Microsoft Dynamics 365

PLAN DEL PRIMER LANZAMIENTO DE VERSIONES 2022

Características que se lanzarán entre abril de 2022 y septiembre de 2022

Versión en inglés

Contents

Dynamics 365 and industry clouds: 2022 release wave 1 plan

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

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

2022 release wave 1 overview

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

Marketing

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

Sales

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

Service

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

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

Finance and operations

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

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

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

Dynamics 365 Project Operations is investing in enabling capabilities ranging from onboarding, estimating, and using resources from external talent pools, helping to boost efficiencies in project planning and delivery. Customers will be able to upgrade from Project Service Automation to Project Operations and integrate with leading project management tools like Microsoft Project Desktop to help increase adoption. Customers can bring their own project management tools through a generic API where task scheduling can happen in the project management tool of choice and then integrate to Project Operations, becoming available to users in a read-only manner.

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

Human Resources

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

Commerce

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

Fraud Protection

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

SMB

Dynamics 365 Business Central continues to simplify the customer onboarding experience by offering a modern Help pane that provides learning guidance and helps to increase productivity and process adoption. Customers using Microsoft Power Platform can also use the newly available connector capabilities. It is also easier to trigger a Power Automate flow directly from Business Central pages, which can save time by automating processes. Collaborating on Business Central data in Microsoft Teams is improved due to the removal of licensing friction.

Customer Insights

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

Supply Chain Insights

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

Guides

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

Remote Assist

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

Microsoft cloud for industry solutions

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

Microsoft Cloud for Financial Services provides capabilities to help manage data to deliver differentiated experiences, empower employees, and help combat financial crime while facilitating security, compliance, and interoperability of financial data. This helps in enhanced collaboration, automation, and insights to streamline processes, personalizes every customer interaction, improves customer experience, and delivers rich data insights.

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

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

Key dates for the 2022 release wave 1

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

Here are the key dates for the 2022 release wave 1.

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

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

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

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

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

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

Change history

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

2022 release wave 1 features available for early access

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

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

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

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

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

Dynamics 365 Sales

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

Feature	Enabled for	Early access	General availability
Engage efficiently with your customers	Users, automatically	✔ Jan 31, 2022	Apr 2022
Filter the underlying opportunities of a forecast	Users, automatically	✔ Jan 31, 2022	Apr 2022
Sales Hub is now preinstalled on all environments	Users, automatically	✔ Jan 31, 2022	Apr 2022

Dynamics 365 Customer Service

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

Feature	Enabled for	Early access	General availability
Analytics for knowledge articles and search terms	Users, automatically	✓Jan 31, 2022	Apr 2022
Scheduling and IoT capabilities in Customer Service workspace	Users, automatically	✓Jan 31, 2022	Apr 2022
Usability enhancements to knowledge article search	Users, automatically	✓Jan 31, 2022	Apr 2022
User-initiated feedback in product	Users, automatically	✓Jan 31, 2022	Apr 2022

Dynamics 365 Field Service

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

Feature	Enabled for	Early access	General availability
New enhanced schedule board enabled for new customers	Users, automatically	✓Jan 31, 2022	Apr 2022

Dynamics 365 Supply Chain Management

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

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

Finance and Operations cross-app capabilities

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

Feature	Enabled for	Early access	General availability
Open-source software update – upgrade jQuery UI to 1.13.0	Users by admins, makers, or analysts	✔ Jan 31, 2022	Apr 2022
Updates to client feature states with version 10.0.25	Users, automatically	✔ Jan 31, 2022	Apr 2022
Updates to saved views and personalization	Users by admins, makers, or analysts	✔ Jan 31, 2022	Apr 2022
Vertically scrolling workspaces	Users, automatically	✔ Jan 31, 2022	Apr 2022

Dynamics 365 Commerce

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

Feature	Enabled for	Early access	General availability
Additional filter options in POS inventory operations	Users by admins, makers, or analysts	✔ Jan 27, 2022	Apr 2022
Integration with Sitecore Content Hub	Admins, makers, marketers, or analysts, automatically	✔ Nov 19, 2021	Apr 2022

Dynamics 365 Business Central

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

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

Marketing

Plan and prepare for Dynamics 365 Marketing in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Marketing**.

Overview

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

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

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

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

TIP Download the release overview guide and share with your team as you plan to onboard the new capabilities included in this release wave.

Download the overview guide (PDF)

* Overview guide available in English version only.

Investment areas

Collaborative apps

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

Moments-based

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

Data and AI

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

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

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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to 2021 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.

Collaborative apps

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

Feature	Enabled for	Public preview	Early access*	General availability
Take action with your customers in more ways by raising triggers from	Admins, makers, marketers, or	✔Feb 1, 2022	-	Apr 2022

a journey to run another journey or Power Automate flow	analysts, automatically			
Trigger journeys based on data changes in any Dynamics 365 app to engage customers at the right time without writing any code	Admins, makers, marketers, or analysts, automatically	-	-	Jun 2022
Personalize interactions using a unified view of customer activity across Dynamics 365 Marketing, Sales, and Customer Service	Admins, makers, marketers, or analysts, automatically	Apr 2022	-	Jun 2022
Collaborate across your organization to create the best marketing campaigns possible using the built-in Microsoft Teams chat	Admins, makers, marketers, or analysts, automatically	Feb 1, 2022	-	Sep 2022

Data and AI

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

Feature	Enabled for	Public preview	Early access*	General availability
Delight your customers with hyper-personalized next-best content selection and boost your marketing ROI by optimizing with AI	Admins, makers, marketers, or analysts, automatically	Jun 2022	-	
Quickly personalize emails using predefined dynamic text, without the need to know the underlying data structure	Admins, makers, marketers, or analysts, automatically	Feb 1, 2022	-	Apr 2022
Connect Dynamics 365 Customer Insights with customer journey orchestration when using your own data lake	Admins, makers, marketers, or analysts, automatically	Mar 2022	-	May 2022
Quickly create emails with enhanced reusable content fragments	Admins, makers, marketers, or	Apr 2022	-	May 2022

Feature	Enabled for	Public preview	Early access*	General availability
	analysts, automatically			
Win customer attention by creating conditional dynamic content with easy-to-use no-code experiences	Admins, makers, marketers, or analysts, automatically	May 2022	-	Jun 2022

Moments-based

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

Feature	Enabled for	Public preview	Early access*	General availability
Create individualized journeys by adding conditions based on attributes captured as part of the event trigger	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Improved email layout templates for faster content creation	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Use additional triggers to create customer journeys	Admins, makers, marketers, or analysts, automatically	✔ Mar 1, 2022	-	Apr 2022
Use outbound subscription centers in real-time journeys	Admins, makers, marketers, or analysts, automatically	-	-	May 2022
Fast, easy, and enjoyable email creation canvas	Admins, makers, marketers, or analysts, automatically	Apr 2022	-	May 2022

Feature	Enabled for	Public preview	Early access*	General availability
Easily create journeys to send reminders encouraging customers to respond to a call to action	Admins, makers, marketers, or analysts, automatically	Apr 2022	-	Jun 2022
Continue the conversation with your customers by taking action on their SMS replies	Admins, makers, marketers, or analysts, automatically	May 2022	-	Jun 2022
Target the right contacts and leads using the reimagined, easy-to-use segmentation builder	Admins, makers, marketers, or analysts, automatically	Jun 2022	-	To be announced

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

Description of **Enabled for** column values:

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

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

Collaborative apps

Overview

- Collaborate across your organization to create the best marketing campaigns possible using built-in Microsoft Teams chat.
- Personalize interactions using a unified view of customer activity across Dynamics 365 Marketing, Sales, and Customer Service.

- Trigger journeys based on data changes in any Dynamics 365 app to engage customers at the right time without writing any code.
- Take action with your customers in more ways by raising triggers from a journey to run another journey or Power Automate flow.

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

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

Business value

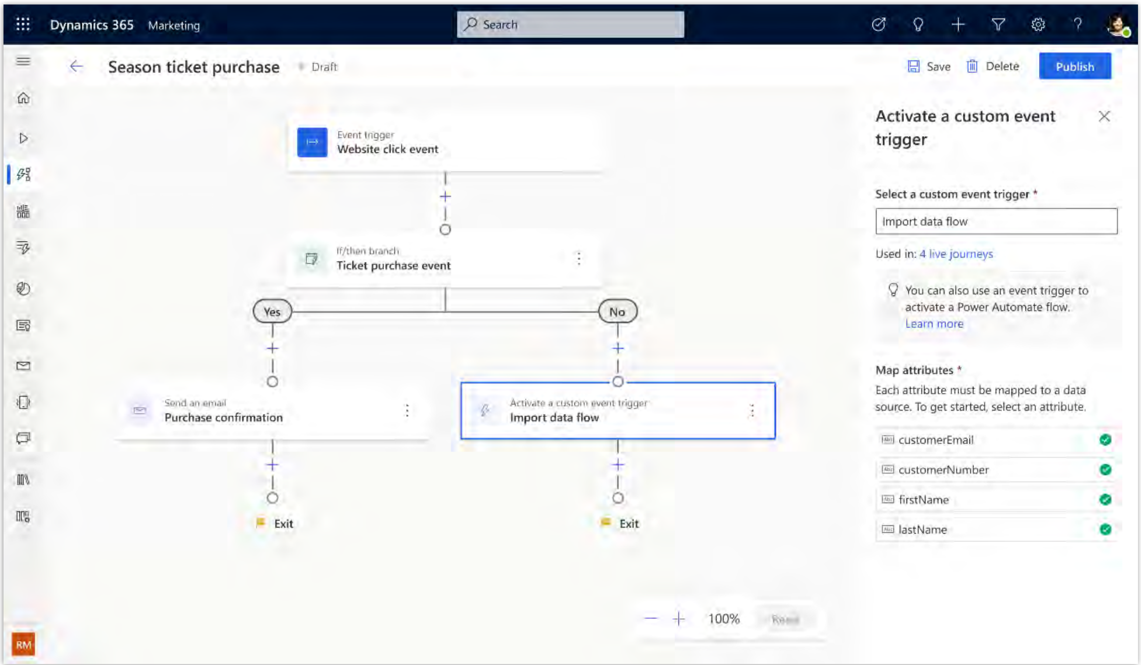
Based on the unique needs of your business, you may need to trigger custom processes or Power Automate flows at relevant points in a customer journey. Or, you might have multiple journeys that logically function together. These scenarios can now be accomplished easily with Dynamics 365 Marketing by using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

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

Feature details

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

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



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

See also

[Trigger custom event actions in real-time marketing journeys](#) (docs)

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

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

Business value

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

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

Feature details

When you use Dynamics 365 applications, all of your customer data and interactions are already being captured in Microsoft Dataverse. Some of this data captures moments where you'd like to engage your customers through a journey—for instance, a support case that is created or a new order placed. You can now create event triggers to capture these moments that matter and then use these event triggers to start and drive journeys.

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

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

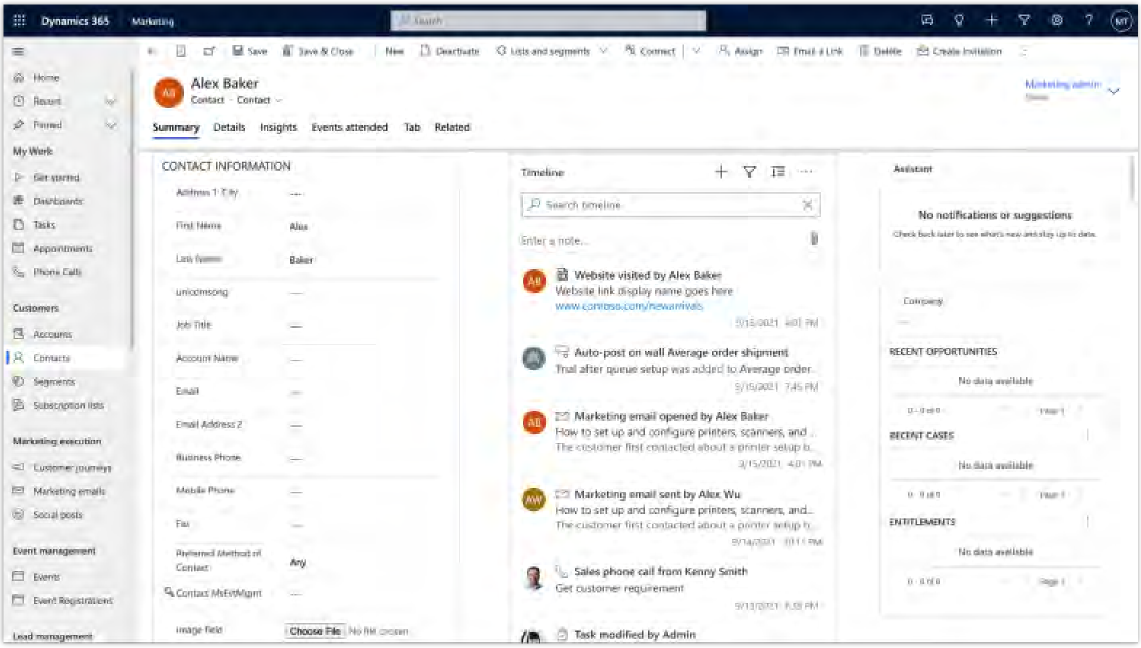
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	-	Jun 2022

Business value

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

Feature details

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



Unified timeline view.

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

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Feb 1, 2022	-	Sep 2022

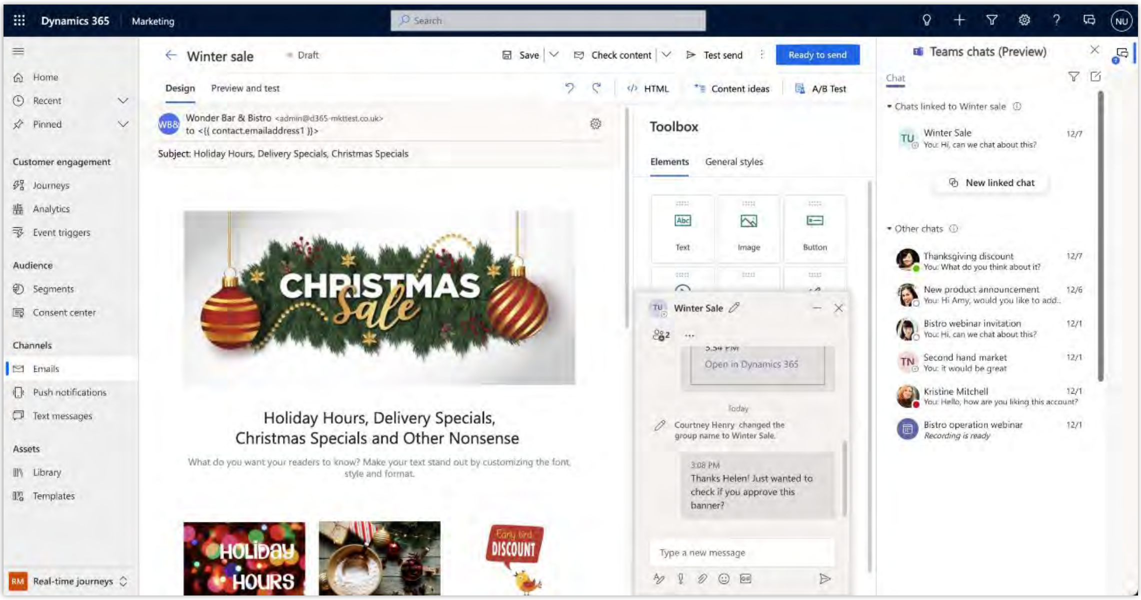
Business value

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

Feature details

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

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



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

See also

[Collaborate using built-in Microsoft Teams chat](#) (docs)

Data and AI

Overview

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

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

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

Business value

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

Feature details

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

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

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

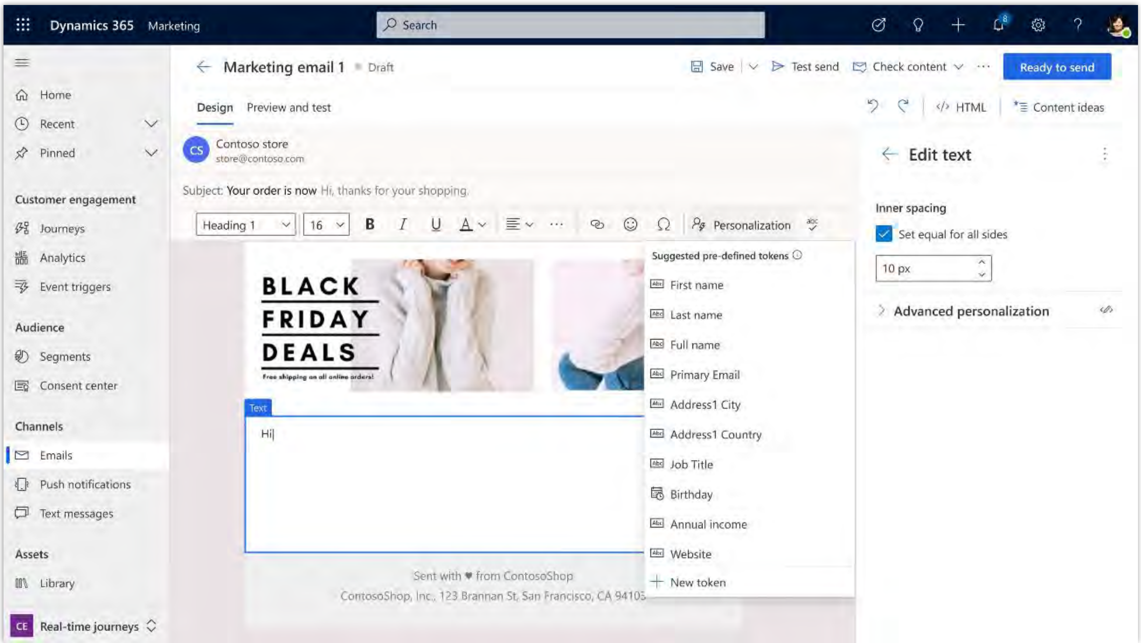
Business value

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

Feature details

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

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



Easily author personalized content with predefined dynamic text.

See also

[Personalize content using pre-defined tokens](docs) (docs)

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

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

Business value

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

Feature details

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

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

Quickly create emails with enhanced reusable content fragments

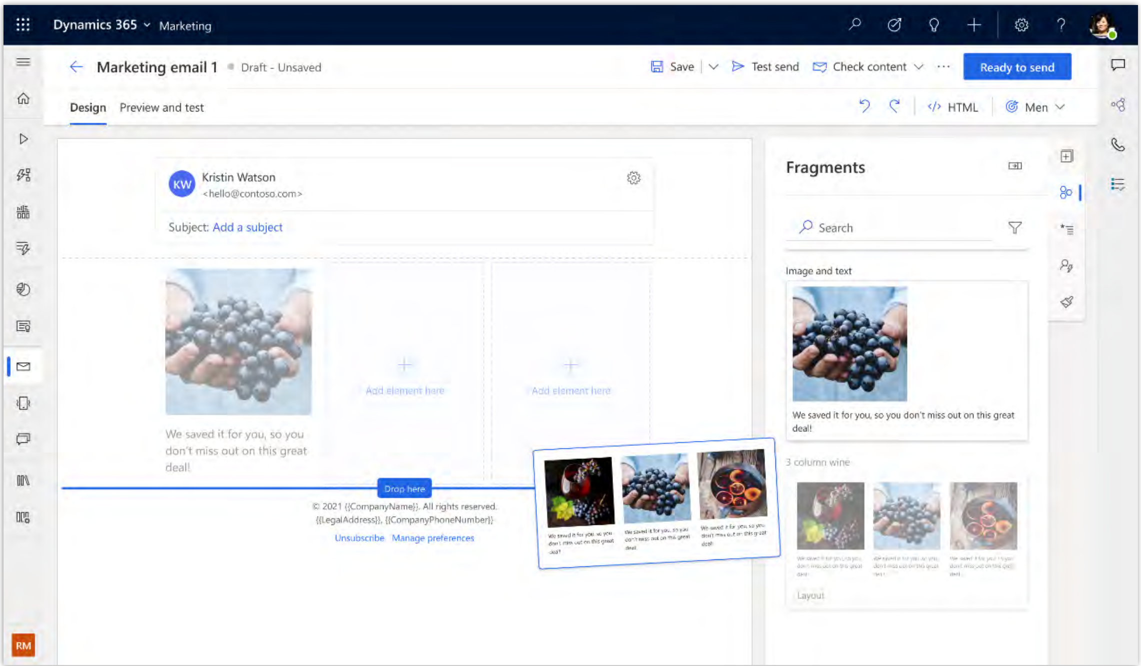
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	-	May 2022

Business value

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

Feature details

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



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

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

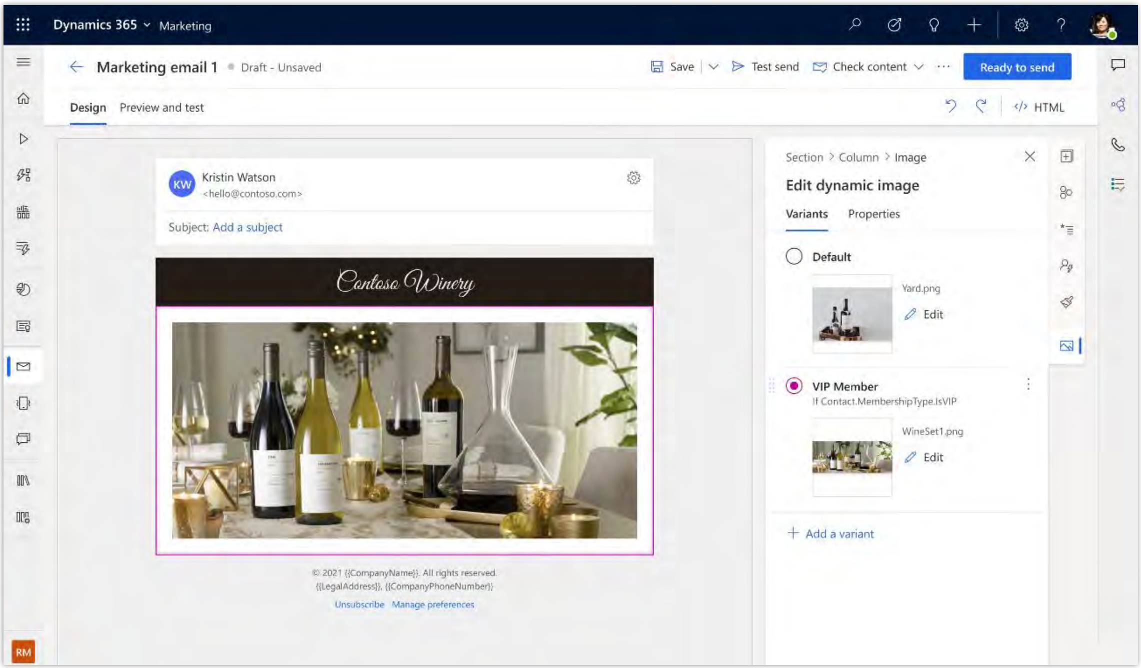
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	May 2022	-	Jun 2022

Business value

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

Feature details

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



Easily author dynamic content with advanced personalization without any code.

Moments-based

Overview

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

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

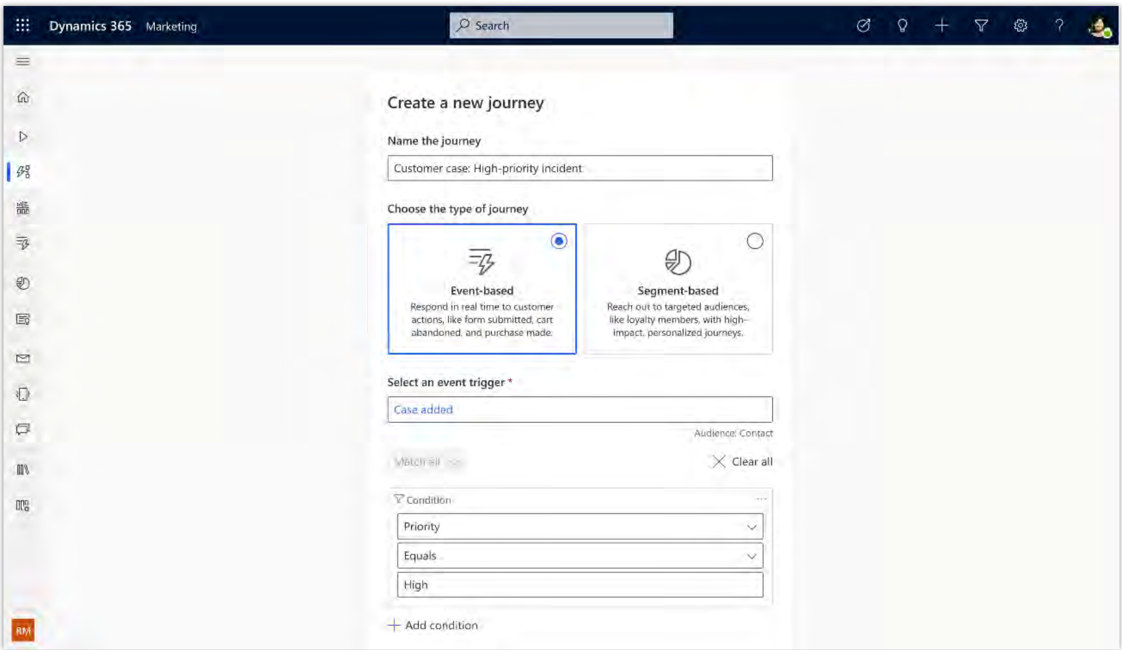
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

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

Feature details

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



Trigger and drive journeys for a specified customer action.

Improved email layout templates for faster content creation

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

Business value

Default email layout templates are now improved and modernized, allowing you to easily kick-start the email creation process.

Feature details

Create emails faster with new layout templates:

- Leverage popular and useful email layouts.
- Enjoy a new look and feel.
- Use simplified guidance with more descriptive and actionable content placeholders.

Use additional triggers to create customer journeys

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

Business value

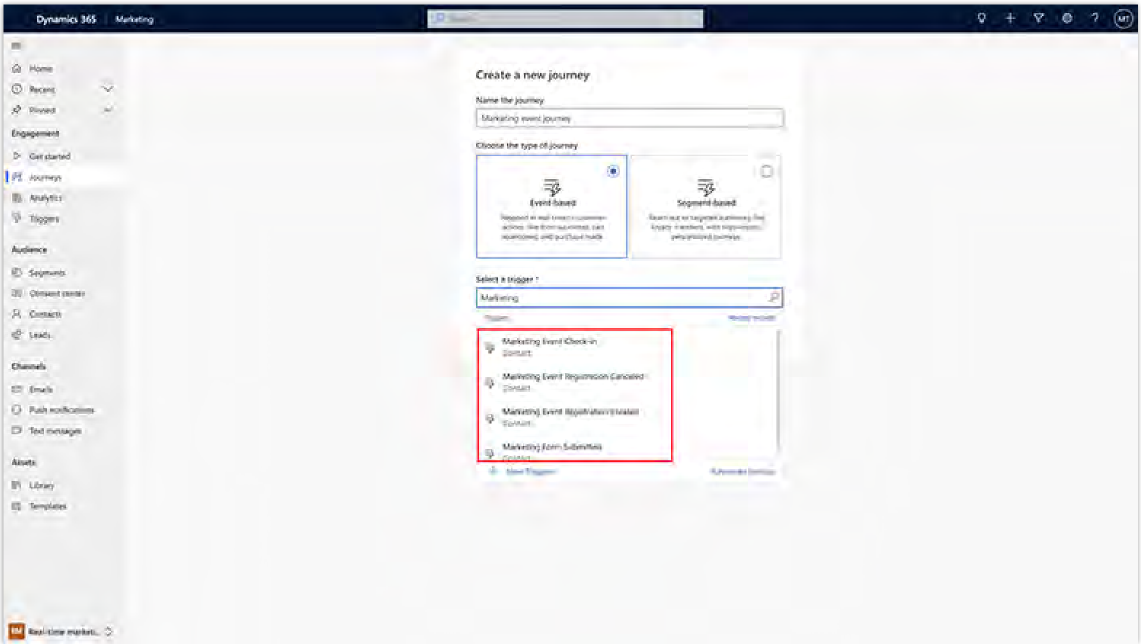
Marketers can now use a set of out-of-the-box triggers to orchestrate the lifecycle of webinars (for example, trigger actions based on attendee interactions such as registration and cancellation) as well as Marketing forms. Using these triggers, marketers can start a journey when an attendee registers for a webinar, exit the journey when an attendee cancels their registration, and conduct other types of orchestration. In addition, marketers can orchestrate a journey when a Marketing form is submitted. For example, trigger a journey when a referral form is submitted.

Feature details

Marketers can use interactions from Marketing webinars as well as Marketing forms to orchestrate, branch, and personalize customer journeys. In addition, each interaction appears on the user's timeline.

The available triggers are:

- **Marketing Event Check-in Created**: A check-in for a marketing event is created.
- **Marketing Event Registration Cancelled**: A marketing event registration is canceled.
- **Marketing Event Registration Created**: A marketing event registration is created.
- **Marketing Form Submitted**: A marketing form is submitted.



Screenshot showing a dropdown list of the new out-of-the-box triggers for real-time marketing.

See also

[Real-time marketing triggers - Business triggers](#) (docs)

Use outbound subscription centers in real-time journeys

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

Business value

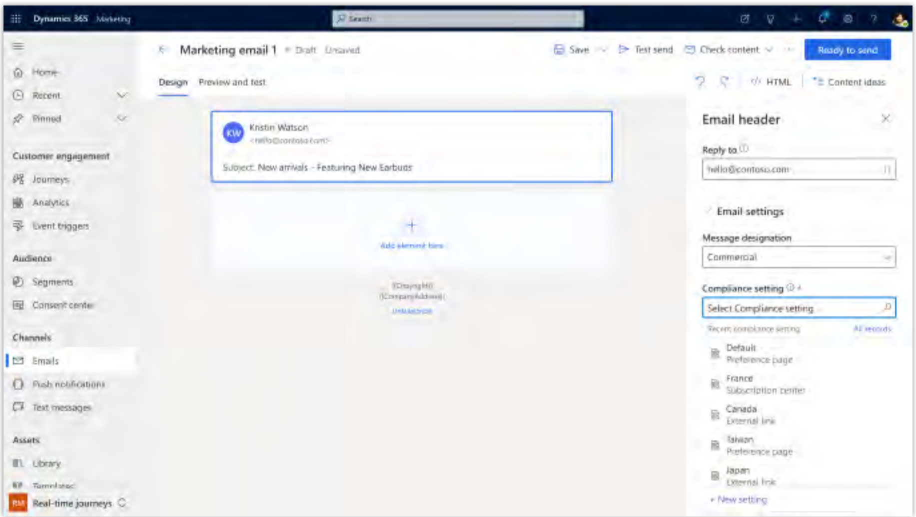
Collecting consent is a critical business need. Subscription centers are a way to gather consent preferences from your customers. Businesses need to be able to customize their subscription center to match their branding and business needs. They also need to have the ability to create different subscriptions centers for different regions, brands, or lines of business.

Now, you can bring the flexibility of subscription centers available in outbound marketing to real-time marketing journeys, enabling you to have multiple subscription centers, customized and branded to your needs.

Feature details

In outbound marketing, a subscription center is a marketing page that known contacts can use to manage their communication preferences and contact details with your organization. Depending on your business needs, you can create multiple subscription centers and add them to your compliance settings in real-time marketing. This gives you the ability to use these subscription centers when creating emails for real-time marketing journeys. When a customer updates their consent settings, the updates apply to both outbound and real-time marketing.

- Ability to create a custom subscription center.
- Add multiple subscription centers to real-time compliance settings.
- Define which subscription center to use in a given email to generate the company address and unsubscribe URL.
- Use the same subscription center in outbound and real-time marketing.



Selecting a subscription center in an email

Fast, easy, and enjoyable email creation canvas

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

Business value

With this release, the email editor is further enhanced with a completely new canvas experience. Now, you can quickly create pixel-perfect emails, allowing you to spend more time focusing on your content.

Feature details

Create emails faster with a more precise, organized, and fluid design canvas.

- Increase creativity and focus with more canvas real estate and a new collapsible toolbar.
- Create your desired layout with fast and precise drag-and-drop.
- Easily select and navigate between elements, columns, and sections.
- Use the in-place menu directly on the canvas for faster content creation.

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

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

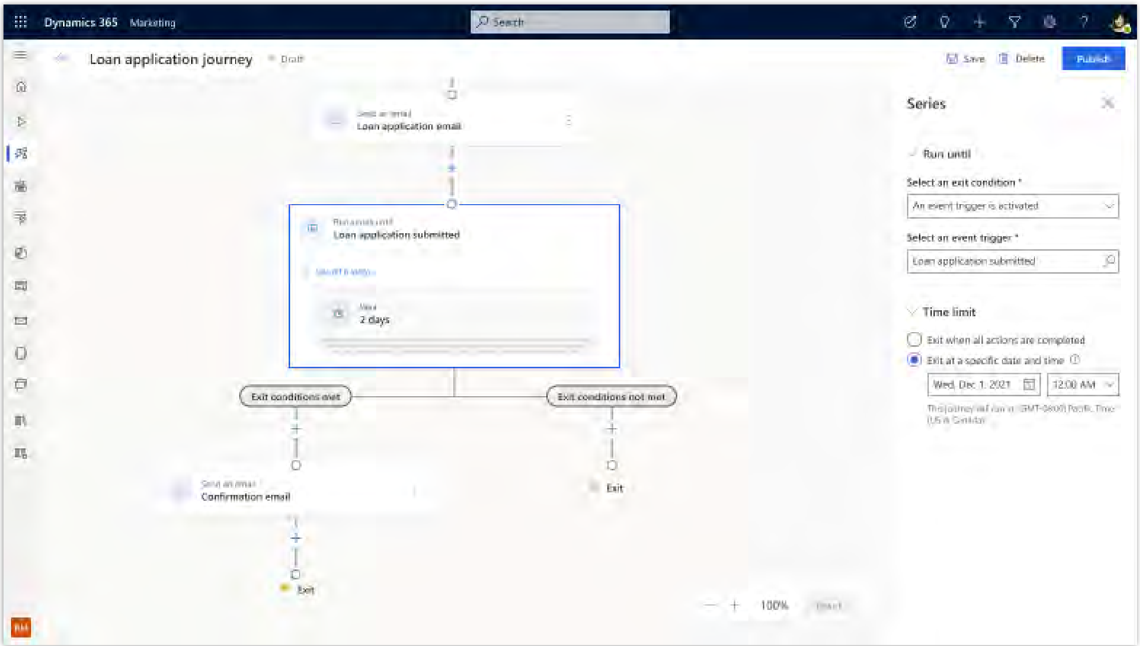
Business value

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

Feature details

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

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



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

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

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

Business value

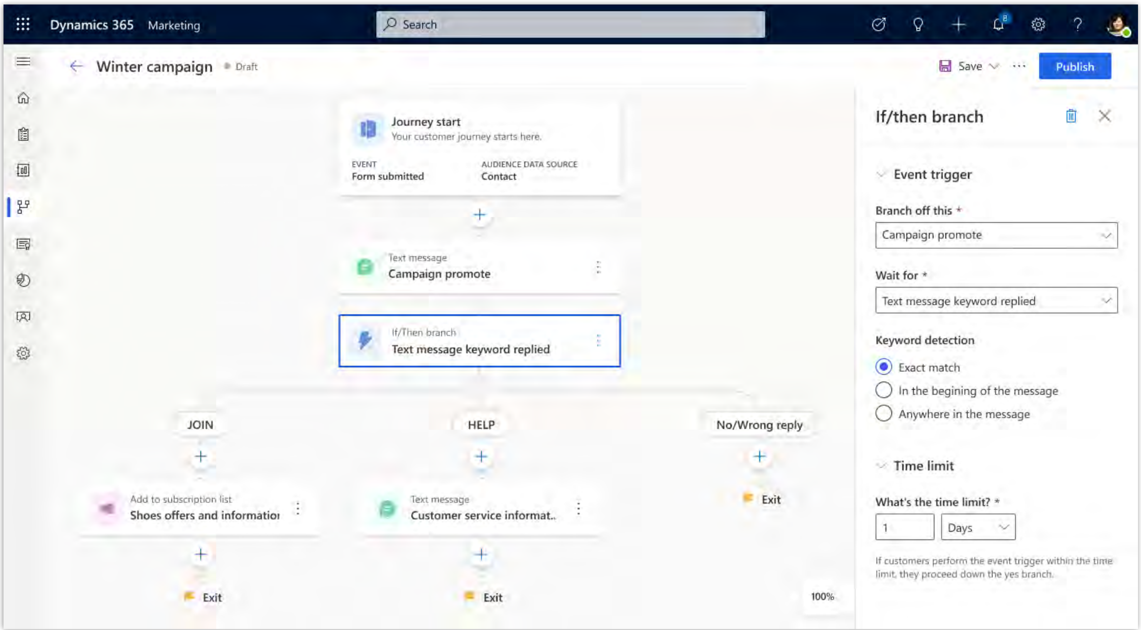
SMS allows you to quickly communicate with your customers. However, it's not enough to just send messages out, you also need to act on their responses. Now you can interact with your customers by creating journeys based on their replies to your SMS messages. Easily create custom keywords and add them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

Feature details

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

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

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



Branch your journey based on the SMS keyword response.

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

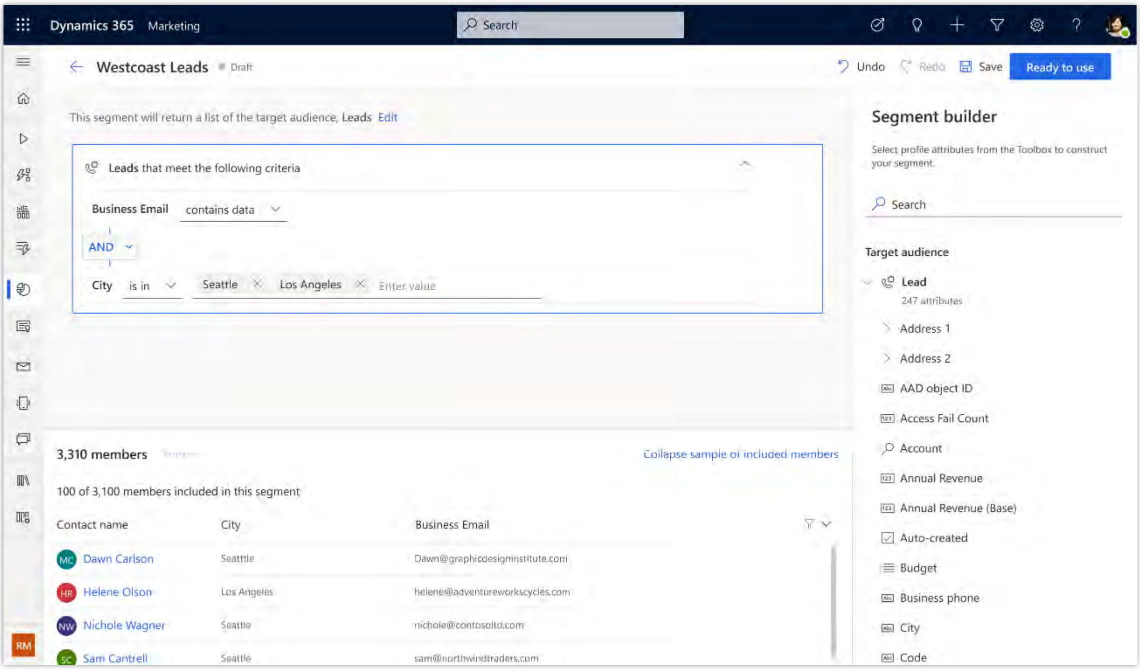
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jun 2022	-	To be announced

Business value

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

Feature details

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



Easily author personalized content with predefined tokens.

Sales

Plan and prepare for Dynamics 365 Sales in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Sales**.

Overview

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

The world's way of working has transformed dramatically in the last decade and even more so within the last couple of years. The role of the seller is evolving, too. 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 this release, we have focused on enabling the seller to do just that. Sellers will be able to harness the power of data and intelligence that will help them before, during, and after each interaction. Sellers will focus on the highest priority activities and will collaborate using Teams from within Dynamics 365 to accelerate their pipeline. Our goal is to help the seller close more deals faster while being as productive as possible.

We want your feedback! We encourage you to continue to reach out at Sales Ideas because your feedback is invaluable to us.

TIP Download the release overview guide and share with your team as you plan to onboard the new capabilities included in this release wave.

Download the overview guide (PDF)

* Overview guide available in English version only.

Investment areas

Teams and Outlook collaboration
Enable sellers to be productive from wherever they are with Dynamics 365 integrations between Microsoft Teams and Outlook.

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

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

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

To learn more, go to the Sales accelerator overview.

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

Facilitating digital selling
Dynamics 365 digital selling capabilities spearhead the digital transformation of sales organizations and constitute the data and productivity first revolution. Digital selling offerings allow customers with Dynamics 365 Sales Enterprise licenses to experience the best of these capabilities in production and feel their value.

Reporting
These standardized reports would allow sales managers and admin users to understand the usage of the sales application. It would also help them in gauging the performance of teams and individuals using the application. The filtering parameters would help them with different perspectives about the performance and usage of sales records.

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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to 2021 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.

Conversation intelligence

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

Feature	Enabled for	Public preview	Early access*	General availability
Capture every interaction with the customer to provide real-time business insights on top of any conversation	Users by admins, makers, or analysts	May 2022	-	Aug 2022
Get the right insight, at the right time, at the right place	Users by admins, makers, or analysts	May 2022	-	Sep 2022
Business insights and productivity tools to boost overall sales performance	Users by admins, makers, or analysts	Jun 2022	-	Sep 2022

Facilitating digital selling

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

Feature	Enabled for	Public preview	Early access*	General availability
Experience sales accelerator, conversation intelligence, and predictive scoring with Dynamics 365 Sales Enterprise license	Users by admins, makers, or analysts	-	-	Apr 2022
Sales Hub is now preinstalled on all environments	Users, automatically	-	✔Jan 31, 2022	Apr 2022

Forecasting and pipeline intelligence

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

Feature	Enabled for	Public preview	Early access*	General availability
Assign attributes per sales stage to improve predictive score accuracy	Users by admins, makers, or analysts	-	-	Apr 2022

Feature	Enabled for	Public preview	Early access*	General availability
Filter the underlying opportunities of a forecast	Users, automatically	-	✔ Jan 31, 2022	Apr 2022
Monitor stagnated deals and how they impact the predictive score	Users by admins, makers, or analysts	✔ Jan 31, 2022	-	Apr 2022
Streamline your forecasting workflow with default experiences	Users by admins, makers, or analysts	✔ Feb 18, 2022	-	Apr 2022
Measure the performance of predictive scoring model with accuracy reports	Users by admins, makers, or analysts	-	-	Jun 2022
Update quotas quickly with inline editing and quota rollups	Users by admins, makers, or analysts	-	-	Jul 2022
Compare annual projections with actual progress over multiple periods	Users by admins, makers, or analysts	-	-	Sep 2022
Support for yearly and weekly forecast periods	Users by admins, makers, or analysts	-	-	Sep 2022

Reporting

Quick and easy access to comprehensive and standardized Dynamics 365 Sales product usage insights.

