automate for desktop	Admins, makers, marketers, or analysts, automatically	Sep 2023	-	-
Actions pane refactoring	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023
Connectivity troubleshooter in Power Automate for desktop	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Feature	Enabled for	Public preview	Early access*	General availability
Fix the selector of a UI element	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023
Improved runtime error messages for Excel actions	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023
Introduce UISpy to work with UI elements	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023
Performance improvements in Power Automate for desktop	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023
Use troubleshooter for UI automation	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023
Use web automation to access cross-domain iframes	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023
Validate the selectors of UI elements	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023
Learn about Power Automate for desktop on the login screen	Admins, makers, marketers, or analysts, automatically	-	-	May 2023

Feature	Enabled for	Public preview	Early access*	General availability
Manage work queues for desktop flows	Admins, makers, marketers, or analysts, automatically	May 2023	-	Sep 2023

* You are able to opt into some features as part of early access on February 6, 2023, 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 is a core automation capability in Power Automate that allows customers to focus on what matters and automate the rest. Cloud flows capabilities include:

- Integration with applications like Microsoft Teams, SharePoint, OneDrive, Dynamics 365 suite of applications, and more.
- Integration with the rest of Microsoft Power Platform, including the ability to invoke workflows from an app created using Power Apps, when a data alert is triggered in Power BI, or to take an action in Power Virtual Agents.
- Mobile applications that help customers receive notifications, perform approvals, and invoke and monitor automation runs on the go.

In 2023 release wave 1, we're focusing on making it easier to build and share automations and help organizations drive adoption with confidence through deeper governance and privacy controls.

Flows created with natural language can now understand parameters

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	May 2023	-	-

Business value

Natural language flow authoring is easier than before with flow parameters pre-filled for you.

Feature details

With this feature, Power Automate automatically fills in the values for the required configuration parameters that you provide when you create flows from a natural language description of the flow you want to create. This feature minimizes the amount of manual configuration you need to do when you create flows from a natural language description.

Get explanations and suggestions when you create a flow with natural language

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	May 2023	-	-

Business value

Natural language flow authoring becomes interactive with suggestions on how to better describe what you want to build.

Feature details

With this feature, Power Automate automatically provides explanations and guided suggestions to makers when they start to create flows from a natural language description of the scenario they want to automate. With these early explanations and suggestions, makers can create flows that meet their needs more precisely.

Push cloud flow execution data into Application Insights

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Jun 2023	-	-

Business value

Administrators can leverage their existing Application Insights instances in Azure to monitor automations within an environment.

Feature details

With the first click stop of this integration (or *milestone* in the continuous range of reference points in this integration), admins can push cloud flow execution data into Application Insights. This push can then be used for advanced monitoring and alerting scenarios for automations running in an environment.

Make changes in draft mode for solution cloud flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jun 2023	-	-

Business value

Users have told us that they're unable to begin creating or editing a flow until they have a large amount of time available because they can't pause halfway through.

Feature details

Currently, makers can't save a flow with errors and can't save a draft version of a flow. With this feature, makers can make changes to solution cloud flows in draft mode, including when there are errors, and publish when changes are complete.

Use versioning for solution cloud flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jun 2023	-	-

Business value

Currently, makers don't have versioning for solution cloud flows, so they lack the ability to revert to a previous version. With this feature, makers can view and restore past versions of solution cloud flows.

Feature details

With this feature, makers can use a panel in the flow designer to view and restore previous versions of solution cloud flows if something goes wrong, or they change their minds. The draft state and version history are stored in Microsoft Dataverse. This is part of a platform-wide approach to versioning, with solution cloud flows being the first solution component to add this Dataverse-backed versioning support. Other solution components will follow. This won't provide source control integration, which is being planned for the future.

Monitor performance for cloud and desktop flow activities

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2023	-	-

Business value

Customers can use a central consolidated view to monitor and understand the executions across cloud and desktop flows.

Feature details

With this feature, you have a single consolidated view to understand the automation performance across your cloud and desktop flows. This feature enables you to:

- Understand the top trends across all of your automation assets (for example, success and failure) across different time periods.
- Understand top errors and their trends.
- Configure corrective actions and alerts for specific error types.
- Estimate the return on investment (ROI) of different automations.

Store cloud flow execution history in Microsoft Dataverse

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2023	-	-

Business value

You can use your Dataverse instances to build custom, longer-term reports based on the flow execution history.

Feature details

With this feature, you can use Dataverse to store your flow execution data. This enables you to:

- Build custom reports for automation ROI (return on investment), monitoring, and more.
- Retain flow execution records for longer than the current limit of 30 days.
- Centralize the automation execution storage data across cloud and desktop flows.

Use natural language to create flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	May 2023

Business value

Easily get started building new cloud flows by describing them in natural language. This feature supports additional actions, connectors, geo-availability, parameter filling, and explainability to make the experience even easier.

Feature details

Using state-of-the-art AI models like GPT3, Power Automate can take natural language as input to create flows. You can use everyday natural language to describe the cloud flow that you want, and Power Automate will create it based on your written description of the scenario to automate. This feature makes it easier for you to build different types of automation faster, allowing a broader population of business users to use Power Automate in a truly no-code experience.

The feature launched in preview for the United States region at Ignite 2022. Now, we'll be making the feature generally available, adding several new enhancements in the process:

- Support for more connectors and actions. Power Automate understands natural language input to build flows that include Dataverse, approvals, and Power Apps.
- Availability in EU (European Union) region and GCC (Government Community Cloud).
- Automatic flow parameter filling. Once a flow is created in natural language, the flow won't only include the individual actions but also the parameters in the action cards.
- Explainability to understand how your description of the flow translates to the different flow actions with suggested improvements.

Generate expressions from examples

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 10, 2022	-	May 2023

Business value

Easily format date, number, and text fields without having to author complex expressions. By providing examples of date, number, or text values and the desired output, you can easily format your values to look exactly how you want them to appear.

Feature details

Power Automate has a rich expression language that you can use to format the different values within your cloud flows; however, finding the appropriate expression to use can be time consuming, particularly for new users. To address this, we're introducing format by examples. Show Power Automate an example of a value that you want to format and the desired output, and Power Automate will suggest the appropriate expression to use. With this feature, you can easily format dates, numbers, and texts.