Feature	Enabled for	Public preview	Early access*	General availability
Quick and easy access to comprehensive and standardized Dynamics 365 Sales product usage insights	Users by admins, makers, or analysts	Apr 2022	-	Jun 2022

Sales accelerator and process automation

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

Feature	Enabled for	Public preview	Early access*	General availability
Update activities from sequence step and correlate it with timeline activities	Users by admins, makers, or analysts	-	-	Apr 2022
Enable Outlook integration to avoid double booking	Users by admins, makers, or analysts	✔ Dec 14, 2021	-	Apr 2022
Make quick decisions with enhancement to worklist cards	Users by admins, makers, or analysts	-	-	Apr 2022
Engage efficiently with your customers	Users, automatically	-	✔ Jan 31, 2022	Apr 2022
Improve seller productivity with better quality leads with Data hygiene	Users by admins, makers, or analysts	✔ Feb 1, 2022	-	May 2022
Move sequences between environments seamlessly to enable sellers to get started quickly	Admins, makers, marketers, or analysts, automatically	-	-	May 2022
Get recommendations while engaging with your customers	Users by admins, makers, or analysts	-	-	May 2022
Choose the right engagement plan for your customers	Users by admins, makers, or analysts	-	-	Jun 2022
Customizable worklist cards for right contextual information to the seller	Users by admins, makers, or analysts	-	-	Jun 2022

Feature	Enabled for	Public preview	Early access*	General availability
Flexible auto-connection of sequences and entities catering to varying business needs	Users by admins, makers, or analysts	-	-	Jun 2022
Personalize the prioritized worklist using advanced filtering	Users by admins, makers, or analysts	-	-	Jun 2022
High-quality leads ensure higher success rates	Users by admins, makers, or analysts	May 2022	-	Jul 2022
Get notified when customers actively engage with you	Users by admins, makers, or analysts	-	-	Aug 2022

Teams and Outlook collaboration

Enable sellers to be productive from wherever they are with Dynamics 365 integrations between Microsoft Teams and Outlook.

Feature	Enabled for	Public preview	Early access*	General availability
Start a linked chat from co-presence in a record	Users by admins, makers, or analysts	May 2022	-	
AI-based contact suggestions for starting linked chat conversations for selected entity types	Users by admins, makers, or analysts	Jun 2022	-	-
Share and update Dynamics 365 records from within a Microsoft Teams message	Users by admins, makers, or analysts	Mar 2022	-	Aug 2022
Take action on business data contextually right from within Teams chats	Users by admins, makers, or analysts	May 2022	-	Aug 2022

Feature	Enabled for	Public preview	Early access*	General availability
Accelerate productivity and collaboration with Teams meeting integration	Users by admins, makers, or analysts	-	-	Sep 2022
Access and update Dynamics 365 records right from within Teams meetings	Users by admins, makers, or analysts	-	-	Sep 2022
Associate Teams meetings to Dynamics 365 records from wherever you work	Users by admins, makers, or analysts	-	-	Sep 2022
Configure and customize Teams meeting integration to your business needs	Users by admins, makers, or analysts	-	-	Sep 2022
Unified admin experience for embedded Teams chat settings	Users by admins, makers, or analysts	Jun 2022	-	To be announced
Collaborate seamlessly on email and chat with a single live editable view of business data in all channels	Users by admins, makers, or analysts	Jul 2022	-	To be announced
Display a preview of the shared Dynamics 365 record when pasting its URL in emails and chats without any messaging extensions	Users by admins, makers, or analysts	Jul 2022	-	To be announced
Share Dynamics 365 records as information cards in email content with the Dynamics 365 messaging extensions for Outlook	Users by admins, makers, or analysts	Jul 2022	-	To be announced
Take action on business data contextually right from within Microsoft Outlook emails	Users by admins, makers, or analysts	Jul 2022	-	To be announced
Provide a workflow requesting admins to enable Teams collaboration settings in Dynamics 365 Sales Hub app	Users by admins, makers, or analysts	Jun 2022	-	To be announced

Feature	Enabled for	Public preview	Early access*	General availability
Streamline setup of Teams app for sales process using Teams templates	Users by admins, makers, or analysts	Jun 2022	-	To be announced

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

Description of **Enabled for** column values:

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

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

Conversation intelligence

Overview

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

Capture every interaction with the customer to provide real-time business insights on top of any conversation

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

Business value

Sales organizations interact with customers using different technologies: enterprises tend to have an on-premises telephony systems in place while small businesses use cloud-based video-telephony providers. The sales personas also connect differently: inside sellers usually conduct 1:1 calls while account managers tend to be part of multi-participant conversations.

These conversations are captured in various formats and quality, aligning with cultural or regulatory reasons. The only thing unifying all of these interactions is the need to extract business-critical insights.

In this release, with Dynamics 365 Conversation Intelligence, the communication technology won't matter. Whichever platform and whatever engagement channel your organization uses to communicate with customers is now supported. Conversation Intelligence will capture all interactions and provide business-critical insights to help your sales team save time, reduce manual labor, and enable your sellers to focus on winning deals.

Feature details

We can cluster the communication technologies into five groups:

- **Teams calling** – If you use Teams for outbound and inbound telephony:

  Full integration of Teams calling into Dynamics 365 Sales, including outbound and inbound calls, using an improved interface and allowing Conversation Intelligence to provide business insights on top of any type of Teams call.

- **Teams meeting** – If you use Teams to conduct video meetings with customers:

  Integration of Conversation Intelligence into the Dynamics 365 Sales app for Teams client, allowing for capturing Teams meetings, and providing real-time business insights for every participating seller.

- **Third-party integration** – If you use any other third-party provider for customer communications:

  Provide a suite of API calls and interface to enable providing of business insights over calls made using third-party telephony providers, in both real time and post-call.

- **Azure Communication Services integration** – If you use Azure Communication Services as a telephony provider:

  Offer Azure Communication Services as an additional first-party telephony provider.

- **Other Dynamics 365 apps** – If you enabled the Teams integration in other Dynamics 365 apps:

  Integrating Teams calls to provide business insights on top of outbound and inbound calls made through other Dynamics 365 apps.

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

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

Business value

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

Feature details

Discoverability

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

Break the silos

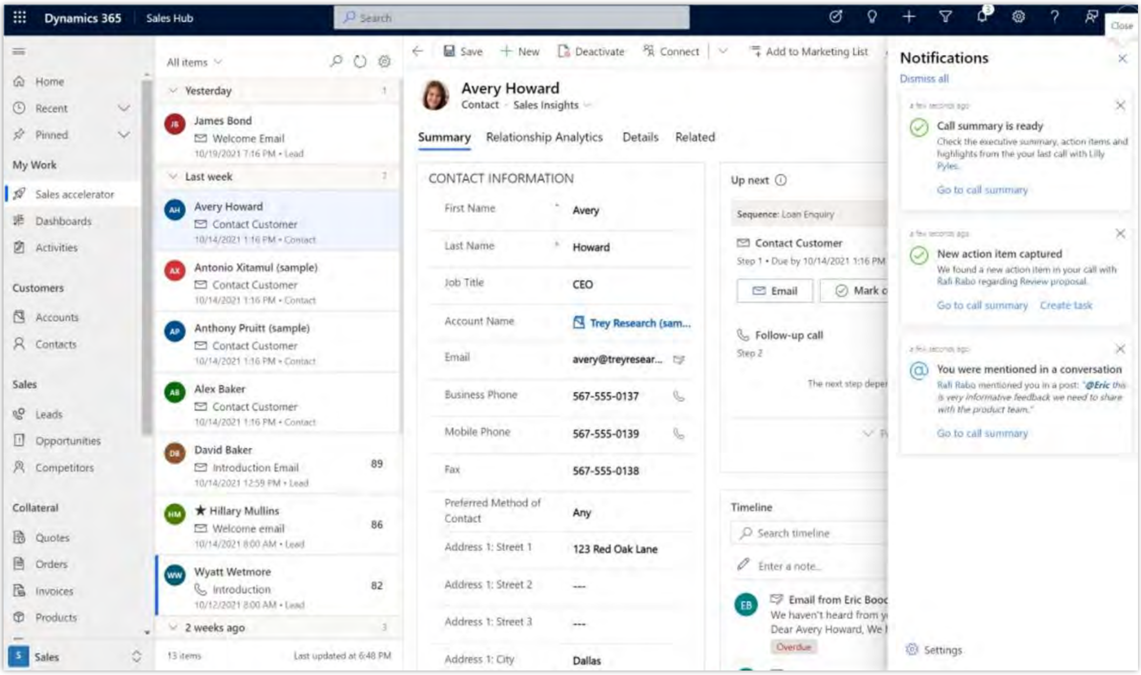
- Bringing the valuable strategy and coaching dashboards from Sales Insights into Dynamics 365 to introduce value where sellers and managers spend their days.

Collaboration

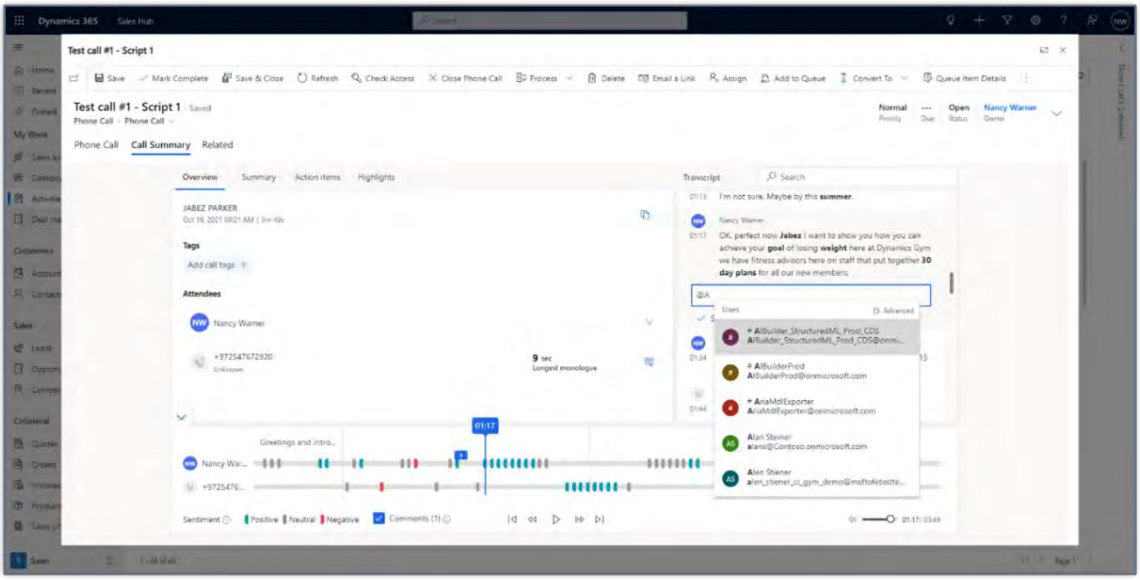
- Enabling comments, mentions, and sharing of conversation intelligence artifacts will make it an integral part of sellers' and managers' day-to-day work and contribute to coaching and collaboration culture.

Powerful search

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



Notifications.



User selection.

Business insights and productivity tools to boost overall sales performance

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

Business value

In today's global, remote, ever-changing markets, sellers need every advantage to win in their domains. Relevant and actionable sales and business insights will help your organization better train and lead their sales force to win in their markets. These timesaving, efficiency-boosting productivity tools will help your sellers spend less time on overhead tasks and more time with customers, quickly building trust, and winning their deals.

Feature details

- Sellers get real-time content suggestions such as battle cards, brands details, and more while on customer calls.
- Easily customize and share call summaries with your own templates.
- Call outcomes correlate to insights to learn how mentions, customer sentiment, and conversation style may affect call outcomes.

Facilitating digital selling

Overview

Dynamics 365 digital selling capabilities spearhead the digital transformation of sales organizations and constitute the data and productivity first revolution. Digital selling offerings allow customers with Dynamics 365 Sales Enterprise licenses to experience the best of these capabilities in production and feel their value.

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

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

Business value

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

Feature details

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

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

NOTE

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

Sales Hub is now preinstalled on all environments

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jan 31, 2022	Apr 2022

Business value

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

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

Feature details

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

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

As an administrator, you can:

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

As a seller or manager, you can:

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

See also

Use the Sales Hub app to access Dynamics 365 Sales features (docs)

Forecasting and pipeline intelligence

Overview

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

Assign attributes per sales stage to improve predictive score accuracy

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

Business value

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

Feature details

As an administrator, you can:

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

Filter the underlying opportunities of a forecast

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓ Jan 31, 2022	Apr 2022

Business value

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

Feature details

As a sales manager or seller, you can access a rule-based control to further filter relevant opportunities in the underlying records grid. This filter will persist on the selected view until the user clears the filter.

See also

Filter the underlying opportunities of a forecast (docs)

Monitor stagnated deals and how they impact the predictive score

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Jan 31, 2022	-	Apr 2022

Business value

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

Feature details

As a seller, you can:

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

See also

Time spent by opportunities in Business Process Flow Stage (docs)

Streamline your forecasting workflow with default experiences

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔Feb 18, 2022	-	Apr 2022

Business value

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

Feature details

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

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

See also

Select the default attribute to group underlying records (docs)

Measure the performance of predictive scoring model with accuracy reports

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

Business value

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

Feature details

As a sales operation team member, you can:

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

Update quotas quickly with inline editing and quota rollups

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

Business value

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

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

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

Feature details

As an administrator, you can:

- Enable inline editing of quotas directly in the forecast configuration.

- Determine if quotas should be rolled up across the hierarchy in the forecast configuration.

As a manager or seller, you can:

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

Compare annual projections with actual progress over multiple periods

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

Business value

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

Feature details

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

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

Support for yearly and weekly forecast periods

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

Business value

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

Feature details

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

Reporting

Overview

These standardized reports will allow sales managers and admin users to understand the usage of the sales application. It will also help them in gauging the performance of teams and individuals using the application. The filtering parameters will help them with different perspectives about the performance and usage of sales records.

Quick and easy access to comprehensive and standardized Dynamics 365 Sales product usage insights

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

Business value

Sales managers and administrators can gain insights on the usage of the sales records and compare the usage across various parameters such as business units, roles, and timeframe.

Feature details

The standardized reports show an overview of usage of sales records. Sales managers and administrators can drill down into the data based on parameters such as time range, territory, and user.

Sales accelerator and process automation

Overview

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

To learn more, go to the Sales accelerator overview.

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

Update activities from sequence step and correlate it with timeline activities

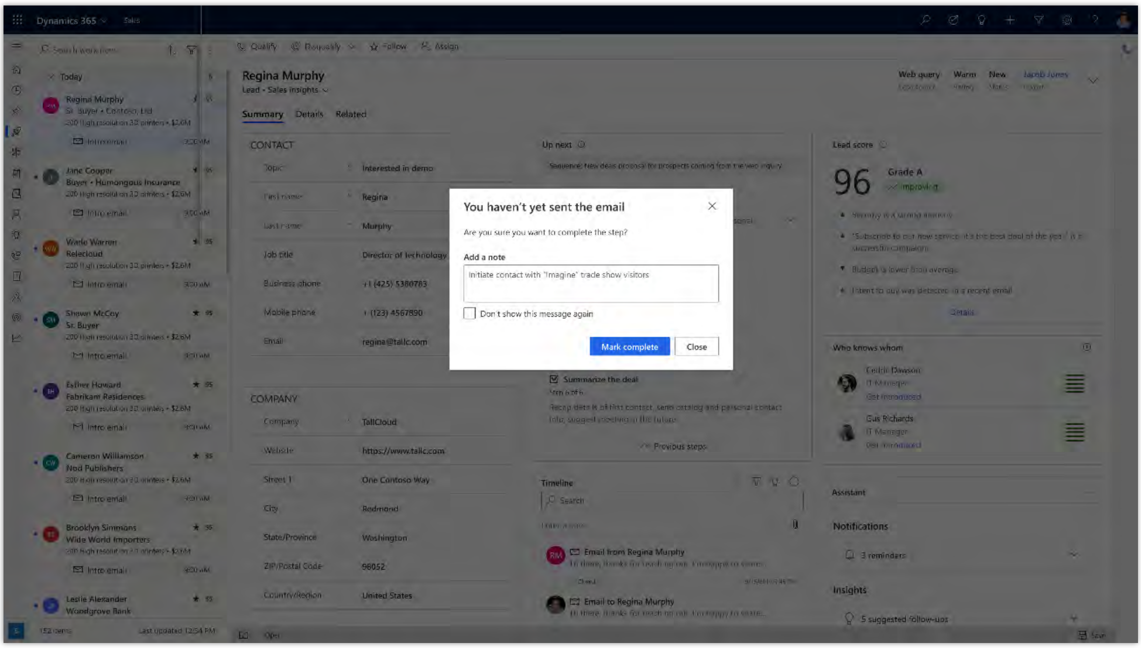
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Apr 2022

Business value

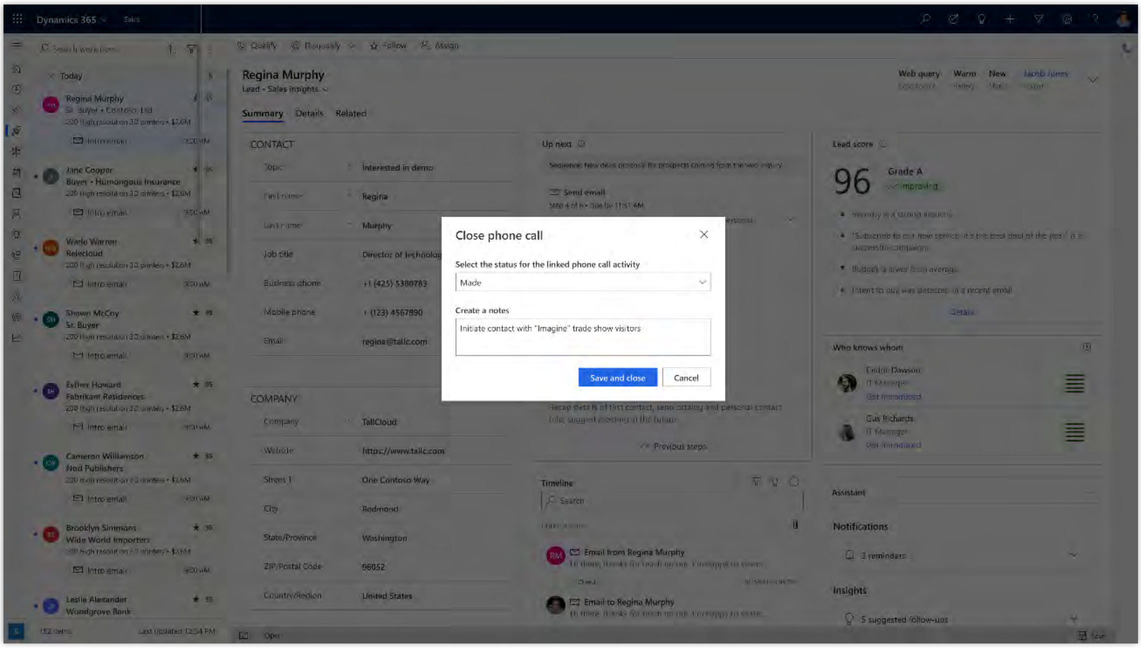
Sales managers want to guide sellers to consistently execute the go-to-market message throughout the customer journey. Sequences allow sales managers to automatically create these activities that appear under the up next widget in sales accelerator. This enhanced functionality automatically updates activity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

Feature details

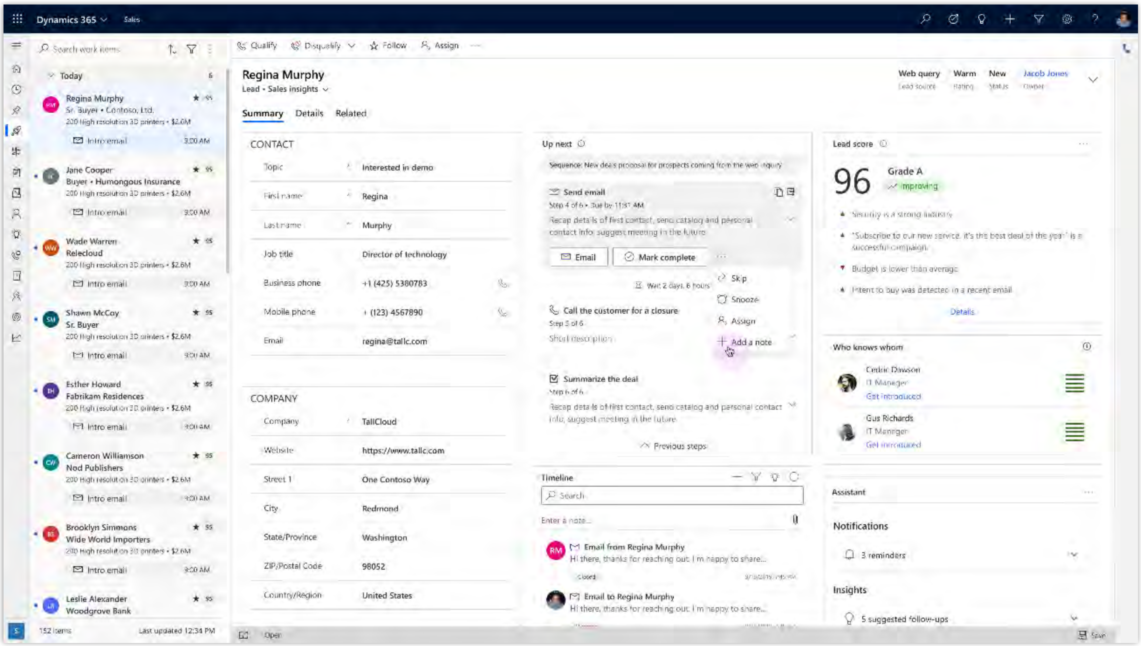
- Automatically update activity description from sequence step description.
- Allow sellers to add activity notes while completing an up next activity.
- Open activity details with one click from the up next widget.
- Enhanced timeline control in Sales Insight form to easily correlate activity with the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



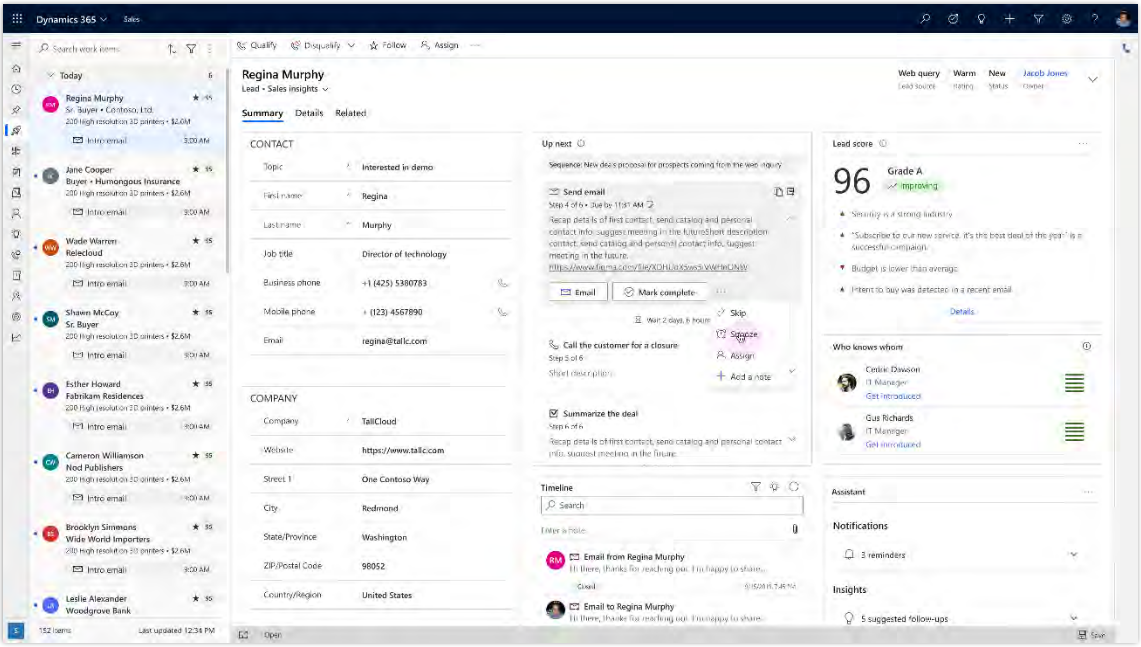
Users can add a note while marking an activity as complete.



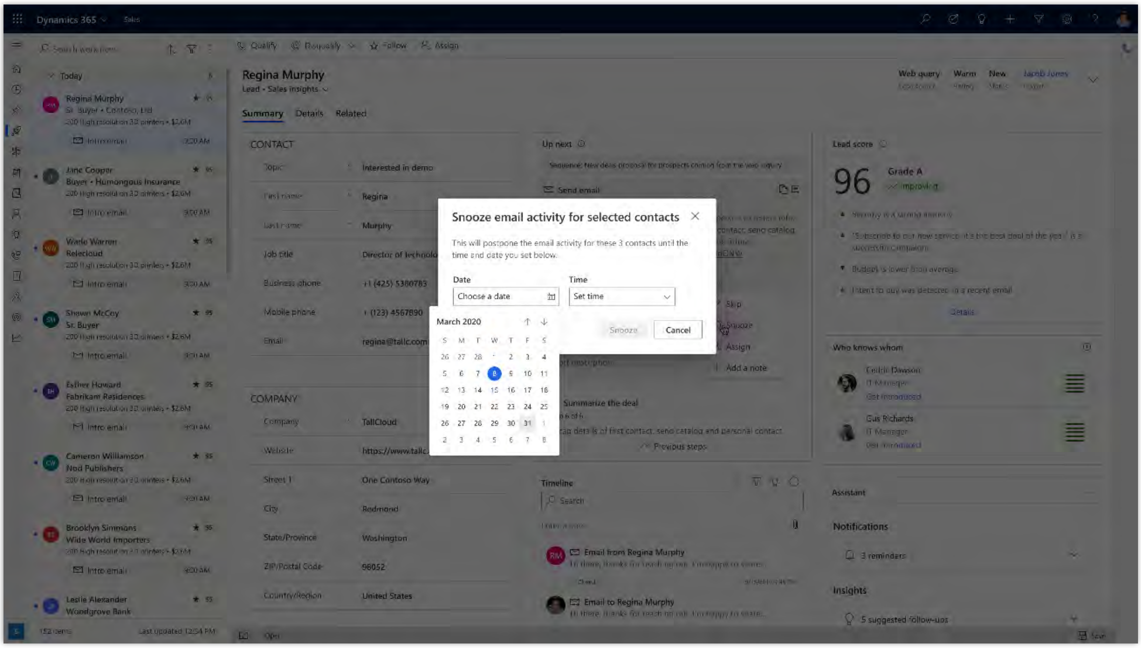
Users can add a note while marking a phone call as complete.



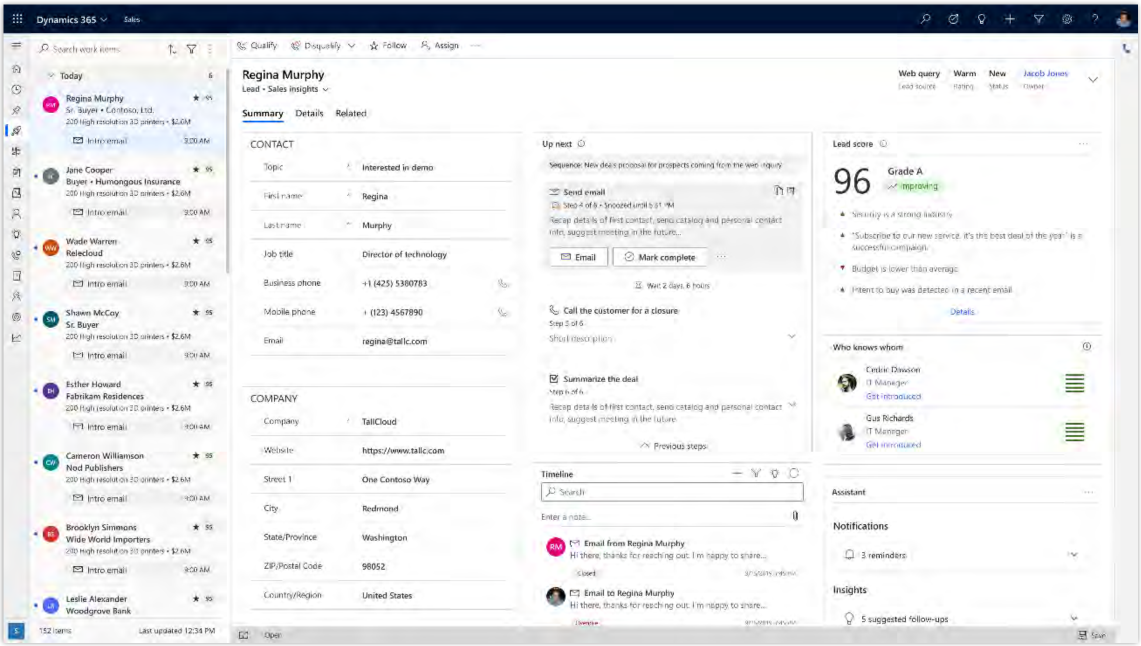
Users can add a note directly from the Up next widget.



Snooze an upcoming task.



Snooze an upcoming task and select a date.



Snoozed item.

Enable Outlook integration to avoid double booking

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

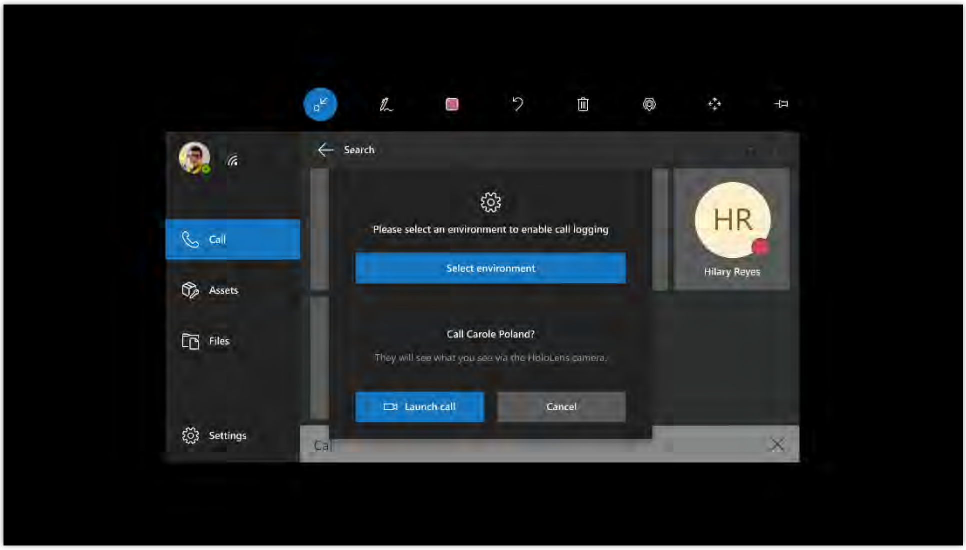
Business value

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

Feature details

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

- The sequence tasks are scheduled honoring the Outlook calendar of the seller.
- If you are using process automation, this also ensures that seller availability for lead or opportunity assignment is based on the Outlook calendar.



Outlook integration

See also

Personalize sales accelerator (docs)

Make quick decisions with enhancement to worklist cards

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

Business value

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

Feature details

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

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

Engage efficiently with your customers

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jan 31, 2022	Apr 2022

Business value

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

Feature details

- The sales accelerator setting will be enabled for all users by default.
- All users would see the sales accelerator side map entry and can use sales accelerator to engage with customers.
- Your sales operation or admin team would still be able to disable this feature for select or all users.

See also

Configure the sales accelerator (docs)

Improve seller productivity with better quality leads with Data hygiene

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔Feb 1, 2022	-	May 2022

Business value

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

Feature details

Automated process based on AI engine to achieve the following:

- Detection mechanism:
  - Duplicates detection
  - False or invalid leads detection

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

See also

Enable duplicate lead detection (docs)

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

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

Business value

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

Feature details

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

Get recommendations while engaging with your customers

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

Business value

Sellers engage with multiple customers daily. It gets difficult to stay on top of each interaction. They need to be guided with relevant insights and suggestions. Dynamics 365 Sales will now suggest the best actions that need to be performed at the right time. This will help your sellers in maximizing their output.

Feature details

In the sales accelerator workspace, find the following enhancements:

- The system will suggest the best actions that need to be performed at the right time.
- The next best actions are based on the AI models.

Choose the right engagement plan for your customers

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

Business value

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

Feature details

In the sales accelerator workspace:

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

Customizable worklist cards for right contextual information to the seller

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

Business value

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

Feature details

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

Flexible auto-connection of sequences and entities catering to varying business needs

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

Business value

Sellers need to quickly adapt to changing business environments and carry out the next activities accordingly. Reassignment of sequences to leads and opportunities can help the sellers to work on the right set of activities for maximizing success rate. Leads and opportunities need to be reassigned to different sellers as per the business need. Resegmentation can enable the sales engagement manager (SEM) to carry this out based on the requirements.

Feature details

- You can resegment leads and opportunities using flexible rules. With this, the sellers can be reassigned the relevant sequence based on changing business needs.
- You can also choose to reassign sellers to the right records based on these rules.
- These rules can be triggered manually or they can be scheduled.

Personalize the prioritized worklist using advanced filtering

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

Business value

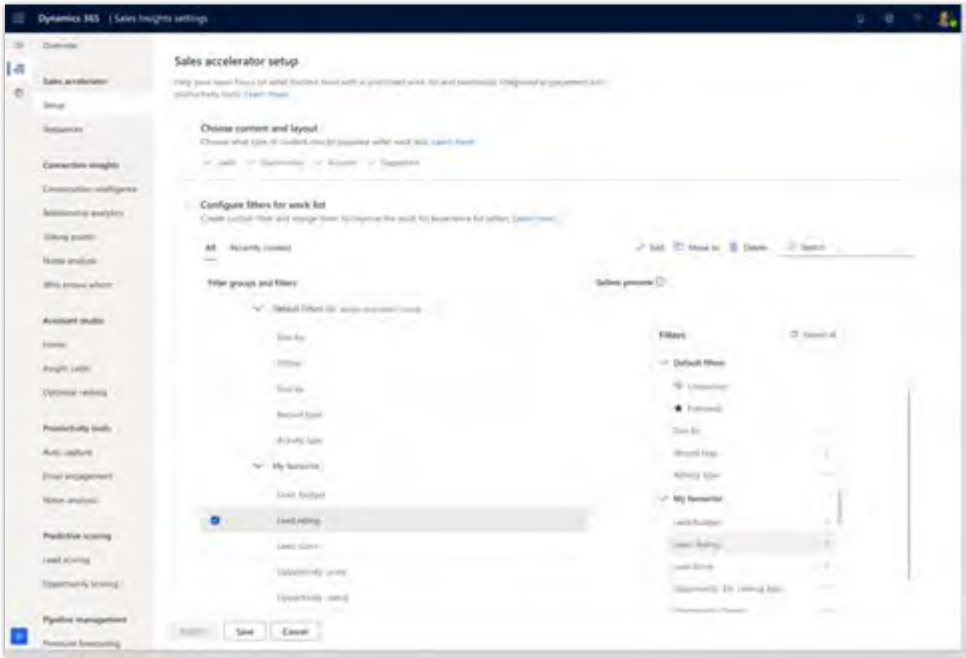
Every seller has a way of working that can be different. Advanced filtering capability helps your sellers quickly arrive at a personalized worklist to work from. Your sellers can use their preferred parameter based on the business scenario to arrive at the correct set of worklist items. Sales engagement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

Feature details

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

- Standard fields
- Custom fields

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



Filter Personalization

High-quality leads ensure higher success rates

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

Business value

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

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

Feature details

This release provides the ability to:

- Review duplicate records and merge them into a single record.
- Warn about a potential duplicate during the data entry for a new lead.
- Run duplicate detection on bulk leads.

Get notified when customers actively engage with you

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

Business value

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

Feature details

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

Notifications will be for:

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

Teams and Outlook collaboration

Overview

Enable sellers to be productive from wherever they are with Dynamics 365 integrations between Microsoft Teams and Outlook.

Start a linked chat from co-presence in a record

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

Business value

Business users can start a chat directly with other team members who are active on the record.

Feature details

With this release, business users can:

- Get a view of other members who are active on the record.
- Start a linked chat directly with members who are active on the record.
- Get context next time when they are working on the record.

AI-based contact suggestions for starting linked chat conversations for selected entity types

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

Business value

Business users can find relevant contacts by using the system-suggested contacts experience. This can help to quickly and correctly start conversations with the relevant people.

Feature details

Instead of depending on the admin-defined, rules-based suggestion of contacts, users can also benefit from system-generated suggested contacts based on activity on the record, working on relevant similar records, and so on.

This feature will be available for specific Sales entities like Accounts, Leads, and Opportunities.

Share and update Dynamics 365 records from within a Microsoft Teams message

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

Business value

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

This feature was released as a preview in the previous release wave. The feature is made generally available in this release wave.

Feature details

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

NOTE This feature requires a Dynamics 365 Enterprise license.

Take action on business data contextually right from within Teams chats

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

Business value

The Dynamics 365 messaging extensions for Teams already allows users to edit business data shared over chats in a modal pop-up. With this feature, participants in the conversation can take actions right on the preview information card itself, thereby increasing productivity and response rate on chats.

Feature details

- Business users can share Dynamics 365 records as live information cards with inline actions on Teams chats.
- Recipients cannot only see but also edit the details that matter—such as the opportunity score, estimated close date and revenue, and status—right from within the message.

Accelerate productivity and collaboration with Teams meeting integration

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

Business value

For many companies around the world, Teams meetings have become a necessity for conducting day-to-day business. With an integrated experience between Teams meetings and Dynamics 365, your organization can simplify remote business practices and empower your users to fully focus on delivering operational excellence and delighting customers. This release will bring an even tighter experience between Teams meetings and Dynamics 365, enabling your users to not only easily associate Teams meetings to their Dynamics 365 records, but also quickly access and update these relevant records right from within the Teams meeting interface.

Feature details

With this release, users can:

- Leverage the Dynamics 365 app for Teams to drive productive conversations across a range of business scenarios, not only when engaging with customers but also when collaborating with the team.
- Capture notes and tasks seamlessly during a Teams meeting that automatically synchronizes with the records in Dynamics 365.
- Boost their productivity by making use of Conversation Intelligence in even more ways before, during, and after meetings.

Access and update Dynamics 365 records right from within Teams meetings

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

Business value

For many companies around the world, Teams meetings have become a necessity for conducting day-to-day business. With an integrated experience between Teams meetings and Dynamics 365, your organization can simplify remote business practices and empower your users to fully focus on delivering operational excellence and delighting customers. This release will bring an even tighter experience between Teams meetings and Dynamics 365, enabling your users to not only easily associate Teams meetings to their Dynamics 365 records, but also quickly access and update these relevant records right from within the Teams meeting interface.

Feature details

- **Before Teams meetings**: Users can access and update Dynamics 365 records through the Dynamics 365 tab.
- **During Teams meetings**: Users can quickly access and update Dynamics 365 records via the in-meeting side panel.

- **After Teams meetings**: Users can access and update Dynamics 365 records through the Dynamics 365 tab.

Associate Teams meetings to Dynamics 365 records from wherever you work

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

Business value

For many companies around the world, Teams meetings have become a necessity for conducting day-to-day business. With an integrated experience between Teams meetings and Dynamics 365, your organization can simplify remote business practices and empower your users to fully focus on delivering operational excellence and delighting customers. This release will bring an even tighter experience between Teams meetings and Dynamics 365, enabling your users to not only easily associate Teams meetings to their Dynamics 365 records, but also quickly access and update these relevant records right from within the Teams meeting interface.

Feature details

With this release, users can:

- Link meetings to Dynamics 365 records directly from Teams using the Dynamics 365 app for Teams.
- Link meetings to Dynamics 365 records from Microsoft Outlook using the Dynamics 365 App for Outlook.
- Create Teams meetings directly from Dynamics 365.

The Dynamics 365 app for Teams can be added automatically to the newly created meetings.

Configure and customize Teams meeting integration to your business needs

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

Business value

For many companies around the world, Teams meetings have become a necessity for conducting day-to-day business. With an integrated experience between Teams meetings and Dynamics 365, your organization can simplify remote business practices and empower your users to fully focus on delivering operational excellence and delighting customers. This release will bring an even tighter experience between Teams meetings and Dynamics 365, enabling your users to not only easily associate Teams meetings to their Dynamics 365 records, but also quickly access and update these relevant records right from within the Teams meeting interface.

Feature details

With this release, administrators can:

- Enable Teams meeting integration for the desired security roles.
- Define which table forms to launch within the in-meeting side panel.
- Customize the in-meeting experience for each table using the Power Apps form designer.

Unified admin experience for embedded Teams chat settings

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

Business value

Enable administrators to easily set up Teams integration within Dynamics 365.

Feature details

Administrators can manage all Teams-related settings in a common and clearly defined admin page. This page will include:

- Integration of Teams channels to Dynamics 365.
- Integration of embedded Teams chat to Dynamics 365.
- Teams meeting integration.

This ensures a clearly defined view of what each settings do, and where it has an impact for the administrator to quickly set it up.

Collaborate seamlessly on email and chat with a single live editable view of business data in all channels

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

Business value

Business conversations happen across multiple channels. This feature ensures data consistency and accelerates collaboration by enabling business users to insert Dynamics 365 records as loops—live and portable information cards with inline actions across emails and chats. All participants in the conversation can view the same live information, update the information, and view changes made by others—across email and chat.

Feature details

Business users can:

- Launch the Dynamics 365 app for Teams or Outlook by typing @Dynamics.
- Copy Dynamics 365 records shared as live, actionable information cards between Outlook emails and Teams chats.
- Take quick actions on Dynamics 365 records shared in emails and chats.
- View live updated business data in email and chats.

Display a preview of the shared Dynamics 365 record when pasting its URL in emails and chats without any messaging extensions

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

Business value

The most common way to share business data in conversations is by pasting the record link in emails and chats. The members in the conversation have to follow the link in the email or chat to open the business app in a browser. The context switch from the collaboration app (Outlook and Teams) to business apps like Dynamics 365 Sales slows down the conversation.

This feature accelerates conversation velocity by enabling business users to embed a preview of the Dynamics 365 record in chat or email when they paste its URL. Recipients get key information about the record as part of the chat or email content, understand the context, and can respond faster. What's more, rolling out the feature by administrators and accessing the feature by business users are both simplified because the feature works without any business application-specific messaging extensions installed.

Feature details

Business users can perform the following actions without installing any messaging extension for business applications:

- Embed preview of Dynamics 365 records when they paste the record URL in Outlook (web access) emails.
- Embed preview of Dynamics 365 records when they paste the record URL in Teams chats.
- View key information about Dynamics 365 records as part of the Outlook (web access) email content if the record URL was pasted.
- Update Dynamics 365 records right from the Outlook (web access) email in which the record URL was pasted.
- View key information of Dynamics 365 records as part of the Teams chat content if the record URL was pasted.

- Update Dynamics 365 records right from the Teams chats in which the record URL was pasted.

Share Dynamics 365 records as information cards in email content with the Dynamics 365 messaging extensions for Outlook

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

Business value

Sharing links to Dynamics 365 records in email is common practice. Today, recipients of such emails need to select the link and open Dynamics 365 in a browser to view the information being referenced, losing time and focus during the context switch. With the new Dynamics 365 messaging extensions for Outlook, users can now search for and insert Dynamics 365 records as information cards that display key preview information as part of the email body to increase conversation velocity. Recipients can view the preview as part of the email body and respond quickly, thereby increasing their productivity.

Feature details

Business users can:

- Install, sign in, and configure the Dynamics 365 messaging extensions for Outlook to connect to their organization and their app. If the messaging extension is added to Microsoft Teams, it will also be added to Outlook, and vice versa.
- Search key sales records in the messaging extensions flyout and insert them as an adaptive card in Outlook (desktop and web access) emails.
- View key information about Dynamics 365 records as part of the Outlook email content.
- Update Dynamics 365 records right from Outlook emails.

Take action on business data contextually right from within Microsoft Outlook emails

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

Business value

Currently, when business data is shared over emails, users need to switch from Microsoft Outlook to Dynamics 365 to take action on them. The context switch reduces productivity and response rates. With this feature, participants in the conversation can take actions on the business data right from within the email in which they are viewing the information, thereby accelerating business velocity by increasing productivity and response rates on email conversations.

Feature details

- Business users can share Dynamics 365 records as live information cards with inline actions on Microsoft Outlook emails.
- Recipients can see and edit the details that matter—such as the opportunity score, estimated close date and revenue, and status—right from within the message.

Provide a workflow requesting admins to enable Teams collaboration settings in Dynamics 365 Sales Hub app

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

Business value

With Teams integration, you can collaborate with groups across departments on customer records using Teams chat or channel. By default, the settings that enable Microsoft Teams integration are disabled. With this feature, you can make a request to your admins to enable these settings if they are turned off.

Feature details

- Business users can request admins to enable Teams collaboration from within the Dynamics 365 Sales Hub app.
- Admins will see a notification badge in **Settings** indicating the number of people requesting access for Teams collaboration.

Streamline setup of Teams app for sales process using Teams templates

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

Business value

Effective collaboration within a team requires you to have an organized workspace. With Teams templates embedded in the Dynamics 365 app, we now provide you with a well-defined team structure designed around your business need or project. With templates, you can quickly create rich collaboration spaces with predefined settings, channels, and apps.

Feature details

With this release, business users can:

- Pick from a list of customized templates to set up a team for their collaboration scenario.
- Be educated on Teams usage and template capabilities through a first-run-experience guided tour.
- Use precreated files and folders for their activities.
- Build on starter tasks that are created for them to meet their specific scenario needs.

Service

Plan and prepare for Dynamics 365 Customer Service in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Service**.

Overview

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

For 2022 release wave 1, we'll continue to deliver features for:

- The all-in-one contact center.
- Contact center routing.
- Agent experiences with automation and knowledge management.

TIP Download the release overview guide and share with your team as you plan to onboard the new capabilities included in this release wave.

[Download the overview guide (PDF)]

* Overview guide available in English version only.

Investment areas

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.

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

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

The ability to create, import, and share knowledge bases is a core capability of successful support delivery. With knowledge management, agents and supervisors can author knowledge articles from templates, add knowledge search providers from multiple sources (SharePoint, Microsoft search, and other Dynamics 365 organizations), and receive AI-triggered knowledge suggestions to speed up support delivery.

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

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

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

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

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

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

receive support, how many support requests a customer can make, and how long after a purchase a customer can be supported as part of the agreement.

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

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

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

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

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

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

Administrator experiences
A modern administration experience should provide a consistent setup experience that unifies the management of Dynamics 365 Customer Service, unified routing, and

omnichannel activities. The Customer Service admin center app consolidates all administrator experiences that are relevant to customer support into a single app. It provides an intuitive and guided, wizard-like experience to enable rapid first-time and incremental setup.

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.

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 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 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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to 2021 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.

Administrator experiences

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

Feature	Enabled for	Public preview	Early access*	General availability
Forecast case and conversation volumes	Users by admins, makers, or analysts	Apr 2022	-	-

Feature	Enabled for	Public preview	Early access*	General availability
Visual customization of Power BI embedded analytics	Users by admins, makers, or analysts	-	-	Apr 2022
Simplify administration with new Customer Service admin center application	Admins, makers, marketers, or analysts, automatically	✓ Feb 28, 2022	-	Apr 2022

Agent experiences

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

Feature	Enabled for	Public preview	Early access*	General availability
Improvements to the Case grid	Users by admins, makers, or analysts	Jul 2022	-	-
Enhanced experience of using email templates while composing an email	Users by admins, makers, or analysts	-	-	Apr 2022
Inbox enhancements to help improve agent productivity	Users by admins, makers, or analysts	-	-	Apr 2022
Scheduling and IoT capabilities in Customer Service workspace	Users, automatically	-	✓ Jan 31, 2022	Apr 2022
User-initiated feedback in product	Users, automatically	-	✓ Jan 31, 2022	Apr 2022
Enhanced experience for creating email templates	Users by admins, makers, or analysts	May 2022	-	Jul 2022

Communities

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

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

Knowledge management

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

Feature	Enabled for	Public preview	Early access*	General availability
Dataverse search integration for knowledge management on portals	Users by admins, makers, or analysts	-	-	Apr 2022
Analytics for knowledge articles and search terms	Users, automatically	-	✔Jan 31, 2022	Apr 2022
Usability enhancements to knowledge article search	Users, automatically	-	✔Jan 31, 2022	Apr 2022
Configure knowledge search control for application side pane	Admins, makers, marketers, or analysts, automatically	✔Feb 1, 2022	-	Apr 2022

Omnichannel

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

Feature	Enabled for	Public preview	Early access*	General availability
Elevate Microsoft Teams channel chat to voice and video	Admins, makers, marketers, or analysts, automatically	Apr 2022	-	-

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

Service-level agreements

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

Feature	Enabled for	Public preview	Early access*	General availability
Custom time calculation in service-level agreements	Users by admins, makers, or analysts	-	-	Apr 2022
Usability enhancements in service-level agreements	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Teams integration

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

Feature	Enabled for	Public preview	Early access*	General availability
Resolve complex cases using intelligent swarming	Users by admins, makers, or analysts	Apr 2022	-	-
AI-generated conversation summary sets context for Teams-based collaboration	Users by admins, makers, or analysts	Apr 2022	-	-
Contextual collaboration using embedded Microsoft Teams	Users by admins, makers, or analysts	-	-	Jun 2022
Provide AI-suggested contacts for Teams-based collaboration	Users by admins, makers, or analysts	Apr 2022	-	Jun 2022
Take action on business data contextually right from within Teams chats	Users by admins, makers, or analysts	May 2022	-	Aug 2022

Feature	Enabled for	Public preview	Early access*	General availability
Build your own actionable cards for business data inserted in emails and chats with a low-code maker experience	Admins, makers, marketers, or analysts, automatically	Jul 2022	-	To be announced
Collaborate seamlessly on email and chat with a single, live, editable view of business data in all channels	Users by admins, makers, or analysts	Jul 2022	-	To be announced
Preview shared Dynamics 365 records when pasting URLs in emails and chats without any messaging extensions	Users by admins, makers, or analysts	Jul 2022	-	To be announced
Share Dynamics 365 records as information cards in email content with the Dynamics 365 messaging extensions for Outlook	Users by admins, makers, or analysts	Jul 2022	-	To be announced
Take action on business data contextually right from within Microsoft Outlook emails	Users by admins, makers, or analysts	Jul 2022	-	To be announced
Interact with Dynamics 365 records directly in Microsoft Teams meetings	Users by admins, makers, or analysts	Apr 2022	-	To be announced

Unified routing

Intelligent work item classification and omnichannel routing capabilities enable the flexibility and automation of AI-enabled workflows.

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

Feature	Enabled for	Public preview	Early access*	General availability
Fallback queues for unified routing	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

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

Description of **Enabled for** column values:

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

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

Administrator experiences

Overview

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

Forecast case and conversation volumes

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

Business value

Customer service managers must ensure that they have an adequate number of agents available to provide service to customers. Overcapacity results in higher costs, while under capacity results in longer customer wait times, reducing customer satisfaction. With this feature, customer service managers can plan the right level of staffing for contact centers based on the forecast volume of cases and conversations.

Feature details

The following are key capabilities of the forecast case and conversation volumes feature:

- Forecast upcoming case and conversation volumes based on historical traffic.
- Visualize forecast volumes on a daily, weekly, and monthly basis, for up to six months.
- Slice and dice forecasted volumes by channel and queue.
- Automatically detect seasonality from historical traffic. This helps customer service managers to accurately predict case or conversation volume during special, seasonal events.

Visual customization of Power BI embedded analytics

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

Business value

Out-of-the-box reporting capabilities that incorporate industry-standard metrics are critical for helping customers to get started with Dynamics 365 Customer Service and speed time to value. However, each customer has unique reporting needs based on the nature of their business. With this feature, customer service administrators can customize out-of-the-box reports to meet their organization's needs by leveraging the Power BI embedded data model.

Feature details

Key capabilities of this feature include the following:

- Rearrange the out-of-the-box report layouts.
- 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 are not exposed directly in the provided Power BI reports.

NOTE In this wave, this feature won't be available in knowledge analytics, the Unified routing report, or Omnichannel intraday insights report.

Simplify administration with new Customer Service admin center application

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✓Feb 28, 2022	-	Apr 2022

Business value

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

Feature details

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

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

See also

Customer Service admin center (docs)

Agent experiences

Overview

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

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

Improvements to the Case grid

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

Business value

The Case grid in Unified Interface has been modernized to increase agent productivity and enhance the agent experience. The data and visualizations will help agents and supervisors make quicker decisions and perform bulk operations.

Feature details

Key capabilities include:

- Ability to view icons for priority and the origin channel, and avatars for the assigned agents.
- View key data such as case age, next SLA breach, and latest activity.
- Perform inline edits and use quick navigation to respond to the latest communication.

Enhanced experience of using email templates while composing an email

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

Business value

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

Feature details

The new insert template experience will provide users with a new template gallery that has multiple views and search capabilities that are based on title, subject, description, and content. It also includes a standard set of filters that can be enhanced with custom fields.

Inbox enhancements to help improve agent productivity

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

Business value

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

Feature details

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

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

Scheduling and IoT capabilities in Customer Service workspace

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jan 31, 2022	Apr 2022

Business value

The Dynamics 365 Customer Service workspace app increases agent productivity with the ability to work on multiple sessions at a time in a single workspace experience. Scheduling and Internet of Things (IoT) capabilities are currently available only in the Customer Service Hub app. In this release, agents can seamlessly manage appointments using scheduling capabilities, and proactively resolve issues created from IoT alerts by using the IoT capabilities in the Customer Service workspace app.

Feature details

This feature provides service scheduling capabilities within the Customer Service workspace.

Key capabilities include the ability to:

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

This feature also provides connected Customer Service capabilities within the Customer Service workspace.

Key capabilities include the ability to:

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

See also

Connected Customer Service in Customer Service workspace (docs)

User-initiated feedback in product

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔Jan 31, 2022	Apr 2022

Business value

Getting rich customer feedback is critical to driving product improvement. Users can share feedback directly from the product, whenever they want to, by leveraging the new user-initiated feedback feature.

Feature details

This feature is visible to everyone using these out-of-the-box app modules in Customer Service:

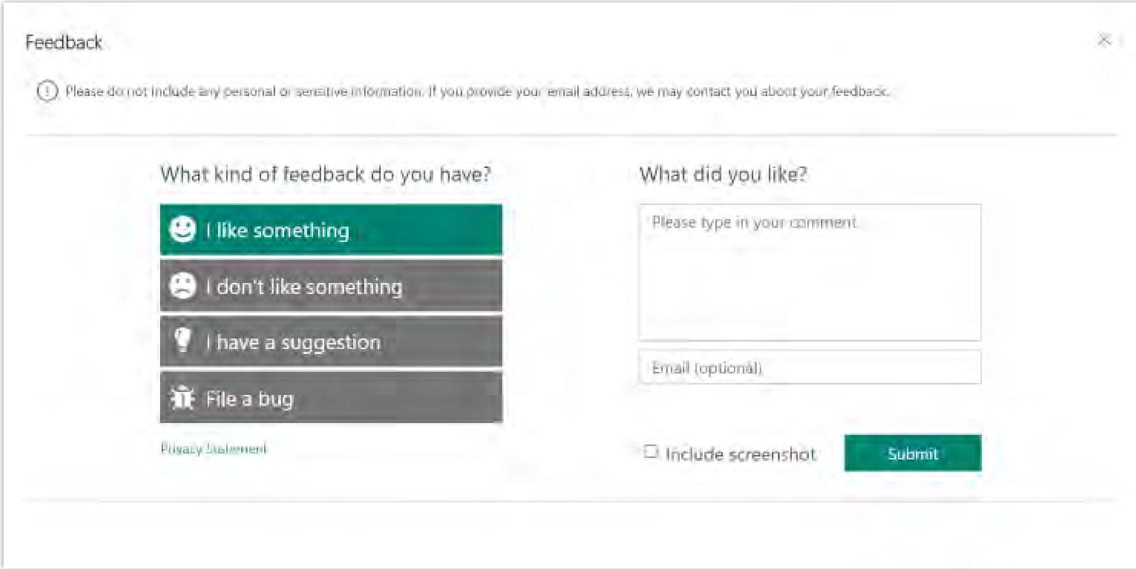
- Customer Service workspace.
- Customer Service Hub.
- Customer Service admin center.

This feature will be available in April for the out-of-the-box Customer Service Team Member app module.

The share feedback icon is located in the ribbon, as shown in the image:

User-initiated feedback entry point.

You can now share what you like or don't like, make suggestions, or report a bug:



User-initiated feedback pop-up window.

See also

Share feedback for Customer Service (docs)

Enhanced experience for creating email templates

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

Business value

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

Feature details

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

Communities

Overview

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

Engage with customers in Dynamics 365 Customer Service Community

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

Business value

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

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

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

Feature details

Capabilities for community managers and moderators

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

Now, community managers can:

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

Users experience a vibrant community

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

Users can:

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

Knowledge management

Overview

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

The ability to create, import, and share knowledge bases is a core capability of successful support delivery. With knowledge management, agents and supervisors can author knowledge articles from templates, add knowledge search providers from multiple sources (SharePoint, Microsoft search, and other Dynamics 365 organizations), and receive AI-triggered knowledge suggestions to speed up support delivery.

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

Dataverse search integration for knowledge management on portals

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

Business value

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

Feature details

The key capabilities of this feature include:

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

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

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

Analytics for knowledge articles and search terms

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jan 31, 2022	Apr 2022

Business value

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

Feature details

The following are some of the key capabilities of knowledge article analytics, including detailed reports that provide historical trends for key metrics such as:

- Number of views
- Number of visitors
- Average feedback rating

- Number of links to cases
- Number of shares

Usability enhancements to knowledge article search

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jan 31, 2022	Apr 2022

Business value

Agents will be able to quickly search for knowledge articles and get relevant search results.

Feature details

Key capabilities:

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

See also

Search for knowledge articles in the Customer Service Hub (docs)

Configure knowledge search control for application side pane

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

Business value

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

Feature details

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

The key capabilities that administrators can configure are:

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

See also

Configure knowledge search control on app side pane for an entity record preview (docs)

Omnichannel

Overview

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

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

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

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

Elevate Microsoft Teams channel chat to voice and video

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

Business value

Organizations that adopt Omnichannel for Customer Service messaging for their enterprise employees who provide support via Microsoft Teams can enhance service delivery by allowing chats to be elevated to voice or video calls.

Feature details

This feature allows agents who are connected to customers over the Microsoft Teams channel to elevate the messaging conversations that originate from Microsoft Teams to a Microsoft Teams voice or video call.

APIs for queue and agent availability

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

Business value

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

Feature details

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

Service-level agreements

Overview

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

Custom time calculation in service-level agreements

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

Business value

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

Feature details

Customers can now customize the calculation of the warning time and the failure time of SLA KPIs. This will help customers address specific business needs to determine and use a particular customer service calendar during runtime.

Other parameters which customers can use to influence the warning and the failure times are the attributes associated with the instance of an entity, failure and the warning duration, and start time of the evaluation.

Usability enhancements in service-level agreements

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

Business value

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

Feature details

The enhancements in the SLAs include:

- Customize the **Succeeded** or **Expired** display text of the SLA timer:

  SLA timer control displays **Succeeded** or **Expired** as a text, based on whether the SLA KPI was met. Customers can now use the maker experience to customize the values to display when SLAs succeed or expire. For example, when SLAs succeed, the text can be displayed as **Met**, and when SLAs expire, the text can be displayed as **Missed**.

- Export and import of holiday schedule and customer service schedule with SLA:

  Customers can now export and import the holiday and customer service schedules from the source environment to the target environment along with the SLA configurations in Unified Interface.

Teams integration

Overview

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

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

Resolve complex cases using intelligent swarming

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

Business value

Transform an entire organization into a unified customer service team by easily bringing together the right talent to effectively resolve complex cases. Agents and subject matter experts can swarm cases in the applications they're accustomed to using, including Customer Service workspace and Microsoft Teams.

Feature details

Some of the key capabilities of this feature are:

- **Intelligent expert finder**: Easily discover the best-suited subject matter experts with the right skills.
- **Notifications**: Notify relevant subject matter experts across Dynamics 365 and Teams.
- **Simple collaborative interface**: Show relevant information and allow for real-time collaboration. This can be accessed from Dynamics 365 Customer Service or the swarm group chat in Microsoft Teams.

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

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

Business value

Reading through a long conversation transcript to understand the context can be time-consuming. On top of that, writing a summary of the conversation adds even more time.

With an AI-generated conversation summary, when an agent has a conversation with a customer and wants to collaborate with other agents, supervisors, SMEs, and so on using embedded Microsoft Teams, AI automatically provides a summary of the conversation for agents to share with their collaborators.

Feature details

Some of the key capabilities of this feature are:

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

Contextual collaboration using embedded Microsoft Teams

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

Business value

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

Feature details

The following key features enable users to:

- Chat with contacts from within Dynamics 365.
- Access key Customer Service contacts, such as supervisors, queue members, and support experts.
- Access AI-driven suggestions of agents who resolved similar cases.
- Access recent Microsoft Teams chat lists.
- Link and unlink chats to case and conversation records.
- Access linked Microsoft Teams chats.
- View message avatars and presence, where users can easily see profile pictures of a chat participant and their availability (presence).

Provide AI-suggested contacts for Teams-based collaboration

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

Business value

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

Feature details

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

Some of the key capabilities of this feature are:

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

Take action on business data contextually right from within Teams chats

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

Business value

The Dynamics 365 messaging extensions for Teams already allows users to edit business data shared over chats in a modal pop-up card. With this feature, participants in the conversation can take actions right on the preview information card itself, thereby increasing productivity and response rate on chats.

Feature details

- Business users can share Dynamics 365 records as live information cards with inline actions on Teams chats.

- Recipients can not only see, but can also edit, the details that matter—such as the case description, status, or priority—right from within the message.

Build your own actionable cards for business data inserted in emails and chats with a low-code maker experience

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

Business value

Today, administrators can configure the data that appears in the information cards inserted in Teams chats when business users insert Dynamics 365 records using the Dynamics 365 messaging extensions for Teams. With this feature, administrators can fully customize the layout, data, and actions on the cards, thereby making the cards tailored to their organization's needs. They can unify experiences across emails and chats by reusing the same card for both channels.

Feature details

Administrators and citizen developers will:

- Have a low-code maker experience to build their own information cards to preview a Dynamics 365 record.
- Have full flexibility over the layout, data, and actions in the preview information cards.
- Be able to deliver a unified preview of Dynamics 365 records across emails and chats by building the cards once and using them across apps.

Collaborate seamlessly on email and chat with a single, live, editable view of business data in all channels

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

Business value

Business conversations happen across multiple channels. This feature ensures data consistency and accelerates collaboration by enabling business users to insert Dynamics 365 records as loops—live and portable information cards with inline actions across emails and chats. All participants in the conversation can view the same live information, update the information, and view changes made by others, across email and chat.

Feature details

Business users can:

- Copy Dynamics 365 records shared as live, actionable information cards between Outlook emails and Teams chats.
- Take quick actions on Dynamics 365 records shared in emails and chats.
- View live, updated business data in email and chats.

Preview shared Dynamics 365 records when pasting URLs in emails and chats without any messaging extensions

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

Business value

The most common way to share business data in conversations is by pasting the record link in emails and chats. The members in the conversation then have to select the link in the email or chat to open the business app in a browser. The context switch from the collaboration app (Outlook and Teams) to business apps like Dynamics 365 Customer Service slows down the conversation.

This feature accelerates conversation velocity by enabling business users to embed a preview of the Dynamics 365 record in chat or email when they paste its URL. Recipients get key information about the record as part of the chat or email content, understand the context, and can respond faster. What's more, rolling out the feature by administrators and accessing the feature by business users are both simplified because the feature works without any business application-specific messaging extensions installed.

Feature details

Business users can perform the following actions without installing any messaging extension for business applications:

- Embed a preview of a Dynamics 365 record when they paste the record URL in Outlook (web access) emails.
- Embed a preview of a Dynamics 365 record when they paste the record URL in Teams chats.
- View key information about Dynamics 365 records as part of the Outlook (web access) email content if the record URL was pasted.
- Update Dynamics 365 records right from the Outlook (web access) email in which the record URL was pasted.

- View key information about Dynamics 365 records as part of the Teams chat content if the record URL was pasted.
- Update Dynamics 365 records right from the Teams chats in which the record URL was pasted.

Share Dynamics 365 records as information cards in email content with the Dynamics 365 messaging extensions for Outlook

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

Business value

Sharing links to Dynamics 365 records in Outlook is common practice. Today, recipients need to select a shared link and open Dynamics 365 in a browser to view the information being referenced, which causes loss of time and focus during the context switch. With the new Dynamics 365 messaging extensions for Outlook, users can search for and insert Dynamics 365 records as information cards that display key preview information as part of the email body to increase conversation velocity. Recipients can view the preview as part of the email body and respond quickly, thereby helping increase their productivity.

Feature details

Business users can:

- Install, sign in, and configure the Dynamics 365 messaging extensions for Outlook to connect to their organization and their app. If the messaging extensions feature is added to Microsoft Teams, it will also be added to Outlook, and vice versa.
- Search key customer service records in the messaging extensions flyout and insert them as an adaptive card in Outlook (desktop and web access) emails.
- View key information about Dynamics 365 records as part of the Outlook email content.
- Update Dynamics 365 records right from Outlook emails.

Take action on business data contextually right from within Microsoft Outlook emails

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

Business value

Currently, when business data is shared via email, users need to switch from Microsoft Outlook to Dynamics 365 to take action. The context switch reduces productivity and response rates. With this feature, participants in the conversation can take actions on the business data right from within the email in which they are viewing the information, thereby accelerating business velocity by increasing productivity and response rates on email conversations.

Feature details

- Business users can share Dynamics 365 records as live information cards with inline actions on Microsoft Outlook emails.
- Recipients can see and edit the details that matter—such as the case description, status, and priority—right from within the message.

Interact with Dynamics 365 records directly in Microsoft Teams meetings

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

Business value

Drive customer satisfaction and agent productivity when agents can, directly from a Microsoft Teams meeting, easily access relevant customer data, take relevant notes, create, assign, or complete tasks, and create and access other related records (for example, contact) without switching applications or losing context.

Agents and other Customer Service subject matter experts can focus on the customer interaction and issue resolution in the Teams meeting, as they have easy access to relevant Dynamics 365 data.

Feature details

These capabilities make it possible for you to:

- Create a Teams meeting when scheduling an appointment from Dynamics 365.
- Join Teams meetings in a single click from Dynamics 365.
- Access and update Dynamics 365 records seamlessly during a Teams meeting.
- Capture notes during a Teams meeting and have these notes automatically sync back to the related Dynamics 365 record.
- Honor Dynamics 365 permissions and rules for data access.

Unified routing

Overview

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

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

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

Enhancements in diagnostics for unified routing

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

Business value

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

Feature details

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

Fallback queues for unified routing

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

Business value

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

Feature details

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

Plan and prepare for Dynamics 365 Field Service in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. 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 capabilities such as work order management, resource scheduling, and asset management. Dynamics 365 Field Service allows organizations to move from paper-based reactive service to deliver proactive and predictive world-class service, empowering digital transformation and allowing innovative business models such as outcome-based service.

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

For official product documentation and training, see:

- Dynamics 365 Field Service product page.
- Dynamics 365 Field Service training on Microsoft Learn.

TIP Download the release overview guide and share with your team as you plan to onboard the new capabilities included in this release wave.

Download the overview guide (PDF)

* Overview guide available in English version only.

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 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.

Helpful links	Description
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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to 2021 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	Early access*	General availability
Dynamics 365 Field Service mobile usability enhancements	Users, automatically	-	-	Apr 2022
New enhanced schedule board enabled for new customers	Users, automatically	-	✔Jan 31, 2022	Apr 2022
Windows 10 support for Dynamics 365 Field Service mobile	Users by admins, makers, or analysts	✔Oct 1, 2021	-	Apr 2022

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

Description of **Enabled for** column values:

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

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

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

Dynamics 365 Field Service mobile usability enhancements

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

Business value

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

Feature details

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

- Date and time input fields will leverage default input controls provided by the device operating system.
- Mobile optimized device keyboards will be shown when interacting with numeric, phone, email, and URL input fields.
- Large format devices (such as tablets and PCs) will have a streamlined agenda view available as part of their booking calendar.
- Frontline workers will be able to upload both image and non-image files to the timeline from their mobile device.
- Customers' primary account phone numbers will be accessible directly on the **Bookable Resource Booking Customer** tab.
- The app interface will be streamlined by removing infrequently used commands, including **Start Task Flow**.

New enhanced schedule board enabled for new customers

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔Jan 31, 2022	Apr 2022

Business value

With 2021 release wave 2, the new schedule board is at functional parity with the old schedule board along many other usability and performance improvements. In 2022 release wave 1, we are improving the user experience by bridging the functional gaps between hourly and multiday views on the schedule board to improve dispatcher productivity.

Feature details

The new schedule board will be the default experience for new tenants. Existing tenants will still have the option to use the legacy schedule board.

Updates in this release include:

- Usability and performance enhancements.
- Bridged the gap between hourly view and daily view by showing more booking info and booking tooltips on the daily view.
- Enabled dispatchers to work more productively by improving the full screen mode to show more resources and requirements. When bookings are created, dispatchers can continue working on the schedule board with no interruption.
- Better Bing Maps integration on the Gantt and map views to better display clusters of requirements when the pins are close together.
- Dispatchers can easily get driving directions with one click and see a resource's driving route.
- Settings page usability improvements.

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.

Windows 10 support for Dynamics 365 Field Service mobile

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

Business value

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

Feature details

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

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

See also

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

Finance and Operations

Plan and prepare for Dynamics 365 Finance in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Finance**.

Overview

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

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

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

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

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

- We will release Globalization Studio, which will enhance the low-code tax compliance and globalization capabilities and make the globalization services and multicountry content available for any first- and third-party app and extended with prebuilt ISV connectors.
- We will continue to extend and enhance globalization services in Globalization Studio, such as Tax Calculation and Electronic Invoicing.
- We continue to enhance the Configurable Business Documents and Electronic Reporting offerings.

TIP Download the release overview guide and share with your team as you plan to onboard the new capabilities included in this release wave.

[Download the overview guide (PDF)]

* Overview guide available in English version only.

Investment areas

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

Globalization
Globalization Studio enhances the low-code globalization capabilities and makes the globalization services and multicountry content available for any first- and third-party app and extended with prebuilt ISV connectors. Globalization services in Globalization Studio continue to be extended and enhanced. This includes:

- **Tax Calculation**: Enable multiple-document tax calculations in one API call to increase the performance of tax calculation processing for customers with a high volume of invoices in certain industries.
- **Electronic Invoicing**: Providing French e-invoice integration with Chorus Pro, configurable mandatory Polish e-invoice and integration with Krajowy System of e-Faktur (KSeF) platform (Public Preview), and integration Saudi Arabia e-invoice with ZATCA's (Zakat, Tax and Customs Authority) systems.
- Enhancing Configurable Business Documents and Electronic Reporting offerings.

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.
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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to [2021 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.

Core financials

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

Feature	Enabled for	Public preview	General availability
Vendor invoice OCR – advanced configurations for OCR service	Admins, makers, marketers, or analysts, automatically	Jul 2022	-
Vendor invoice OCR – deployment wizard for vendor invoice OCR integration	Users by admins, makers, or analysts	Jul 2022	-
Vendor invoice OCR – vendor invoice OCR hub	Admins, makers, marketers, or analysts, automatically	Jul 2022	-
Vendor invoice OCR – business rules in staging area	Admins, makers, marketers, or analysts, automatically	Aug 2022	-
Update budget plans with Excel template upload	Admins, makers, marketers, or analysts, automatically	-	Apr 2022
Enhancements around ledger settlements	Users by admins, makers, or analysts	✓ Feb 25, 2022	Apr 2022
New button added to view settlement voucher	Users, automatically	✓ Feb 25, 2022	Apr 2022
Post in batch for bill of exchange related journals	Users, automatically	✓ Feb 25, 2022	Apr 2022
Reverse reconciled advanced bank reconciliation	Users by admins, makers, or analysts	✓ Feb 25, 2022	Apr 2022

Feature	Enabled for	Public preview	General availability
Validate vendor bank account before submitting vendor payment journal to workflow	Users by admins, makers, or analysts	✓ Feb 25, 2022	Apr 2022
Subscription billing – recurring contract billing	Users by admins, makers, or analysts	✓ Feb 28, 2022	Apr 2022
Subscription billing – revenue allocation	Users by admins, makers, or analysts	✓ Feb 28, 2022	Apr 2022
Subscription billing – revenue and expense deferrals	Users by admins, makers, or analysts	✓ Feb 28, 2022	Apr 2022
Post to Revenue account for zero priced sales order invoice lines	Users by admins, makers, or analysts	-	May 2022
Resetting the workflow status for free text invoices from Unrecoverable to Draft	Users by admins, makers, or analysts	-	May 2022
Stop posting of free text invoices on first error	Users by admins, makers, or analysts	-	May 2022
Bank to ledger reconciliation report improvement	Users by admins, makers, or analysts	-	May 2022
Foreign Currency Revaluation performance improvements	Users by admins, makers, or analysts	-	May 2022
Budget control document filtering enhancement	Users by admins, makers, or analysts	-	Jul 2022
General ledger year-end enhancements - specify balance sheet dimensions and year-end close micro-service	Users by admins, makers, or analysts	-	Jul 2022
Increase the length of invoice numbers	Users by admins, makers, or analysts	-	Jul 2022
Financial Dimension service	Users by admins, makers, or analysts	-	Aug 2022

Feature	Enabled for	Public preview	General availability
Invoice automation – process vendor invoices during the import process	Admins, makers, marketers, or analysts, automatically	-	Aug 2022
Ledger settlement automation	Users by admins, makers, or analysts	-	Aug 2022
New vendor invoice data entity for OCR integration	Users by admins, makers, or analysts	-	Aug 2022

Globalization

As part of Globalization Studio, we are enhancing low-code globalization services and multicountry content in this release.

Feature	Enabled for	Public preview	General availability
Electronic Invoicing service – configurable Polish e-invoice and integration	Users by admins, makers, or analysts	Aug 2022	-
Electronic Invoicing service – Saudi Arabia e-invoice integration	Users by admins, makers, or analysts	Aug 2022	-
Configurable business documents – specific destinations via printer management settings in the reports (phase 2)	Users by admins, makers, or analysts	-	Apr 2022
Russian fixed assets – integration with Asset Management lifecycle	Users by admins, makers, or analysts	-	Apr 2022
Tax Calculation service – inheriting origin tax information for reversal transactions	Users, automatically	-	Apr 2022
Electronic reporting - order by function in queries	Admins, makers, marketers, or analysts, automatically	✔ Feb 1, 2022	Apr 2022
Configurable business documents - business document management workspace integration with global repo	Users, automatically	✔ Feb 1, 2022	Apr 2022

Feature	Enabled for	Public preview	General availability
Electronic reporting - support Zebra Programming Language (ZPL II) output	Users, automatically	-	Apr 2022
Electronic Invoicing service – French e-invoice integration with Chorus Pro	Users by admins, makers, or analysts	-	Jun 2022
Globalization Studio	Users by admins, makers, or analysts	-	Sep 2022
Tax Calculation service – accepting multiple documents in one API call	Users by admins, makers, or analysts	Apr 2022	Sep 2022

Description of **Enabled for** column values:

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

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

Core financials

Overview

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

Vendor invoice OCR – advanced configurations for OCR service

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

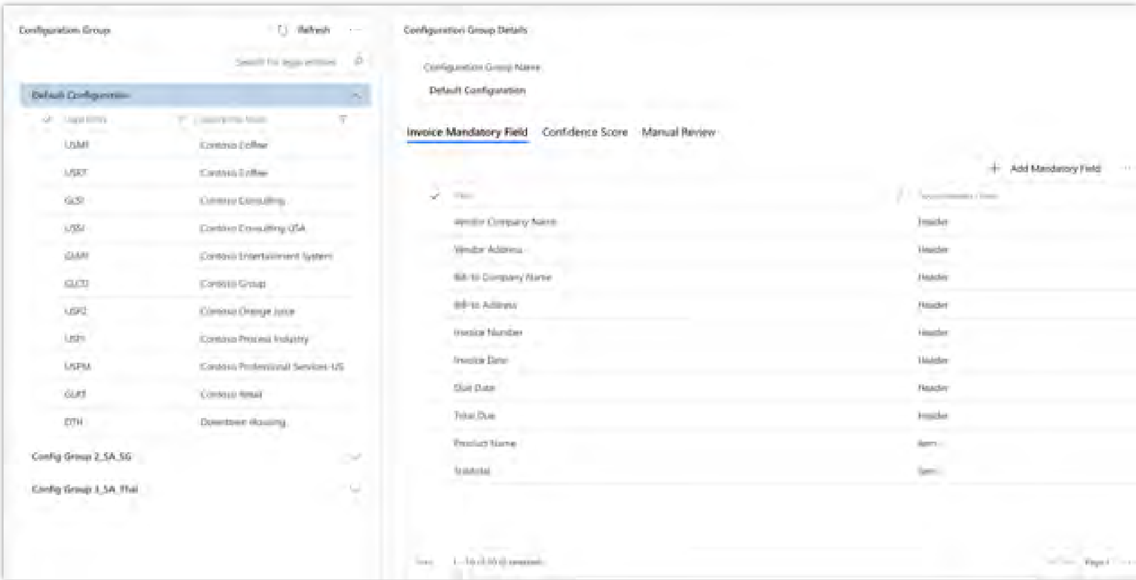
Business value

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

Feature details

This feature provides a list of configuration settings that include:

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



Vendor invoice OCR configuration.

Vendor invoice OCR – deployment wizard for vendor invoice OCR integration

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

Business value

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

Feature details

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

Vendor invoice OCR – vendor invoice OCR hub

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

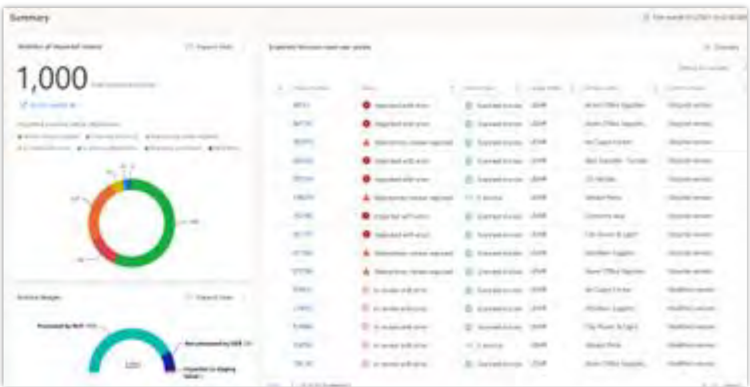
Business value

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

Feature details

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

The staging area will accept any accuracy level of recognized data from the AI builder—without regard to whether or not the invoice data is complete. The data can be enriched and validated automatically according to rules or even machine learning during the import process. It's also possible to review and edit invoices manually from the user interface.



Vendor invoice OCR cockpit.

Vendor invoice staging area.

Vendor invoice OCR – business rules in staging area

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

Business value

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

Feature details

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

Update budget plans with Excel template upload

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

Business value

Updating large number of budget plan records using the open in Excel (OData) experience can be time consuming during the publishing process. A new parameter is added to the budget layout templates to allow budget plan records to be mass loaded from the budget menu using batch processing, removing that wait time. The same template can also be published using the OData experience if only a few changes have been made.

Feature details

A parameter has been added to each budget plan layout that uses a data management framework (DMF) upload approach to be used when enabled. This parameter will create the DMF project for the users and enables the mass update budget plan lines menu item found in the budget plans. The user will be able to open the worksheet and either publish with the Excel add-in tools or save the worksheet to be uploaded using the mass update tools.

Enhancements around ledger settlements

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 25, 2022	Apr 2022

Business value

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

Feature details

This feature includes the following enhancements:

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

- The Transactions for... page, when opened from the Trial balance list page, will use the settlement date to determine which transactions to display when choosing the option Show unsettled transactions only.

New button added to view settlement voucher

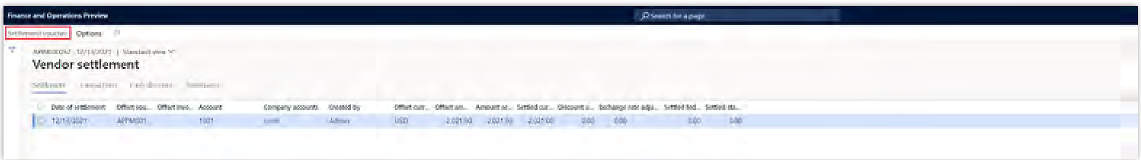
Enabled for	Public preview	General availability
Users, automatically	✔ Feb 25, 2022	Apr 2022

Business value

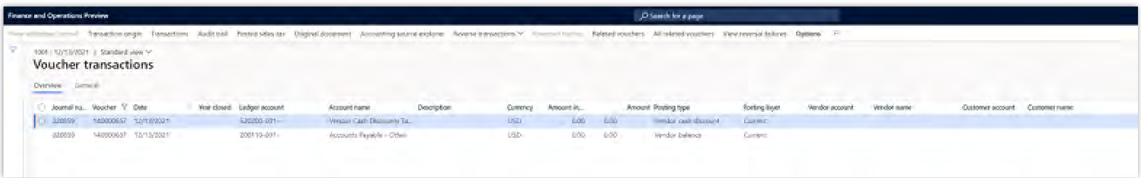
The ability to view all the transactions in a settlement voucher with a single click can significantly increase efficiency when you're viewing or working with settlement history for vendors and/or customers.

Feature details

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



Settlement voucher



Voucher transactions

Post in batch for bill of exchange related journals

Enabled for	Public preview	General availability
Users, automatically	✔ Feb 25, 2022	Apr 2022

Business value

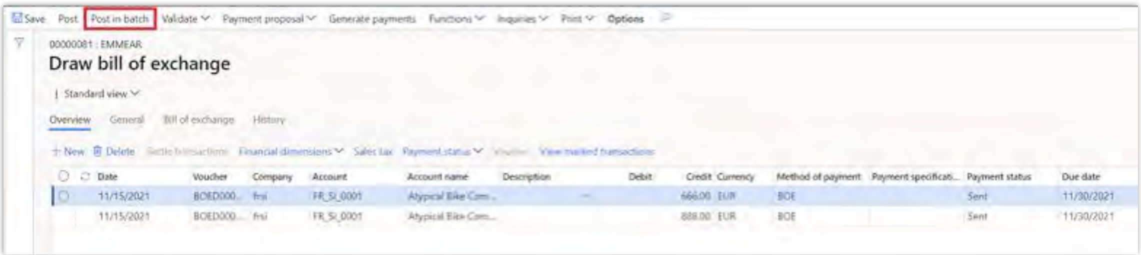
This feature lets you run the journal posting process in the background for all bill of exchange journals, which in turn lets you continue working on other tasks in the system at the same time.

Feature details

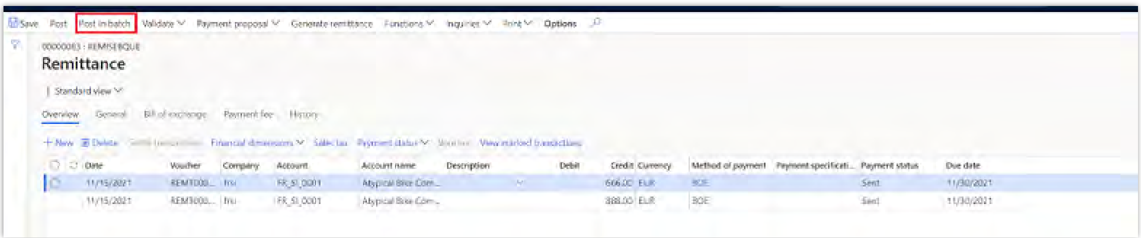
All bill of exchange journals will now include a new button, called **Post in batch**. The journals that have the new button added include:

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

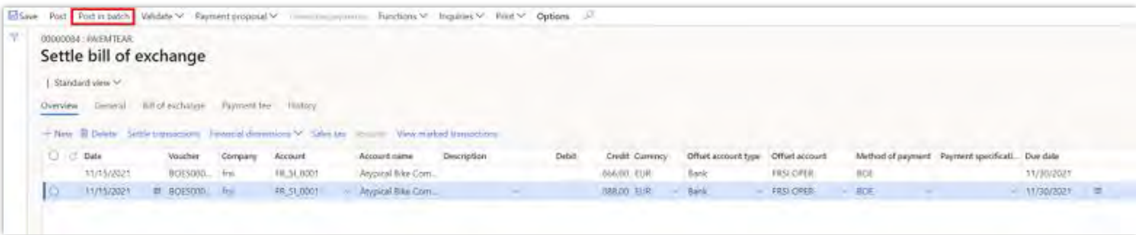
You can click **Post in batch** to start batch posting for each of these journals.



Draw bill of exchange

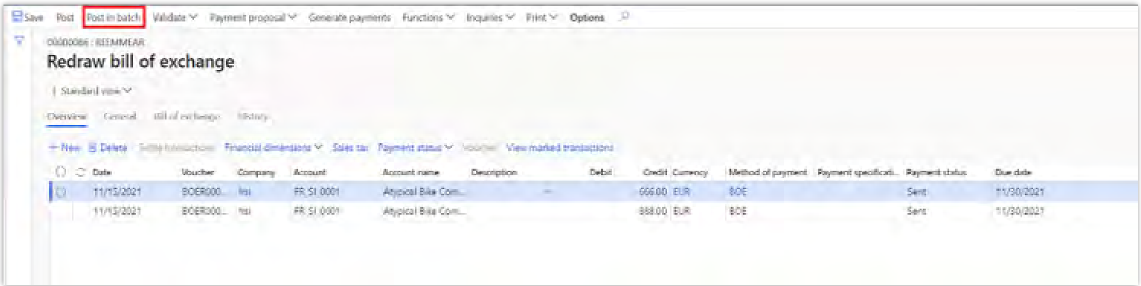


Remittance



Settle bill of exchange

Protest bill of exchange



Redraw bill of exchange

Reverse reconciled advanced bank reconciliation

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 25, 2022	Apr 2022

Business value

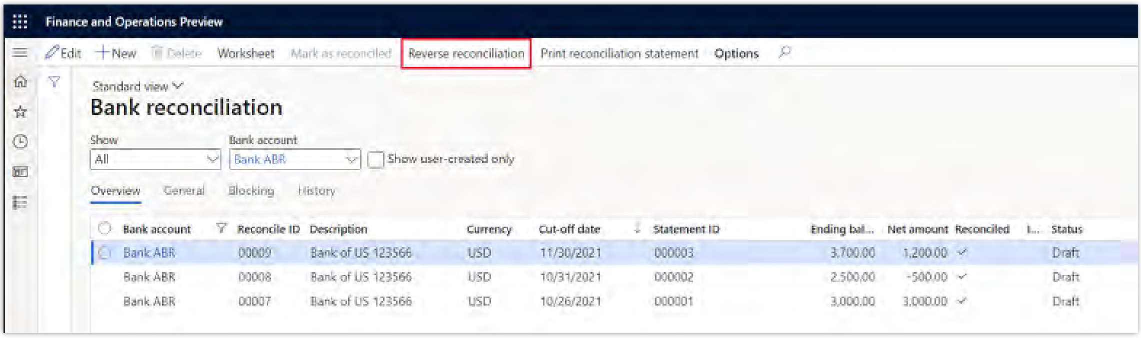
This feature lets you reverse reconciled advanced bank reconciliation in a single step.