See also

Format data by examples preview (docs)

Define sequential approvals in Power Automate

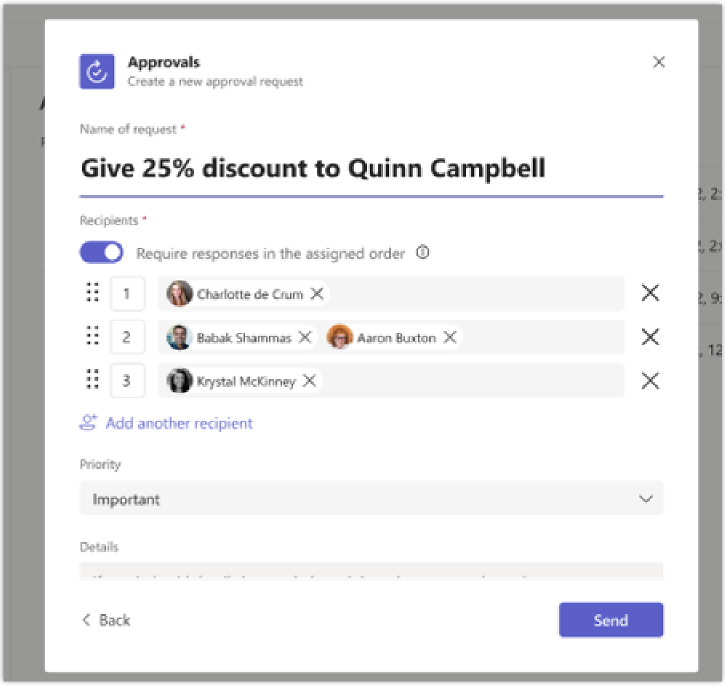
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	May 2023

Business value

This feature allows users to create more complex approval workflows within Microsoft Teams and Power Automate flows.

Feature details

With this feature, makers can define multiple levels/stages in an approval flow in Microsoft Teams or Power Automate and assign who needs to approve them. The approval request goes to the next level/stage after all approvers in a previous level/stage approve the flow. If someone rejects the flow at any level/stage, it's considered rejected, and it isn't passed on to subsequent levels/stages. All approvers can see the history of the approvals at each stage and the outcome.



Screenshot of the sequential approvals dialog.

Use native integration for flows in Excel

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2023	-	May 2023

Business value

Enable users to create and execute flows directly from within Excel, making it easier to work with Power Automate flows.

Feature details

This feature brings Power Automate flow creation and run support directly within Excel. With this feature, users can access Excel-specific templates from the **Automate** menu in Excel. From there, they can easily use the template onboarding experience to set up the templates. From this add-in, users will also be able to manage flows associated with the Excel file they're currently accessing.

Connect to other environments from the Microsoft Dataverse connector

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-	Aug 2023

Business value

Create flows that combine data and perform operations across different Microsoft Dataverse databases.

Feature details

Currently, makers must use the Microsoft Dataverse (legacy) connector to connect to environments outside of the current environment. With this feature, makers can connect to other environments from the Microsoft Dataverse connector's actions and triggers. Additionally, admins can use endpoint filtering to restrict cross-environment connections from the Microsoft Dataverse connector.

Desktop flows

Overview

Desktop flows is the Robotic Process Automation (RPA) solution within Power Automate. Desktop flows provides automation for Windows desktop applications, services, and experiences for orchestration and deployment within Power Platform. In 2023 release wave 1, we'll invest in desktop flows in the following ways:

- Drive adoption within large and small enterprises, delivering features that enable organizations to deploy their automations at scale.
- Provide citizen developers with delightful first run experiences with high ease of use and fast access to hosted resources so they can build or run their automations.
- Enable ISV integrations, opening new options for partners to build RPA solutions based on desktop flows decoupled from cloud flows.

Create desktop flow connections without passwords

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-	-

Business value

Desktop flow users aren't limited to hard-coded credentials to use desktop flows. It's now possible to set up a connection without providing a password, providing a more flexible application lifecycle management (ALM) for desktop flows.

Feature details

With this feature, users can create a desktop flow connection specifying which machine to target and their current user account. The desktop flow connection will be visible in the Power Automate portal and can be used to launch a desktop automation.

Monitor ROI performance in desktop flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2023	-	-

Business value

With this new feature, CoE and business teams can define return on investment (ROI) characteristics and closely monitor pre and post automation performances.

Feature details

Deciding on which automation project to invest time and resources requires a well-defined automation backlog that has been prioritized based on impact and complexity of automations and should be aligned with strategic corporate objectives.

You can consider the resulting ROI and operational insights this new feature brings in future decision-making processes about which automation projects to start next.

Pass complex data between parent and child desktop flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2023	-	-

Business value

Before this feature, Power Automate for desktop didn't support passing Excel or browser handle IDs initiated in a desktop flow between a parent and a child flow. The addition of this feature avoids the use of workarounds to handle such scenarios.

Feature details

Using parent and child flows is a great way for customers to reuse logic between their various workflows. It helps to avoid creating large, hard-to-maintain flows and enables you to have smaller, more manageable units. A key part of child flows is the ability to pass information from the parent. This functionality was limited in the past for some data types. Now, Power Automate for desktop supports passing Excel and browser instance handle IDs between parent and child desktop flows.

Support direct connectivity with Power Automate for desktop

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2023	-	-

Business value

Direct connectivity within Power Automate for desktop eliminates the requirement to install the machine runtime app, which was previously used for attended runtime scenarios.

Feature details

Direct connectivity with Power Automate for desktop allows users to run desktop flows initiated in the cloud directly through the desktop console. This feature eliminates the requirement to install the machine runtime app, which was previously used to register machines and during the runtime of cloud flows.

Actions pane refactoring

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Business value

This redesign complements the availability of cloud connectors in the desktop application of Power Automate, making it easier to search for and select actions and connectors.

Feature details

Users can now search for modules and actions in a more straightforward way. They can handle the built-in actions and the cloud connectors that will be available in the desktop application without having to use the existing tree structure.

Connectivity troubleshooter in Power Automate for desktop

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Business value

Users will have access to a new troubleshooting and diagnostic tool that will help them resolve issues and get information about resolution steps for various problems that may occur.

Feature details

Users have access to a new troubleshooting and diagnostic tool that helps them resolve issues and get information about resolution steps for various possible problems in Power Automate for desktop. The first phase of this tool checks basic connectivity requirements, like being able to connect to the proper public endpoints, which are needed for Power Automate to work properly.

Fix the selector of a UI element

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Business value

You can now create desktop flows that perform UI and browser automation and don't fail due to a lack of ability to locate the UI elements in every execution.

Feature details

UI and browser automation in desktop flows interact with UI elements. When you capture a UI element, a selector gets generated and specifies the UI element. A selector is the **address** of the UI element, and Power Automate for desktop can locate the UI element while running the desktop flow.

In many cases, the selector of a UI element is dynamic, meaning that it can be slightly different every time the window or webpage is loaded. This scenario may cause a UI/browser automation action to fail during running time, as the selector is no longer the same as at the time of capturing.

You can capture a UI element multiple times using a wizard, and Power Automate for desktop will compare all captured selector information and suggest a new one that is more dynamic and robust and can be used for **addressing** the specific UI element.