Feature details

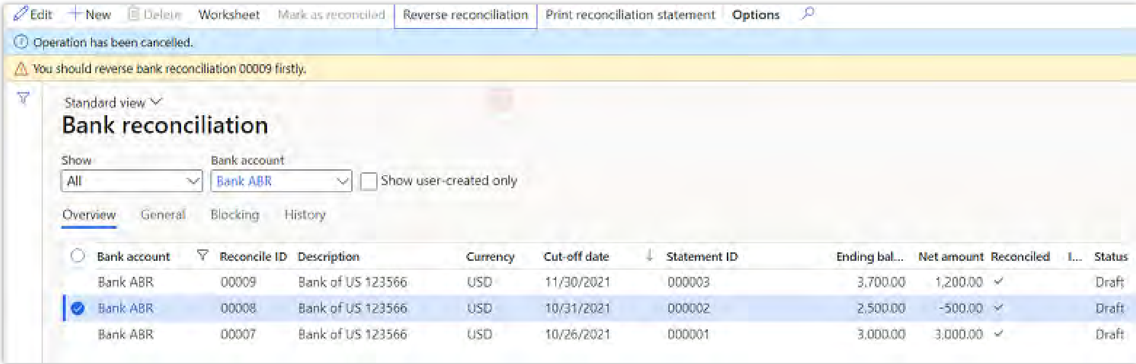
When bank reconciliations are reconciled without new transactions or correction amounts, this feature enables the reverse reconciliation button on the **Bank reconciliation** and **Bank reconciliation worksheet** pages to reverse reconciliations.

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

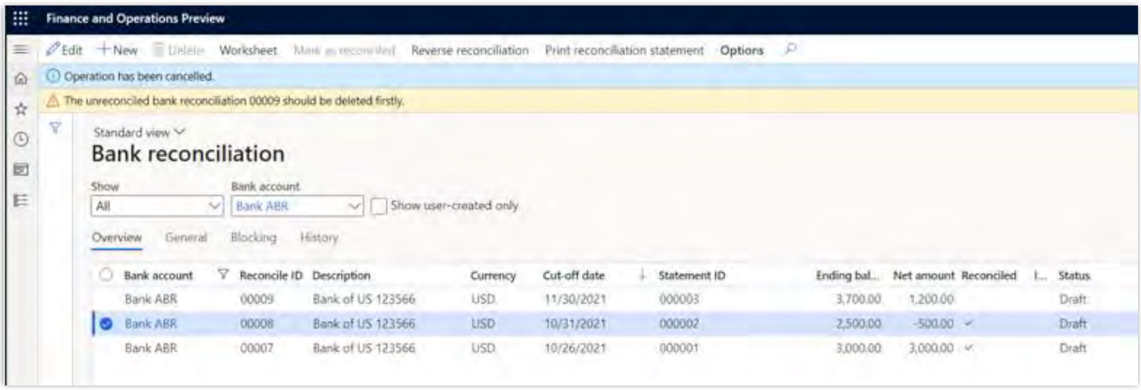
Advanced bank reconciliations can't be reversed if new transactions or correction amounts exist in the reconciliation.



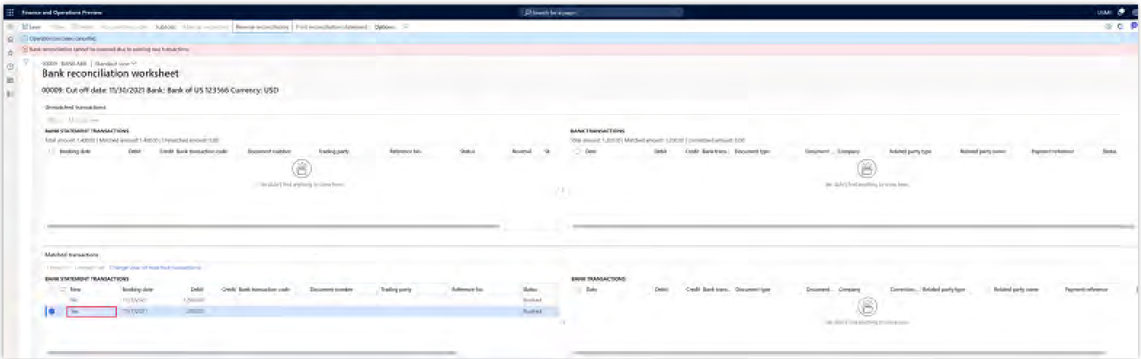
Reverse reconciliation



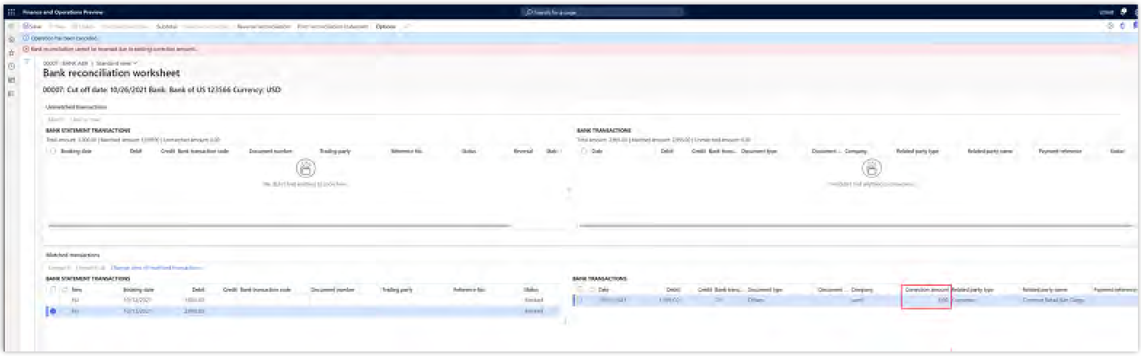
Reverse previous bank reconciliations



Remove unreconciled bank reconciliations



Bank reconciliation with new transactions



Bank reconciliation and corrections

Validate vendor bank account before submitting vendor payment journal to workflow

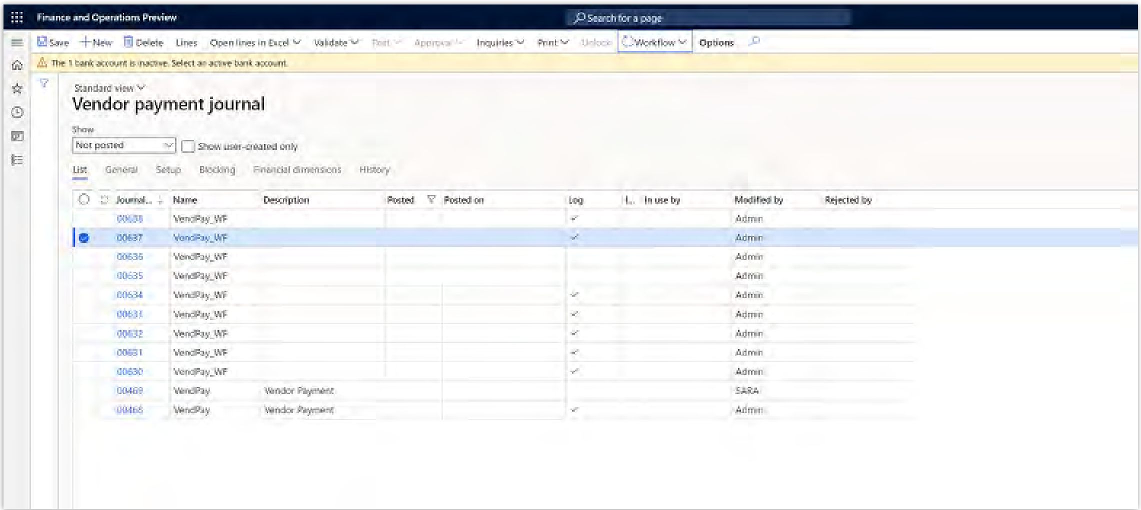
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 25, 2022	Apr 2022

Business value

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

Feature details

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



Validate vendor bank account before submitting to workflow.

Subscription billing – recurring contract billing

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 28, 2022	Apr 2022

Business value

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

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

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

Feature details

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

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

Flexible pricing is critical to invoicing customers. Invoicing through subscription billing can be based on consumption, meter readings, or usage. For example, consumption can be entered manually or entered through entity import. Meter readings can be entered and used as the beginning reading for the next period. Invoices can be created based on usage with price tiers or pricing adjustments based on quantity to be invoiced.

Subscription billing – revenue allocation

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 28, 2022	Apr 2022

Business value

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

Feature details

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

Subscription billing – revenue and expense deferrals

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 28, 2022	Apr 2022

Business value

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

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

Feature details

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

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

Post to Revenue account for zero priced sales order invoice lines

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

Business value

Allowing updates to the Revenue account in General ledger for sales lines that have no price helps to provide a complete audit trail by displaying the debit and credit of zero for the Revenue and Accounts receivable accounts. This will save accounts receivable staff time in their reconciliation processes.

Feature details

This feature adds an option to allow posting to the Revenue account in General ledger for sales order lines that have no price. To set up or view this information, go to the **Post to Revenue account for zero priced sales order invoice lines** parameter on the **Ledger and sales tax** tab of the **Accounts receivable parameters** page. When this option is enabled, both the Revenue account and Accounts receivable account will be updated for zero amount lines. When the option is not enabled, the Accounts receivable account will be updated for zero amount. The Revenue account will not be updated for the zero amount.

Resetting the workflow status for free text invoices from Unrecoverable to Draft

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

Business value

In the case of a system interruption, a free text invoice can get into the status of unrecoverable. Users may now reset the status of documents in a status of **Unrecoverable**. This will save time for users by eliminating the need to call customer service and support.

Feature details

You can use the **Workflow history** page to reset the workflow status to **Draft**. You can open this page from **Free text invoice** or from **Common > Inquires > Workflow**. To reset the workflow status to **Draft**, select **Recall**. You can also reset the workflow status to **Draft** by selecting the **Recall** action on the **Free text invoice** or **All free text invoices page**. After the workflow status is reset to **Draft**, it will be available for editing on the **Free text invoice** page.

Stop posting of free text invoices on first error

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

Business value

Finding the issue on the first posting error allows the accounts receivable staff to investigate the error quickly, allowing for faster billing in the long run. The error can be corrected, and the invoice can be re-selected for posting.

Feature details

This feature adds an option to stop posting free text invoices when an error occurs. You can select to stop free text invoice posting when an error occurs on the **Updates** tab of the **Accounts receivable parameters** page. Select **Yes** for the **Stop posting of free text invoices on first error** parameter to stop the posting of free text invoices when an error occurs. If posting in a batch, an error will stop the posting process and the batch status will be set to **Error**. If this option is not selected, the posting process will skip an invoice with a posting error and will continue to post additional invoices. If posting in a batch, a posting error will not prevent other invoices from being posted. The batch status will be **Ended**.

Bank to ledger reconciliation report improvement

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

Business value

The **Bank to ledger** reconciliation report has been improved. Currently, if a bank transaction has a correction during bank reconciliation, there's a discrepancy in the Bank to ledger reconciliation report. Now, an additional correction record is added to help the reconciliation process.

Feature details

During bank reconciliation, if a bank transaction has a correction, there will be two bank transaction lines on the Bank to ledger reconciliation report. One line is the original bank transaction, and the other is the correction. The two lines from the bank transaction will now match the two lines from the general ledger transaction.

Foreign Currency Revaluation performance improvements

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

Business value

This feature enables the **Accounts payable** and **Accounts receivable** Foreign Currency Revaluation job to be broken up into smaller batches. This can help reduce the number of memory errors, especially for customers with a large volume of open transactions.

Feature details

This feature will batch transactions for the **Accounts payable** and **Accounts receivable** Foreign Currency Revaluation job to improve performance. The Accounts payable and Account receivable Foreign Currency Revaluation job will be split into batches according to the number of open transactions.

Budget control document filtering enhancement

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

Business value

This feature helps users have more granular control on what documents are included in the budget control checks during processing.

Feature details

This feature introduces the ability to specify which budget control documents are budget checked by providing a query-based filter option for each budget control document included. This allows for a subset of a document type to be budget checked. For example, it will enable you to check Purchase Orders with Pool = “01”. A new column is added to this tab to indicate if a query is defined for the document type selected. Two additional buttons above the document grid provide additional filtering.

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

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

Business value

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

Feature details

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

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

The following enhancements were added in the July 2021 release:

- Moves the setup of the year-end closing templates to a new setup page. The existing year-end close page will change in a way that’s similar to the general ledger foreign currency revaluation, where a list will indicate each of the times the year-end close has been run or reversed. An accounting manager can initiate the year-end close from the new page.
- Lets accounting managers reverse a year-end close by selecting the most recent fiscal year and selecting the **Reverse year-end close** button. The reversal will delete the accounting entries for the previous year-end close but won't rerun the year-end close automatically.
- Requires voucher numbers when closing a year, where this was optional (based on a parameter setting in general ledger) in previous versions.
- Maintains the history and audit trail of previously closed years by company and year.

Increase the length of invoice numbers

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

Business value

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

Feature details

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

Financial Dimension service

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

Business value

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

Feature details

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

Invoice automation – process vendor invoices during the import process

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

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 then submitting them to workflow processing. Typically, those steps are completed manually before the invoices are posted. Prior to implementing this feature, importing vendor invoices resulted in a pending vendor invoice. Routine invoice processing steps, such as three-way matching, were completed in the background.

This feature 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.

Ledger settlement automation

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

Business value

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

Feature details

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

New vendor invoice data entity for OCR integration

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

Business value

Customers are increasingly using an optical character recognition (OCR) solution to import invoices into Dynamics 365 Finance and Operations system. However, existing data entities for vendor invoice importing have limitations that include incomplete functionalities, data inconsistency, and poor performance. The new data entity aims at solving major issues and making it easier to consume invoice data.

Feature details

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

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

Globalization

Overview

Globalization Studio enhances the low-code globalization capabilities and makes the globalization services and multicountry content available for any first- and third-party app and extends it with prebuilt ISV connectors. Globalization services in Globalization Studio continue to be extended and enhanced. This includes:

- **Tax Calculation**: Enable multiple-document tax calculations in one API call to increase the performance of tax calculation processing for customers with a high volume of invoices in certain industries.
- **Electronic Invoicing**: Providing French e-invoice integration with Chorus Pro, configurable mandatory Polish e-invoice and integration with Krajowy System of e-Faktur (KSeF) platform (Public Preview), and integration Saudi Arabia e-invoice with ZATCA's (Zakat, Tax and Customs Authority) systems.
- Enhancing Configurable Business Documents and Electronic Reporting offerings.

Electronic Invoicing service – configurable Polish e-invoice and integration

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

Business value

The Electronic Invoicing service allows businesses to fully automate the electronic invoicing process end to end—from issuing Sales, Free text, Project, and Advance invoices to 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

Using a phased approach, Poland has introduced 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-invoices for business to business (B2B) and, when requested by a customer, for business to consumer (B2C) transactions. Starting January 1, 2023, the KSeF system will be rolled out as mandatory to all the companies that are subject to VAT.

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

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

- Integration 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 the Electronic Invoicing service.

Electronic Invoicing service – Saudi Arabia e-invoice integration

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

Business value

The Electronic Invoicing service allows businesses to fully automate the electronic invoicing process end to end. This includes issuing Tax and Simplified invoices to submitting electronic invoices to the tax authorities for clearance or reporting purposes.

This feature concludes the implementation of electronic invoicing in Saudi Arabia by addressing extended requirements.

Feature details

The Saudi Arabian Authority announced and published electronic invoicing regulations on December 4, 2020. According to the regulations, the electronic invoice is defined as an invoice generated, stored, and amended in a structured electronic format through an electronic solution, which includes all the requirements of a tax invoice. A handwritten or scanned invoice isn't considered an Electronic Invoice. The details can be found in the Regulation.

Requirements are mandated in phases:

- Phase 1, known as the Generation phase, requires taxpayers to generate and store tax invoices and notes through electronic solutions compliant with Phase 1 requirements. Phase 1 is enforceable as of December 4, 2021. The Electronic Invoicing service has supported this scenario since 2021.
- Phase 2, known as the Integration phase, will be rolled out in waves by targeted taxpayer groups starting January 1, 2023. Phase 2 will introduce technical and business requirements for electronic invoices and electronic solutions, and the integration of these electronic solutions with ZATCA's (Zakat, Tax and Customs Authority) systems.

To comply with these Phase 2 requirements, the following functionality is implemented:

- Generation of XML files of Tax and Simplified electronic invoices in the format legally required in Saudi Arabia.
- Submission of Tax electronic invoices to Saudi Arabia tax authorities for clearance purposes.

- Submission of Simplified electronic invoices to Saudi Arabia tax authorities for reporting purposes.
- Generation and submission of electronic invoices for simplified invoices issued at Commerce point of sales (POS) to Saudi Arabia tax authorities.

NOTE The Saudi Arabia e-invoice integration feature is available only as a capability within the Electronic Invoicing service.

Configurable business documents – specific destinations via printer management settings in the reports (phase 2)

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

Business value

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

Feature details

Before this feature, print management settings were set based on the related electronic reporting destination in a legal entity. The initial feature implementation enables the setup and edit of business document-specific destinations by using the print management user interface in the Electronic Reporting framework. This feature extends this capability to all the remaining configurable reports that were not using it in the initial release.

Russian fixed assets – integration with Asset Management lifecycle

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

Business value

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

- Improved machine effectiveness with preventive maintenance capabilities that reduce asset failure and extend equipment life expectancy.
- Condition-based maintenance, which reduces asset lifecycle costs.
- Improved visibility into production performance, which helps customers to plan ahead.
- Insight into downtime, with intelligent analytics that helps users make informed data-driven decisions.

- Automated management of maintenance workflows to limit risks.
- Efficient spare parts management that ensures a complete overview of item consumption on assets, thereby optimizing the maintenance process.
- Reduced production costs using enhanced visibility of assets across sites and departments.
- Visibility into real-time asset financial information.
- Advanced cost control on assets, locations, faults, work hours, and work orders.
- Reduction in maintenance overtime, labor, and contractor costs.

Feature details

This functionality enhances the **acquire to retire** asset lifecycle and end-to-end process flows with the **Russian fixed assets** module.

By integrating the **Asset management** and **Fixed assets** modules, you can link Russian fixed assets with maintenance assets. Fixed assets users can then create a maintenance asset from a new or existing fixed asset, and Asset Management users can associate a maintenance asset with an existing fixed asset.

Tax Calculation service – inheriting origin tax information for reversal transactions

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

Business value

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

Feature details

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

This feature supports the following transactions:

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

This feature applies to the Tax Calculation service and the core tax engine.

Electronic reporting - order by function in queries

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓ Feb 1, 2022	Apr 2022

Business value

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

Feature details

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

See also

ORDERBY ER function (docs)

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

Enabled for	Public preview	General availability
Users, automatically	✓ Feb 1, 2022	Apr 2022

Business value

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

Feature details

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

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

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

Electronic reporting - support Zebra Programming Language (ZPL II) output

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

Business value

You can extend the document routing agent-based direct printing functionality of the Electronic reporting (ER) framework by using the Zebra Programming Language (ZPL II). ZPL II is used by many companies operating worldwide for printing labels containing barcodes. You can now use Electronic reporting to configure ER solutions for producing reports in ZPL II.

Feature details

At design time, you can configure an Electronic reporting (ER) format to produce ZPL II labels in a TXT or XML format. You can also specify which printer is used. Use the ER archive destination to collect details of all produced labels.

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

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

Business value

The Electronic Invoicing service allows businesses to fully automate the electronic invoicing clearance process end to end. This ranges from issuing Sales, Free text, and Project invoices to submitting electronic invoices to Chorus Pro for clearance purposes and 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 maintaining 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 2023 and 2025. Consequently, any French company that is subject to VAT and operates in B2B relationships will be required to use electronic invoicing with Chorus Pro starting in 2023, depending on company size.

The following functionality is implemented to support companies in enabling new business processes and to address a new set of requirements:

- Generate electronic invoice files in UBL Biz 3 (PEPPOL) format for Sales invoice, Free text invoice, and Project invoice.
- Submit electronic invoice files to the Chorus Pro Platform and process the statuses.

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

Globalization Studio

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

Business value

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

Feature details

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

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

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

- Connectors to Microsoft globalization services using Microsoft Power Platform and Dataverse to enable sharing globalization capabilities and content with any first- and third-party applications. In the first release, we'll ship:
- A Tax Calculation service connector.
- An Electronic Invoicing service connector.
- Connectors to ISV tax compliance and globalization solutions extending out-of-the-box tax compliance and globalization content and capabilities. The ISV Connectors are currently planned for 2022 release wave 2, where we will ship:
- An ISV solution connector that's embedded in the Tax Calculation microservice for US sales tax and use tax rates. You can turn on the connector to get an ISV solution without any customized integration effort.
- An ISV solution connector that's embedded in the Electronic Invoicing microservice. This connector delivers "last mile" business-to-government integrations for some countries, extends global coverage by enabling e-invoicing solutions for non-Microsoft localized countries, and provides access to E-Invoicing Exchange Frameworks to route electronic invoices created by using Globalization Studio.

Globalization Studio is the only tool to provide all of the low-code configuration and setup experience for any new globalization services.

Tax Calculation service – accepting multiple documents in one API call

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

Business value

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

Feature details

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

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

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

Plan and prepare for Dynamics 365 Supply Chain Management in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Supply Chain Management**.

Overview

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

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

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

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

TIP Download the release overview guide and share with your team as you plan to onboard the new capabilities included in this release wave.

Download the overview guide (PDF)

* Overview guide available in English version only.

Investment areas

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

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

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

modernization of core manufacturing execution operations for improved usability and resilience.

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

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

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

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

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

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.
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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2021 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

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

Feature	Enabled for	Public preview	General availability
Inventory and logistics feature state updates for version 10.0.25	Users by admins, makers, or analysts	✔Feb 15, 2022	Apr 2022
Packing work for packing stations	Users by admins, makers, or analysts	✔Feb 15, 2022	Apr 2022
Product information management feature state updates for version 10.0.25	Users by admins, makers, or analysts	✔Feb 15, 2022	Apr 2022
Scan barcodes in the warehouse using GS1 format standards	Users by admins, makers, or analysts	✔Feb 15, 2022	Apr 2022
Warehouse management feature state updates for version 10.0.25	Users by admins, makers, or analysts	✔Feb 15, 2022	Apr 2022
Inventory Visibility on-hand query to support advanced warehouse management items	Users by admins, makers, or analysts	Mar 2022	Apr 2022
Available-to-promise for the Inventory Visibility Add-in	Users by admins, makers, or analysts	Mar 2022	Apr 2022

Feature	Enabled for	Public preview	General availability
Hazardous materials enhancements	Users by admins, makers, or analysts	✔ Feb 15, 2022	Apr 2022
Global Inventory Accounting Add-in for Dynamics 365 Supply Chain Management	Users by admins, makers, or analysts	✔ Jun 18, 2021	Apr 2022
Inventory allocation for the Inventory Visibility Add-in	Users by admins, makers, or analysts	Apr 2022	May 2022
Landed cost integration entities for third-party freight forwarders	Users by admins, makers, or analysts	Apr 2022	Jun 2022
Enhanced warehouse execution workloads on scale units	Users by admins, makers, or analysts	May 2022	Jul 2022

Manufacturing

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

Feature	Enabled for	Public preview	General availability
Material consumption and reservations in the production floor execution interface	Users by admins, makers, or analysts	✔ Jan 31, 2022	Apr 2022
Register material consumption on scale units	Users by admins, makers, or analysts	✔ Feb 1, 2022	Apr 2022
Manufacturing and asset management feature state updates for version 10.0.25	Users by admins, makers, or analysts	✔ Feb 15, 2022	Apr 2022
Catch weight items for the production floor execution interface	Users by admins, makers, or analysts	✔ Mar 4, 2022	Apr 2022

Planning

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

Feature	Enabled for	Public preview	General availability
Planning feature state updates for version 10.0.25	Users by admins, makers, or analysts	✔ Feb 15, 2022	Apr 2022
Planning Optimization support for subcontracting	Users by admins, makers, or analysts	Apr 2022	Apr 2022
Planning Optimization centralized calendar maintenance	Users by admins, makers, or analysts	✔ Feb 1, 2022	Apr 2022
Planning Optimization suggestions to optimize existing supply	Users by admins, makers, or analysts	✔ Feb 15, 2022	Apr 2022
Planned orders simplified	Users by admins, makers, or analysts	✔ Mar 18, 2022	Jun 2022
Planning Optimization support for shelf life	Users by admins, makers, or analysts	Apr 2022	Jun 2022
Planning Optimization support for resource scheduling with finite capacity	Users by admins, makers, or analysts	Jun 2022	Sep 2022
Make-to-order supply automation	Users by admins, makers, or analysts	Jul 2022	Sep 2022
Planning Optimization for select manufactured items	Users by admins, makers, or analysts	Jul 2022	Sep 2022
Planning Optimization support for capable-to-promise (CTP)	Users by admins, makers, or analysts	Jul 2022	Sep 2022
Demand Driven Material Requirements Planning (DDMRP)	Users by admins, makers, or analysts	Jul 2022	To be announced

Description of **Enabled for** column values:

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

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

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

Inventory and logistics

Overview

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

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

Inventory and logistics feature state updates for version 10.0.25

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 15, 2022	Apr 2022

Business value

Turning on features by default helps ensure that your system stays current with the latest inventory and logistics capabilities of Supply Chain Management.

Feature details

Features becoming mandatory with the 10.0.25 release

These features have become mandatory and can no longer be disabled.

Procurement and sourcing

- **Ability to confirm accepted purchase orders from vendor collaboration in batch**: Allows you to batch-confirm purchase orders that are accepted with no change via vendor collaboration. A new menu item is available in the **Procurement and sourcing** module for batch scheduling, and a parameter will allow the batch run.
- **Purchase agreement Closed status**: This feature enables you to set the status of a purchase agreement to closed.

Sales and marketing

- **Sales order referenced data export policy**
- **Sales order to purchase order line deletion policy**
- **Sales quotation referenced data export policy**

Features becoming enabled by default with the 10.0.25 release

These features will be turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2022 release wave 2.

Cost management

- **Show inventory closing log in grid**: Enables logs generated by inventory closing or calculation to be shown in a grid instead of the Infolog, so you can easily analyze the logs and do troubleshooting as needed.
- **Inventory value report storage**
- **Inventory value report data clean up**: Provides means of cleaning the orphan records caused by **Inventory value report** ended abnormally.

Inventory management

- **Maximum execution time for the warehouse management on-hand entries cleanup job**

Procurement and sourcing

- **Add Quantity ordered field to the Posting product receipt page**: Adds a new field called **Quantity ordered** to the **Posting product receipt** page. The new field appears on the receipt **Lines** grid before the **Quantity** field. The feature also copies the **Deliver remainder** field to the grid and positions it after the **Quantity** field.

- Allow vendors to apply for procurement categories through vendor collaboration: This feature allows vendors to request a new procurement category.
- **Charges setup with site and warehouse**
- **Purchase agreement responsible party**: This feature enables you to define a primary and secondary responsible party on the **Purchase agreement classification** page and resulting purchase agreements.
- **Add lines to PO invoices associated with a purchase agreement**: This 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.
- **Enable purchase duty calculation based on annual tariff**: Enable the purchase duty calculation based on the annual degressive graduated tariff. The number of decimal places for the purchase duty percentage increased up to five.
- **Saved views for purchase orders**: This feature provides several saved views for the **Purchase order details** page. The views help you to focus on relevant fields and actions while working with purchase orders. The feature adds views optimized for each of the following purposes: order creation, order approval, inventory management, and financial management.
- **Charges from and to amounts on Purchase orders**: This new feature enables you to use the from and to amounts to set up charges on the purchase order. However, this functionality is not available on purchase order charges.

Sales and marketing

- **Contact person data entity export optimization**
- **Enable lookup for sales quotation document introduction and document conclusion fields**
- **Improve "Top 100" customers report performance**: Improves the performance of the **Top 100** customers report by always running the report across all customers (which is its intended use) rather than by allowing custom queries. When this feature is enabled, all **Records to include** settings are disabled in the **Top 100** report dialog.
- **Recalculate estimated customer balance**: This feature lets you choose whether the system should automatically recalculate the estimated customer balance each time a sales order is created or updated using oData. When sales orders are created or updated using oData, the customer estimated amount used for credit limit check is not automatically updated. It is required to run the **Recalculate credit limit** batch job.
- **Sales return order line registration with decimal precision with and without catch weight**

- **Saved Views for Sales and Marketing**
- **Single click sales order confirmation**

Features becoming generally available with the 10.0.25 release

Cost management

- **Cost calculation level**: Adds a new bill of material (BOM) level named **Cost calculation level**, which excludes production and batch orders from its calculations. The system will use this new level when executing cost calculations in costing versions. The system will continue to use the existing **Costing level** BOM level in processes such as recalculation and inventory close.
- **Inventory closing progress details**: Provides a detailed view of inventory closing progress.
- **Enable user-defined batch number setup for inventory closing reverse**: The **Inventory closing reverse** process creates batch jobs for each impacted item, which might throttle the batch server if there are too many items. This feature enables the process to use the extra batch helpers, which are currently used by the inventory closing process.
- **Options of defaulting financial dimensions for inventory standard cost revaluation**: Enables you to decide where the inventory standard cost revaluation voucher should take financial dimensions from. You can configure this feature using the **Origin of financial dimension** field on the **Inventory accounting** tab of the **Inventory and warehouse management parameters** page.

Procurement and sourcing

- **Enable resetting procurement related workflows**: Allow the following workflows to be reset to draft status: purchase order, vendor change, and purchase requisitions.
- **Disable Purchase Requisition Distribution Reset Button**: This feature of the **Accounting distribution** page disables the **Reset** button on that page only for purchase requisitions that are in review.

Sales and marketing

- **Sales quotation details performance enhancement**: This feature improves performance when opening the Sales quotation details page.
- **Sales order details performance enhancement**

See also

What's new or changed in Dynamics 365 Supply Chain Management 10.0.25 April 2022 (docs)

Packing work for packing stations

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 15, 2022	Apr 2022

Business value

This feature greatly improves the flexibility and agility of packing and shipping operations. During the packing process, warehouse workers are now able to pack and ship individual parcels that are related to the same shipment. It makes packing and shipping operations more effective. Items from the same order do not need to be shipped together if some can be shipped before the other. The same order can be packed and shipped in multiple parcels at different shipment times if needed.

Feature details

Currently, when warehouse management processes are configured to bring inventory to packing stations, the picking work contains links to load lines. This can cause issues if you try to split the shipment at load confirmation because you want to ship just part of the shipment (using the confirm and transfer feature) rather than wait for the whole shipment to ship. This feature makes it possible to create so-called *packing work* when inventory lands at the packing station. Instead of the initial picking work, the links to load lines are now carried by the packing work lines. When a container is closed, the packing work is adjusted so that there is one closed work record per closed container. This allows the system to easily split the closed containers (which must still be moved to the baydoor) and move the open containers and remaining picking work into a new shipment at ship confirmation (again, using the confirm and transfer feature).

Product information management feature state updates for version 10.0.25

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 15, 2022	Apr 2022

Business value

Turning on features by default helps customers stay current with the latest product information management capabilities of Supply Chain Management.

Feature details

Mandatory features with the 10.0.25 release

These features have become mandatory and can no longer be disabled.

Product information management

- **Navigation to BOM version from BOM lines**: Enables navigation from bill of material (BOM) lines to the **BOM Version** page.
- **Strict validation on default order quantities**: Adds the option to apply strict validation to the default order quantities. When the parameter **Validation on default order quantities** is set to **Strict**, stricter validation will be applied. Then the standard order quantity will need to be a multiple of the multiple value. This applies to the **Purchase order**, **Inventory**, and **Sales order** tabs.

Enabled-by-default features with the 10.0.25 release

These features will be turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2022 release wave 2.

Product information management

- **Bill of materials report pre-processing to avoid timeout**: This feature pre-processes the bill of materials report. This will help prevent timeout issues for reports that include a very large amount of data.
- **Default financial dimensions separately when using item templates**: This feature will let you use the various financial dimensions (Business unit, Cost center, Department, Item group, and Project) separately when applying an item template. When the template is applied and contains one or more of the financial dimensions, instead of overwriting all the financial dimensions specified on the item, the dimensions will be treated separately. In other words, if a given financial dimension is specified on the item, its value for the specific financial dimension will be kept when applying the template that has a blank value for the financial dimension. And if the item's value for the dimension is blank or specified, and the item template defaults a value, then the value from the template will default on the item.
- **Enable product dimension groups for item templates**: This feature adds support for product dimension groups in item templates for product masters.
- **Regenerate product variant names based on nomenclature**: This features lets you regenerate product variant names based on their assigned nomenclature, thereby allowing you to update product variant names that already exist. This is useful, for example, in cases where you assign product variant names based on nomenclature that includes dimension names, which can change during the lifespan of the product variant.
- **Variant suggestions page improvements**
- **Improved attribute inheritance for Engineering Change Management**: This feature 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.

- **Engineering Change Management**
- **Manage changes to formulas and their ingredients**
- **Enable change management on existing products**
- **Engineering notifications for production**: When a product is changed in the engineering department, it might be important to notify the production department about those changes. In that way, production workers can take appropriate action, such as component substitution, BOM replacement, or route replacement. This feature lets you notify production about changes to products that are being produced.
- **Variant generation for engineering products**
- **Product readiness checks**

See also

What's new or changed in Dynamics 365 Supply Chain Management 10.0.25 April 2022 (docs)

Scan barcodes in the warehouse using GS1 format standards

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 15, 2022	Apr 2022

Business value

This feature greatly simplifies the scanning process in warehouses where pallets and containers are labeled with GS1 barcodes. Warehouse workers can simply scan the GS1 barcode to extract all the needed information in a single scan. This reduces the time associated with the task by eliminating the need to do multiple scans or input information manually while ensuring the accuracy of information logged at the point of scanning.

Feature details

The GS1 barcode format is a global standard for exchanging data between different companies. The standard defines the data format and the various kinds of data that can be encoded using it. GS1 barcodes can have multiple data elements, so a single barcode can include many types of product information, including batch, expiration date, and more.

This feature enables the Warehouse Management mobile app to scan a single GS1 barcode and correctly extract all the information needed to process the task at hand.

See also

GS1 bar codes and QR codes (docs)

Warehouse management feature state updates for version 10.0.25

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 15, 2022	Apr 2022

Business value

Turning on features by default helps customers stay current with the latest warehouse management capabilities of Supply Chain Management.

Feature details

Mandatory features with the 10.0.25 release

These features have become mandatory and can no longer be disabled.

- **Capture product variants and tracking dimensions in the warehousing app during load item receiving**
- **Allow replenishment template to use existing immediate replenishment work (across units)**: Adds a new check box to the **Replenishment templates** page that allows a template to claim unreserved quantities from existing immediate replenishment work.
- **Change work pool on work**
- **Cluster position full**
- **Cluster Putaway Feature**
- **Confirm and transfer**
- **Enhanced license plate label layouts**
- **Hide the Total Value field on the "All Loads" and "Load Details" pages**: The **Total Value** field, when visible, has a performance impact on the **All Loads** and **Load Details** page. When enabled, this feature hides the field.
- **Deferred processing of manual inventory movement operation**
- **Change the inventory status of items controlled by tracking dimensions**: This feature lets you change the inventory status of items controlled by tracking dimensions and includes the ability to update only selected records. Use settings on the **On-hand by location** page and the **Inventory status change** periodic task to apply this feature.
- **License plate label build configuration**: This feature introduces a new configuration form with fields that must be populated when a new license plate label is generated. It will allow large-scaled businesses to improve performance of license plate label building by skipping fields not required for specific advanced warehousing processes defined by work templates.

- **Do not allow to create loads that do not meet wave load building template requirements**: Ensures that a load meets all requirements from its template. Also, if the load mix group is used, the templates should be created both for criteria codes and constraints to be able to create loads with any code.
- **Load line manual correction for admin or similar trusted users**: This feature enables admin users to fix quantity values on load lines that are found to be out of sync.
- **Location license plate positioning**
- **Location product dimension mixing**
- **Control whether to display a receiving summary page on mobile devices**
- **Manual sales line picking service for admin or similar trusted users**: This feature allows administrators to manually pick inventory transactions related to sales lines, including lines that have already been released to the warehouse.
- **Make mobile device inventory movement inventory status field editable**: Makes the **Inventory status** field editable in the Warehouse Management mobile app inventory movement flow when moving inventory from a license plate controlled location.
- **Prompt to resolve ambiguous 'Loc / LP' names**: Lets warehouse workers specify whether the value entered in a **Loc/LP** field in the Warehousing Management mobile app identifies a license plate or a location.
- **User settings, icons, and step titles for the new warehouse app**: This feature adds settings that apply to the new Warehouse Management mobile app. The new settings let you view and set default app settings for each specific device model and/or user. This feature also adds the back-end changes needed to support icons for menus and actions, and to add illustrations and helpful titles for each step in a process.
- **Evaluate all actions for Multi SKU location directives**: For multi-SKU location directives, only one action is evaluated for every location directive line. When this feature is enabled, all actions are evaluated in a sequenced order.
- **Automatic assigning of the GUIDs on WHS user creation**: Automatically assigns GUIDs when creating WHS users. This fix improves performance for all installations and is required if you are running a distributed hybrid architecture.
- **Confirm outbound shipments from batch jobs**
- **Prevent transfer order shipped license plates from being used on other warehouses than the destination warehouse**
- **Quality check**
- **Replenish to max based on stocking limits**: Adds a new replenishment strategy for wave demand-replenishment template lines. The new strategy uses location directives to find locations that could be replenished, and it will replenish them until the demand is covered.
- **Work pick line overview**

- **Change the number sequence for cycle counting work**: This feature changes the number sequence used for work creation numbers for cycle counting work.
- **Use existing catch weight tags when reporting production orders as finished**
- **Warehouse slotting feature**
- **Warehouse Slotting for transfer orders**: Allows warehouse managers to replenish picking locations based on demand from transfer orders that aren't yet released to the warehouse.
- **Warehouse Slotting allocation enhancements**: Adds an option for the template lines used by the warehouse slotting feature that makes the system consider existing on-hand inventory at a target location.
- **Task-based wave label printing**: Wave label printing functionality makes it possible to generate and print wave labels in a separate transaction scope.
- **Wave template grouping**
- **Work line details**
- **Preserve work template sequence numbers on delete**: Prevents the system from automatically overwriting work template sequence numbers after a template has been deleted. It also adds a **Regenerate sequence numbers** button to the **Work templates** page to remove all gaps from the sequence.
- **Zone threshold replenishment**

Enabled-by-default features with the 10.0.25 release

These features will be turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2022 release wave 2.

- **Additional location zone**: Adds three new zone fields to each warehouse location record and adds support for them in the location setup wizard. The new zone fields can be populated manually or via the location wizard. They can be used in any query or filter that uses the locations table.
- **Saved views for load processing**
- **Saved view for the load planning workbench**
- **Process warehouse app events**
- **Outbound workload visualization**
- **Enable fast validation for warehouse mobile devices**: Helps improve performance by enabling the mobile app to consolidate license plates and validate catch weight tags during sales picking using local data, without interacting with the server.
- **Saved views for shipment processing**
- **Create and process transfer orders from the warehouse app**

- **Wave batch job details**: Enables all users who work with waves to inspect the batch jobs and related tasks associated with any wave. The feature adds a new page called **Wave batch job details**, which provides a read-only view of batch jobs and related tasks.
- **Wave execution notifications**: This feature uses business events and the action center to deliver notifications related to wave execution.
- **Saved view for wave processing**
- **Saved view for the work details page**

Features transitioning to being generally available with the 10.0.25 release

- **Use faster API for containers closing/reopening on packing station**: When this feature is enabled, inventory transactions related to containers are created using a new lightweight process to improve performance of closing or reopening containers during manual packing station processing.
- **Cross-docking templates with location directives**: Enables the use of 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.
- **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.
- **License plate receiving history**: This feature 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.
- **Scale unit support for warehouse app work lists**: Updates the way work list configurations for the warehouse app are stored in the database to make them portable between the hub and scale unit databases. There are no changes to the user interface. Note: On enabling this feature, the system will update relevant data across all legal entities.
- **Validate templates selected for replenishment jobs**: Helps ensure users select valid replenishment templates when setting up a replenishment job. It 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.
- **Shipment wave label details**: Allows tracking of every print of a shipment's labels.
- **Round quantities down to nearest sales unit on release to warehouse**: Adds an option that can restrict order quantities on release to the warehouse. When enabled,

order quantities will be rounded down to the nearest whole sales unit, and orders that include quantities for less than one sales unit will be rejected for release.

- **Material handling equipment interface**

See also

What's new or changed in Dynamics 365 Supply Chain Management 10.0.25 April 2022 (docs)

Inventory Visibility on-hand query to support advanced warehouse management items

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

Business value

Businesses using advanced warehouse management (WHS) are now able to leverage the Inventory Visibility service to make near real-time inventory on-hand queries of all warehouse items. With this enhancement, the Inventory Visibility service calculates WHS-enabled items correctly, regardless of which hierarchical level the items are stored in.

Feature details

The Inventory Visibility Add-in supports on-hand quantity queries for WHS-enabled items, regardless of whether each item has WHS-specific reservation operations (such as being reserved for WHS work at the WMS location level).

In the previous release, Inventory Visibility didn't always correctly calculate on-hand inventory of WHS-enabled items and didn't include WHS reservation logic. For example, suppose you had a WHS item stored at location A under warehouse 1 (where WHS management is enabled), created a sales order, reserved a quantity of one for this order, and then released the order to warehouse. Then you reserved a quantity of one at a WMS location for the sales order pick work. In this case, Inventory Visibility would erroneously deduct two units from the total quantity because it didn't recognize the full warehouse hierarchy. With this enhancement, inventory of reserved WHS-enabled items will be calculated just as accurately as for non-WHS items.

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

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

Business value

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

Feature details

Recalculate inventory based on a specified date and period

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

View future seven-day availability with rolling calculations

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

Hazardous materials enhancements

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 15, 2022	Apr 2022

Business value

These new hazardous material handling capabilities help make it even easier for companies to stay compliant with local regulations when transporting hazardous materials across different geographies.

Feature details

For this release, we have added to the existing hazardous materials functionality to provide even more detailed information storage and reporting features that will help keep your organization compliant with international shipping regulations for hazardous materials.

Master data enhancements

You are now able to store and retrieve the following types of hazardous materials information:

- **Flash point declaration**: Specify the temperature at which each given material will ignite. This value will be included in the hazardous materials description for the item.
- **Larger stowage descriptions**: The field for describing stowage requirements now accepts more characters so you can better describe stowage details.
- **Translations for hazardous materials descriptions**: The system can now translate descriptions for each language that is set up for hazardous material language support.

Carriage of merchandise by road report

Carriage of merchandise by road (CMR) reports now support the following features and information:

- **Set emergency response instructions at the global level**: You could already specify emergency response instructions at the item level, but now you can provide common instructions that apply to all items.
- **Show descriptions for non-hazardous materials in CRM reports**: Your CMR reports can now include a line that summarizes non-hazardous materials in addition to the line describing hazardous materials in a shipment.
- **Container ID is now shown for multimodal shipments**: Shipments containing hazardous materials can now be tracked by container ID.
- **Your CMR reports can now include ADR points**: The European Agreement Concerning the International Carriage of Dangerous Goods by Road (ADR) establishes a system that assigns a point score based on how dangerous each hazardous material is. Your CMR reports can now show the total ADR score for each shipment.

Verified gross mass document

Verified gross mass (VGM) documents now provide the following details for each shipment:

- **Shipping container BIC ID** (also added to the shipment record and the driver check-in and check-out process)
- **Booking number**
- **Trailer number**
- **Carrier name**

Various other reports

Several other hazardous materials reports have also been improved.

- **IATA shipper's declaration**: This report now includes more details, including item quantities.

- **Multimodal dangerous goods declaration**: This report now shows item quantities and includes a footer with emergency response information.
- **Shipment summary report**: This report now shows the number of packages instead of the total item quantity.

Usability improvements

The **All loads** and **Load details** and **Shipment** pages now provide links to the relevant hazardous materials reports.

See also

Hazardous materials overview (docs)

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

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

Business value

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

Feature details

Organizations, especially those with international operations, often prefer to account for inventory by standard cost as part of their management accounting setup. However, local governments, tax authorities, and the International Financial Reporting Standards Foundation (IFRS) typically don't recognize standard cost as an accounting principle and often require average or specific identification. In addition, organizations often want to account inventory using a local currency and the functional currency.

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

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

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

A costing ledger is defined by:

- Calendar
- Currency
- Exchange rate table
- Convention

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

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

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

Supported input measurement basis policy options:

- Normal historical
- Standard

Supported cost flow assumption policy options:

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

Supported recording interval:

- Perpetual

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

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

See also

Global Inventory Accounting home page (docs)

Inventory allocation for the Inventory Visibility Add-in

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

Business value

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

Feature details

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

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

With the inventory allocation feature you can:

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

Landed cost integration entities for third-party freight forwarders

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

Business value

Third-party logistics providers (3PLs) can now submit voyage, container, and folio records, update estimated costs, track control records, and do vendor cost invoice allocations directly to the landed cost module using the transaction entities. This saves time and improves accuracy by ensuring that this information doesn't have to be keyed in manually for companies using landed cost to manage their inbound processes.

Feature details

The landed cost module helps businesses streamline inbound shipping operations by providing complete financial and logistical control over imported freight, from the manufacturer to the warehouse. Transaction data entities for landed cost enable external data sources (such as freight forwarder services) to create voyages and costs, and to update container tracking records.

Supported operations include:

- Create and update voyage, shipping container, and folio records for existing inbound order lines.
- Create and update estimated costs for each cost area.
- Create and update shipping container activity records to capture the start date, estimated end date, and actual end date for each leg of the container's journey.
- Create vendor cost invoice allocations.

Enhanced warehouse execution workloads on scale units

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

Business value

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

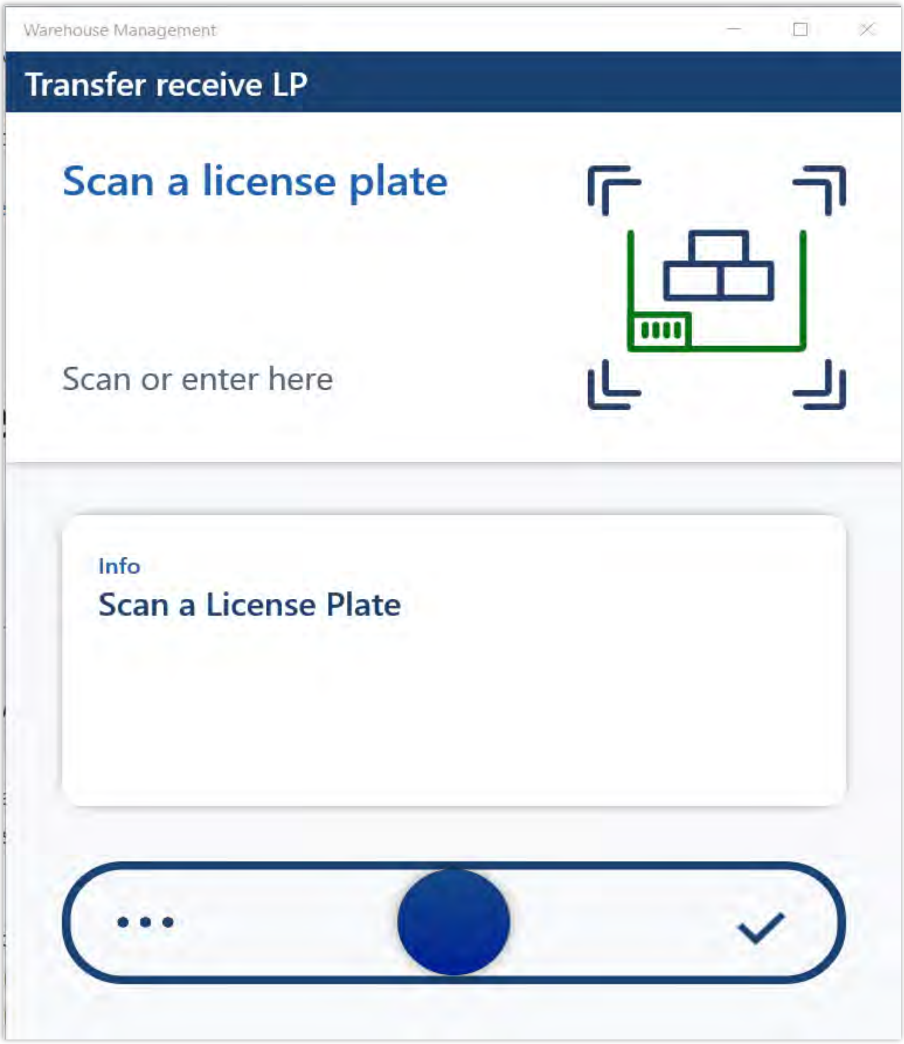
Warehouse execution workloads now provide expanded out-of-the-box capabilities for scale units running as part of a distributed hybrid topology. This set of additional features add support for a wide range of new scenarios, thereby enabling more of our customers to operate using a resilient, scalable,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

Feature details

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

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

For more information about the benefits of using scale units, see Scale units in a distributed hybrid topology.



Transfer order license plate receiving.

Manufacturing

Overview

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

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

Material consumption and reservations in the production floor execution interface

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jan 31, 2022	Apr 2022

Business value

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

Feature details

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

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

Material consumption and reservations in the production floor execution interface.

Important dates

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

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

See also

[How workers use the production floor execution interface](#) (docs)

Register material consumption on scale units

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 1, 2022	Apr 2022

Business value

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

Feature details

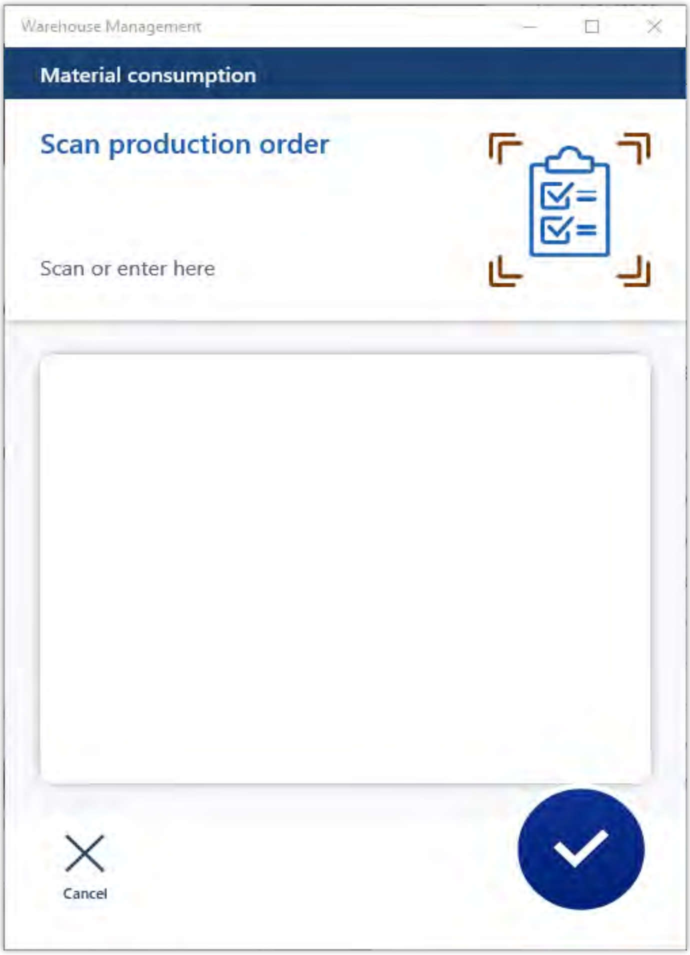
Use the Warehouse Management mobile app to register material consumption for production and batch orders when running on a scale unit

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

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

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

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



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

Learn more about the benefits of scale units

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

Important dates

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

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

See also

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

Manufacturing and asset management feature state updates for version 10.0.25

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 15, 2022	Apr 2022

Business value

Turning on features by default helps customers stay current with the latest manufacturing and asset management capabilities of Supply Chain Management.

Feature details

Mandatory features with the 10.0.25 release

These features have become mandatory and can no longer be disabled.

Manufacturing

- **Improvements to the Approve and Transfer jobs dialogs**: Adds two new fields (**Approval group** and **From date**) to the **Approve and Transfer jobs** dialogs. These fields improve the overview of which jobs are going to be approved or transferred.
- **Feature for locking job card device and job card terminal so that they can be sanitized**
- **Production floor execution**
- **A new button to Stop break has been added to the Job Card Terminal page**: Adds a new Stop break button, which is needed when the parameter Lock employee is selected on the Configure Job Card Terminal page. When the Lock employee parameter is selected, the Job Card Terminal page does not return to the sign-in page when a worker makes registrations (for example, when a worker registers a break). With this configuration, workers must select Stop break when returning from a break in order to continue the current job or register on any other activity.
- **Enable automatic generation of license plate number when reporting as finished in the job card device**: Makes it possible to configure whether license plate numbers should be automatically generated or entered manually when reporting as finished from the job card device.
- **License plate for reporting as finished added to the Job Card Device**
- **Print label from Job Card Device**: Enables printing a label when reporting as finished from the job card device. The label is part of document routing and enabled in the **Configure job card for devices** page.

- **Enable partial receipt of subcontracted items and fix an issue with the calculation of scrap for BOM lines of type Vendor**: Enables partial receipt of subcontracted items. Previously, when reporting a partial quantity on a purchase order for a subcontracted service item, the full quantity was updated on the related picking list journal on the production order. Now, the correct partial received quantity is updated. This feature also fixes an issue with an incorrect updated scrap quantity when using the bill of material (BOM) lines of type **Vendor**.

Enabled-by-default features with the 10.0.25 release

These features will be turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2022 release wave 2.

Asset management

- **Asset management functionality for the production floor execution interface**

Manufacturing

- **Show full serial, batch, and license plate numbers in the production floor execution interface**: This feature provides an improved experience for viewing lists of serial, batch, and license plate numbers in the production floor execution interface. The display changes from a card view with a limited number of characters to a list view that provides enough space to show the full values. The list also provides the ability to search for specific numbers.
- **Job search for the production floor execution interface**: This feature makes it possible to add a search field to the production floor execution interface. Workers can search by entering text or scanning a bar code.
- **Override default production reservation**

Features transitioning to being generally available with the 10.0.25 release

Asset management

- **Counter-based maintenance enhancements**
- **Apply rules for grouping work orders while running a maintenance plan**

Manufacturing

- **Improved production catch weight quantity picking**: This feature 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.

See also

What's new or changed in Dynamics 365 Supply Chain Management 10.0.25 April 2022 (docs)

Catch weight items for the production floor execution interface

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 4, 2022	Apr 2022

Business value

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

Feature details

Register material consumption, batch numbers, and serial numbers for catch weight items

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

Report on co-products and by-products for catch weight items

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

Important dates

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

Feature stage	Version	Date
Public preview	10.0.26	March 2022
Generally available	10.0.26	April 2022
On by default	10.0.31	December 2022
Mandatory	10.0.35	July 2023

Planning

Overview

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

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

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

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

Planning feature state updates for version 10.0.25

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 15, 2022	Apr 2022

Business value

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

Feature details

Mandatory features with the 10.0.25 release

These features have become mandatory and can no longer be disabled.

- **Forecast model selection on Demand forecast details**: On the **Demand forecast details** page, the user can select the forecast models to be included for the historical forecast.
- **Master planning progress visualization**
- **Enable master plan setup wizard features**
- **Parallel firming of planned orders**

Enabled-by-default features with the 10.0.25 release

These features will be turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2022 release wave 2.

- **Saved views for planned orders**

- **Planned order firming with filtering**

Features transitioning to being generally available with the 10.0.25 release

- **Batchable firming and consolidation for planned bulk and pack batch orders**: This feature lets you use batch jobs to firm and consolidate planned bulk and pack orders.
- **Resource planning with maintenance**: This feature adds planned maintenance work orders to resource planning overviews and the Gantt chart.

See also

What's new or changed in Dynamics 365 Supply Chain Management 10.0.25 April 2022 (docs)

Planning Optimization support for subcontracting

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

Business value

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

Feature details

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

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

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

Learn more about Planning Optimization

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

Planning Optimization centralized calendar maintenance

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 1, 2022	Apr 2022

Business value

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

Feature details

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

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

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

Learn more about Planning Optimization

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

See also

Calendars and master planning (docs)

Planning Optimization suggestions to optimize existing supply

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 15, 2022	Apr 2022

Business value

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

Feature details

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

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

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

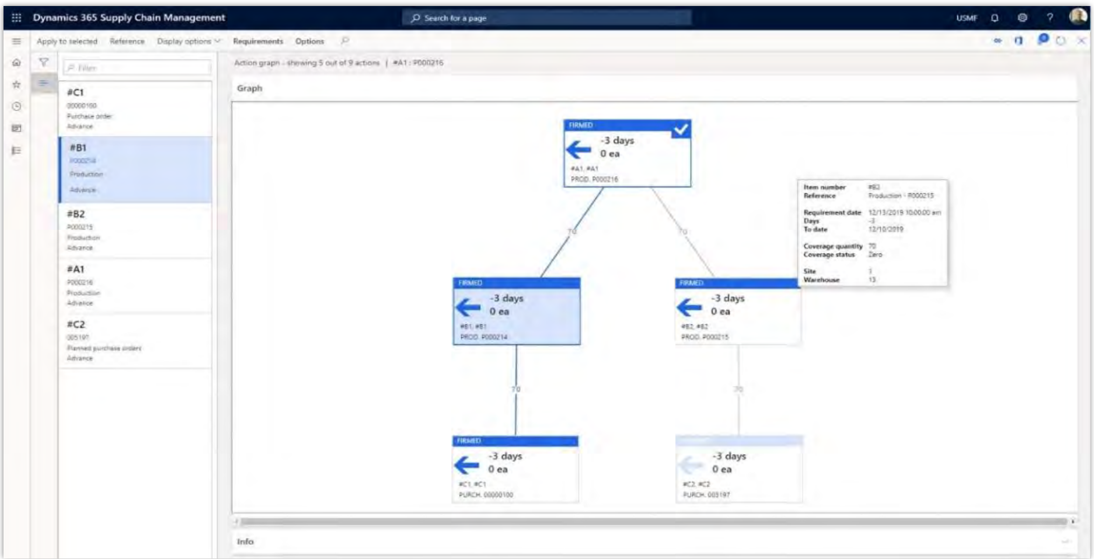
Planning Optimization benefits

With Planning Optimization, companies can benefit from:

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

Learn more about Planning Optimization

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



Action messages shown in the Action graph.

See also

Action messages (docs)

Planned orders simplified

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 18, 2022	Jun 2022

Business value

This feature provides a simplified page for working with planned orders. It lets users work more quickly when all they have to do is review, approve, and firm planned orders.

Feature details

This feature makes it faster and easier to view, approve, and firm planned orders. It adds a page called **Planned orders simplified,** which is a simplified version of the standard **Planned orders** page. The simplified page provides fewer options but is faster to work with when all you need to do is review, approve, and firm your planned orders.

You can use this page to complete the following tasks:

- View all planned orders for a specific plan.
- Create new planned orders.
- Delete single or multiple planned orders.
- Firm single or multiple planned orders.
- Change the planned order status for single or multiple planned orders.
- Seamlessly open planned order details for an individual planned order to view full details of the order.
- Create custom views by using saved views.

See also

Planned orders simplified (docs)

Planning Optimization support for shelf life

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

Business value

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

Feature details

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

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

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

Learn more about Planning Optimization

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

Planning Optimization support for resource scheduling with finite capacity

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

Business value

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

Feature details

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

- Avoid overbooking resources.

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

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

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

Learn more about Planning Optimization

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

Geographic areas

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

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

Make-to-order supply automation

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

Business value

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

Feature details

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

- View the resource capacity load for a user-defined period, thereby enabling long-term evaluation of the capacity load.
- Improve CTP accuracy by controlling the delay tolerance (negative days) for each master plan.
- Keep products available for last-minute orders and optimize usage of existing supply. This is achieved by using the latest possible supply to a demand, instead of using the first possible supply.
- Keep component assignment flexible for production orders after firming, which enables the system to optimize for last-minute demand changes. In other words, limit marking to one level.
- Control fulfillment policy for each sales order with defaulting from the customer setup.
- Enhance intercompany information flow. Purchase orders are updated to include fields for mode of delivery, delivery terms, and external item number. This ensures that detailed demand information can flow to the supplying company.

Planning Optimization for select manufactured items

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

Business value

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

Feature details

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

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

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

Learn more about Planning Optimization

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

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

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

Business value

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

Feature details

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

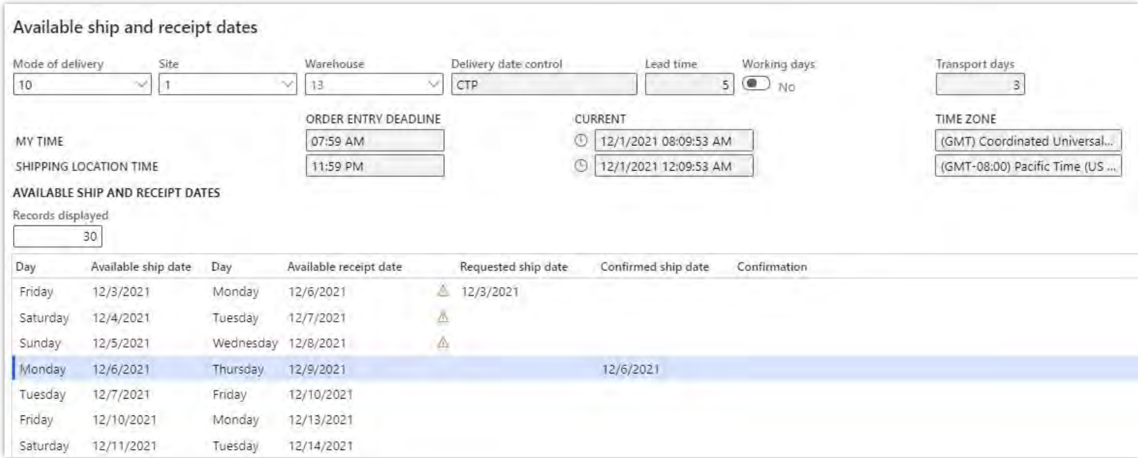
Planning Optimization benefits

With Planning Optimization, companies can benefit from:

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

Learn more about Planning Optimization

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



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

Demand Driven Material Requirements Planning (DDMRP)

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

Business value

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

Feature details

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

The five sequential components of DDMRP

DDMRP has five sequential components:

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

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

The five steps of DDMRP.

Main components of the DDMRP offering for Planning Optimization

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

- **Inventory positioning**: Enable companies to calculate and identify the decoupled lead time (DLT) for purchased, distributed, and manufactured items.
- **Buffer profiles**: Group items into independently managed families with variable settings for zone impact. Calculate DDMRP buffers and zone values using a combination of buffer profile attributes and the individual part traits of usage, lead time, and order minimum.
- **Dynamic buffer adjustments**: Dynamically altering buffers for planned or anticipated events. Maintained as minimum, re-order point, and maximum.
- Demand-driven planning:
    - Perform the DDMRP net flow equation, including qualifying sales order demand (due today, past due, and qualified spikes).
    - Display net flow status (color, percentage, and quantity) for easy prioritization and supply order generation.
    - All elements of the net flow equation are visible on the planner workbench.
- **Highly visible and collaborative execution**: Display alerts based on buffer status for on-hand position.

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

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

Learn more about Planning Optimization

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

Plan and prepare for Dynamics 365 Intelligent Order Management in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Intelligent Order Management**.

Overview

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

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

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

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

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

- Microsoft Dynamics 365 Intelligent Order Management website
- Microsoft Dynamics 365 Intelligent Order Management overview video
- Microsoft Dynamics 365 Intelligent Order Management documentation

Investment areas

Business to consumer (B2C) enhancements
Omnichannel commerce remains a top investment priority for digital commerce leaders. For this release, we are providing key updates that will provide consumers the confidence to make purchases while knowing they will have a delightful post-purchase and self-service returns experience. These new capabilities allow brands to achieve more streamlined, cost-effective processes to reliably deliver to consumers. This solution can thereby help build the brand loyalty that is critical for direct-to-consumer growth and empower brands in a competitive playing field with closed marketplaces.

Provider integrations
The ability to connect to an ecosystem of solutions in the order capture, logistics, fulfillment, and delivery process flows gives customers the choice to work with the software and the partners that bring value to their business. Microsoft will expand the out-of-the-box providers that ship with Dynamics 365 Intelligent Order Management, enabling rapid deployment and the ability to quickly reorganize as processes and requirements change.

Order visibility and insights
Monitoring complex order, fulfillment, and delivery capabilities requires a system that will provide insights so that you can take actions on the issues you need to focus on. Building on the capabilities in the Dynamics 365 Intelligent Order Management solution, we are providing expanded capabilities to help monitor your system health. This functionality will enable you to focus on systems that cause issues in your order process. With expanded machine learning and Power BI-driven dashboards, you will gain insights into events through the order capture, fulfillment, and returns process. With the new functionality, you can focus on metrics that will help you continuously optimize your process and build customer loyalty.

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

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

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

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

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 Intelligent Order Management.
Product documentation	Find documentation for Intelligent Order Management.
User community	Engage with Intelligent Order Management experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Intelligent Order Management.

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

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

For a list of the previous wave's release plans, go to 2021 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.

Application monitoring and troubleshooting

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

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

Business to consumer (B2C) enhancements

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

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

Core orchestration functionality

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

Feature	Enabled for	Public preview	General availability
Fulfillment optimization using reinforcement learning	Users, automatically	Mar 2022	Apr 2022
Improved integration with Inventory Visibility Add-in for Dynamics 365 Supply Chain Management	Users by admins, makers, or analysts	Apr 2022	To be announced

Order visibility and insights

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

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

Provider integrations

Expanded ecosystem of providers delivered from Microsoft and partners.

Feature	Enabled for	Public preview	General availability
Expanded ecosystem of providers	Users by admins, makers, or analysts	✔ Feb 1, 2022	Apr 2022

Description of **Enabled for** column values:

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

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

Application monitoring and troubleshooting

Overview

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

Improved monitoring and debugging experience for admins and business users

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

Business value

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

Feature details

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

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

Business to consumer (B2C) enhancements

Overview

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

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

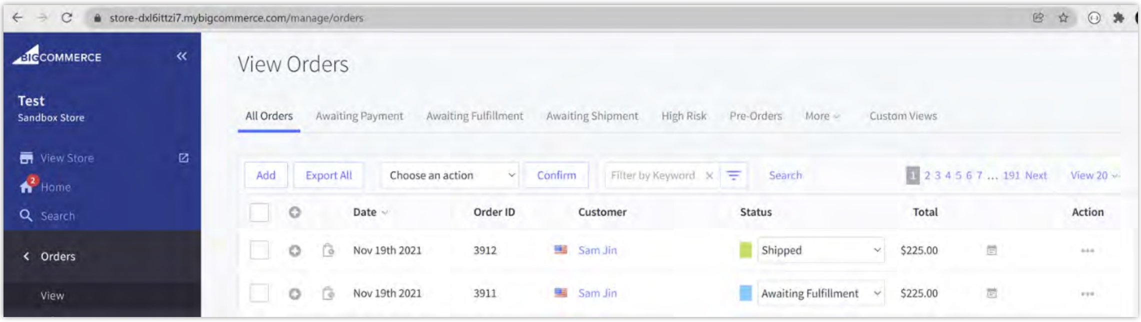
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2022	To be announced

Business value

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

Feature details

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



BigCommerce status updates.

Core orchestration functionality

Overview

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

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

Fulfillment optimization using reinforcement learning

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

Business value

This feature will enable businesses to create optimal fulfillment plans that are real-time, using real-time inventory, and with the consideration of past demands in order to minimize opportunity costs. The feature will provide a dashboard to capture metrics around the fulfillment plans being created. Order managers will be able to be proactive and take action as needed.

Feature details

The PROF algorithm will create optimal fulfillment plans using reinforcement learning:

- Supports real-time fulfillment plan creation based on real-time inventory and subsequent order confirmation.
- A learning factor, λ (lambda), will keep information from previous fulfillment plans baked into it to intrinsically forecast demand and create plans accordingly.

Improved integration with Inventory Visibility Add-in for Dynamics 365 Supply Chain Management

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

Business value

Businesses strive to optimally allocate available inventory across multiple channels to meet customers' expectations of fast and on-time delivery, thereby improving the customer experience and maximizing sales. Dynamics 365 Intelligent Order Management will provide functionality that produces a single view of inventory that can be dynamically shared across order sources, fulfillment, and reverse logistics. The functionality will help businesses drive intelligent decisions that can help them achieve optimal inventory allocation and build customer confidence.

Feature details

Intelligent Order Management will provide tighter integration with the Inventory Visibility Add-in for Dynamics 365 Supply Chain Management. With this functionality, you can get real-time insights into your inventory across warehouses that will help you meet customer expectations for their orders. The following functionality will be enabled:

- Inventory Visibility will be updated to reflect when an order is placed or an order is canceled.
- Orders that will have inventory arriving soon can be placed (available to promise, or ATP).
- Inventory can be allocated for specific channels. When inventory is depleted, it can be taken from a common pool.

Order visibility and insights

Overview

Monitoring complex order, fulfillment, and delivery capabilities requires a system that will provide insights so that you can take actions on the issues you need to focus on. Building on the capabilities in the Dynamics 365 Intelligent Order Management solution, we are providing expanded capabilities to help monitor your system health. This functionality will enable you to focus on systems that cause issues in your order process. With expanded machine learning and Power BI-driven dashboards, you will gain insights into events through the order capture, fulfillment, and returns process. With the new functionality, you can focus on metrics that will help you continuously optimize your process and build customer loyalty.

Expanded visibility and insights in the order journey

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

Business value

Monitoring complex order, fulfillment, and delivery capabilities requires a system that will provide insights so that you can take action on the issues you need to focus on. Building on the capabilities in the Dynamics 365 Intelligent Order Management solution, we are providing expanded capabilities to help monitor your system health. This functionality will enable you to focus on systems that cause issues in your order process. With expanded machine learning and Power BI-driven dashboards, you will gain insights into events through the order capture, fulfillment, and returns process. With the new functionality, you can focus on metrics that will help you continuously optimize your process and build customer loyalty.

Feature details

The **Order anomaly** dashboard shows multiple graphs to detect trends across different KPIs, including:

- Total sale amount, country, and product line.
- Total revenue per month, per country, and per quarter.
- Order lines contributing to highest sales and revenue.

We are also building an inventory dashboard that will capture and display values such as supply versus demand, items that need to be restocked, and the most popular items in every warehouse.

Provider integrations

Overview

The ability to connect to an ecosystem of solutions in the order capture, logistics, fulfillment, and delivery process flows gives customers the choice to work with the software and the partners that bring value to their business. Microsoft will expand the out-of-the-box providers that ship with Dynamics 365 Intelligent Order Management, enabling rapid deployment and the ability to quickly reorganize as processes and requirements change.

Expanded ecosystem of providers

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 1, 2022	Apr 2022

Business value

The ability to connect to an ecosystem of solutions in the order capture, logistics, fulfillment, and delivery process flows gives customers the flexibility to work with partners that bring the most value to their business. Dynamics 365 Intelligent Order Management will provide an expanded ecosystem of out-of-the-box providers, enabling rapid deployment and the ability to quickly reorganize as processes and requirements change.

Feature details

Listed below are the providers that Microsoft is working with.

Order intake providers:

- BigCommerce

Electronic Data Interchange (EDI) providers:

- Orderful

Delivery providers:

- ShipStation

Warehouse management providers:

Warehouse management services (WMS) providers help in the picking and packaging of orders to get them ready for shipment. When integrated with Intelligent Order Management, the WMS will be able to fetch outbound order data, process the data, and export shipping information back into Intelligent Order Management. The WMS connector will also be able to fetch the initial inventory data from Intelligent Order Management, and update it periodically as the inventory changes.

- Flexe

Enterprise resource planning (ERP) providers:

- NAV 2016

Tax service providers:

- Avalara

See also

Provider catalog (docs)

Plan and prepare for Dynamics 365 Project Operations in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Project Operations**.

Overview

In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams to win more deals, accelerate delivery, empower employees, and maximize profitability. The application provides the necessary visibility, collaboration, and agility across the project lifecycle to drive success for project-centric businesses. Powered by Microsoft Power Platform, customers are provided with an unmatched set of capabilities that enable everyone to analyze, act, and automate across their organization to transform their services business from the ground up. It's everything you need to run your project operations, from deal management to financials, all in one application.

For 2022 release wave 1, we will deliver functionally rich experiences in the following areas:

- Project-based vendor invoice reconciliation for Project Operations for resource and non-stocked scenarios.
- Upgrade from Dynamics 365 Project Service Automation to Dynamics 365 Project Operations Lite Deployment - Phase 2.
- Time-zone agnostic price defaulting on project actuals.
- Revision and activation of quotes.
- Per diem expenses in the modern interface experience.
- External project scheduling.

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.

What's new and planned for Dynamics 365 Project Operations

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

For a list of the previous wave's release plans, go to 2021 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
Modern approvals	Users, automatically	✓Oct 10, 2021	Apr 2022
Per diem expenses in the modern interface experience	Users by admins, makers, or analysts	✓Feb 15, 2022	Apr 2022
Pay-when-paid support for resource-based nonstocked scenarios	Users by admins, makers, or analysts	-	Jul 2022
Transfer all lines with posting errors to new integration journal	Users by admins, makers, or analysts	May 2022	Jul 2022

Feature	Enabled for	Public preview	General availability
Time-zone agnostic price defaulting on Project Operations actuals	Users by admins, makers, or analysts	-	Aug 2022
External Project Operations planning	Users by admins, makers, or analysts	-	Aug 2022
Upgrade from Dynamics 365 Project Service Automation to Dynamics 365 Project Operations Lite Deployment - Phase 2	Users by admins, makers, or analysts	-	Aug 2022
Date-effective overrides in Project Operations pricing and costing	Users by admins, makers, or analysts	-	Sep 2022
Editing resource assignment contours	Users by admins, makers, or analysts	-	Sep 2022
Revision and activation of quotes	Users by admins, makers, or analysts	-	Sep 2022
Support vendor payment of expense liability in foreign currency	Users by admins, makers, or analysts	-	Sep 2022
Project-based vendor invoice reconciliation for Project Operations for resource and nonstocked scenarios	Users by admins, makers, or analysts	Aug 2022	Sep 2022

Description of **Enabled for** column values:

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

Modern approvals

Enabled for	Public preview	General availability
Users, automatically	✓ Oct 10, 2021	Apr 2022

Business value

Improved processing of approvals results in a faster time to revenue for the customer and an improved end-user experience when submitting entries that require approval. This feature allows for more accurate tracking of the approval status and improved reliability of posting.

Feature details

This feature improves the batch processing of approvals through the introduction of Approval sets. Approval sets group approval requests together into smaller subsets of operations. This grouping allows approvals to be processed by project in a specific order and allows for retrying and sequencing. Grouping the approval requests together improves the reliability and traceability of approval processing for large volumes of approvals.

Approval sets indicate the overall processing state of their related records. When an approval record is processed using an approval set, the record moves from **Submitted** to **Approved** and is no longer linked to the approval set. If a record fails when it is submitted for approval, the record remains in a status of **Submitted**, and the approval set is marked as **Failed**. The approval set logs the error message of the failure.

See also

Approval sets (docs)

Per diem expenses in the modern interface experience

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Feb 15, 2022	Apr 2022

Business value

The modern user experience improves the ease of use when entering per diem expenses.

Feature details

In the reimagined expense UI, submitting per diem expenses isn't supported. This is a mandatory requirement for many employers looking to provide per diems for employee travel. Companies that provide per diems to employees for travel can use the new and reimagined modern expense experiences to enter per diem expenses with this feature.

This feature includes the following capabilities:

- Scenario 1: Per diem based on the number of meals per day.
- Scenario 2: Per diem based on meal type per day.
- Scenario 3: Per diem based on meal type per trip.
- Scenario 4: Per diem limits with zero meal reduction.

See also

Expense itemization (docs)

Pay-when-paid support for resource-based nonstocked scenarios

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

Business value

This feature provides the capability to hold payment to a subcontractor until the project contract customer pays for the work that's performed by the subcontractor.

Feature details

This feature includes the following capabilities:

- The project accountant can define pay-when-paid thresholds for a specific vendor, group, or all vendors and subcontractors per project.
- The accounts payable clerk can record pay-when-paid terms in the project purchase order.
- The project accountant can reconcile and audit the project cost transactions and sales transactions.
- Vendor invoices for payment can be released after the customer pays for the project invoice.

Transfer all lines with posting errors to new integration journal

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

Business value

Project Operations transaction lines without business validation errors are processed immediately. The project accountant can review transactions with errors in a dedicated journal, address the issues, and then post them.

Feature details

This feature improves the integration journal experience in Project Operations. When enabled, the system posts the correct lines in the journal and creates a new journal for all lines with errors. Users can then review the journals by going to **Project management and accounting** > **Journals** > **Project Operations integration journal**, and filter the journals by the value in the **Original journal** field.

Time-zone agnostic price defaulting on Project Operations actuals

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

Business value

This feature improves the accuracy and predictability of costing and pricing time, expense, and material usage recorded on projects.

Feature details

Time-zone agnostic price defaulting allows you to eliminate an unexpected default price if the time, expense, or material usage falls on the date when prices are due to change. Given that all the date fields in the tables related to price defaulting are time-zone aware, the pricing of time, material, or expense can change and yield unexpected results when the user recording the entry is either ahead or behind the UTC time zone. With this feature, time-zone agnostic date fields on price lists and the transactional tables will make the default price and cost more predictable and accurate, regardless of the user's time zone that is recording the transaction.

External Project Operations planning

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

Business value

This feature provides generic APIs for customers to bring their own project management tool.

Feature details

In this release wave, customers can bring their own project management tools through a generic API where task scheduling can happen in the project management tool of choice and then integrate to Project Operations, becoming available to users in a read-only manner. Resource scheduling and booking would remain in Project Operations.

Key capabilities in this feature release include:

- Generic APIs to integrate tasks, assignments, and contours.
- Connector for common project management tools such as Desktop client and Project Online.

Upgrade from Dynamics 365 Project Service Automation to Dynamics 365 Project Operations Lite Deployment - Phase 2

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

Business value

Providing an in-place upgrade experience, this capability set targets customers who are currently using Dynamics 365 Project Service Automation and are looking to upgrade to Dynamics 365 Project Operations.

Feature details

In the last release wave, an upgrade from Project Service Automation v3 to Project Operations was enabled for customers who don't take a dependency on the work breakdown structure (WBS) or related entities. In this release wave, we are extending the upgrade to customers with projects. This includes:

- Customers who manage projects within the current WBS limits.
- Customers who require support for larger projects.

Date-effective overrides in Project Operations pricing and costing

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

Business value

Better control of maintaining price lists, gaining performance, and reducing data explosion in the project lifecycle.

Feature details

During the project lifecycle, a full copy of the price list can be initiated in different scenarios, such as:

- When a project is sold and a project contract is created.
- When prices for project resources change in a given cycle.
- When custom pricing is required for a particular project quote.

Each price list can have between 10–10,000 rows across 4 to 5 different child tables. During any of the above-mentioned scenarios, making a full copy of the price list may not be required. It can also take a long time and may cause data explosion. For this feature, the concept of price overrides allows users to create targeted date-effective overrides for specific prices in a price list. These price overrides can also be scoped to a particular quote or project contract. This feature changes the following scenarios around copying price lists in Project Operations:

- The number of times a price list is copied fully is reduced or minimized using configuration parameters and dialog prompts.
- Customers can reduce data explosion by creating overrides for specific prices.
- The ability to use standard price lists on project contracts if there is no need to create a full custom price list.

Editing resource assignment contours

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

Business value

This feature provides more precision in project planning and estimation.

Feature details

With this feature enabled, customers can edit resource assignment contours within the day, week, month, or year range. This precision improves the fidelity of resource requirements and financial estimates by allowing users to accurately forecast effort over the duration of the task and for the specific resource.

Revision and activation of quotes

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

Business value

This feature enhances process support for deal management in project-based companies.

Feature details

Currently, Project Operations does not support activation and revision of quotes. This restricts customers from having project-based deals where similar requirements for a quote sent to the customer should be made read only and must be versioned when the quote is revised with clear version history. With this capability, project-based quotes will support a process for versioning a quote that is sent to the customer, which will allow for revising these quotes based on customer-requested or internally triggered changes.

Support vendor payment of expense liability in foreign currency

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

Business value

Project Operations uses the standard defined exchange rate for currency conversions. However, because of time lags in the process from posting to actual payment, there is often a mismatch between the transaction amount and the posted amount. This feature addresses the issue with foreign currency payments related to expense transactions.

Feature details

When creating an expense report with foreign currency for an employee, the system converts the value of that foreign currency to the legal entity currency using the exchange rate taken on the day the expense report was created. After several days, when the customer tries to make a payment back to the employee or vendor, the system converts the amount to be paid using the exchange rate on that day. This results in a difference in the amount between the expense report and the amount paid. Because of this issue, the employee or vendor is either underpaid or overpaid, requiring manual intervention to settle correctly. With this feature, we aim to address the discrepancy with foreign currency payments related to expense transactions.

Project-based vendor invoice reconciliation for Project Operations for resource and nonstocked scenarios

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

Business value

This feature will enable the integration of project vendor invoices coming from the Finance and Operations apps. Invoices will be made available for procurement and front-office personas, such as project and account managers. These invoices can then be reconciled with time entries and other documents, such as product receipts and vendor invoices that need to be cleared for payment.

Feature details

Subcontracting or outsourcing project work to vendors, managing the vendor resource assignments, and the delivery of work is essential in every project-based organization. In the last release wave, Project Operations added end-to-end experiences for managing the contracted capacity of subcontractors on project work, allowing subcontractor time to be estimated and recorded correctly. We also added the ability to record and reconcile project vendor invoices with time, expense, and material usage on projects, allowing vendor invoices to be cleared for payment for customers using the Lite deployment (Dataverse only) of Project Operations.

In this release wave, subcontracting capabilities will be enabled for customers using Project Operations for resource and nonstocked scenarios (Project Operations Integrated with Finance and Operations app). This release will also include:

- Project manager review of project vendor invoices recorded by Accounts payable clerks in Dynamics 365 Finance.
- Project accountants' ability to record, review, and audit subcontract-related actuals in project financials.

Plan and prepare for Finance and Operations cross-app capabilities in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. 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 at a rapid pace, we deliver frequent updates (eight per year) that help customers stay current in a consistent, predictable, and seamless manner.

The key driver for the new core capabilities is to increase productivity and return on investment. The Finance and Operations cross-app capabilities in this release wave can be divided into the following categories:

Data and process integration: This feature area includes improvements to the integration between Finance and Operations apps and Azure Data Lake Storage. The capabilities include:

- Enable customers to build rich data integrations and reports using data from both customer engagement apps and Finance and Operations apps using Azure Synapse Link for Microsoft Dataverse.
- Enable customers to optionally include large fields, such as memos and XML strings, to be exported to Azure Data Lake Storage.
- Enable customers to optionally exclude sensitive data, such as Social Security numbers, from being exported to Azure Data Lake Storage.

Power Platform requests for Finance and Operations environments: Today, customers using Finance and Operations applications have no way to purchase additional compute resources when their processing needs increase. Microsoft plans to extend the Power Platform requests to cover the compute meter on the Finance and Operations platform. Most customers using Finance and Operations applications will be entitled to a sufficient amount of base capacity along with their app licenses. Only those customers needing more compute processing will have to purchase those units. Power Platform requests will expand the scope and definition of what is already being sold as order lines.

Regression suite automation tool (RSAT): RSAT continues to be an important area for Microsoft and customers. It is a cornerstone for customers moving to the cloud in that they are able to produce automated tests that enable them to easily perform user acceptance tests of new releases and ensure a smooth experience with each upgrade. The 2022 release wave 1 features will improve the usability of RSAT and provide better integration between RSAT and Microsoft Azure DevOps.

Cross-app features: Cross-app features provide ease of use to all users of Finance and Operations apps. These capabilities improve development, administration, and user experiences by addressing some of the key shortcomings we've heard about from our customers.

Investment areas

Cross-application features
Cross-app features provide ease of use to all users of Finance and Operations apps. These capabilities improve development, administration, and user experiences by addressing some of the key shortcomings we've heard about from our customers.

Near-zero downtime
Today, customer environments running Finance and Operations apps need sustained downtime for maintenance operations. These maintenance operations include updates to operating systems, security, apps, or infrastructure that are needed to modernize the platform. We are investing in features that will help to reduce these downtime requirements, creating a scenario where there is almost zero downtime for maintenance operations.

In 2021 release wave 2, we reduced the downtime that is required for maintenance updates. Some of the investments included in this initiative will allow batch jobs to be retried and updates to the operating system patching window to take effect without taking the entire system offline. In **2022 release wave 1**, we will be further investing in this area to achieve near-zero downtime.

Regression suite automation tool improvements
The Regression suite automation tool (RSAT) continues to be an important area for Microsoft and customers. It is a cornerstone for customers moving to the cloud in that they are able to produce automated tests that enable them to easily perform user acceptance tests of new releases and ensure a smooth experience with each upgrade. The 2022 release wave 1 features will improve the usability of RSAT and provide better integration between RSAT and Microsoft Azure DevOps.

Data and process integration
This feature area includes improvements to the integration between Finance and Operations apps and Azure Data Lake Storage. The capabilities include:

- Enable customers to build rich data integrations and reports using data from both customer engagement apps and Finance and Operations apps using Azure Synapse Link for Microsoft Dataverse.
- Enable customers to optionally include large fields, such as memos and XML strings, to be exported to Azure Data Lake Storage.
- Enable customers to optionally exclude sensitive data, such as Social Security numbers, from being exported to Azure Data Lake Storage.

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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to 2021 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

Capabilities and features that apply to all Finance and Operations apps.

Feature	Enabled for	Public preview	General availability
Open-source software update – upgrade jQuery UI to 1.13.0	Users by admins, makers, or analysts	✔ Jan 31, 2022	Apr 2022
Updates to client feature states with version 10.0.25	Users, automatically	✔ Jan 31, 2022	Apr 2022
Updates to saved views and personalization	Users by admins, makers, or analysts	✔ Jan 31, 2022	Apr 2022
Vertically scrolling workspaces	Users, automatically	✔ Jan 31, 2022	Apr 2022
Allow users to select and change tile sizes	Users by admins, makers, or analysts	-	Apr 2022
Streamlined tabbing behavior for full-page forms	Users by admins, makers, or analysts	Mar 2022	Apr 2022
Optimize loading of Action center notifications	Users by admins, makers, or analysts	Apr 2022	Jul 2022

Data and process integration

Finance and Operations data and processes are available in Microsoft Dataverse and Azure Data Lake Storage.

Feature	Enabled for	Public preview	General availability
Specify which data is exported to Azure Data Lake	Users by admins, makers, or analysts	Apr 2022	-
One Azure Synapse experience for all Dynamics 365 data	Users by admins, makers, or analysts	Jul 2022	-

Near-zero downtime

The goal of this initiative is to reduce downtime for maintenance operations such as updates to operating systems, security, apps, and infrastructure.

Feature	Enabled for	Public preview	General availability
Batch priority-based scheduling	Admins, makers, marketers, or analysts, automatically	-	Apr 2022

Regression suite automation tool improvements

Improvements for the Regression suite automation tool.