Improved runtime error messages for Excel actions

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Business value

Users can now get a straightforward explanation about what went wrong with their Excel actions. Also, they have access to remediation steps, so they don't always need to resort to support help.

Feature details

Before this feature, it was challenging to understand what went wrong and what needed to be done to fix runtime errors. This feature provides more descriptive error messages, including troubleshooting steps incorporated in the error dialog or links to knowledge articles for assistance.

Introduce UISpy to work with UI elements

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Business value

With this new component, you can view the details of all UI elements available on the screen and create better custom selectors. You can discover all the UI elements of a window in an easier and more user-friendly way and test specific actions on top of these UI elements.

Feature details

UISpy is a new sub-app of Power Automate for desktop. You can use it to inspect all the UI elements of your screen, check the hierarchy trees of all windows, capture the elements you desire, and test actions like **click** or **populate** without any interaction with the flow designer.

Performance improvements in Power Automate for desktop

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Business value

The desktop application of Power Automate has become more responsive for users regarding certain functionalities.

Feature details

With this feature, users can start a desktop flow run from the console or flow designer, and they can improve the response time of the console when launching using an external URL.

Use troubleshooter for UI automation

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Business value

You can now check whether all prerequisites for performing UI automation are met in an easy and timely manner and ensure that all capabilities are in place and up and running as expected.

Feature details

UI automation of Power Automate for desktop requires some components for interacting with UI elements in screens of specific technologies.

You're able to troubleshoot cases that Power Automate for desktop tries to interact with:

- Webpages
- Java apps and applets
- Virtual desktops in Citrix or RDP
- SAP

Use web automation to access cross-domain iframes

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Business value

Power Automate for desktop supports web automation scenarios, including steps for interacting with web UI elements that consist of cross-domain iframes.

Feature details

Although web automation is an important feature of desktop flows, some webpages can be complicated to automate because of nested iframes. With this feature, Power Automate for desktop can capture iframes elements, unblocking scenarios where automations need to work with iframes on webpages.

Validate the selectors of UI elements

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2023

Business value

You can now ensure that a selector, whether edited or not, can locate the specified UI element. You may perform any change in the selector and test in an easy way whether the selector is valid and can find the desired UI element on the screen.

Feature details

UI and browser automation in desktop flows interacts with UI elements. A selector that specifies the UI element is generated when a UI element is captured. A selector is the **address** of the UI element that allows Power Automate for desktop to locate the UI element while running the desktop flow.

With the selector testing feature, you can navigate to the UI element builder window for a captured UI element, test one or all selectors, and check whether the UI element can be found.

You can perform testing immediately after opening the builder or after editing one or more selectors. The testing process will inform you whether a UI element is found on the screen (success), not found (failure), or multiple UI elements are found with the specific selector(s).

Learn about Power Automate for desktop on the login screen

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	May 2023

Business value

This feature improves the login screen of Power Automate for desktop, so that users can understand the product value before logging in.

Feature details

Power Automate for desktop has a new informative login screen that allows users who might not be familiar with the product to understand its value, core features, and endless possibilities for automation.

Manage work queues for desktop flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	May 2023	-	Sep 2023

Business value

CoE teams and business stakeholders can jointly create, maintain, and control prioritized work queues. Process and CoE admins can then closely monitor the performance and efficiency of their work queues and respond to business exceptions that may occur across their digital workforce.

Feature details

This feature introduces some key workload management features in the form of work queues:

- Power Automate portal experience to create and manage work queues and their item details
- Work queues support custom prioritization and built-in RBAC support
- Work queue interactions are supported through new actions in Power Automate for desktop

Power Virtual Agents

Plan and prepare for Power Virtual Agents in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Power Virtual Agents**.

Overview

Video: Learn about this product's new capabilities

Power Virtual Agents enable anyone in your organization to create AI-powered bots that can chat with users about specific topics. Your bots can answer routine questions, resolve common issues, or automate tasks that take up valuable customer or employee time.

Creating a bot is typically a complex and time-intensive process, requiring long content update cycles and a team of experts. Power Virtual Agents gives anyone in your organization the ability to create powerful custom bots using an easy, code-free graphical interface without the need for AI experts, data scientists, or teams of developers. A bot can interact with users, ask for clarifying information, and answer a customer's questions.

Power Virtual Agents has deep integration with Power Automate and the Microsoft Bot Framework. Authors can extend their bots to integrate with API backends which enables 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.

The 2023 release wave 1 brings improvements to the authoring experience. This includes topic overlap detection in all Power Virtual Agents languages, adaptive card authoring, multi-modal response authoring, and more.

Investment areas

Core authoring
Create bots with Power Virtual Agents using the no-code authoring canvas to manage how topics interact, design conversation flow, and customize the look and feel. Then test changes to your bot without having to fully deploy it.

Enhance your bots further with variables and entities to make your bot more capable of understanding your users. Then add rich content, such as Adaptive Cards and Speech Synthesis Markup Language (SSML), to make your bots more relatable and easier to use. Manage all of your bots in one place with the improved app navigation.

Bot configuration
Power Virtual Agents provides several ways to configure your bots to adapt to your needs. Configuration settings also allow you to extend your bots with other services and features. This includes authentication provider support, the use of Microsoft Bot Framework skills to augment the bot's capabilities, and channel integration, such as Microsoft Teams and Facebook.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Power Virtual Agents** below:

Check out the release plan

For application administrators

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

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

Get the most out of Power Virtual Agents

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Power Virtual Agents.
Product documentation	Find documentation for Power Virtual Agents.
User community	Engage with Power Virtual Agents experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Power Virtual Agents.

What's new and planned for Power Virtual Agents

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to [2022 release wave 2 plan].

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
Trigger bot topics by events	Admins, makers, marketers, or analysts, automatically	✓ Nov 15, 2022	May 2023
Use Power Fx expressions in authoring canvas	Admins, makers, marketers, or analysts, automatically	✓ Nov 15, 2022	May 2023

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
Enrich conversations with Adaptive Cards	Users by admins, makers, or analysts	✓ Nov 15, 2022	May 2023
Give users a natural experience with multi-modal response authoring	Admins, makers, marketers, or analysts, automatically	✓ Nov 15, 2022	May 2023
Use list variables and looping in conversations	Users by admins, makers, or analysts	✓ Nov 15, 2022	Jun 2023

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

Power Virtual Agents provides several ways to configure your bots to adapt to your needs. Configuration settings also allow you to extend your bots with other services and features. This includes authentication provider support, the use of Microsoft Bot Framework skills to augment the bot's capabilities, and channel integration, such as Microsoft Teams and Facebook.

Trigger bot topics by events

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Nov 15, 2022	May 2023

Business value

Many bots need to perform pre- or post-message processing logic to meet key business requirements. For instance, each message may need to be added to a central audit trail or scanned for sensitive PII which needs to be redacted before being processed and stored in analytics.

Feature details

Advanced triggering for Power Virtual Agents bots provides a powerful extensibility point enabling bot authors to add processing logic at key events within a bot, such as when a message is received and sent. A topic can now be triggered by events, enabling an author to leverage connectors, Power Fx expressions, or any other node type, ensuring key extensibility needs can be met.

Use Power Fx expressions in authoring canvas

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Nov 15, 2022	May 2023

Business value

A broad range of authoring personas can now author low-code expressions to perform system integration and data management tasks that previously required software engineers. For example, connectors can be invoked directly, and data returned can be manipulated to retrieve key information.

Feature details

Expression authoring is a key capability for any bot in order to implement more sophisticated logic. For example, you can now author expressions to perform data validation or control looping logic. In addition, you can better manipulate data, performing operations on variables (for example, adding a percentage). By retrieving data from connectors, you can, for example, retrieve data from a JSON object or array.

See also

Create expressions using Power Fx (docs)

Core authoring

Overview

Create bots with Power Virtual Agents using the no-code authoring canvas to manage how topics interact, design conversation flow, and customize the look and feel. Then test changes to your bot without having to fully deploy it.

Enhance your bots further with variables and entities to make your bot more capable of understanding your users. Then add rich content, such as Adaptive Cards and Speech Synthesis Markup Language (SSML), to make your bots more relatable and easier to use. Manage all of your bots in one place with the improved app navigation.

Enrich conversations with Adaptive Cards

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 15, 2022	May 2023

Business value

Enrich Power Virtual Agents conversational experiences and address business scenarios that require the bot user to interact with custom-formatted data or visual content.

Feature details

In this release wave, bot authors can create actionable and interactive rich media content using Adaptive Cards.

Cards can enrich Power Virtual Agents conversational experiences and address business scenarios that require the bot user to interact with custom-formatted data, manipulate visual content, fill a form, and more.

Bot authors can select from a set of pre-built Adaptive Card templates in Power Virtual Agents and fill them in with their data.

See also

Add an Adaptive Card (docs)

Give users a natural experience with multi-modal response authoring

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Nov 15, 2022	May 2023

Business value

Conversational experiences can support both text and speech and have more optimized speech talk tracks (for example, more succinct) along with multiple variations to ensure the experience is more natural.

Feature details

Response authoring within the authoring canvas now supports both text and speech variations. By default, text responses will be used for speech, but you can choose to provide a speech variation which will be used for speech-enabled channels, such as telephony. Speech variations can make use of SSML optimizations to improve pronunciation and provide more control generally on the text-to-speech operation.

Responses can use variables held in bot memory, and multiple variations can be authored, which are chosen randomly for a given user to ensure a more natural experience.

See also

Add a speech message override (docs)

Use list variables and looping in conversations

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 15, 2022	Jun 2023

Business value

Variable management ensures a wide range of datatypes can be stored at the bot or topic level, enabling topics to be more data-driven and well designed. You'll be able to create bots that better suit specific customer scenarios, based on data, and with better customization.

Feature details

Topic authors can use a list variables to take array outputs from Power Automate and Bot Framework skills and present them as a list of choices in a bot question.

Looping enables a group of nodes on a topic to be repeated until a condition (expressed through Power Fx) is met, which means repeating actions can be easily created within bot conversations.

See also

Return a list of results (docs)

Microsoft Dataverse

Plan and prepare for Microsoft Dataverse in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **Microsoft Dataverse**.

Overview

Microsoft Dataverse is a low-code data platform that allows you to easily build scalable and interconnected applications, automations, and agents. This is achieved by 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.

Investment areas

Microsoft 365 collaboration
Microsoft Dataverse powers many collaboration capabilities, including integrations with different Microsoft 365 products like Microsoft Exchange, Outlook, and Teams. Dataverse enables users to collaborate with colleagues across your company without the need to switch between applications whether you're sending or receiving emails, creating or joining Teams meetings, or linking Teams chats to records.

Enterprise trust
Hybrid workplaces involving people, devices, and apps built on data from Microsoft Dataverse require an advanced enterprise trust model, including authentication, authorization, and data exfiltration. In 2023 release wave 1, we'll continue to improve all security related investments in Dataverse.

Dataverse developer environments
Microsoft Dataverse developer environments are meant to empower makers to build rich apps on Dataverse and invite users to run apps for non-production usage. In 2023 release wave 1, we'll bring new investments that will continue to enhance maker experiences with developer environments.

Dataverse extensibility
Customers can create custom logic, tables, forms, applications, .NET plugin assemblies, and more to either extend the existing capabilities of Dataverse or create new capabilities that cater to their business needs. In 2023 release wave 1, we'll be releasing the ability to create dependent assemblies for plug-ins.

Dataverse events
Business and data events along with virtual tables provide the shared data layer for the convergence of complementary technologies that are intended to work together. In 2023 release wave 1, we'll expand the eventing infrastructure to send in-app notifications to recipients in real-time. We'll also focus on enabling business process mining through an event analytics model. The model will provide a persisted, sequential series of events on which process mining applications, like process advisor in Power Automate, can provide rich process analytics.

Bridge Microsoft Power Platform to Azure data
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.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Microsoft Dataverse** below:

[Check out the release plan]

For application administrators

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

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

What's new and planned for Microsoft Dataverse

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

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 Microsoft Dataverse integration with Azure Synapse Analytics.

Feature	Enabled for	Public preview	General availability
Synapse Link for Dataverse enables choosing finance and operations app tables	Users by admins, makers, or analysts	Apr 2023	-

Dataverse developer environments

Microsoft Dataverse developer environments, also known as personal environments, support discovery and adoption.

Feature	Enabled for	Public preview	General availability
Makers can quickly and easily access a Dataverse environment	Users by admins, makers, or analysts	May 2023	
Governing developer environments	Users by admins, makers, or analysts	May 2023	

Dataverse events

These features enhance the scale and reliability of the event framework and build a common event model to enable process mining and analysis.

Feature	Enabled for	Public preview	General availability
Receive real-time notifications in Power Apps	Users by admins, makers, or analysts	-	Apr 2023

Feature	Enabled for	Public preview	General availability
Use process mining with events	Admins, makers, marketers, or analysts, automatically	Mar 2023	May 2023

Dataverse extensibility

Dataverse is an extensible platform.

Feature	Enabled for	Public preview	General availability
Include dependent assemblies with plug-ins	Admins, makers, marketers, or analysts, automatically	✔ Mar 31, 2022	Jul 2023

Enterprise trust

Improve the overall security and compliance standards of Microsoft Dataverse.

Feature	Enabled for	Public preview	General availability
Delegate subnets for outbound connectivity from customer plug-ins	Users by admins, makers, or analysts	Apr 2023	-
Instantly revoke users and enforce IP restriction with CAE	Users by admins, makers, or analysts	Apr 2023	Aug 2023

Microsoft 365 collaboration

Microsoft Dataverse applications collaborate with Microsoft 365 applications.