Feature	Enabled for	Public preview	General availability
Lifecycle support and support for on-premises deployments	Users, automatically	May 2022	May 2022
Improved integration with Azure DevOps	Users, automatically	Jun 2022	Jun 2022
Improvements to the Task recorder experience	Users, automatically	Aug 2022	Aug 2022
Support for integration testing	Users by admins, makers, or analysts	Aug 2022	Aug 2022
Support of test case variants	Users, automatically	Sep 2022	Sep 2022
Improved Azure DevOps experience	Users by admins, makers, or analysts	Sep 2022	Sep 2022

Description of **Enabled for** column values:

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

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

Cross-application features

Overview

Cross-app features provide ease of use to all users of Finance and Operations apps. These capabilities improve development, administration, and user experiences by addressing some of the key shortcomings we've heard from our customers.

Open-source software update – upgrade jQuery UI to 1.13.0

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jan 31, 2022	Apr 2022

Business value

This feature helps maintain the security of Finance and Operations apps as updated open-source software provides patches for vulnerabilities discovered in earlier versions. Updated open-source software also may include performance enhancements and new capabilities.

Feature details

This feature upgrades jQuery UI to version 1.13.0 (from 1.12.1) for Finance and Operations applications.

IMPORTANT Before enabling this feature, you should test any extensible controls or custom JavaScript code, specifically those utilizing jQuery UI APIs. This feature is targeted to be required with the October 2022 release, but is currently optional to allow time for migration of affected APIs.

Important dates

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

Feature stage	Version	Date
Generally available	10.0.25	April 2022
Mandatory	10.0.29	October 2022

Updates to client feature states with version 10.0.25

Enabled for	Public preview	General availability
Users, automatically	✔ Jan 31, 2022	Apr 2022

Business value

This information helps customers stay current on the latest client capabilities of Finance and Operations apps.

Feature details

Mandatory features with the 10.0.25 release

- Enable a drop-down list on multiline controls
- New HTML editor control
- Email throttling
- Internet Explorer end-of-support notifications

NOTE Starting with version 10.0.25, Internet Explorer can no longer be used. See Internet Explorer deprecation for more information.

- Open-source software update – upgrade Moment and remove jQWidgets
- New color picker control

NOTE The timelines for transitioning the **New grid control** and **Saved views** features (and their dependent features) to mandatory have been postponed to October 2022.

Enabled-by-default features with the 10.0.25 release

These features will be turned on by default, but can still be manually disabled. These features are all targeted to become mandatory with 2022 release wave 1.

- Align interaction patterns for combo boxes with those of look-up controls
- Allow admins to select default document types
- Allow configuration of the publish batch size in the Excel add-in
- Visual update for wizards
- Translation support for organizational saved views
- Improved legal entity support for saved views
- Full page apps

Updates to saved views and personalization

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jan 31, 2022	Apr 2022

Business value

Saved views allow an easy and no-code approach for customers and users to optimize their user experiences and deploy and manage those experiences at an organizational level. The enhancements to saved views and personalization described below will make saved views more applicable for more scenarios, which can lead to improved user satisfaction and productivity.

Feature details

The saved views capabilities in Finance and Operations apps will be extended in the following ways:

- View support for dialogs
- View support for workspaces
- Queries on views on task pages
- View support for custom filters
- Allow individual forms to opt out of saved views

View support for dialogs

The **Saved views support for dialogs** feature adds view support for dialogs, notably the ability to save multiple dialog views and publish those views to users.

Important dates

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

Feature stage	Version	Date
Generally available	10.0.25	April 2022
On by default	10.0.29	October 2022
Mandatory	10.0.33	April 2023

View support for workspaces

The **Saved views support for workspaces** feature will add view support for workspace forms, notably the ability to save multiple workspace views and publish those views to users. With this change, when users add tiles, lists, or links to a workspace, they will also need to select the target workspace views the content should be added to.

Important dates

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

Feature stage	Version	Date
Public preview	10.0.25	April 2022
Generally available	10.0.27	July 2022
On by default	10.0.33	April 2023
Mandatory	10.0.37	October 2023

Queries on views on task pages

The **Allow queries to be saved to views on Task Single and Task Double pages** feature allows filters and sorts to be saved to views on Task Single and Task Double pages. These are pages with older interfaces that allow you to show and edit data for a single entity and parent/child entities, respectively.

Important dates

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

Feature stage	Version	Date
Generally available	10.0.25	April 2022
On by default	10.0.29	October 2022
Mandatory	10.0.33	April 2023

View support for custom filters

Custom filters are controls modeled on forms that cause modifications to the query. New APIs are available to allow custom filters to work more seamlessly with saved views. Specifically, custom filters can now trigger a view definition to be marked as having unsaved changes, and custom filter controls can listen for system changes to the query to ensure the control value stays in sync with the query.

Exclude individual forms from saved views

For forms with coding patterns that are not conducive to saved views, developers can now opt to exclude an individual form from saved views. This will mean that no view selector is available on the form and there will be no publishing capabilities.

See also

Saved views (docs)

Vertically scrolling workspaces

Enabled for	Public preview	General availability
Users, automatically	✔ Jan 31, 2022	Apr 2022

Business value

This feature offers improved usability and alignment with other Dynamics 365 products to have vertically scrolling pages.

Feature details

To date, workspaces in Finance and Operations apps have used panoramas to be horizontal in nature, which followed the Windows 8 design paradigm. Starting with the April 2022 release, workspaces will be adjusted so that sections stack vertically (instead of laying out horizontally) and are collapsible. This change will be accomplished through updates to the Workspace form patterns to optimize form metadata for a vertical page orientation.

To stay in alignment with out-of-the-box workspaces, externally created workspaces will need to update to the latest form patterns. Other minor tweaks may be desired to optimize for a vertical experience.

See also

Workspace form pattern (docs)

Allow users to select and change tile sizes

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

Business value

This feature extends the personalization experience so users can optimize their workspace layouts, which can lead to improved user satisfaction and productivity.

Feature details

While users have always had the ability to add tiles to workspaces, any tile added was always the same "Medium" size and could not be adjusted to match the tile sizes on the workspace or adjusted to optimize the layout of that section. With this feature, users can change the size of tiles in workspaces to one of four available sizes via personalization. Additionally, when adding new tiles to a workspace, users can select the desired tile size in the configuration dialog.

The available tile sizes are:

- 4 x 4 (Large)
- 2 x 4 (Wide)
- 2 x 2 (Medium)
- 1 x 2 (Short wide)

Important dates

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

Feature stage	Version	Date
Generally available	10.0.26	May 2022
On by default	10.0.29	October 2022
Mandatory	10.0.33	April 2023

Four different size options for tiles

Streamlined tabbing behavior for full-page forms

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

Business value

This feature improves usability and accessibility by making it easier and simpler for users to reach all portions of a page.

Feature details

Historically in Finance and Operations apps, users would tab between all the controls in each region of a full-page form (such as the navigation bar, main form, or Action pane). To move focus to a different region on the page, users needed to use the mouse or a dedicated keyboard shortcut. This feature removes these tabbing containers so that a user can tab through all controls on a full-page form regardless of the region they are working in and without the need for special keyboard shortcuts.

Note that the existing keyboard shortcuts will continue to function as a means for users to move quickly between the regions on a page. For more details on those shortcuts, see Navigation shortcuts.

The general tabbing order through any full-page form follows this order:

1. Navigation bar
2. Navigation pane
3. Action pane
4. Show filters/Show list buttons
5. Filter pane (if visible)
6. Navigation list (if visible)
7. Main page content
8. Aside pane (if visible)

The control that gets initial focus on page load is not impacted by these changes.

Important dates

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

Feature stage	Version	Date
Generally available	10.0.26	May 2022
On by default	10.0.29	October 2022
Mandatory	10.0.33	April 2023

Optimize loading of Action center notifications

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

Business value

This feature provides improved performance in starting a new session or loading a page, particularly for users with large numbers of notifications in the system.

Feature details

Traditionally, Action center messages were loaded starting with the oldest notification for the user and iteratively over time retrieving newer messages. With this approach, it could take a long time for users to see the newest and most relevant messages since they last signed in. This feature optimizes how Action center messages are retrieved by simply loading the 100 newest messages. Users can select **See all** in the Action center to browse or filter through older messages. New messages received while the user is signed in will continue to display in the Action center.

Important dates

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

Feature stage	Version	Date
Generally available	10.0.27	July 2022
On by default	10.0.29	October 2022
Mandatory	10.0.33	April 2023

Data and process integration

Overview

This feature area includes improvements to the integration between Finance and Operations apps and Azure Data Lake Storage. The capabilities include:

- Enable customers to build rich data integrations and reports using data from both customer engagement apps and Finance and Operations apps using Azure Synapse Link for Microsoft Dataverse.
- Enable customers to optionally include large fields, such as memos and XML strings, to be exported to Azure Data Lake Storage.

- Enable customers to optionally exclude sensitive data, such as Social Security numbers, from being exported to Azure Data Lake Storage.

Specify which data is exported to Azure Data Lake

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

Business value

This feature enables you to have greater control over the Finance and Operations data that is exported to Azure Data Lake.

Feature details

This feature enables you to optionally include or exclude Finance and Operations data that is exported to Azure Data Lake. For example:

- You can optionally include large fields, such as memos and XML strings, to be exported to Azure Data Lake.
- You can optionally exclude sensitive data, such as Social Security numbers, from being exported to Azure Data Lake. Sensitive data may be valuable for operational purposes (and is securely stored within Finance and Operations apps). However, this data may not be required for reporting, and you may not want to make it available in the Azure Data Lake.

One Azure Synapse experience for all Dynamics 365 data

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

Business value

Customers can build rich data integrations and reports using data from both customer engagement apps and Finance and Operations apps. Using a single experience in Azure Synapse workspaces, customers can choose and work with data from all of their Dynamics 365 apps.

Feature details

Customers can install and configure the **Export to Azure Data Lake** add-in and then configure a data lake with their Dynamics 365 environment and apply it to both customer engagement apps and Finance and Operations apps. This enables customers to export data from both customer engagement apps and Finance and Operations apps to the data lake.

With one experience, customers can connect to an Azure Synapse workspace and work with data with any tool, including (but not limited to) T-SQL, Spark, Synapse pipelines, or Power BI. Dynamics 365 metadata (friendly names, entity shapes, and data relationships) are reflected in Synapse tools. This enables customers to build rich data integrations and reports to unlock insights hidden in the data.

Near-zero downtime

Overview

Today, customer environments running Finance and Operations apps need sustained downtime for maintenance operations. These maintenance operations include updates to operating systems, security, apps, or infrastructure that are needed to modernize the platform. We are investing in features that will help to reduce these downtime requirements, creating a scenario where there is almost zero downtime for maintenance operations.

In 2021 release wave 2, we reduced the downtime that is required for maintenance updates. Some of the investments included in this initiative will allow batch jobs to be retried and updates to the operating system patching window to take effect without taking the entire system offline. In **2022 release wave 1**, we will be further investing in this area to achieve near-zero downtime.

Batch priority-based scheduling

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

Business value

This feature provides the following benefits:

- Enables customers to specify the priority of execution, down to the job level.
- It is no longer necessary to assign batch jobs to batch servers.
- Offers a near-zero downtime experience for all Finance and Operations customers.

Feature details

Priority-based scheduling decouples batch groups from the batch server and allows you to define priorities for batch groups.

It is no longer necessary to assign batch jobs to batch servers. Instead, relative scheduling priorities based on business requirements are used to determine the order in which tasks are run across available batch servers. The available values for the scheduling priority are **Low**, **Normal**, **High**, **Critical**, and **Reserved capacity**.

This will help to remove the dependency on batch jobs associated with a batch server and enables a path for near-zero downtime for servicing, security patching, and quality updates.

See also

Priority-based batch scheduling (docs)

Regression suite automation tool improvements

Overview

The Regression suite automation tool (RSAT) continues to be an important area for Microsoft and customers. It is a cornerstone for customers moving to the cloud in that they are able to produce automated tests that enable them to easily perform user acceptance tests of new releases and ensure a smooth experience with each upgrade. The 2022 release wave 1 features will improve the usability of RSAT and provide better integration between RSAT and Microsoft Azure DevOps.

Lifecycle support and support for on-premises deployments

Enabled for	Public preview	General availability
Users, automatically	May 2022	May 2022

Business value

Partners that help build test suites on behalf of other companies haven't had support for moving these test suites into their customers' installations. Moving test suites requires a lot of manual work to edit Microsoft Excel files to align with new test case IDs. Updating these variables is difficult and time consuming. This new feature provides integrated tools for exporting and importing test suites between environments without the manual work from changing test case IDs.

Customers that run Finance and Operations apps with an on-premises deployment are not officially supported with the Regression suite automation tool (RSAT). This feature will enable and document how to set up RSAT to run with this topology. An RSAT option is added to enable storing screenshots, with steps for documenting how the test case is executed.

Feature details

The Regression suite automation tool (RSAT) includes a new option for exporting and importing test suites. These options allow tests to be created under one installation and moved to another—for example, when a partner develops tests on behalf of a customer and later needs to move these tests to the customer's installation. This feature can also be used to create a clone of test suites within the same or different environments—for example, to create a new baseline to work from. The import process creates test cases, assigns new IDs to the test cases, and automatically makes changes to Excel parameter files for reference to new cases, including variables added within the test suite.

Finance and Operation apps with on-premises deployments haven't had official support of RSAT use. This feature provides updates to RSAT to fully enable use with on-premises installations. Documentation will be provided that explains how this is set up.

RSAT will have a new option available under **Settings** for enabling capture and storage upload of screenshots. This includes the ability to add steps that can be used for documenting how a test case executes, which is useful for user training or auditing needs.

Improved integration with Azure DevOps

Enabled for	Public preview	General availability
Users, automatically	Jun 2022	Jun 2022

Business value

This feature improves the usability and efficiency in working with test suites centered around the Regression suite automation tool (RSAT).

Feature details

Customers are not typically familiar with Microsoft Azure DevOps and using DevOps together with RSAT to define and run acceptance tests. Defining and running acceptance tests require time and effort to navigate DevOps. This adds to the cost of onboarding test automation with RSAT and can hold some companies back from using RSAT.

The improved RSAT and DevOps integration focuses on reducing the need for customers to interact directly with DevOps. You will be able to navigate to some of the DevOps features using RSAT. This means you can create new test suites directly in RSAT without leaving the app. The improved integration also offers seamless navigation to perform test runs in DevOps so you can easily review data.

Improvements to the Task recorder experience

Enabled for	Public preview	General availability
Users, automatically	Aug 2022	Aug 2022

Business value

Customers have provided feedback that the Task recorder can be difficult to use, and this has discouraged some companies from onboarding test automation.

This feature improves the usability of the Task recorder and adds a few additional changes that make it easier to use with the Regression suite automation tool.

Feature details

Based on customer feedback, Microsoft has improved the usability of the Task recorder. Features have been added to the Task recorder that provide support when recording, and help prevent users from making mistakes during the recording experience.

New options are added to support the validation of system controls, such as SQL Server Reporting Services and document upload. This enables new scenarios that can now be recorded that were not supported earlier, such as expense management scenarios.

Support for integration testing

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

Business value

Companies commonly use applications that integrate with Finance and Operations apps and need to test that these integrations are working. There has not been an easy way to automate testing for integration scenarios. Partners typically have developed special code for integration testing. It's not cost effective for customers to pay partners for this work. This feature provides ways to enable running third-party applications that run either before or after Finance and Operations apps are run.

Feature details

This feature includes additional automation testing support for integration scenarios, as requested by customers running the Regression suite automation tool (RSAT). This feature will also focus on providing ways for users without developer skills to create and run third-party apps.

Support of test case variants

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

Business value

Companies often need tests of multiple different variants for scenarios, where slight changes to data are all that varies among the tests. This has required creating multiple test cases with similar steps with each variant, which results in great overhead for test maintenance. This is particularly painful when test steps need to be changed, as well.

This feature provides a cost-effective way to maintain test cases in the Regression suite automation tool (RSAT).

Feature details

This feature provides:

- Support for RSAT to run test cases multiple times. For example, a test case may be run multiple times with identical data to generate data volumes or to measure performance. RSAT will provide an option to specify the number of times a test case should be run repeatedly.
- An effective way of managing how test cases should be run with different data inputs. For example, different data inputs may include tables from the Excel parameter form to cover different variants for the test case.
- Ways to handle variation to how a test case should be run. For example, you'll be able to add conditions to both test cases and test steps to handle a branched type of execution

Improved Azure DevOps experience

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

Business value

Customers that use the Regression suite automation tool (RSAT) and Azure DevOps are commonly not taking advantage of the full features available in DevOps. This feature seeks to provide information and guidance to help customers obtain more value from using DevOps as part of the toolbox for driving test automation.

Feature details

This feature provides information on how to set up and configure Azure DevOps to be used with RSAT. This includes information on how to set up a pipeline for running test cases automatically. The test cases can be run automatically per scheduled times or by manually triggering them, which is an alternative to running them manually from within RSAT. This capability is assisted by a DevOps extension with common RSAT tasks that make it easy to integrate DevOps with RSAT.

This feature also includes guidance on how to build dashboards with useful charts to help visualize and analyze test results efficiently.

Human Resources

Plan and prepare for Dynamics 365 Human Resources in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Human Resources**.

Overview

Dynamics 365 Human Resources helps businesses empower and engage their workforce, provide modern benefits packages, and stay compliant. It allows HR professionals to be more strategic, providing the workforce insights they need to build better organization structures, compensation, benefits, leave and absence, compliance, employee and manager self-service, and performance management programs. Human Resources centralizes people data to build an HR ecosystem, using Microsoft Power Platform to tailor workflows, improve business intelligence, and connect with third-party best-of-breed HR solutions. Human Resources connects people and operations data to help you optimize workforce costs and take better care of employees.

For 2022 release wave 1, we are focusing on three key areas:

- **Improving business automation**: Equip HR professionals with the ability to tailor experiences and automatically complete processes when employees are joining, leaving, and moving within an organization.
- **Intelligent talent management**: Provide intelligent talent management capabilities to enable companies to ensure the right people are in the right jobs and plan for future investments.
- **Environment migration**: Deliver migration capabilities to enable moving to the merged infrastructure.

The next sections provide details about the specific features we're releasing across these areas.

TIP Download the release overview guide and share with your team as you plan to onboard the new capabilities included in this release wave.

[Download the overview guide (PDF)]

* Overview guide available in English version only.

Investment areas

Benefits management
Benefits management provides you with a flexible solution that supports a wide variety of benefit options. Human Resources also includes an easy-to-use employee experience that showcases your benefit offerings.

General
We're enhancing our user experience and providing general improvements to Human Resources that apply to multiple workspaces and pages.

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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to [2021 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 provides a flexible solution that supports a wide variety of benefit options including an easy-to-use employee experience that showcases your benefit offerings.

Feature	Enabled for	Public preview	General availability
Benefits notifications	Users by admins, makers, or analysts	Jun 2022	Jul 2022

General

We're enhancing our user experience and providing general improvements to Dynamics 365 Human Resources that apply to multiple workspaces and pages.

Feature	Enabled for	Public preview	General availability
Create one set of human resources capabilities within Dynamics 365	Admins, makers, marketers, or analysts, automatically	✔Jan 31, 2022	Jul 2022
Consistent environment management and integrations between Human Resources and Finance and Operations apps	Admins, makers, marketers, or analysts, automatically	Apr 2022	Jul 2022
Migration to Finance and Operations infrastructure	Admins, makers, marketers, or analysts, automatically	Jun 2022	Jul 2022

Description of **Enabled for** column values:

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

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

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

Benefits management

Overview

Benefits management provides you with a flexible solution that supports a wide variety of benefit options. Human Resources also includes an easy-to-use employee experience that showcases your benefit offerings.

Benefits notifications

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

Business value

Employees often need to be contacted about their benefits. The benefits notifications feature allows benefits administrators to contact employees through email, based on the employee's benefit enrollment progress. Email notifications can be used to send instructions to employees or reminders to complete their enrollment.

Feature details

Enhancements to benefits notifications will help benefits administrators notify:

- Employees of their open enrollment status.
- Employees about plan updates due to qualifying events.
- New hires when they are able to select their benefits.

General

Overview

We're enhancing our user experience and providing general improvements to Human Resources that apply to multiple workspaces and pages.

Create one set of human resources capabilities within Dynamics 365

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jan 31, 2022	Jul 2022

Business value

This feature will merge the capabilities from the standalone Human Resources app into the Finance and Operations infrastructure.

Feature details

Within Dynamics 365 today are two sets of human resources capabilities. One set is in the standalone Human Resources application, which uses a different infrastructure than Finance and Operations apps. The other set of capabilities is in the legacy Human Resources module in Dynamics 365 Finance. This causes confusion for customers and partners about which set of capabilities to use.

Merging the Human Resources infrastructure into the same infrastructure as other Finance and Operations apps, such as Finance, Supply Chain Management, and Project Operations, eliminates the confusion about which set of capabilities to use. You'll have a single set of human resources capabilities within Dynamics 365.

Some of these capabilities include:

- Leave and absence management
- Benefits management
- Task management

Capabilities will start to be available in Feature Management on Operations environments following the Service Update Availability process.

Timeline for capability availability:

Version	Capability	Preview	Generally Available
10.0.25	Personnel management core	X	
	Business process	X	
	Task management	X	
	Compensations management	X	
	Compliance & Case management	X	
	Electronic reporting	X	

Version	Capability	Preview	Generally Available
	Employee development	X	
	Employee & manager self service	X	
	Learning	X	
	Legacy benefits management	X	
10.0.26	Benefits management	X	
	Leave and absence management	X	
10.0.27	People workspace	X	
	ATS integration	X	
10.0.28	Dynamics 365 Human Resources Teams app	X	

Consistent environment management and integrations between Human Resources and Finance and Operations apps

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

Business value

Dynamics 365 Human Resources will merge back into the Finance and Operations infrastructure but will continue to be licensed as an independent application, like Dynamics 365 Finance and Dynamics 365 Supply Chain Management. This will bring together disparate Human Resources data into a single solution to create market clarity, improve extensibility, and drive consistency across Finance and Operations apps. These new capabilities will provide a consistent admin experience for managing the application lifecycle for Human Resources.

Feature details

Deploying, updating, and integrating among applications can be a complex process. It becomes even more complex when you need different approaches for different applications. By driving consistency between Human Resources and other Finance and Operations apps, you can better plan and manage how you deploy, update, and integrate Human Resources. You'll be able to manage environments, updates, and integrations for Human Resources the same way you do for other Finance and Operations applications, such as Finance, Supply Chain Management, and Project Operations.

This feature provides you with consistency when it comes to:

- Management of environments within Dynamics 365 Lifecycle Services, issue search, and Regression Suite Automation Tool (RSAT).
- The experience of how upgrades, updates, and hotfixes are applied to environments.
- Integration options with Microsoft Power Platform using virtual entities and dual-write.
- Continuous delivery of custom solutions or extensions as applied to environments.
- Regional availability.

Migration to Finance and Operations infrastructure

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

Business value

Now that Dynamics 365 Human Resources is on the Finance and Operations infrastructure, standalone Human Resources customers and Finance and Human Resources customers need to migrate to the new infrastructure.

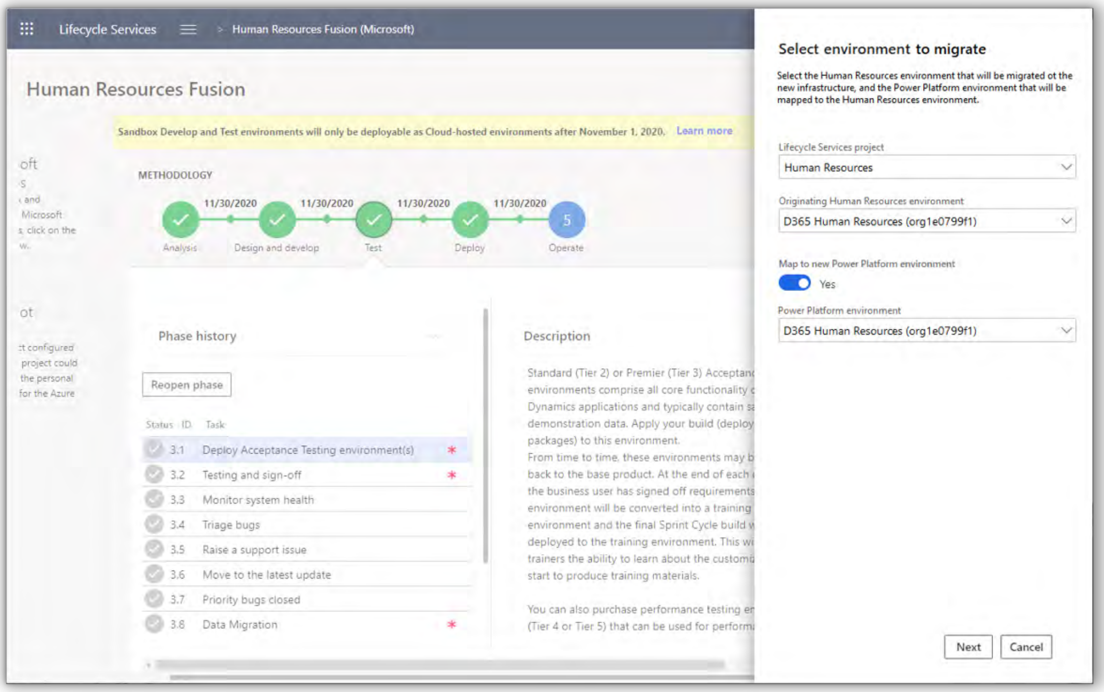
Feature details

Customers who are on the standalone Human Resources:

- Copying data and migrating Power Platform extensions to the Citizen Application Platform infrastructure.

Customers who are on Dynamics 365 Finance and using the HR module:

- Copying data and migrating Power Platform extensions to the Citizen Application Platform infrastructure.
- Creating entities where needed.
- Export from Human Resources and import into a Finance environment.



Migration options in Lifecycle Services.

Commerce

Plan and prepare for Dynamics 365 Commerce in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Commerce**.

Overview

Dynamics 365 Commerce is an end-to-end solution delivering seamless commerce across all channels. It encompasses sales, mobility, intelligence, and productivity, to help customer-facing businesses achieve more in a cloud-first, mobile-first way. The solution offers comprehensive support to operate a broad range of business processes including e-commerce, clienteling, point of sale, call center, merchandising, inventory, and channel management, while providing a unified and immersive customer experience for B2C and B2B engagements across physical and digital channels.

Organizations can drive better business outcomes with Commerce through:

- **Engaging customers across channels**: Give your customers or partners the option to purchase when, how, and where they want—on any device—by delivering a frictionless and consistent engagement across physical and digital channels.
- **Building your e-commerce presence**: Grow your business with a unified digital commerce solution that scales to meet your needs across business and consumer sales.
- **Enabling AI-driven intelligent commerce**: Delight your customers with engaging, personalized, and item-based AI-powered recommendations discovery experiences to increase repeat visits, customer retention, and loyalty.
- **Modernizing retail stores and streamlining operations**: Create personalized and friction-free retail commerce experiences through user-friendly applications powered by robust back-office operations.
- **Gaining agility and scalability through a natively headless solution**: Support traditional and emerging channels by using an agile, API-driven headless commerce engine to help adapt to current and emerging needs.

Key investments for this wave include:

- **Streamlined omnichannel media management**: Leverage new workflows in headquarters to manage media assets that are used across channels.
- **New B2B e-commerce business opportunities**: New capabilities such as sales agreements, on-behalf-of ordering to facilitate and grow B2B business opportunities.

- **Integrated experimentation**: Create, edit, manage, and analyze the full lifecycle of A/B experiments in site builder.
- **Enable customer service chat in e-commerce**: Use chat to connect call center agents with customers on your e-commerce site.

TIP Download the release overview guide and share with your team as you plan to onboard the new capabilities included in this release wave.

[Download the overview guide (PDF)]

* Overview guide available in English version only.

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 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.

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 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.
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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to 2021 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
Chat in Commerce with Power Virtual Agents and Omnichannel for Customer Service	Admins, makers, marketers, or analysts, automatically	-	Apr 2022
Copy CMS content using site builder	Admins, makers, marketers, or analysts, automatically	-	Apr 2022
Direct fiscal integration from POS	Users by admins, makers, or analysts	-	Apr 2022
Enhanced fiscal connector configuration	Users by admins, makers, or analysts	-	Apr 2022
Store Commerce app for Windows	Admins, makers, marketers, or analysts, automatically	-	Apr 2022
Integration with Sitecore Content Hub	Admins, makers, marketers, or analysts, automatically	✓Nov 19, 2021	Apr 2022
Additional filter options in POS inventory operations	Users by admins, makers, or analysts	✓Jan 27, 2022	Apr 2022
Payments in installments with the Dynamics 365 Payment Connector for Adyen for Brazil	Users by admins, makers, or analysts	-	Apr 2022
Honor site and warehouse settings on trade agreement in Commerce pricing engine	Users by admins, makers, or analysts	✓Feb 28, 2022	Apr 2022

Feature	Enabled for	Public preview	General availability
PayPal Cart Checkout support in e-commerce	Users by admins, makers, or analysts	✔ Feb 28, 2022	Apr 2022
Show or hide tax breakdown in e-commerce when prices include sales tax	Users by admins, makers, or analysts	Apr 2022	Jul 2022
Edit customer information asynchronously in POS and e-commerce channels	Users by admins, makers, or analysts	May 2022	Jul 2022

Description of **Enabled for** column values:

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

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

Chat in Commerce with Power Virtual Agents and Omnichannel for Customer Service

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

Business value

A first-class customer support experience is key to providing a personalized and delightful commerce experience for consumers. Multiple commerce touchpoints exist today, such as physical stores, online channels, and social channels, and consumers expect personalized support experience in all of them.

This feature helps you to increase cart conversions to sales, increase personalized engagement with consumers, and enhance customer service with integration of a human agent and self-service Power Virtual Agents chatbots. Improvements to the agent experience include access to real-time customer profile, order, and purchasing data.

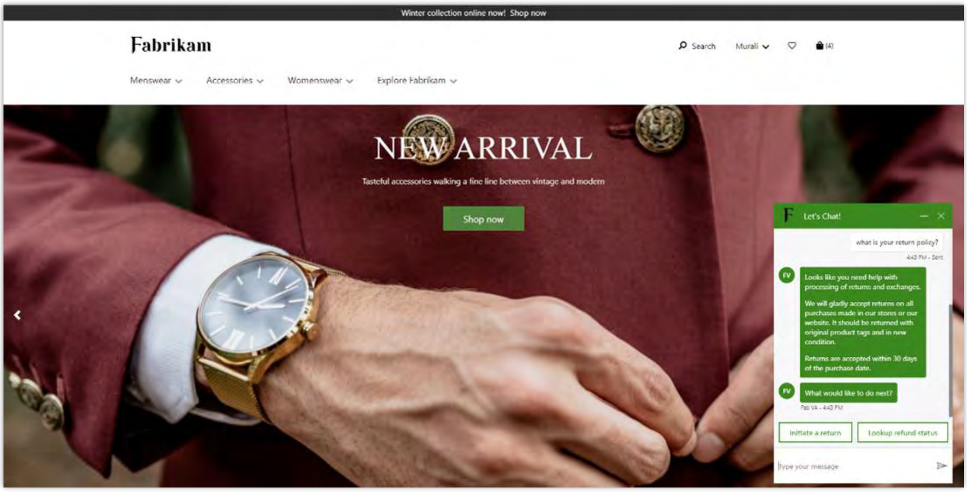
Feature details

Customer service functionality is now a part of Dynamics 365 Commerce. This functionality leverages the capabilities in Dynamics 365 Omnichannel for Customer Service and Power Virtual Agents.

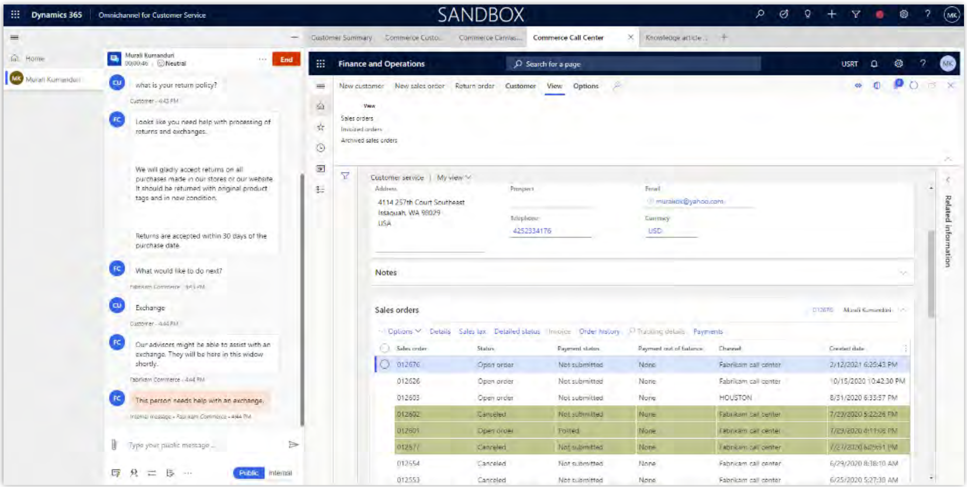
Site administrators will be able to configure a chat widget on their e-commerce site with proactive notification capability based on different criteria. The chat can be invoked proactively based on different triggers like time spent on the site, number of visits to a page, cart value, or number of items in the cart. Customer context is passed to Power Virtual Agents, Omnichannel for Customer Service for Chatbot, and the live agent, in order to be able to act on behalf of the customer.

Customer service agents will be enabled to better serve customers by using a unified view of profile and transaction data across the Dynamics 365 apps in the Omnichannel for Customer Service support channel. Agents will act on data from the service channel.

The Power Virtual Agents starter content pack will be made available to enable retailers to jumpstart deployment and make modifications to meet their business needs. Topics in the content pack will showcase how Power Automate connects to Commerce HQ and Commerce Server APIs to act on behalf of the customer via Power Virtual Agents.



Example of chat module in Dynamics 365 Commerce e-commerce.



Chat session between customer service agent and customer.

Copy CMS content using site builder

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

Business value

Dynamics 365 Commerce users will be able to copy e-commerce sites within and across e-commerce environments using site builder. This functionality helps minimize the manual work that may be required when you promote content from a non-production environment to a production environment or copy content from a production environment to a non-production environment for troubleshooting or training purposes. The ability to programmatically copy e-commerce sites helps to minimize errors resulting from the manual entry of data and reduces the time and effort required during initial deployment.

Feature details

Dynamics 365 Commerce will provide a user interface (UI) in site builder that will enable you to copy sites as self-serve operations within or across environments. This functionality will allow you to copy site content from your production environment to lower environments for development, testing, troubleshooting, and training purposes, thereby removing the risk of disruptions in the production environment.

Direct fiscal integration from POS

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

Business value

This Dynamics 365 Commerce feature will increase the flexibility in selecting appropriate in-store topologies in countries or regions that have fiscal registration requirements. It will be possible to integrate a point of sale (POS) with a fiscal device or service directly when no physical connection is required. This functionality, for example, enables fiscal integration for mobile devices with no shared hardware station required.

Feature details

The feature extends the [fiscal integration framework] by adding a capability to create fiscal connectors that will be executed in POS. This type of connector will communicate with a fiscal device or service that provides an HTTP API and will not require a dedicated physical machine in the store to be plugged in or deployed on.

The following capability is currently planned to be released after the general availability of this feature:

- A sample of the direct fiscal integration from POS for selected countries or regions. This capability is currently planned for May 2022.

Enhanced fiscal connector configuration

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

Business value

This new Dynamics 365 Commerce capability increases the flexibility in configuring fiscal integration in stores in countries or regions that have fiscal registration requirements. With these improvements, it will be possible to define connections settings for fiscal connectors for individual point of sale (POS) registers, as well as to disable the fiscal registration for selected POS registers.

Feature details

The feature extends the [fiscal integration framework] by adding the following options:

- An option to define connection settings for a fiscal connector on the individual POS register level, in addition to the hardware profile level. This will provide the ability to configure different connection settings for individual fiscal devices or service instances used by different POS registers in the store. This capability is currently planned for April 2022.
- An option to disable fiscal registration for selected POS registers in a fiscal registration-enabled store. Store associates will be able to use the registers for non-sales operations (such as inventory management operations), and to create sales that can then be

completed on fiscal registration-enabled registers. This capability is currently planned for May 2022.

- The option to review the fiscal registration process state and details on the **Settings** page of POS. This capability is currently planned for July 2022.

Store Commerce app for Windows

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

Business value

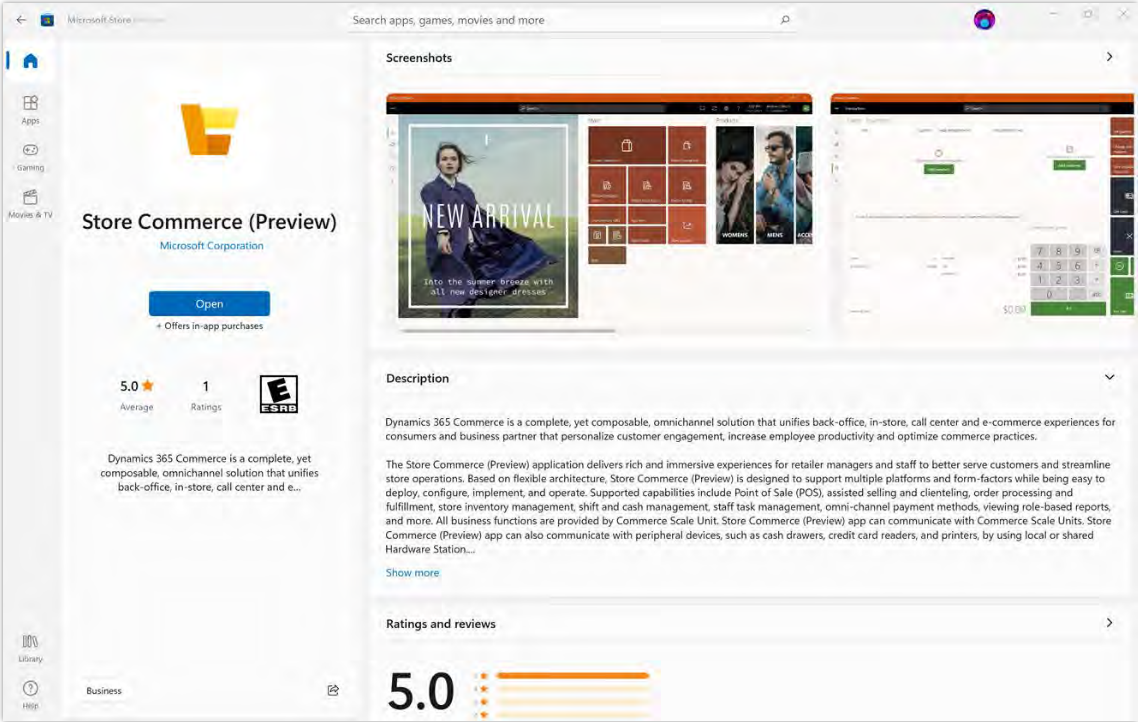
The Store Commerce app in Dynamics 365 Commerce is the next generation of the Dynamics 365 Commerce point of sale (POS) app and represents Microsoft's continuing commitment to provide the best POS experience for our customers. The Store Commerce app installer will support offline deployment, multiple extensions, and ISV installers. The app is both forward and backward compatible with your Commerce Scale Unit (CSU), and you can reuse your existing extensions and customizations in it. Rendering performance is improved using the Chromium rendering engine.

Feature details

Store Commerce is a shell app for Windows that renders the Cloud point of sale (CPOS) app. Although CPOS can run in a web browser, Store Commerce runs as a native Windows app like the Modern point of sale (MPOS). This allows Store Commerce to support a dedicated hardware station for direct integration with a payment terminal, printer, cash drawer, and other peripherals. You don't have to set up a shared hardware station to use hardware devices.

To render the user interface (UI), Store Commerce uses the Chromium engine instead of the Universal Windows Platform (UWP) app rendering framework used by MPOS. The Chromium engine has better rendering performance than the native JavaScript UWP app in Windows.

The Store Commerce app in Dynamics 365 Commerce provides all the rich commerce functionality that first-line workers such as cashiers, sales associates, inventory associates, stock clerks, and store managers expect from MPOS and CPOS. These workers can perform commerce-related operations such as cash-and-carry transactions, cash/shift management, customer engagement, assisted selling, clienteling, endless aisle, order processing/fulfillment, inventory management, and reporting.



Store Commerce application.

Integration with Sitecore Content Hub

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Nov 19, 2021	Apr 2022

Business value

This release provides a seamless integration with the Sitecore Content Hub CMS, an industry-leading, enterprise content management solution. By providing the ability to easily configure Sitecore Content Hub for use with Site Builder, customers can easily consume images, videos, and enriched content for use in marketing and merchandising pages. This functionality enables enterprise organizations to simplify brand management, marketing, and product assets in one system for use across print, media, and digital experiences.

Feature details

A data connector will automatically push the Dynamics 365 Commerce product and category data into your Sitecore Content Hub instance allowing additional digital asset management and product enrichment options for your Commerce channels. Content and assets stored in Sitecore are simple to access through inline authoring workflows within Dynamics 365 Commerce site builder. These inline Commerce site builder workflows will allow authors to choose digital assets or HTML fragments from Sitecore in a seamless and efficient workflow.

Additional filter options in POS inventory operations

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jan 27, 2022	Apr 2022

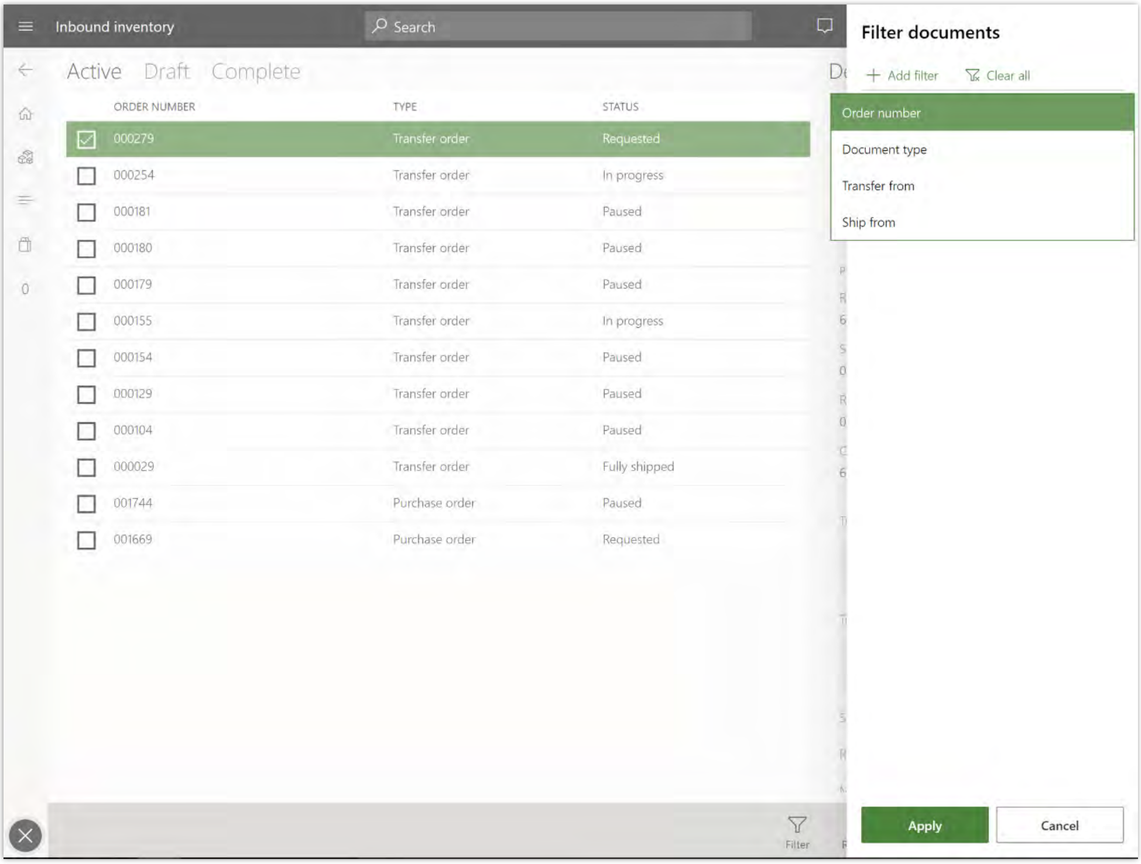
Business value

The current in-market point of sale (POS) inventory operation in Dynamics 365 Commerce only supports the **Order number** filter option in the **Inbound inventory** and **Outbound inventory** operations. Organizations that need additional filter capabilities have to build custom extensions. This feature will provide support for additional filter options that are commonly requested across POS inventory operations, thereby eliminating the need for unnecessary extensions and significantly improving the efficiency of the store inventory operation.