Feature	Enabled for	Public preview	General availability
Approve and enable mailboxes without an administrator	Users by admins, makers, or analysts	✔ Jan 23, 2023	Apr 2023

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.

Synapse Link for Dataverse enables choosing finance and operations app tables

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	-

Business value

All Dynamics 365 customers, including customers who use finance and operations apps, can work with their data in Azure Synapse Analytics using a single, integrated experience built into Microsoft Dataverse. They can choose data from all Dynamics 365 apps, including finance and operations and Dynamics 365 Sales, Service, and Marketing apps within a single integrated experience. Customers and partners can also leverage advanced features in Synapse Link for Dataverse, including support for restricted storage accounts as well as Parquet format and Delta Lake. Customers who currently use the export to data lake feature in finance and operations can plan migration to Synapse Link for Dataverse.

Feature details

If you're a finance and operations apps customer who's currently using the export to data lake feature in finance and operations, you can easily transition to Synapse Link for Dataverse.

If you're an AX 2012 or AX 2009 customer planning an upgrade to cloud-based finance and operations, you can easily query finance and operations data using Azure Synapse Analytics. You can preserve your existing data integration pipelines by accessing finance and operations data in the lake in table form.

Dataverse developer environments

Overview

Microsoft Dataverse developer environments are meant to empower makers to build rich apps on Dataverse and invite users to run apps for non-production usage. In 2023 release wave 1, we'll bring new investments that will continue to enhance maker experiences with developer environments.

Makers can quickly and easily access a Dataverse environment

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2023	-

Business value

Makers can now build applications using Microsoft Dataverse in a personal environment without any additional license cost.

Feature details

As a maker you can now get a personal environment to build your application on Microsoft Dataverse without any additional license requirements. This will allow you to experience all the capabilities from connecting data, building apps, and finally running apps while using Dataverse. You can experience the capabilities of Dataverse and then use a sandbox or production environment when you want to scale the application. This environment doesn't take capacity against your tenant capacity and is limited to 2GB storage per environment.

Governing developer environments

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2023	-

Business value

As a Power Platform admin, you can govern the creation of developer environments in your tenant. Developer environments are also known as personal environments.

Feature details

"Developer environment" is another name used for a personal environment, which can be created by makers at make.powerapps.com. As makers start creating developer environments, Power Platform admins might want to manage the developer environments within their tenant. Although developer environments are beneficial to makers, Power Platform administrators will be able to control their creation. To that end, controls will be given to Power Platform admins to enable or disable developer environments for the makers in the tenant, along with additional controls, such as assigning labels to the developer environment.

Dataverse events

Overview

Business and data events along with virtual tables provide the shared data layer for the convergence of complementary technologies that are intended to work together. In 2023 release wave 1, we'll expand the eventing infrastructure to send in-app notifications to recipients in real-time. We'll also focus on enabling business process mining through an event analytics model. The model will provide a persisted, sequential series of events on which process mining applications, like process advisor in Power Automate, can provide rich process analytics.

Receive real-time notifications in Power Apps

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2023

Business value

Contextual communication is becoming an essential part of every business. This feature provides real-time contextual notifications to Power Apps users.

Feature details

When a lead is assigned, an opportunity changes status, there's a timeline post, the respective personnel should be notified for information and timely actions. These notifications happening in the context of a business case make the application powerful. For this feature, we're enhancing in-app notifications in Power Apps. These are toast notifications received within Power Apps or Dynamics 365 applications when a certain event takes place and appear in the notification center (the "bell" icon placed on the top right corner of the application header).

With 2023 release wave 1, in-app notifications will now be delivered in real time to the application user. Current delivery time is dependent on the user navigation. The client polls the notifications when the user navigates in the application, meaning the notification delivery can be slow and unpredictable. The notifications will now be pushed to the client in real time enabling business scenarios where the user must immediately be informed about events in the organization.

An additional enhancement to in-app notifications is the addition of two new action types for the notification actions. Actions on the notification card currently support requests to a URL. Support will now be added for the following action types:

- **Side pane**: An action on the notification card can open a side pane and load a context defined in the action parameters.
- **Teams chat**: An action on the notification card can open a Teams chat in Dynamics 365. This open an existing chat or create a new chat related to a record in the application.

Use process mining with events

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2023	May 2023

Business value

Process mining enables deep analysis of business processes, identifying bottlenecks, and opportunities for process optimization. This feature provides native platform capabilities for streaming your business events to a managed data lake and capture those events in a standard schema.

Feature details

Process mining helps to analyze simple to complex business processes present in the business applications and solutions we use every day. The objective of process mining is to help our customers identify process bottlenecks, create opportunities to optimize their business processes, and reduce handling costs.

The event store in the lake will provide a persisted, sequential series of events on which process mining applications (for example, process advisor in Power Automate) to use to provide rich process analytics.

Dataverse extensibility

Overview

Customers can create custom logic, tables, forms, applications, .NET plugin assemblies, and more to either extend the existing capabilities of Dataverse or create new capabilities that cater to their business needs. In 2023 release wave 1, we'll be releasing the ability to create dependent assemblies for plug-ins.

Include dependent assemblies with plug-ins

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Mar 31, 2022	Jul 2023

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.

See also

Dependent Assembly plug-ins (docs)

Enterprise trust

Overview

Hybrid workplaces involving people, devices, and apps built on data from Microsoft Dataverse require an advanced enterprise trust model, including authentication, authorization, and data exfiltration. In 2023 release wave 1, we'll continue to improve all security related investments in Dataverse.

Delegate subnets for outbound connectivity from customer plug-ins

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	-

Business value

This feature provides enterprise trust readiness along with network isolation capabilities.

Feature details

Outbound interactions between Microsoft Dataverse and a customer's on-premises deployments will now use the Microsoft Azure backbone instead of the public internet. This feature applies to connections from customer plug-ins only.

The IT administrator will now be able to establish a network enterprise policy for outbound connections and link their VNet/subnet with their Power Platform environment to route plug-in outbound traffic securely through the Azure backbone.

This feature will initially be released with a programmatic interface. However, a graphical user interface to configure the feature is planned for the future.

For more information, go to [What is subnet delegation?](#).

Instantly revoke users and enforce IP restriction with CAE

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2023	Aug 2023

Business value

With this feature, you'll be able to revoke users instantly and enforce IP restrictions using continuous access evaluation (CAE) while complying with Azure Active Directory (Azure AD) identity policy for user revocation and conditional access IP enforcement policy.

Feature details

CAE evaluates user critical events like user account deletion or disablement, password change, whether multi-factor authentication is enabled for the user, and conditional access policy like IP enforcement in near real time. Once the CAE detects the changes, the user is denied access to the resource.

The key benefits of CAE are:

- **User termination or password change or reset**: User session revocation will be enforced in near real time.

- **Network location change**: Conditional access location policies will be enforced in near real time.
- Token export to a machine outside of a trusted network can be prevented with conditional access location policies.

Microsoft 365 collaboration

Overview

Microsoft Dataverse powers many collaboration capabilities, including integrations with different Microsoft 365 products like Microsoft Exchange, Outlook, and Teams. Dataverse enables users to collaborate with colleagues across your company without the need to switch between applications whether you're sending or receiving emails, creating or joining Teams meetings, or linking Teams chats to records.

Approve and enable mailboxes without an administrator

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jan 23, 2023	Apr 2023

Business value

If you're using Dynamics 365 with Exchange Online, a user with a **Global administrator** or **Exchange administrator** role is currently required to approve mailboxes before they can be enabled to synchronize with Dynamics 365. With this feature, users can approve their own mailboxes.

Feature details

Users will be able to approve and enable their own mailboxes without needing to involve an administrator. This means users will be able to perform actions, such as sending and receiving email with their Exchange Online mailbox.

See also

Approve your own user mailbox (docs)

Governance and administration

Plan and prepare for governance and administration in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **governance and administration**.

Overview

Microsoft Power Platform offers a range of governance and administration capabilities that span Power Platform and Dynamics 365 applications. These capabilities are designed to help administrators and IT professionals set up, secure, manage, govern, and monitor the use and adoption of Power Platform and its components across the enterprise. The Power Platform admin center is the unified user experience we provide for 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.

Key investments for this wave include:

- Extending administrator's ability to set data policies on desktop flows.
- Enabling administrators to manage and remove the Dataverse System Administrator role more easily.
- Enhancing sharing limits in Managed Environments to include cloud flows in solutions.
- Enhance Managed Environments with pipelines allowing in-product application lifecycle management (ALM) automation to help admin, makers, and professional developers.

Investment areas

Power Platform data policies and governance controls
Power Platform data policies and governance controls include experiences, services, and runtime components necessary to enforce organizational standards and to evaluate compliance at-scale across Power Platform.

In 2023 release wave 1, we'll be introducing a new classification in the data policy wizard allowing administrators to classify desktop flow action groups in a tab named **Exempt** to ensure the connectors or actions are ignored from policy enforcement.

Licensing and reporting
Admins can manage their entitlements (capacity, user licenses, and more) and understand how they're being used across their organization.

Managed Environments for Power Platform
Enabling Managed Environments on some or all environments in the Power Platform admin center offers Power Platform administrators a growing set of new premium administration capabilities. Managed Environments is a new, simple way for administrators to easily get more visibility and more control to govern their low code assets.

Managed Environments offer a set of premium management capabilities that are available only on enabled environments. These premium management capabilities require admins to assign licenses to all active users in that environment. This is an on-going investment as Microsoft will continue to add more powerful and simple-to-use capabilities to govern Managed Environments.

In 2023 release wave 1, we're introducing capabilities to limit sharing of solution-aware flows, and the general availability of pipelines will simplify application lifecycle management (ALM) for admins, makers, and professional developers.

Power Platform user experiences
Power Platform user experiences include a set of user interfaces and commands that allow administrators to manage different access privileges for users to Power Platform environments and resources. These include managing security roles, business units, access control, and more.

In 2023 release wave 1, we'll make it easier for administrators to remove or manage the automatically assigned Dataverse System Administrator role in an environment.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for governance and administration** below:

Check out the release plan

For application administrators

User-impacting features to the user experience enabled automatically
User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released

to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

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

What's new and planned for governance and administration

This topic lists features that are planned to release from April 2023 through September 2023. 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.

For a list of the previous wave's release plans, go to 2022 release wave 2 plan.

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.

Licensing and reporting

Admins can review usage and manage their licenses and entitlements.

Feature	Enabled for	Public preview	General availability
License autoclaim for Power Apps licenses	Admins, makers, marketers, or analysts, automatically	Apr 2023	Jun 2023

Managed Environments for Power Platform

Managed Environments offer premium administration capabilities for Power Platform administrators.

Feature	Enabled for	Public preview	General availability
Limit sharing of solution-aware cloud flows in managed environments	Users by admins, makers, or analysts	Jun 2023	-
Simplify ALM with pipelines	Admins, makers, marketers, or analysts, automatically	-	Jun 2023

Power Platform data policies and governance controls

Enforce organizational policies and evaluate compliance at-scale across Power Platform.

Feature	Enabled for	Public preview	General availability
Automatic deletion of inactive developer environments	Users, automatically	Apr 2023	May 2023
Exempt data groups in DLP policies	Admins, makers, marketers, or analysts, automatically	Mar 2023	Jun 2023

Power Platform user experiences

These experiences allow administrators to govern and manage user access privileges to Power Platform resources.

Feature	Enabled for	Public preview	General availability
Modern security role editor experience in the Power Platform admin center	Admins, makers, marketers, or analysts, automatically	Mar 2023	Jun 2023
Manage System Administrator security role assignment to tenant administrator	Admins, makers, marketers, or analysts, automatically	May 2023	Aug 2023

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.

Licensing and reporting

Overview

Admins can manage their entitlements (capacity, user licenses, and more) and understand how they're being used across their organization.

License autoclaim for Power Apps licenses

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	Jun 2023

Business value

License autoclaim for Power Apps will simplify license assignments for admins. This feature enables their Power Apps users to automatically claim Power Apps per user licenses when they're needed instead of requiring the admin to identify users who need licenses in advance.

Feature details

Admins will be able to setup an autoclaim policy for Power Apps per user licenses in the Microsoft 365 admin center just like they can for other Microsoft licenses. After they do so, any user in their tenant that needs a standalone Power Apps license will be automatically assigned a Power Apps per user license when they need it. For example, if a user without a standalone Power Apps license opens an app that requires a premium license, the user will automatically be assigned a Power Apps per user license.

A report of all users who have been assigned licenses under the autoclaim policy will be available in the Microsoft 365 admin center. Admins can choose to enable or disable the autoclaim policy at any time.

Managed Environments for Power Platform

Overview

Enabling Managed Environments on some or all environments in the Power Platform admin center offers Power Platform administrators a growing set of new premium administration capabilities. Managed Environments is a new, simple way for administrators to easily get more visibility and more control to govern their low code assets.

Managed Environments offer a set of premium management capabilities that are available only on enabled environments. These premium management capabilities require admins to assign licenses to all active users in that environment. This is an on-going investment as Microsoft will continue to add more powerful and simple-to-use capabilities to govern Managed Environments.

In 2023 release wave 1, we're introducing capabilities to limit sharing of solution-aware flows, and the general availability of pipelines will simplify application lifecycle management (ALM) for admins, makers, and professional developers.