Feature details

With this feature, the following filter options will be supported in the POS inventory operation directly out of the box.

- **Inbound inventory**
    - List view: Order number, Type, Status, Transfer from (location)
    - Details view: Product number, Product (name), Location
- **Outbound inventory**
    - List view: Order number, Status, Transfer to (location)
    - Details view: Product number, Product (name), Location
- **Inventory adjustment**
    - List view: Journal number, Journal name, Description, Default adjustment type
    - Details view: Product number, Product (name), Location, Adjustment type
- **Inventory movement**
    - List view: Journal number, Journal name, Description
    - Details view: Product number, Product (name), From (location), To (location)
- **Stock count**
    - List view: Journal number, Journal name, Description, Status
    - Details view: Product number, Product (name), Location



Filter options in the Inbound inventory operation

Payments in installments with the Dynamics 365 Payment Connector for Adyen for Brazil

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

Business value

This feature extends the out-of-the-box Dynamics 365 Payment Connector for Adyen to support paying in installments for Brazil. This payment option is popular in Brazil because shoppers can receive goods or services immediately but have the option to spread the cost over multiple months.

Feature details

The Dynamics 365 Payment Connector for Adyen is an out-of-the-box payment connector that supports various payment instruments globally. This feature leverages the connector's built-in credit card installments capability and extends the payment connector to support paying in installments in stores that are located in Brazil.

While paying by card, a retail customer can make a choice to pay in installments. A cashier can then select the **Installments** payment preference type and specify the number of payments that is requested by the customer. The payment preference information is passed to Adyen with other credit card payment data. Further installment processing is handled by Adyen and the customer's bank. The purchase amount is split into the specified number of equal monthly payments. These payments are charged to the customer's credit card every 30 days until their purchase is paid in full.

Honor site and warehouse settings on trade agreement in Commerce pricing engine

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 28, 2022	Apr 2022

Business value

Today, site and warehouse storage dimensions on a trade agreement definition are not fully honored by the in-market Dynamics 365 Commerce pricing engine. For example, if a site is specified and a warehouse is not specified on a trade agreement, the Commerce pricing engine will ignore the site and apply the trade agreement to all sites. This has caused inconsistent behavior between Dynamics 365 Supply Chain Management and Commerce for pricing calculations.

Feature details

This feature enhances the Commerce pricing engine so that it will honor site and warehouse settings on a trade agreement price or trade agreement discount when determining the matching trade agreement for price calculation. With this feature enabled, a trade agreement can be applied to a sales order line only when the fulfillment location set on the line matches the specified site and warehouse on the trade agreement.

PayPal Cart Checkout support in e-commerce

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 28, 2022	Apr 2022

Business value

Dynamics 365 Commerce will add support for PayPal Cart Checkout (formerly PayPal Express) to enable a faster e-commerce checkout experience. PayPal Cart Checkout allows a user who signs in to PayPal for a payment to use their address information that is stored in

PayPal on the e-commerce site, thereby reducing the data entry required for a customer to check out. As users return from the PayPal payment window, the checkout form will be populated with their chosen user information and will be ready for the user to confirm the purchase. Streamlining a user's experience from cart to order completion will reduce friction for online purchase flows.

Feature details

This feature will add the following capabilities for your e-commerce experience:

- An **Express** section in the checkout page to allow users to check out using PayPal Cart Checkout.
- A dedicated module for PayPal Cart Checkout.
- Auto-population of shipping address, billing address, and email address when returning from PayPal Cart Checkout to the e-commerce checkout page.
- Auto-selection of the first delivery method against the cart to streamline the checkout flow.
- The ability to include the **PayPal Cart Checkout** button in the cart page.

Show or hide tax breakdown in e-commerce when prices include sales tax

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

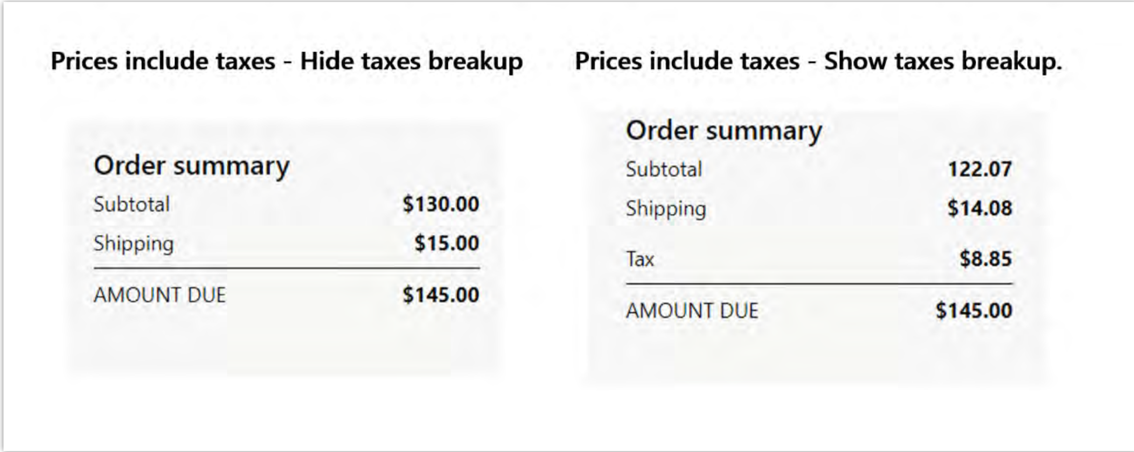
Business value

Businesses in some legal entities may include sales tax in their prices. In that scenario, businesses can either show the tax breakdown by extracting the tax portion from prices and charges, or hide the tax breakdown. This feature allows businesses to organize the order summary in the e-commerce channel to meet business requirements that apply to prices including sale tax.

Feature details

This feature provides the following capabilities:

- Businesses can display tax information explicitly in the order summary on cart, checkout, confirmation, and order details pages in the e-commerce channel.
- Businesses can hide tax information in the order summary on cart, checkout, confirmation, and order details pages in the e-commerce channel. Prices and charges in the order summary will be displayed inclusive of taxes.



Show or hide tax breakdown in sales tax scenario on e-commerce channel.

Edit customer information asynchronously in POS and e-commerce channels

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

Business value

High availability and high performance are default expectations for e-commerce sites today. To help meet these expectations, Dynamics 365 Commerce e-commerce sites will no longer need to rely on real-time communication with Commerce HQ when you edit customer information. The ability to edit customer information asynchronously for async and non-async customers is a way to reduce real-time calls to Commerce HQ.

Feature details

This feature adds the following capability for editing customer information asynchronously:

- Ability to edit customer information asynchronously, regardless of whether the customer was created synchronously or asynchronously.

Fraud Protection

Plan and prepare for Dynamics 365 Fraud Protection in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. 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 brings together account protection, payment protection, and loss prevention, providing a 360-degree view of the fraud landscape to partners and businesses to help them discover and combat fraud efficiently and effectively.

We are investing in six areas in this release to amplify our partners' and businesses' ability to fight fraud:

- Enhancing the ability of fraud solution providers to operate and manage their many customers' fraud at scale.
- Enabling search capabilities to enhance the analytics and policy setting for fraud managers.
- Adding natively integrated case management for purchase protection.
- Providing provisioning of Fraud Protection in Canada.
- Protecting businesses' native mobile applications against fraud.
- Protecting businesses' Power App Portal products more easily against fraud.

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

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
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What's new and planned for Dynamics 365 Fraud Protection

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

For a list of the previous wave's release plans, go to 2021 release wave 2 plan.

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Feature	Enabled for	Public preview	General availability
Canadian provisioning of Dynamics 365 Fraud Protection	Users, automatically	Apr 2022	Jun 2022
Enhance ability of fraud solution providers to manage fraud at scale	Users, automatically	Apr 2022	Jun 2022
Natively integrated case management for purchase protection	Users, automatically	Apr 2022	Jun 2022
Protect native mobile applications against fraud	Users, automatically	Apr 2022	Jun 2022

Feature	Enabled for	Public preview	General availability
Protect Power Apps portals products against fraud	Users, automatically	Apr 2022	Jun 2022
Search functionality for fraud managers	Users, automatically	Apr 2022	Jun 2022

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
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Canadian provisioning of Dynamics 365 Fraud Protection

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

Business value

Businesses can choose to have Dynamics 365 Fraud Protection provisioned within Canada if they have specific data residency needs or latency requirements that would call for it.

Feature details

With this new feature, businesses will be able to choose to provision Fraud Protection within Canada, the United States, or Europe. Businesses with data residency needs specific to Canada or with tight latency needs will be able to choose a region within Canada to provision to.

Enhance ability of fraud solution providers to manage fraud at scale

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

Business value

Payment service providers (PSPs), cloud service providers, system integrators, and other fraud solution providers who manage fraud on behalf of other businesses can use Dynamics 365 Fraud Protection to operate and manage their customers at scale, more effectively and efficiently.

Feature details

Fraud solution providers (such as PSPs) who offer fraud management services to run and operate on behalf of many businesses will be able to:

- More effectively manage fraud across many businesses, where each business has multiple tenants and multiple verticals.
- Use aggregated fraud analytics to observe what is happening across all of their customer businesses.
- Benefit from enhanced policy creation and management across all of their customers.

Natively integrated case management for purchase protection

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

Business value

Dynamics 365 Fraud Protection will include a natively integrated case management experience. With this new functionality, fraud managers will experience a seamless end-to-end fraud operations workflow for purchase protection.

Feature details

Fraud Protection will have a case management experience for purchase protection built into the product.

Fraud Protection previously offered an optional plug-in for manual review that product owners could choose to use to build, host, and connect to their Fraud Protection instance. With this new feature, case management for purchase protection will be integrated natively into Fraud Protection. Using the Fraud Protection rules experience, fraud managers can identify purchase transactions that require further review and add them to the manual review queue. They can then take the appropriate action on these transactions from within Fraud Protection.

Protect native mobile applications against fraud

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

Business value

With this new feature, businesses will be able to protect their native mobile applications in addition to their mobile browser-based applications using Dynamics 365 Fraud Protection.

Feature details

This new feature will enable businesses to integrate Fraud Protection into their iOS and Android ecosystems to protect against fraud.

Fraud managers will be able to protect their native mobile applications, in addition to their mobile browser-based applications. Mobile protection will be available for both purchase protection and account protection.

Protect Power Apps portals products against fraud

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

Business value

Businesses that build products with Microsoft Power Apps portals will be able to easily protect their products by using Dynamics 365 Fraud Protection. That way, their apps and websites will be better protected from fraud.

Feature details

Fraud Protection will provide a certified purchase protection Power Apps portals connector and a certified account protection Power Apps portals connector that will enable businesses to easily integrate their products that were built using Power Apps portals with Fraud Protection. With this feature, businesses can better protect their customers from fraud.

Search functionality for fraud managers

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

Business value

Fraud managers can run operations in Dynamics 365 Fraud Protection more effectively by using newly added search capabilities.

Feature details

Fraud Protection is introducing a new search capability that can help fraud managers run fraud operations more efficiently. Complementary to the existing fraud analytics in purchase protection and account protection, the new search feature extends a fraud manager's ability to find information. Fraud managers can find transaction events with historical and relationship context included and discover clusters of unusual behavior and previously unknown interconnections across transaction events.

SMB

Plan and prepare for Dynamics 365 Business Central in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Business Central**.

Overview

Dynamics 365 Business Central is a comprehensive business application solution that is designed and optimized for small and midsized organizations. In 2022 release wave 1, you will see further investments centering on helping users get to productive usage faster, whether they are new or existing customers of ours, by providing in-app improvements to help them get started. We expand on the capabilities of the Help pane and make it the go-to resource for helping both new and existing users. We continue our geographic expansion, and we will improve performance and usability by focusing on easier navigation in menus. To help users be productive, we enhance our reporting capabilities with Excel layouts.

Seamless service: No matter the industry type of a small or midsized business (SMB), business users expect a dependable service and platform that they can run their business on.

Administration: In 2022 release wave 1, Business Central delivers a set of features that are designed to simplify and improve the way our partners administer tenants, and the way administrators manage licensing and permissions.

Application: The finance and supply chain capabilities in Business Central are improved with several optimizations and enhancement of the capabilities so that users can execute business processes more productively.

Better with Microsoft 365: In 2022 release wave 1, we improve the efficiency of collaborative business processes in Microsoft Teams, and we harden the Excel and Outlook add-ins.

Country and regional: In 2022 release wave 1, Business Central is generally available in more countries and regions.

Onboarding: In 2022 release wave 1, customers can get to productive usage faster using the new modern Help pane.

Development tools: As we have moved entirely to Visual Studio Code, we continue to invest in areas that enhance productivity for developers. Additionally, we introduce GitHub Go for partners to set up CI/CD for their apps without any prior knowledge about pipelines, Docker, or PowerShell.

Power Platform: We improve our Power Automate capabilities, making it much easier to set up workflows for the specific needs of an organization.

TIP Download the release overview guide and share with your team as you plan to onboard the new capabilities included in this release wave.

Download the overview guide (PDF)

* Overview guide available in English version only.

Investment areas

Better with Microsoft 365
In 2022 release wave 1, we invest in a stronger reporting story through better integration with Excel where we'll use the Excel layout capabilities. We also further improve the support for collaborative business processes in Teams so you can bring Business Central pages into a Teams channel. Finally, we also enrich the information from Business Central that we present in Teams.

Development
We continue to invest in a rich spectrum of extensibility tooling capabilities for developers, including making the AL language even stronger, providing developers with a great experience.

Microsoft Power Platform
In 2022 release wave 1, we improved the integration with Microsoft Dataverse and Microsoft Power Platform so that users can be more productive and self-sufficient when they use Power Apps, Power Automate, and Power BI with Business Central. For example, we made it simple and intuitive to trigger a Power Automate flow from a specific Business Central page. In another example, this update makes it possible to use data change events from Dataverse virtual tables in the Power Automate flows.

Application
In 2022 release wave 1, we deliver updates based on the most popular requests for improvement. We'll invest in better reporting, improve the control of deferral postings,

improve the Dimensions capabilities by allowing default dimensions on locations, and we'll deliver several improvements to the supply chain area.

Onboarding
Onboarding is a key focus in every release wave. The aim is to make the onboarding of new customers faster, but also the onboarding of new users. In the most recent release waves, we have removed some of the friction in the onboarding of new customers by empowering partners to deliver uniform onboarding experiences at scale. This way, our partners can deliver more valuable services to their customers. Partners can use a combination of in-product artifacts, such as the Get Started checklist, teaching tips, configuration packages, and assisted setups.

In 2022 release wave 1, onboarding to Dynamics 365 Business Central will be even easier because we will focus on people-centric experiences. Business Central becomes able to provide easy access to context-specific content. This way, we flatten the learning curve and unblock individual users in performing their business processes. Users will also be guided to understand how they can personalize Business Central to their needs.

The access to the context-specific content will be powered by a new and modern Help pane similar to that of other Microsoft offerings. The context-specific content that users get access to through the Help pane will include Microsoft-hosted content and partner-hosted content so that the Help pane is the go-to place to get unblocked.

Additionally, teaching tips will be able to include clickable links so that page- and control-level teaching tips can refer to documentation or other in-app pages.

Modern clients
In 2022 release wave 1, we make improvements to our extensive portfolio of clients with the focus on better usability, accessibility, performance, and stability.

Country and regional
More countries are added to bring Business Central to more than 70 countries. Expansion to more countries and regions is achieved through partner-led localization. Our partners create the relevant localization apps and publish them to AppSource. In combination with the built-in language offerings, Business Central is available to serve customers in over 70 countries and regions worldwide.

Governance and administration
Business Central 2022 release wave 1 delivers a set of admin and governance capabilities to help admins and IT pros set up, secure, manage, govern, and monitor customer environments. Areas of investments include improving the error messages to include additional details and support information.

Reporting
Reporting is top-of-mind for many business users, both as a way to get insight into new growth opportunities but also as a way to share data as a foundation for business planning discussions. We will deliver a better experience with Excel layouts. We'll also provide improvements to the account schedules capability. Finally, we will improve our Power BI

analytics story by enabling more Power BI dashboards to be shown on the Home page of business users.

Service and platform
No matter the industry type of a small or medium-sized business (SMB), business users expect a dependable service and platform that they can run their business on. In every release wave, we improve performance. In this release wave, we provide more insight by enabling an in-product performance advisor and in-client performance profiler. We also continue the effort of improving the client's rendering time and the performance of data entry.

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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to 2021 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.

Application

In 2022 release wave 1, we deliver updates based on the most popular requests for improvement. We'll invest in better reporting, and several improvements to the supply chain area.

Feature	Enabled for	Public preview	General availability
Blocking deletion of G/L accounts	Users, automatically	✔ Jan 4, 2022	Apr 2022

Feature	Enabled for	Public preview	General availability
Auto-accept transactions for intercompany journals	Users by admins, makers, or analysts	Feb 4, 2022	Apr 2022
Payment reconciliation journal - Preview Posting enabled	Users, automatically	Feb 15, 2022	Apr 2022
Allow the sell-to and bill-to customers to be different for jobs	Users, automatically	Mar 1, 2022	Apr 2022
Bank Account Statement report	Users, automatically	Mar 1, 2022	Apr 2022
Block VAT and General Posting Setups	Users, automatically	Mar 1, 2022	Apr 2022
Change default company bank account on sales and service documents	Users, automatically	Mar 1, 2022	Apr 2022
Check amounts for proposed payments and settlements	Users, automatically	Mar 2022	Apr 2022
Check documents and journals in while you work	Users, automatically	Mar 1, 2022	Apr 2022
Consolidate customer and vendor balances	Users, automatically	Mar 1, 2022	Apr 2022
Finding documents and entries efficiently	Users, automatically	Mar 1, 2022	Apr 2022
Fixed Quantity in product bills of materials	Users, automatically	Mar 1, 2022	Apr 2022
Introducing Finance Charge Interest Rate - Czechia	Users, automatically	Mar 2022	Apr 2022
Log emails using a shared mailbox and Graph API	Users, automatically	Mar 1, 2022	Apr 2022
Mail account scenarios for CZ Advance Payments (Czechia)	Users, automatically	Mar 2022	Apr 2022

Feature	Enabled for	Public preview	General availability
Map to Dataverse option sets such as payment terms, freight terms, and shipping agents without code	Users by admins, makers, or analysts	✓ Mar 1, 2022	Apr 2022
More control over deferrals posting	Users, automatically	✓ Mar 1, 2022	Apr 2022
New Accountant profile (Czechia)	Users, automatically	Mar 2022	Apr 2022
New UI for entering demand forecasts to add support for variant code and other improvements	Users, automatically	✓ Mar 1, 2022	Apr 2022
Report selection for projects	Users, automatically	✓ Mar 1, 2022	Apr 2022
Set default dimensions on locations	Users, automatically	✓ Mar 1, 2022	Apr 2022
Support inventory pick and warehouse pick operations for jobs	Users, automatically	✓ Mar 1, 2022	Apr 2022
Create bank deposits	Users by admins, makers, or analysts	✓ Mar 7, 2022	Apr 2022
Standardizing the bank reconciliation process in North American versions	Users by admins, makers, or analysts	✓ Mar 7, 2022	Apr 2022
Two-digit year evaluates to 1950-2049 range	Users, automatically	Apr 2022	Apr 2022
Shopify connector	Users by admins, makers, or analysts	-	Apr 2022
Release and reopen multiple documents	Users, automatically	✓ Mar 1, 2022	May 2022
Sync sales orders both ways in Business Central and Sales	Users by admins, makers, or analysts	Apr 2022	May 2022
Improved and extensible Adjust Exchange Rates batch job	Users by admins, makers, or analysts	✓ Mar 1, 2022	Jun 2022
Use different G/L accounts for payables and receivables transactions	Users by admins, makers, or analysts	✓ Mar 1, 2022	Jun 2022

Better with Microsoft 365

In 2022 release wave 1, we invest in a stronger reporting story, including better integration with Excel. We also improve the support for collaborative business processes in Teams so you can bring Business Central pages into a Teams channel.

Feature	Enabled for	Public preview	General availability
Enhancements to Microsoft Teams integration	Users, automatically	-	Apr 2022
Outlook add-in – add email attachments to Business Central records	Users, automatically	✓ Feb 1, 2022	Apr 2022
Share a file through OneDrive	Users, automatically	✓ Mar 7, 2022	Apr 2022
Outlook add-in popout window enhancements	Users, automatically	✓ Mar 9, 2022	Apr 2022
A single tile to go to Business Central	Users, automatically	-	Jun 2022

Country and regional

More countries are added to bring Business Central to availability in over 70 countries.

Feature	Enabled for	Public preview	General availability
Country/regional expansion - Angola	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Bahrain	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Bosnia and Herzegovina	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Botswana	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022

Feature	Enabled for	Public preview	General availability
Country/regional expansion - Costa Rica	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Cyprus	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Dominican Republic	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Ecuador	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - El Salvador	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Guatemala	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Honduras	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Jamaica	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Maldives	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Mauritius	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022

Feature	Enabled for	Public preview	General availability
Country/regional expansion - Nicaragua	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Panama	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Paraguay	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Trinidad and Tobago	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Uruguay	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Country/regional expansion - Zimbabwe	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022

Development

We continue to invest in a rich spectrum of extensibility tooling capabilities for developers, including making the AL language even stronger, providing developers with a great experience.

Feature	Enabled for	Public preview	General availability
Demo tool and demo data for manufacturing scenarios	Users, automatically	-	Apr 2022
Isolated events	Admins, makers, marketers, or analysts, automatically	-	Apr 2022

Feature	Enabled for	Public preview	General availability
New isolated event OnCompanyOpenCompleted	Admins, makers, marketers, or analysts, automatically	-	Apr 2022
New reporting events	Admins, makers, marketers, or analysts, automatically	-	Apr 2022
In-client performance profiler	Users, automatically	✔ Mar 1, 2022	Apr 2022
Multiple layouts of the same type in reports and report extensions	Admins, makers, marketers, or analysts, automatically	✔ Mar 1, 2022	Apr 2022
Telemetry - monitor health and uptake of features	Users by admins, makers, or analysts	✔ Mar 1, 2022	Apr 2022
Ability to elevate permissions in AL code	Users, automatically	Apr 2022	Apr 2022
AL-Go for GitHub - modern DevOps for partners	Admins, makers, marketers, or analysts, automatically	Apr 2022	Apr 2022
Deploy dependent projects in workspace	Admins, makers, marketers, or analysts, automatically	Apr 2022	Apr 2022
Telemetry - company name as a custom dimension in AL LogMessage	Users, automatically	Apr 2022	Apr 2022
Telemetry - votes on whether error messages are useful	Users, automatically	Apr 2022	Apr 2022
Users can export report datasets to XML	Users, automatically	Apr 2022	Apr 2022

Governance and administration

Business Central 2022 release wave 1 delivers a set of admin and governance capabilities to help admins and IT pros set up, secure, manage, govern, and monitor customer environments.

Feature	Enabled for	Public preview	General availability
Security administrators can define default permission set assignments when users sign up	Admins, makers, marketers, or analysts, automatically	✔ Feb 1, 2022	Apr 2022
Set user email policies to control who can read email sent from Business Central	Users by admins, makers, or analysts	✔ Mar 1, 2022	Apr 2022
Support for granular delegated admin privileges (GDAP)	Admins, makers, marketers, or analysts, automatically	Mar 2022	Apr 2022
Telemetry for environment lifecycle events	Users, automatically	Apr 2022	Apr 2022
Updating only licensed users from Microsoft 365 runs faster and more efficiently	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022
Delegated admin's job queue entries are run by user	Admins, makers, marketers, or analysts, automatically	May 2022	May 2022
Telemetry for permission error dialogs	Users, automatically	Jun 2022	Jun 2022
Permission set handling enhancements	Admins, makers, marketers, or analysts, automatically	May 2022	Jun 2022

Microsoft Power Platform

In 2022 release wave 1, we improved the integration with Microsoft Dataverse and Microsoft Power Platform.

Feature	Enabled for	Public preview	General availability
Dataverse data change events	Admins, makers, marketers, or analysts, automatically	Apr 2022	-
Action group to run chosen instant Power Automate flow	Users by admins, makers, or analysts	Apr 2022	May 2022
Improvements to the Power Automate and Power Apps connector	Admins, makers, marketers, or analysts, automatically	Apr 2022	May 2022

Modern clients

In 2022 release wave 1, we make improvements to our extensive portfolio of clients with the focus on better usability, accessibility, performance, and stability.

Feature	Enabled for	Public preview	General availability
Copy link from Share menu	Users, automatically	✔ Feb 1, 2022	Apr 2022
New desktop app delivering full web client experience on desktop is listed in the Microsoft Store	Users, automatically	✔ Mar 1, 2022	Apr 2022
Control add-in resiliency	Users, automatically	✔ Mar 9, 2022	Apr 2022
Usability improvements to the web client	Users, automatically	✔ Mar 9, 2022	Apr 2022

Onboarding

Onboarding is a key focus in every release wave. The aim is to make the onboarding of new customers faster, but also the onboarding of new users.

Feature	Enabled for	Public preview	General availability
Context-aware links in the Help pane from Microsoft and partners	Users, automatically	✓Mar 1, 2022	Apr 2022
Guided tour that helps users find settings and personalization tools	Users, automatically	✓Mar 1, 2022	Apr 2022
Support for rich text in teaching tips and tours	Users, automatically	✓Mar 1, 2022	Apr 2022
Tour of the Role Explorer and how to filter it	Users, automatically	✓Mar 1, 2022	Apr 2022

Reporting

Reporting is top-of-mind for many business users, both as a way to get insight into new growth opportunities but also as a way to share data as a foundation for business planning discussions.

Feature	Enabled for	Public preview	General availability
New capabilities for financial reporting with account schedules	Users, automatically	✓Mar 1, 2022	Apr 2022
New pages for report layout administration	Users, automatically	Apr 2022	Apr 2022
Use Excel to design layouts for reports	Users, automatically	Apr 2022	Apr 2022

Service and platform

No matter the industry type of a small or medium-sized business (SMB), business users expect a dependable service and platform that they can run their business on.

Feature	Enabled for	Public preview	General availability
Performance - partners can get insights into database wait statistics	Users, automatically	Apr 2022	Apr 2022
Performance-related insights into missing indexes	Users, automatically	Apr 2022	Apr 2022
Telemetry - error dialogs are logged to telemetry	Users, automatically	Apr 2022	Apr 2022
Telemetry - support engineers can now see user IDs in telemetry	Users, automatically	Apr 2022	Apr 2022
Telemetry - the action of enabling detailed telemetry is logged to telemetry	Users, automatically	Apr 2022	Apr 2022
Telemetry - when a database deadlock occurs, it is logged to telemetry	Users, automatically	Apr 2022	Apr 2022

Description of **Enabled for** column values:

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

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

Application

Overview

In 2022 release wave 1, we deliver updates based on the most popular requests for improvement. We'll invest in better reporting, improve the control of deferral postings, improve the Dimensions capabilities by allowing default dimensions on locations, and we'll deliver several improvements to the supply chain area.

Blocking deletion of G/L accounts

Enabled for	Public preview	General availability
Users, automatically	✔ Jan 4, 2022	Apr 2022

Business value

Maintenance of the chart of accounts takes place only a few times, once it's been set up for an organization, but it does occur. To help avoid accidental deletion of general ledger (G/L) accounts, this release wave adds an extra check.

Feature details

Though relatively rare, changing business needs might require you to make a change in your chart of accounts that involves deleting one or more accounts. Before you delete an account, you must balance the account to zero and then close the fiscal year to prevent new entries from being added to the account. Also, most countries and regions have requirements for how long businesses must store their financial data. To help ensure that you don’t delete an account that has entries within the period where they must be kept, you can specify the start date of the period for which your country or region requires you to store financial data in the **Check G/L Acc. Deletion After** field on the **General Ledger Setup** page. For example, If you must keep data for five years, and today’s date is 2/9/2022, you would enter a date of 12/31/2016. If you do, Business Central will inform you if you have accounts with entries that you must keep. You probably shouldn’t delete accounts that have entries, but you can if you must.

To further safeguard accounts from accidentally being deleted, we’ve added the **Block Deletion of G/L Accounts** toggle to the **General Ledger Setup** page. If you turn on the toggle, Business Central will prevent users from deleting accounts that have entries after the date that is specified in the **Check G/L Acc. Deletion After** field. If you must delete such accounts, a user who can access the **General Ledger Setup** page can turn off the **Block Deletion of G/L Accounts** toggle.

We recommend that you turn on the **Block Deletion of G/L Accounts** toggle and that you always have a date set in the **Check G/L Acc. Deletion After** field.

New field in General Ledger: Block Deletion of G/L Accounts.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Understanding the General Ledger and the Chart of Accounts (docs)

Auto-accept transactions for intercompany journals

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Feb 4, 2022	Apr 2022

Business value

Intercompany postings make accounting for two or more companies an easier task for a centralized finance department as well as bookkeepers in intercompany partner companies. We're adding another automated task, automated general journal acceptance, to remove several manual steps in the intercompany accounting process.

Feature details

New fields in the **Intercompany Setup** page mean that you can set up the company for automatic creation of received intercompany transactions from intercompany partners, posted through the intercompany general journal.

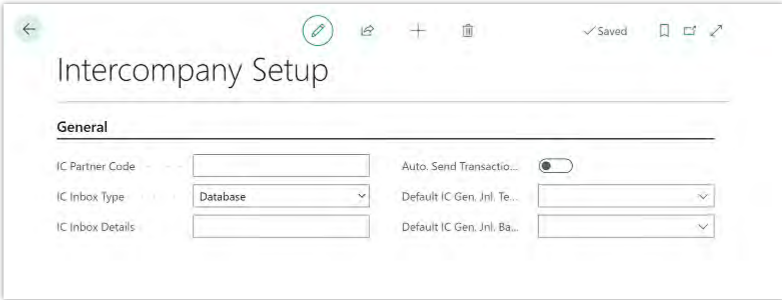
In this release wave, we add a new **Intercompany Setup** page, and we deprecate the older one. The new feature must be enabled in the **Feature Management** page.

The new **Intercompany Setup** page has fields to specify where received intercompany journal transactions are created:

- **Default IC Gen. Jnl. Template**
- **Default IC Gen. Jnl. Batch**

The entries are not posted, only created in the journal.

NOTE If you do not enable the new feature, you will see two search results for *Intercompany Setup* if you use the in-product search functionality. Then, if you choose the new page, you will be forwarded to the **Feature Management** page to switch it on. If you have enabled the new feature, the old page will have a link you can select to take you to the new setup page. This is a temporary experience and will go away once the old setup page is fully removed from the product in 2023 release wave 2.



New Intercompany Setup page with two new fields.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

Thank you for submitting [this idea](). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

[Set Up Intercompany Transaction Posting]() (docs)

Payment reconciliation journal - Preview Posting enabled

Enabled for	Public preview	General availability
Users, automatically	✔ Feb 15, 2022	Apr 2022

Business value

Bank and payment reconciliations are key processes for all businesses because they provide an overview of whether the cash flow is accurate, and that all transactions have been accounted for. In this release, we're making it even more efficient to use payment reconciliation journals.

Feature details

The payment reconciliation journal has been improved with the following capabilities:

- View fields for debits and credits on the footer of journals.
- Preview before posting.

You will find the features in the **Payment Reconciliation Journal** 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.

Allow the sell-to and bill-to customers to be different for jobs

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

We've added support for projects where the party that is receiving a service is different from the party that is paying the bill. When a project manager creates a job, they can specify the customer who will benefit from the project, and this customer can be different from the company that will pay for the project. Additionally, the project manager can specify the place where the work will happen by selecting from a list of ship-to addresses for the customer, add information about external references to simplify communication about the project, and overwrite the standard financial terms of the specific project.

Feature details

We've added **Sell-to** and **Ship-to** field groups to the **Jobs** page. Existing jobs will be updated automatically, and these new fields will inherit values from the respective fields in the **Bill-to** group that was already available.

Additionally, the **Your Reference**, **External Document No.**, **Payment Terms Code**, and **Payment Method Code** fields are added to jobs and will be respected when you create invoices.

Changes in the Job table and the Job Card page

Element	Table 167 Job	Upgrade	Page 88 Job Card
Sell-to			
Sell-to Customer No.	Added to table	From Bill-to Customer No.	Added to General tab

Element	Table 167 Job	Upgrade	Page 88 Job Card
Sell-to Customer Name	Added to table	From Bill-to Customer Name	Added to General tab
Sell-to Customer Name 2	Added to table	From Bill-to Customer Name 2	-
Sell-to Address	Added to table	From Bill-to Address	Added to General tab
Sell-to Address 2	Added to table	From Bill-to Address 2	Added to General tab
Sell-to City	Added to table	From Bill-to City	Added to General tab
Sell-to Contact	Added to table	From Bill-to Contact	Added to General tab
Sell-to Post Code	Added to table	From Bill-to Post Code	Added to General tab
Sell-to County	Added to table	From Bill-to County	Added to General tab
Sell-to Country/Region Code	Added to table	From Bill-to Country/Region Code	Added to General tab
Sell-to Phone No.	Added to table	From Bill-to Phone No.	-
Sell-to E-Mail	Added to table	From Bill-to E-Mail	n/a
Sell-to Contact No.	Added to table	From Bill-to Contact No.	Added to General tab
SellToContact."Phone No."	n/a	n/a	Added to General tab
SellToContact."Mobile Phone No."	n/a	n/a	Added to General tab
SellToContact."E-Mail"	n/a	n/a	Added to General tab
Bill-to			
Bill-to Customer No.	Already in table	Kept current value	Moved to new Invoice and Shipping tab
Bill-to Customer Name	Already in table	Kept current value	Moved to new Invoice and Shipping tab

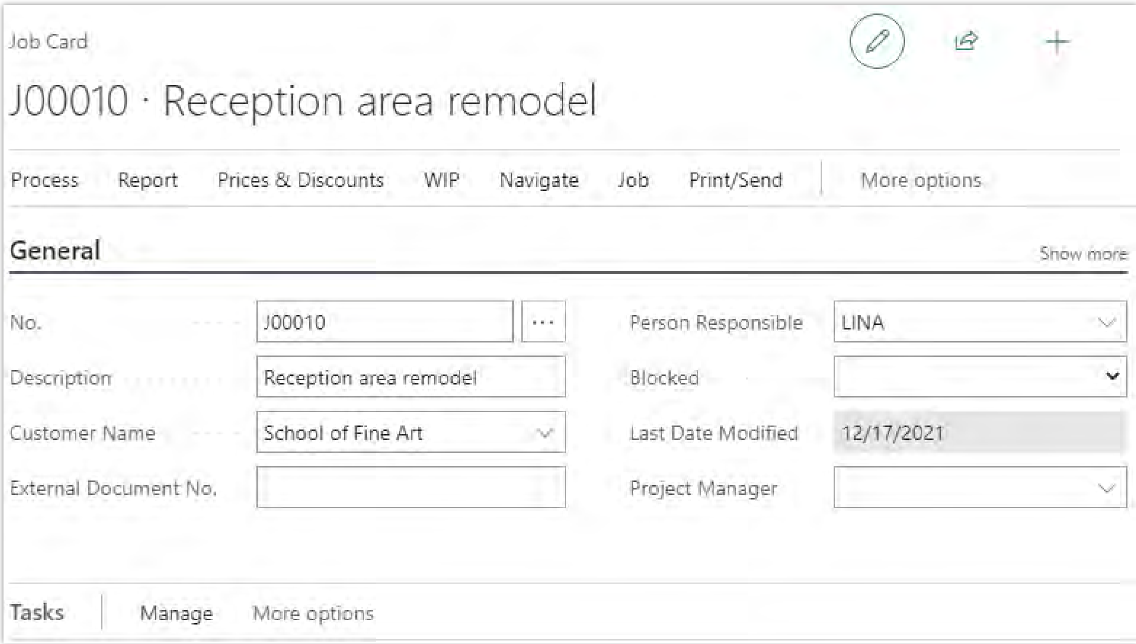
Element	Table 167 Job	Upgrade	Page 88 Job Card
Bill-to Customer Name 2	Already in table	Kept current value	-
Bill-to Address	Already in table	Kept current value	Moved to new Invoice and Shipping tab
Bill-to Address 2	Already in table	Kept current value	Moved to new Invoice and Shipping tab
Bill-to City	Already in table	Kept current value	Moved to new Invoice and Shipping tab
Bill-to Contact	Already in table	Kept current value	Moved to new Invoice and Shipping tab
Bill-to Post Code	Already in table	Kept current value	Moved to new Invoice and Shipping tab
Bill-to County	Already in table	Kept current value	Moved to new Invoice and Shipping tab
Bill-to Country/Region Code	Already in table	Kept current value	Moved to new Invoice and Shipping tab
Bill-to Contact No.	Already in table	Kept current value	Moved to new Invoice and Shipping tab
BillToContact."Phone No."	n/a	n/a	Moved to new Invoice and Shipping tab
BillToContact."Mobile Phone No."	n/a	n/a	Moved to new Invoice and Shipping tab

Element	Table 167 Job	Upgrade	Page 88 Job Card
BillToContact."E-Mail"	n/a	n/a	Moved to new Invoice and Shipping tab
Ship-to			
Ship-to Code	Added to table	*blank*	Added to new Invoice and Shipping tab
Ship-to Name	Added to table	From Bill-to Customer Name	Added to new Invoice and Shipping tab
Ship-to Name 2	Added to table	From Bill-to Customer Name 2	-
Ship-to Address	Added to table	From Bill-to Address	Added to new Invoice and Shipping tab
Ship-to Address 2	Added to table	From Bill-to Address 2	Added to new Invoice and Shipping tab
Ship-to City	Added to table	From Bill-to City	Added to new Invoice and Shipping tab
Ship-to Contact	Added to table	From Bill-to Contact	Added to new Invoice and Shipping tab
Ship-to Post Code	Added to table	From Bill-to Post Code	Added to new Invoice and Shipping tab
Ship-to County	Added to table	From Bill-to County	Added to new Invoice and Shipping tab

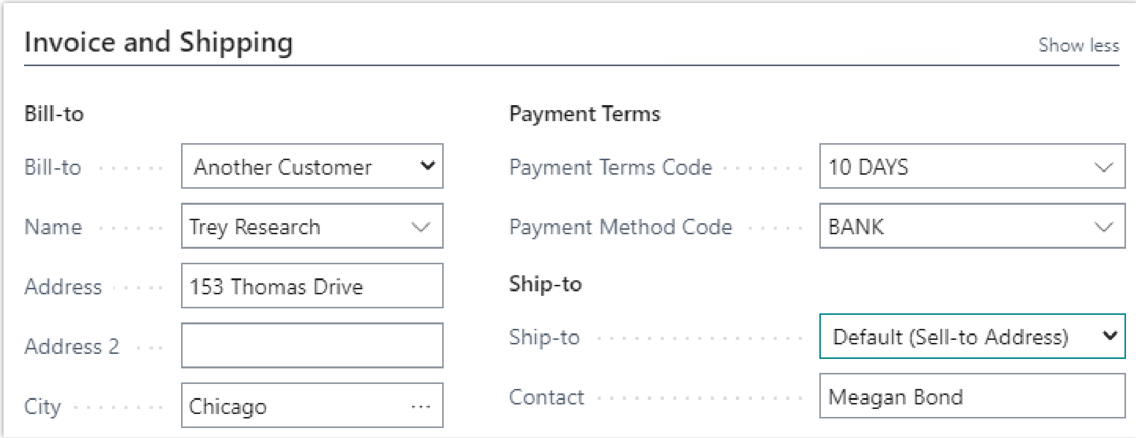
Element	Table 167 Job	Upgrade	Page 88 Job Card
Ship-to Country/Region Code	added to table	From Bill-to Country/Region Code	Added to new Invoice and Shipping tab
Other			
External Document No.	Added to table	*blank*	Added to General tab
Your Reference	Added to table	*blank*	Added to General tab
Payment Method Code	Added to table	*blank*	Added to new Invoice and Shipping tab
Payment Terms Code	Added to table	*blank*	Added to new Invoice and Shipping tab

Known issues (to be fixed in next minor update)

The Payment Method Code and Payment Terms Code fields are not populated with information from the customer selected in the Bill-To Customer No.field.



Job Card - General tab



Job Card - Invoice and Shipping tab

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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

Set Up Jobs, Prices, and Job Posting Groups (docs)

Bank Account Statement report

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

Bank reconciliation is a critical accounting task for most businesses because it helps make sure that everything is registered, and that the cash positions are correct. The report for the posted bank reconciliations (bank account statements) has now been improved to allow for more efficient validation and auditing.

Feature details

The **Bank Account Statement** report on the posted bank reconciliations has been modified so it now shows a more detailed snapshot of the bank information as of the time when the bank reconciliation was posted. New fields, **G/L Balance**, **Outstanding Payments**, and **Checks**, make it easier to validate and audit.

Find the Bank Statement Report in the **Bank Statements** list (posted bank reconciliations list).

Block VAT and General Posting Setups

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

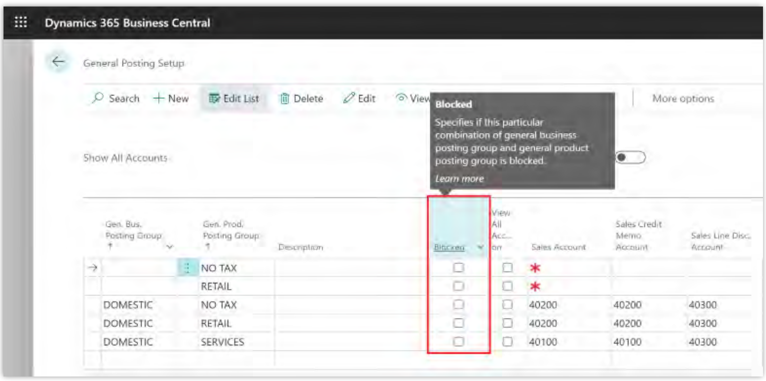
Business value

When you start using Business Central with your company's data, you want to get started fast. During the learning phase, you might have made mistakes in how you set up value-added tax (VAT) posting, tax posting, or general posting. Also, company policies might change, resulting in making some posting setups obsolete. Blocking such setups helps users comply with company posting policies. This way, you're of assured consistent posting, because only the valid setup can be used.

Feature details

To support you in getting started fast, Business Central will show you notifications if you are missing general ledger (G/L) accounts in posting groups or posting setups, such as the **VAT/Tax Posting Setup** page or the **General Posting Setup** page. You can turn this on or off using the *G/L accounts missing in posting group or setup* notification in the **My Notifications** page, which is part of the **My settings** page.

To take you directly to the relevant posting group or setup that is missing a G/L account, Business Central will automatically create those posting setups, using the posting groups in the document or journal you're currently working on. At this point, you might just fill in the missing G/L accounts: Then, later, when you further refine the setup, you might realize this setup was wrong. Business Central does not allow the deletion of VAT posting setup and general posting setup when there are entries created based on such configurations. But now you can use the **Blocked** field in the **VAT/Tax Posting Setup** or **General Posting Setup** page to prevent users from mistakenly using old, no longer relevant setup for new postings.