Limit sharing of solution-aware cloud flows in managed environments

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2023	-

Business value

With sharing limits, your admins can control how broadly makers can share their cloud flows within your organization.

Feature details

The existing sharing limits for canvas apps located in managed environments will now equally apply to cloud flows that are stored into solutions. Admins will have the option to configure:

- No sharing limits
- Only allow sharing with security groups
- Exclude sharing with security groups

Simplify ALM with pipelines

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Jun 2023

Business value

Pipelines in Power Platform simplify application lifecycle management (ALM) with in-product ALM automation accessible to all makers, admins, and professional developers. Pipelines significantly reduce the barriers around adopting healthy, enterprise-grade ALM and have many new features and improvements with the general availability release.

Feature details

Pipelines provide more control and better visibility with less effort. Building on the public preview release, the general availability release of pipelines will offer many critical new capabilities with more streamlined experiences. These capabilities include:

- Set up automated deployment pipelines with less friction.
- Add low-code logic and approvals to your deployment process with cloud flows or extend pipelines using plug-ins.

- Schedule deployments for a later date and time.
- Deploy using service principals so that citizen developers don't require elevated permissions within production environments.
- Custom-tailor deployment processes to meet the needs of your organization.
- Developers can do more with additional command line capabilities and build task support.
- Admins have better visibility and auditing capabilities within the streamlined management experience.
- More control over how solutions are managed across various connected environments.

See also

Overview of pipelines in Power Platform (docs)

Power Platform data policies and governance controls

Overview

Power Platform data policies and governance controls include experiences, services, and runtime components necessary to enforce organizational standards and to evaluate compliance at-scale across Power Platform.

In 2023 release wave 1, we'll be introducing a new classification in the data policy wizard allowing administrators to classify desktop flow action groups in a tab named **Exempt** to ensure the connectors or actions are ignored from policy enforcement.

Automatic deletion of inactive developer environments

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	May 2023

Business value

Inactive developer environments are automatically disabled and then deleted to free up resources for improved performance.

Feature details

Power Platform provides a cleanup mechanism that automatically removes inactive developer environments from your tenant. A developer environment is considered inactive if it hasn't been used for 90 days. An inactive developer environment is first disabled, and the administrator or owner is notified. If the administrator or owner doesn't act for the next 30 days, the developer environment is automatically deleted.

Exempt data groups in DLP policies

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2023	Jun 2023

Business value

Admins can leverage the new **Exempt** category to consult the desktop flow action groups that aren't yet governed, and they can progressively place them in the other data groups of their data policy at their own pace.

Feature details

Connectors that are in the **Exempt** category are ignored by the data policy. For example, if a connector is placed in the **Blocked** category, it can't be used when building an app or flow. However, if the connector is placed in the **Exempt** category, it can be freely used when building an app or flow irrespective of the connectors placed in other data groups.

Power Platform user experiences

Overview

Power Platform user experiences include a set of user interfaces and commands that allow administrators to manage different access privileges for users to Power Platform environments and resources. These include managing security roles, business units, access control, and more.

In 2023 release wave 1, we'll make it easier for administrators to remove or manage the automatically assigned Dataverse System Administrator role in an environment.

Modern security role editor experience in the Power Platform admin center

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2023	Jun 2023

Business value

Admins can manage security roles and privileges using the modern security role editor in the Power Platform admin center. The modern experience is more accessible and replaces the need to navigate to the experience in the legacy web client.

Feature details

Admins can use a modern, streamlined, and simplified experience to manage security roles and privileges in the Power Platform admin center. This will enable admins to easily manage roles and privileges without the need to use the legacy web client.

Manage System Administrator security role assignment to tenant administrator

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2023	Aug 2023

Business value

Empower customers to manually assign and manage high-privileged security roles to appropriate users in their environment.

Feature details

The System Administrator security role in Dataverse environments is automatically assigned to all users who have the Global Administrator, Power Platform Administrator, and Dynamics 365 Administrator role in Azure Active Directory (Azure AD). The System Administrator security role isn't removed when the user no longer has the tenant role assigned.

With this feature:

- Customers can produce an inventory of users with System Administrator access across all environments in the tenant and remove stale users who should no longer have the System Administrator role assignment.
- Stop the auto assignment of the System Administrator role in all Dataverse environments for users with the tenant administrator roles defined in Azure AD.
- Provide a mechanism for tenant administrators to add themselves to the System Administrator role in an environment to support break-glass and emergency scenarios.

Data integration

Plan and prepare for data integration in 2023 release wave 1

IMPORTANT The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for **data integration**.

Overview

Data integration is foundational for the Microsoft Intelligent Data Platform, enabling data connectivity, transformation, and integration across hundreds of enterprise-critical cloud and on-premises data sources. Power Query enables users of Power BI, Excel, Azure Synapse, Power Apps, Insights Apps, and other Microsoft products and services to ingest and transform data from hundreds of sources into the Microsoft data ecosystem.

In this upcoming release wave, we'll deliver various big data performance and high scale improvements to connectivity scenarios from Azure Synapse, Dataverse, Snowflake, Databricks, Google BigQuery, and Amazon Redshift, as well as many other Power Query connectors.

You can also expect several enhancements to the on-premises and VNet data gateways capabilities, delivering best-in-class hybrid data connectivity to users across multiple Microsoft cloud products and services.

Power Query experiences will also be enhanced with several new capabilities across Get Data and the Data Transformation experiences in the Power Query Editor, making it even easier and more productive for users to work on their data prep tasks in a visual authoring environment.

We're also releasing significant improvements to offer a new generation of Dataflows to Microsoft Data Cloud, supporting Power Platform, Dynamics 365, and beyond.

Investment areas

Power Query connectors
Power Query connectors enable users to quickly connect to hundreds of applications, websites, databases, online services, and systems of record with the ease of low-code experiences. Every connector is built following Microsoft's best practices for seamless integration and use.

Power Query Online
Power Query Online 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 in a web-based environment. This experience integrates into a wide variety of Microsoft products and services, including dataflows in Power BI, Power Apps, Dynamic 365 Insights Applications, and several more. For more information, go to Power Query.

Dataflows
Dataflows provide a low-code self-service data preparation experience using Power Query, including automation and monitoring capabilities that enable users across Microsoft Power BI, Power Apps, Dynamics 365, and Azure to integrate data for downstream use by many other users and applications.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for data integration** below:

Check out the release plan

For application administrators

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

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

What's new and planned for data integration

This topic lists features that are planned to release from April 2023 through September 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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Dataflows

Dataflows is a low-code data preparation experience using Power Query to integrate data across Power BI, Power Platform, Dynamics 365, and Azure.

Feature	Enabled for	Public preview	General availability
Employ features from the next generation of Power BI dataflows	Admins, makers, marketers, or analysts, automatically	Sep 2023	

Power Query connectors

Power Query connectors enable connectivity to hundreds of applications, websites, databases, online services, and systems of record, with low-code experiences.

Feature	Enabled for	Public preview	General availability
Apply versioning fields and rich text columns in SharePoint Online List	Admins, makers, marketers, or analysts, automatically	Apr 2023	

Feature	Enabled for	Public preview	General availability
Use the SQL Server Analysis Services connector in Power BI dataflows	Admins, makers, marketers, or analysts, automatically	Apr 2023	-
Update Google Analytics connector to use V4 Data API	Admins, makers, marketers, or analysts, automatically	Sep 2023	-

Power Query Online

Power Query Online is the data connectivity and data preparation experience provided as a web-based environment.

Feature	Enabled for	Public preview	General availability
Natural language interface generates new Power Query steps	Users, automatically	Apr 2023	-
Choose from recommended data transformations	Users, automatically	Apr 2023	-
Split one query into multiple with conditional split	Users, automatically	Sep 2023	-

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Dataflows

Overview

Dataflows provide a low-code self-service data preparation experience using Power Query, including automation and monitoring capabilities that enable users across Microsoft Power BI, Power Apps, Dynamics 365, and Azure to integrate data for downstream use by many other users and applications.

Employ features from the next generation of Power BI dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2023	-

Business value

Dataflows are a self-service, cloud-based data preparation technology that helps customers bring the world's data into Power BI. Power BI creators of dataflows, for example, can promote reusability of data transformation and reduce load on data sources by centralizing data prep tasks into dataflows that other Power BI creators can take advantage of when building datasets in Power BI, Excel workbooks, and more.

Feature details

A new generation of Power BI dataflows improve on existing experiences and features in the following ways:

- The AutoSave dataflow feature automatically saves any edits to dataflows to the cloud, into a draft dataflow, so you can continue editing at a later time.
- The background publishing feature defers query validation to the background, allowing you to publish the dataflow without waiting for the potentially lengthy validation process to complete. If any validation errors are encountered, they're reported through the dataflow experience.
- An improved dataflow debugging and monitoring experience reduces the time it takes to investigate and fix refresh errors.
- We've added support for loading dataflow output to new destinations and support for loading data from data sources in VNets.

Power Query connectors

Overview

Power Query connectors enable users to quickly connect to hundreds of applications, websites, databases, online services, and systems of record with the ease of low-code experiences. Every connector is built following Microsoft's best practices for seamless integration and use.

Apply versioning fields and rich text columns in SharePoint Online List

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-

Business value

Users and customers have continually asked that versioning fields and rich text column support be added to the Power Query SharePoint Online list connector.

Feature details

We'll implement support for versioning fields and rich text columns in the implementation of SharePoint Online List 2.0, eliminating parity gaps with the implementation of SharePoint Online List 1.0.

Use the SQL Server Analysis Services connector in Power BI dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2023	-

Business value

With the release of this connector in Power BI dataflows, you can connect to and load your business data from SQL Server Analysis Services for use in Power BI dataflows.

Feature details

It’s important to have similar experiences and functionalities in every Power Query instance. With this feature, you'll be able to use the SQL Server Analysis Services connector in Power BI dataflows, along with its availability in Power Query Desktop today.

Update Google Analytics connector to use V4 Data API

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2023	-

Business value

With the update of this connector, you can connect to and load your business data from Google Analytics 4 Data API for use in Power Query Experiences.

Feature details

The current Google Analytics connector doesn't use the Google Analytics 4 Data API, and users have indicated that there is a strong desire to use features of that API. Therefore, we're updating the Google Analytics connector to use the Google Analytics 4 Data API.

Power Query Online

Overview

Power Query Online 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 in a web-based environment. This experience integrates into a wide variety of Microsoft products and services, including dataflows in Power BI, Power Apps, Dynamic 365 Insights Applications, and several more. For more information, go to Power Query.

Natural language interface generates new Power Query steps

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	-

Business value

Users are most commonly using the search bar to find answers or provide guidance for common data preparation actions that they'd like to perform. The search box in Power Query Online currently only supports a basic search functionality. This new feature tries to expand the capabilities by being able to interpret what the user types in their natural language and provides a set of suggested steps that they can choose from to insert into their query.

Feature details

A new feature for the global search box in Power Query Online that infuses the GPT-3 technology enables the user to type a request or desired action in their natural language. The feature is then able to interpret such input into a suggestion or a series of suggestions for actions or transformation steps that can be added to the user's query.

Choose from recommended data transformations

Enabled for	Public preview	General availability
Users, automatically	Apr 2023	-

Business value

New users will find a new experience in Power Query that lets them expedite their journey through data preparation by providing a set of suggested transformations based on the data preview of a particular step in the Power Query Editor.

Feature details

Power Query Online will provide a new experience where users will be given a set of suggested steps that they can pick from, with a clear description of what the suggested step tries to accomplish and a data preview of the data output for their data. This new experience focuses on delivering the user a quick and visual experience to address common data preparation scenarios.

Split one query into multiple with conditional split

Enabled for	Public preview	General availability
Users, automatically	Sep 2023	-

Business value

Users have commonly been requesting accelerators for common tasks in Power Query. One of the major requests is an accelerator to manage and expedite the process of creating query references. Conditional split delivers on this ask with a new dialog to split a query into multiple queries based on conditions through a single, rich dialog.

Feature details

Conditional split accelerates the process of creating query references from a single query by allowing the user to select the query and create new query references from that query through a single and intuitive dialog. The dialog provides a way to define the name of the queries to be created, and each of these queries will be created following the conditions set by the user.

The user will be able to manage this conditional split component to add or remove the queries created as the output of the process.

Deprecation of Power Platform apps

A feature or capability that's deprecated is one that we intend to remove in a future release. The feature or capability will continue to work and will be fully supported until it's officially removed. After it's removed, the feature or capability will no longer work. Deprecation notifications can span a few months or years.

We encourage you to use this information, along with the release plans, to prepare for future releases. This notice is intended to give you sufficient time to plan and update your code before a deprecated feature or capability is removed.

- A deprecated feature is not in active development and may be removed in a future update.
- A removed feature is no longer available in the product.

For the current lists of Power Platform deprecations, including for Power Apps, Microsoft Dataverse, Power Automate, and AI Builder, visit:

- Important changes (deprecations) coming in Power Apps and Power Automate

Other deprecations

For the lists of other deprecations, visit:

- Sales
- Customer Service
- Field Service
- Finance and operations apps
- Universal Resource Scheduling
- Healthcare accelerator
- Financial services accelerator

See also

- Dynamics 365 and Microsoft Cloud for Industries 2022 release wave 2 plan
- Dynamics 365 and Microsoft Power Platform release plans
- Microsoft Lifecycle Policy

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.

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