Shows new Blocked field in General Posting Setup 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.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Set up posting groups on the go (docs)

Change default company bank account on sales and service documents

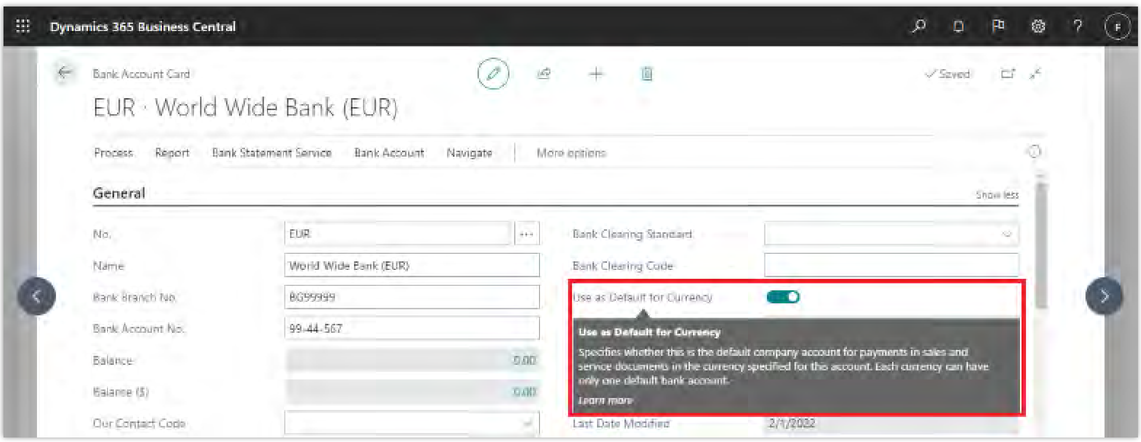
Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

Companies today use multiple bank accounts at different banks, which reduces the costs of handling financial transactions, limits currency risks, and so on. Also, more and more companies use electronic sales invoices that need to include the bank account that the company expects to get paid. Being able to change the bank account on sales and service documents adds flexibility to directing customer payments.

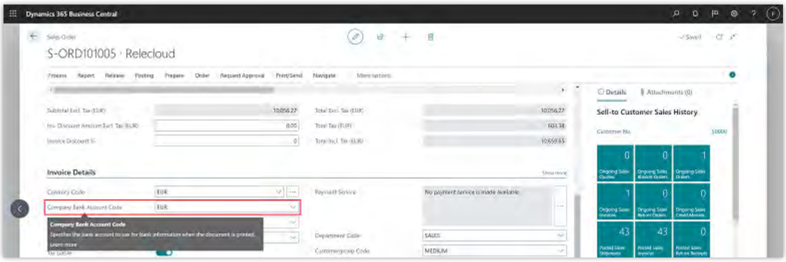
Feature details

You can now set default bank accounts for companies, and for individual currencies, by choosing **Use as Default for Currency** on the **Bank Account** page.



Show new Use as Default for Currency field on Bank Account Page.

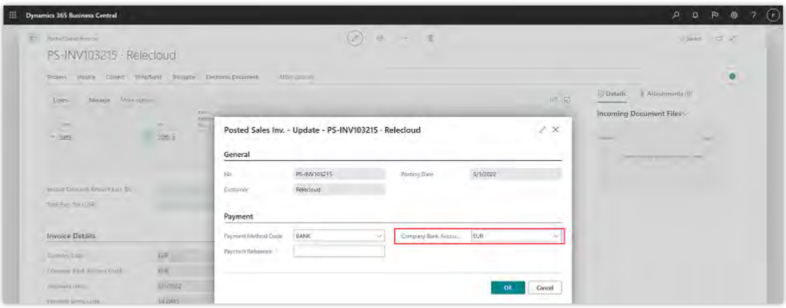
When an order processor creates a sales document, the default bank account is automatically assigned based on currency specified in the **Company Bank Account Code** field.



Shows company bank account selection on sales order.

When you post sales or service documents, the selected bank account is copied to the **Company Bank Account Code** field on the posted documents. Users who have the appropriate permissions can change the default bank account by choosing a different account in the **Company Bank Account Code** field.

Printed documents also contain details about the selected bank account.



Show company bank account on Update posted document page.

Additionally, partners can extend bank account selection and defaulting logic on sales documents to fit the needs of specific industries and customers.

Tell us what you think

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Thank you for your idea

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Check amounts for proposed payments and settlements

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

Business value

This feature provides improved efficiency and prevents users from making mistakes when they create documents.

Feature details

We're adding support for including data from other areas, such as bank documents, credits, cash desks, or advances, to correctly calculate the amount that is already proposed for payment or settlement for a given customer, vendor, or employee entry, or a purchase advance.

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.

Check documents and journals in while you work

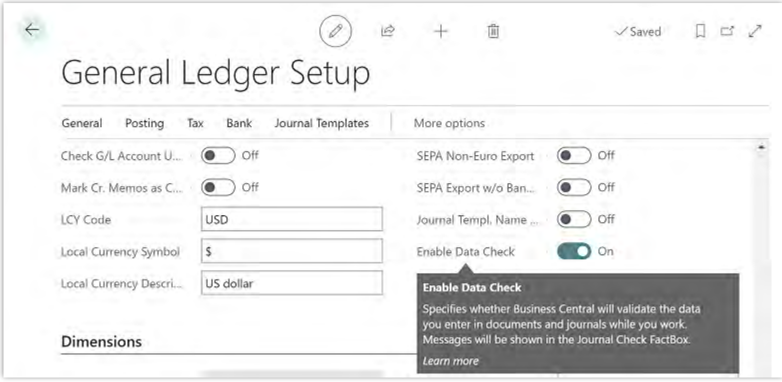
Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

To alert you about issues with data in documents and journals that can prevent you from posting, we've introduced validations that identify issues right away. Early, unobtrusive visual indications that there is a problem can help improve productivity and save time.

Feature details

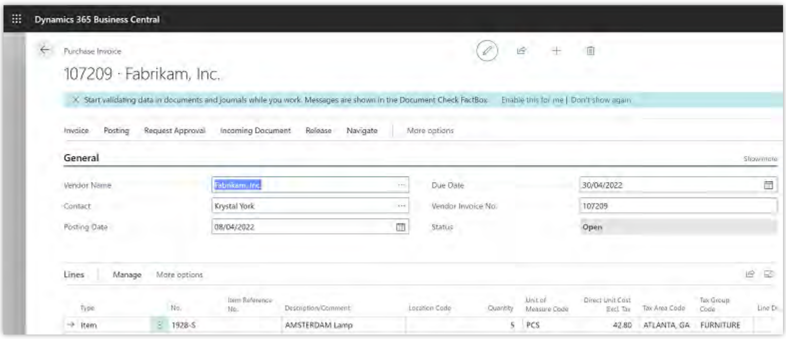
If your administrator enables the **Feature: Check documents and journals while you work** feature on the **Feature Management** page, Business Central will validate the data you enter on documents and journals while you work. If you're just reviewing documents while approving them, this capability may not be of use to you. If that's the case, your administrator can turn off the **Enable Data Check** toggle on the **General Ledger Setup** page.



Shows new Enable Data Check option in General Ledger Setup page

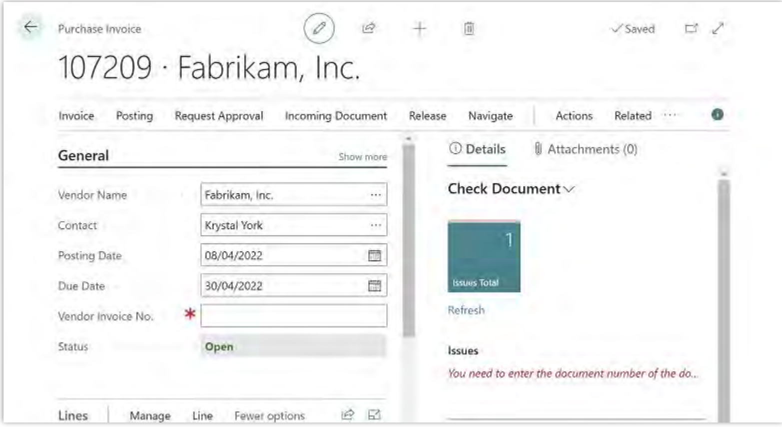
NOTE This feature will be turned on by default in a future release. When that happens, the **Feature: Check documents and journals while you work** option will no longer be available on the **Feature Management** page. You'll be able to turn the feature on or off by using the **Enable Data Check** toggle on the **General Ledger Setup** page.

If you turn on the **Enable Data Check** toggle on the **General Ledger Setup** page, a notification will display on documents where the check document capability is available.



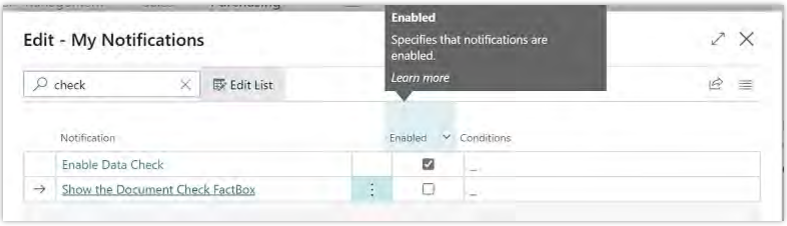
Shows on Purchase invoice page that allows user to show Document Check FactBox.

If you choose **Enable this for me** in the notification, the **Document Check** FactBox will appear, and Business Central will start checking the document for issues while you enter information. The **Issues Total** tile in the FactBox shows the total number of issues that Business Central found. You can choose the tile to open an overview of the issues.



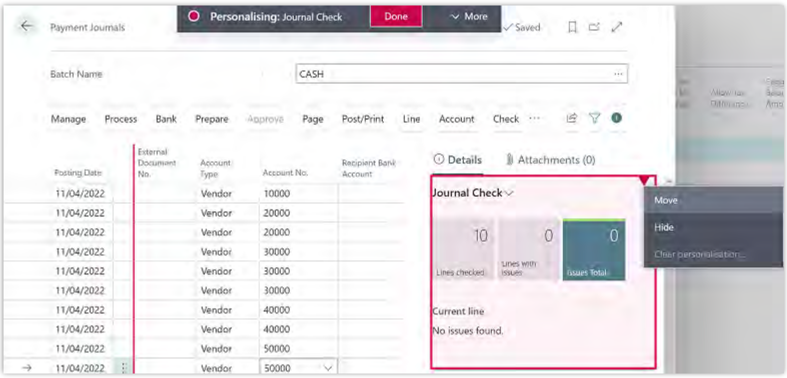
Shows Document Check FactBox on Purchase Invoice.

If you want to stop using **Document Check** you can turn off the **Show the Document Check FactBox** toggle on the **My notifications** page.



Shows how to disable Show the Document Check FactBox notification in My notifications page.

NOTE The **Journal Check** FactBox is always enabled for journals. You can hide the FactBox by personalizing the page.



Shows Journal Check FactBox in General Journal page.

NOTE You must have the **Feature: Check documents and journals while you work** feature enabled in the [Feature Management](#) page to use this capability.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

[Entering Data](docs) (docs)

Consolidate customer and vendor balances

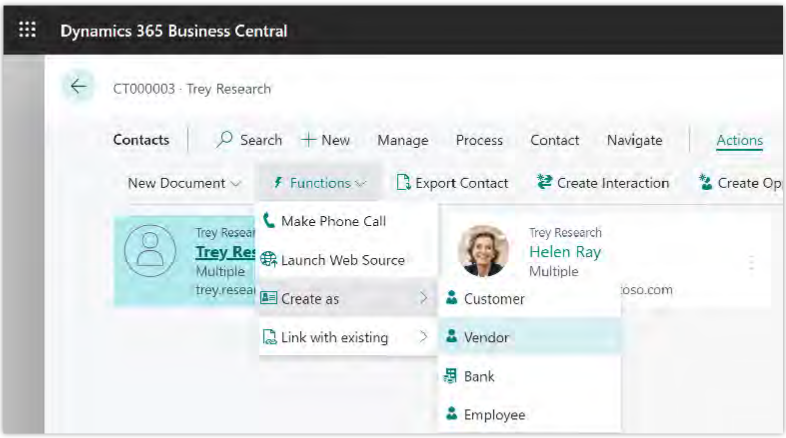
Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

A company that you do business with might be both a customer and a vendor. When that's the case, you can avoid making unnecessary payments or receipts and save on transaction fees by consolidating the customer and vendor balances.

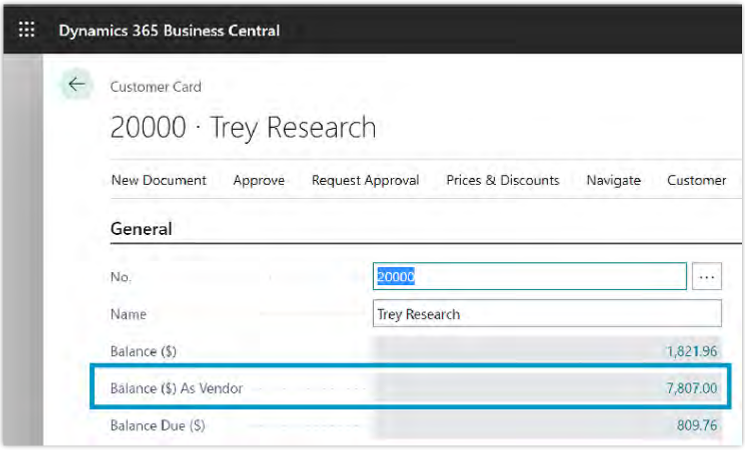
Feature details

You can turn a contact company into a customer or vendor by using the **Create as Customer** or **Create as Vendor** actions on the **Contact Card** page. This link is a prerequisite for seeing the **Balance as Vendor** field on the **Customer** page and the **Balance as Customer** field on the **Vendor** page.



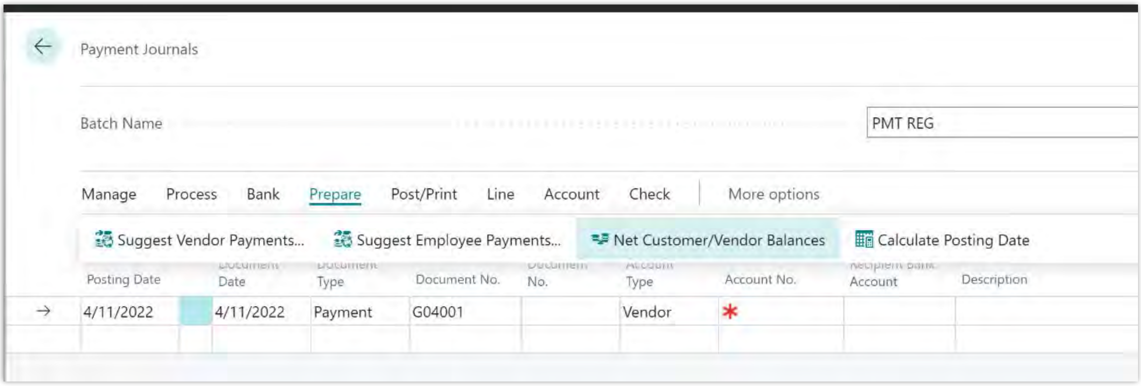
Shows Create as, Vendor functions to create a vendor from contact.

The **Customer Card** page offers the **Balance as Vendor** field, and the **Vendor Card** page includes the **Balance as Customer** field for companies that were created or linked to the same contact company.



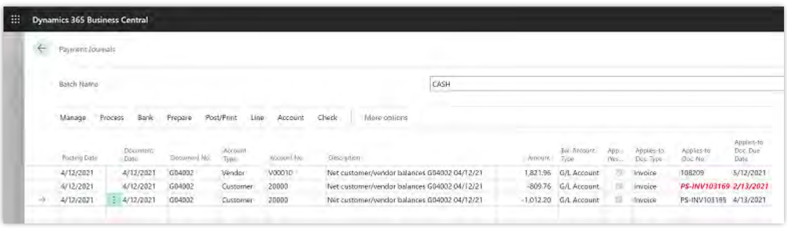
Shows Balance As Vendor field when customer is created as a vendor.

On the **Payment Journal** page, you can use the **Net Customer/Vendor Balances** action to net the customer and vendor balances for the company.



Shows Net Customer/Vendor Balances action on Payment Journal page.

The **Net Customer/Vendor Balances** action creates payment journal lines to which the net balances for a customer and vendor are linked.



Shows payment journal lines that the Net Customer/Vendor Balances action creates.

Tell us what you think

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Thank you for your idea

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Finding documents and entries efficiently

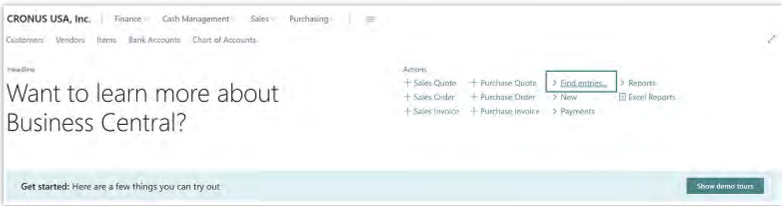
Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

Getting a fast answer to a customer on the status of an order, quickly finding a vendor invoice's due date based on the invoice number, or tracking down a purchase order for an item based on its serial number are of utmost importance in today's fast-paced world.

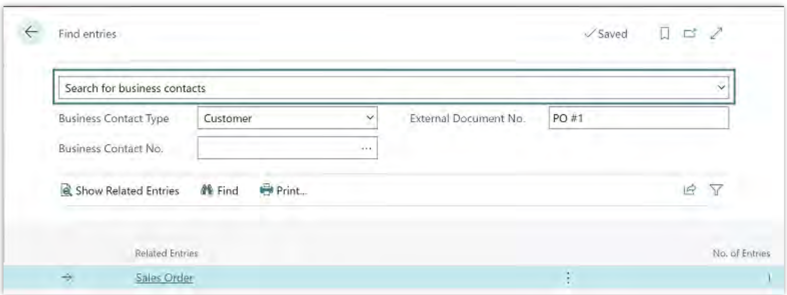
Feature details

Finding related documents and entries is an existing capability of Business Central that you can use to track entries that are generated during the posting of specific transactions. The Find Entries feature has been available on most pages that display posted document or document entries, but now it's also available on all Role Centers.



Shows Find Entries on Business Manager role center page.

You can easily access the Find Entries feature by using the **Ctrl+Alt+Q** shortcut key combination anywhere in Business Central.

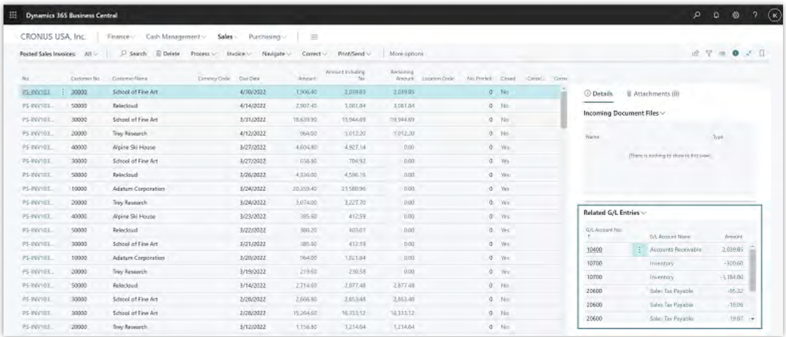


Shows update Find Entries page.

You can use the **Find Entries** feature to search in the context of a specific posted document, where it will show entries created for that document. You can also use it for broader searches, such as the following:

- **Search for documents** using a posted document number or external document number to find a specific posted or unposted document and related entries.
- **Search for business contacts** and business contacts related document or specific document using an external document number.
- **Search for item references** using serial or lot numbers to find all documents that include an item with those numbers.

Pages for posted documents and ledger entries, such as the **Posted Sales Invoice** or **Customer Ledger Entries** pages, show the general ledger entries related to a specific document or entry, even without using **Find Entries** page.



Shows new Related G/L Entries FactBox on posted documents page.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Finding Related Entries for Posted Documents (docs)

Fixed Quantity in product bills of materials

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

You can ensure that the consumption of a component is the same, regardless of the scrap or output quantities.

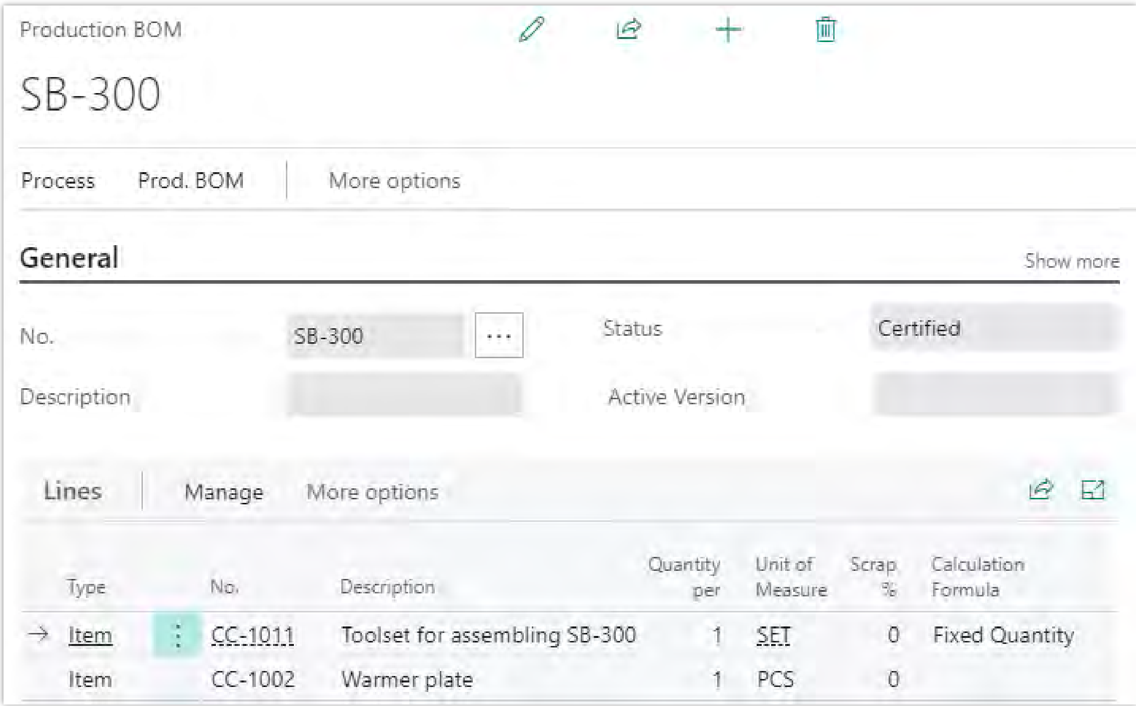
Feature details

You can select the **Fixed Quantity** option in the **Calculation Formula** field on production BOM lines, planning components, and production order components to ensure that the consumption of a component is the same.

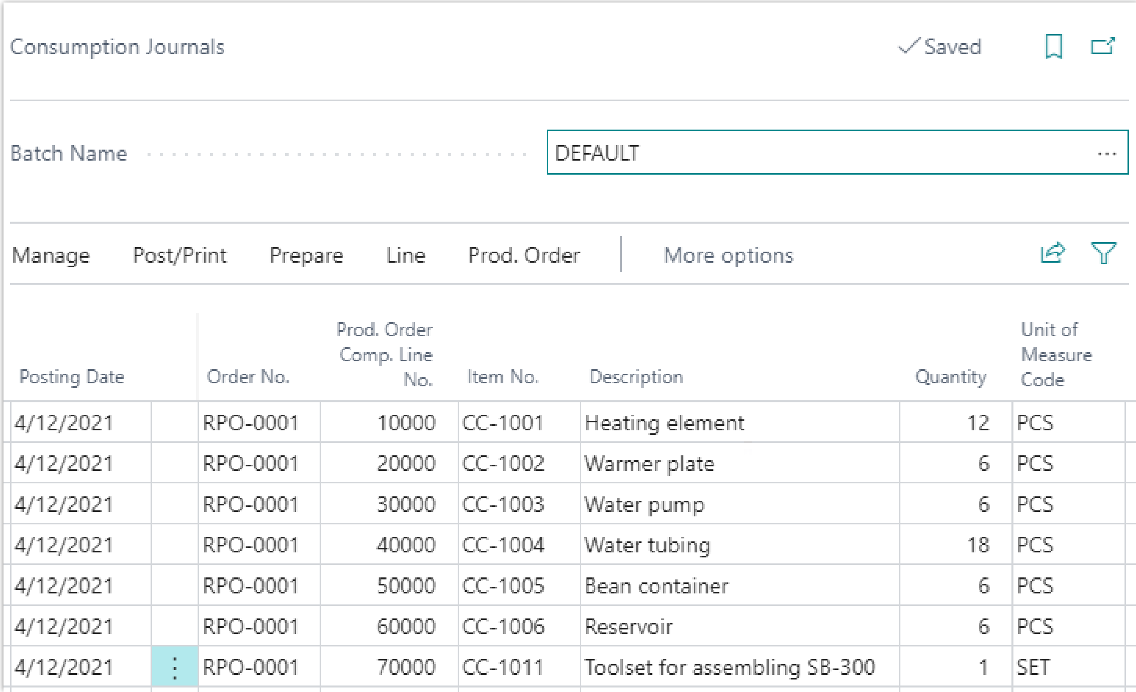
You can choose from the following values in the **Calculation Formula** field:

- **Blank**: The quantity is not calculated.
- **Length**: Quantity = Length * Quantity per
- **Length * Width**: Quantity = Length * Width * Quantity per
- **Length * Width * Depth**: Quantity = Length * Width * Height * Quantity per
- **Weight**: Quantity = Weight * Quantity per
- **Fixed Quantity** = Quantity Per

In production order components, when the **Calculation Formula** field is set to **Fixed Quantity**, the **Expected Quantity** field value is always equal to the **Quantity Per** field. The scrap % that is defined on the same line is ignored. Fixed quantity is respected by the **Availability by BOM** report that will show the item as the bottleneck if the available quantity is less than the quantity in the **Quantity Per Parent** field. The **Able to Make Parent** and **Able to Make Top Item** fields always have blank values regardless of the available quantity. Fixed quantity is respected by the **Standard Cost Calculation** process. Lot size for the produced item impacts the cost allocated for one item.



Production BOM with Fixed Quantity



Posting Date		Order No.	Prod. Order Comp. Line No.	Item No.	Description	Quantity	Unit of Measure Code
4/12/2021		RPO-0001	10000	CC-1001	Heating element	12	PCS
4/12/2021		RPO-0001	20000	CC-1002	Warmer plate	6	PCS
4/12/2021		RPO-0001	30000	CC-1003	Water pump	6	PCS
4/12/2021		RPO-0001	40000	CC-1004	Water tubing	18	PCS
4/12/2021		RPO-0001	50000	CC-1005	Bean container	6	PCS
4/12/2021		RPO-0001	60000	CC-1006	Reservoir	6	PCS
4/12/2021	⋮	RPO-0001	70000	CC-1011	Toolset for assembling SB-300	1	SET

Consumption Journal with Fixed Quantity

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.

Introducing Finance Charge Interest Rate - Czechia

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

Business value

Due to legal requirements, we're replacing the Czech local functionality for multiple interest rates with the Finance Charge Interest Rate functionality in the base app.

Feature details

For each finance charge term code, you can specify multiple interest rates so that you can calculate finance charges with multiple interest rates for a specific period. This is helpful if you charge different interest on payments that are late. The interest calculation is the same for each financial charge, with variation only in the rate of interest for a specific period. If multiple interest rates are not set up, then the interest rate and period that is defined in the **Finance Charge Terms** and **Reminder Terms** pages for the whole period of calculation will be used.

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.

Log emails using a shared mailbox and Graph API

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

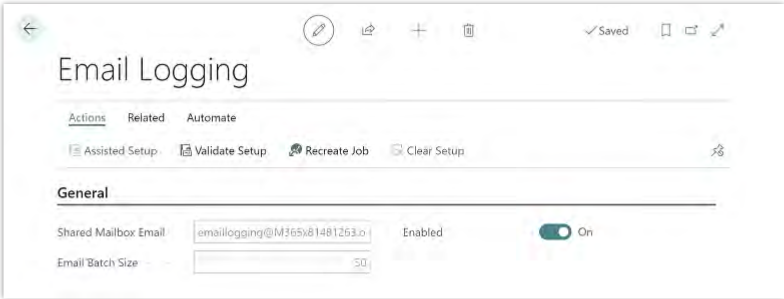
Get more out of the communications between salespeople and your existing or potential customers by tracking email exchanges and turning them into actionable opportunities. Business Central can work with Microsoft Exchange Online to keep a log of the inbound and outbound messages.

Feature details

After setting up a shared mailbox and mail flow rules in Exchange Online and enabling Feature Update: Email logging using the Microsoft Graph API, you can go to the **Assisted Setup** page and start the **Set up email logging** guide to setup email logging in Business Central using a shared mailbox and Graph APIs. There are three simple steps in the guide:

1. Confirm you've set up a shared mailbox and mail flow rules for email logging.
2. Enter the shared mailbox to use for email logging and validate the connection.
3. Finish the guide and start logging email interactions between your salespeople and your contacts.

Alternatively, you can use **Email Logging** page to review and validate your setup and view email logging activities.



Shows new email logging page.

NOTE You must have the **Feature Update: Email logging using the Microsoft Graph API** feature enabled in the [Feature Management](#) page to use this capability.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

[Track Email Message Exchanges Between Salespeople and Contacts](#) (docs)

Mail account scenarios for CZ Advance Payments (Czechia)

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

Business value

With this update, communication with your contacts becomes more efficient because you can send advance payments and advance documents by email.

Feature details

In this release wave, you'll be able to send advance payments and advance documents by email.

The new email capability adds support for assigning scenarios to individual email accounts. The requirement is to add the ability to define scenarios for the following types of documents:

- Sales Advance Invoice
    - You can send a sales advance document.
- Sales Tax Advance Document
    - You can send a sales tax invoice/credit note document.

We're transferring report settings to the standard **Report Selection** page, where you can define additional parameters for sending emails such as the following parameters:

- Use for Email Body
- Use for Email Attachment
- Email Body Layout Description

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.

Map to Dataverse option sets such as payment terms, freight terms, and shipping agents without code

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 1, 2022	Apr 2022

Business value

Payment terms, shipment methods, and shipping agents can change along with the environments in which businesses operate. To react quickly to changing business conditions, businesses must be able to quickly and cost effectively change their payment, shipping, or freight policies across their business systems.

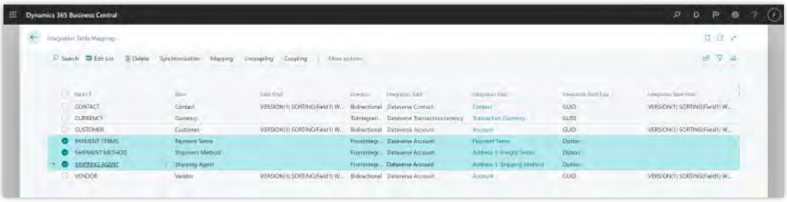
Feature details

You can manually map payment terms, freight terms, shipping methods, and shipping agents between Business Central and Microsoft Dataverse.

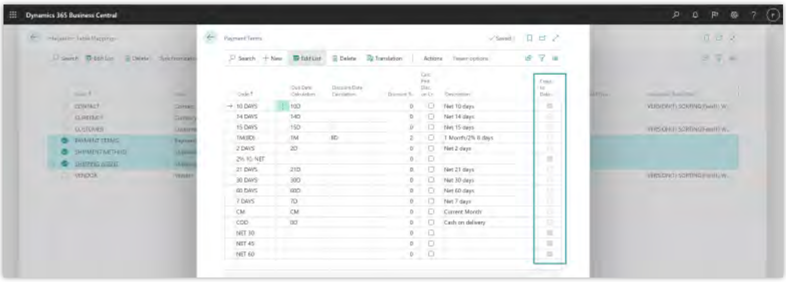
If you enable the **Feature Update: Map to option sets in Dataverse without code** feature in Feature Management in Business Central, you will no longer need to do code customizations to synchronize payment terms, shipment methods, and freight terms. The feature update will add integration table mappings for payment terms (PAYMENT TERMS), shipment methods (SHIPMENT METHOD), and shipping agents (SHIPPING AGENT).

Because payment terms, shipment methods, and shipping agents are handled as standard integration table mappings, you can view which payment terms, shipment methods, and shipping agents are coupled using the **Coupled in Dataverse** column.

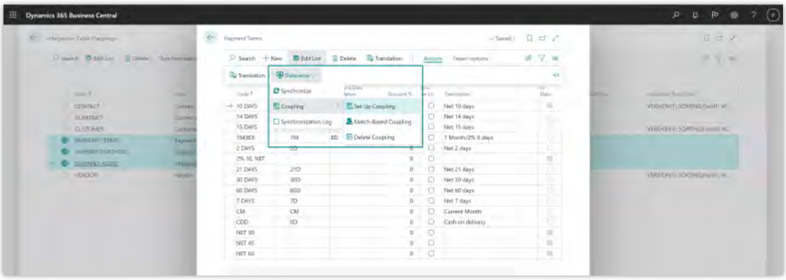
You can synchronize payment terms, shipment methods, and shipping agents data by using the **Synchronize** action, set up or delete coupling by choosing the **Coupling**, **Set up coupling** or **Delete coupling** actions, or do a match-based coupling by choosing the **Match-Based Coupling** action.



Shows integration table mappings for payment terms, shipment methods, and shipping agents.



Shows Coupled to Dataverse column on Payment Terms page.



Shows Dataverse action group on Payment Terms page.

NOTE You need to have **Feature Update: Map to option sets in Dataverse without code** feature enabled in [Feature Management] page to use this capability.

Tell us what you think

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Thank you for your idea

Thank you for submitting [this idea]. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

More control over deferrals posting

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

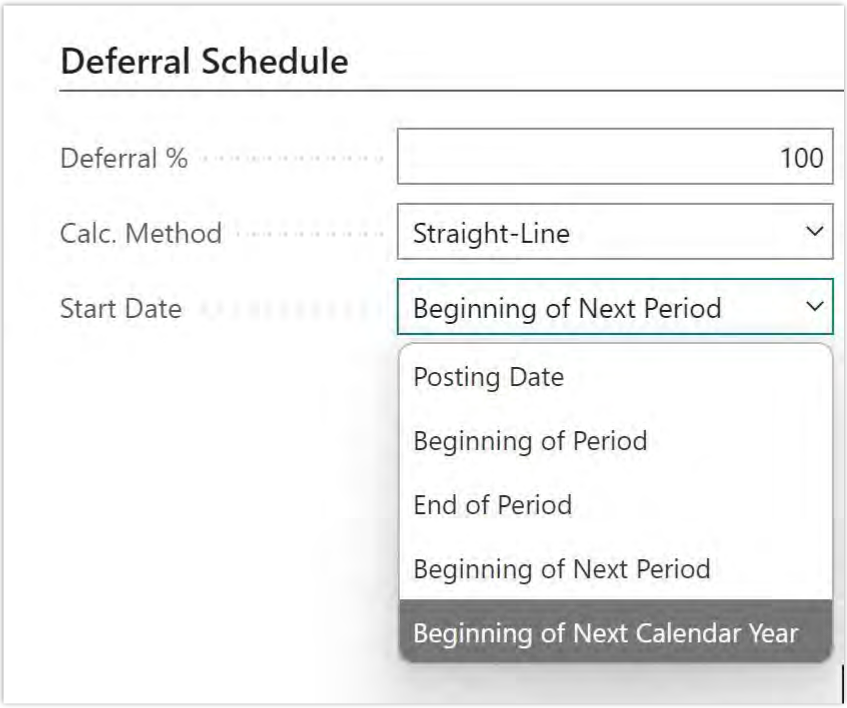
Business value

People use deferrals to recognize a revenue or an expense during a period that is different from the one in which the transaction was actually posted. Most accounting controls are focused on the current accounting period. The deferrals functionality lets you automatically defer revenues and expenses over a specified schedule and multiple accounting periods, giving accountants more control over when people post deferrals.

Feature details

You can define periods during which you allow people to post deferrals for specific users on the **G/L Setup** page, and for users on the **User Setup** page by entering dates in the **Allow Deferral Posting From** and **Allow Deferral Posting To** fields. This lets people post deferral entries in a future period, even though the Allow Posting From/To fields block other entries.

For deferral templates, you now have an option to specify **Beginning of Next Calendar Year** as the starting date.



New option for Start Date: Beginning of Next Calendar Year.

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.

New Accountant profile (Czechia)

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

Business value

Simplification of how users work.

Feature details

Functionality for finance staff in the Czech Republic who perform day-to-day work and management reporting. Use this profile to find most of the Czech local functionality for finance, fixed assets, sales, purchase, and more capabilities.

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.

New UI for entering demand forecasts to add support for variant code and other improvements

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

Accurate demand forecasting gives businesses valuable insight into their position in the market, which helps decision makers shape their strategies for pricing, business growth, and market potential. The ability to include the right level of detail on item variants in demand forecasts unlocks planning capabilities and reduces lead times for companies that don't have an inflow of sales orders and manage many nearly identical items.

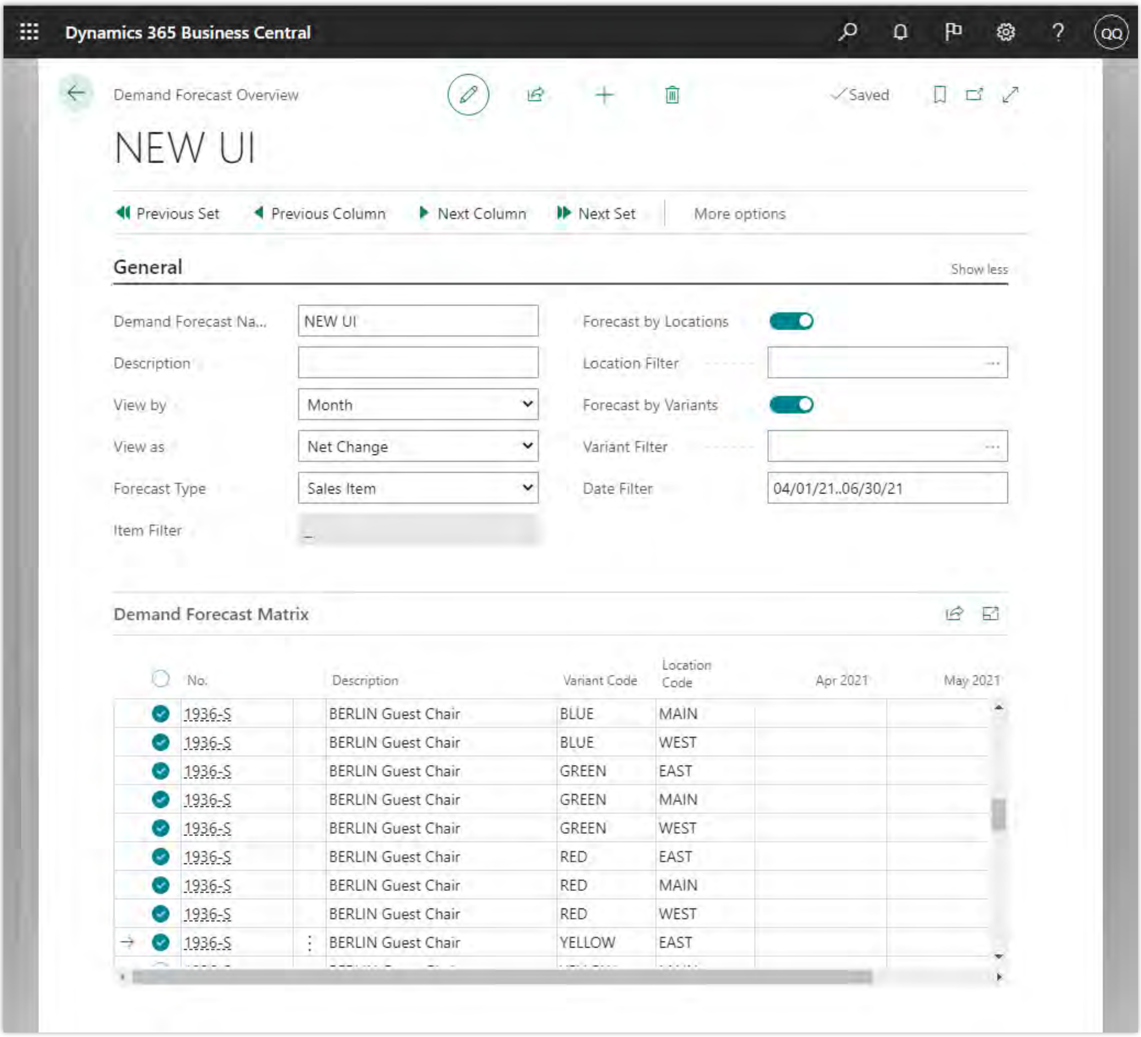
Feature details

Item variants are a great way to keep your list of items under control, especially if you have a large number of items that are almost identical and vary only in color, for example. Rather than setting up each variant as a separate item, you can set up one item and then specify the various colors as variants of the item.

You can already register the anticipated demand not only with respect to locations and dates, but with item variants as well in the **Demand Forecast Entries** page directly or use the **Edit in Excel** action for bulk editing.

With 2022 release wave 1, you can define the right level of details in the **Forecast by Location** and **Forecast by Variant** fields in the **Demand Forecast Overview** page. Notice that filters by date, locations, items, as well as forecast type are stored in the **Demand Forecast Name** table. So you can easily stop and continue your work later.

Existing customers must activate the new experience in the **Feature Management** page: *Feature Update: Enable a new user experience for creating demand forecasts*. For new customers of Business Central, this experience is enabled by default.



Demand Forecast Overview page with enabled location and variant.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Create a Demand Forecast (docs)

Report selection for projects

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

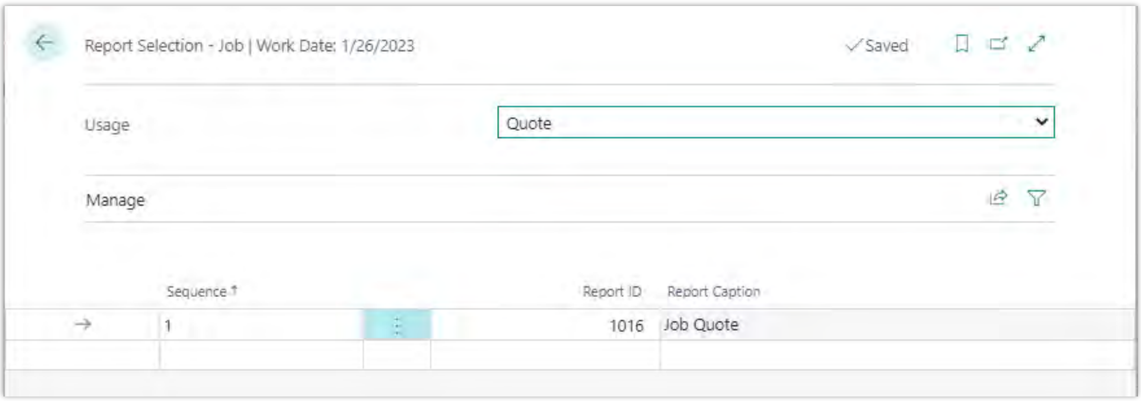
The Report Selections for Jobs page lets users specify which report object will be used to print job quotes if you use the Jobs module to manage your projects.

Feature details

Use the in-product Search to open the new **Report Selection - Job** page. The default configuration will use report 1016 **Job Quote**, but you can change this default behavior. You can also add reports to the **Report Selection - Job** page if you want to print more than one report per document type, for example.

In this version, you can only specify **Job Queue** as the value for the **Usage** field.

For more information, see [Report Selection]



Report Selection - Job.

Thank you for your idea

Thank you for submitting [this idea]. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

[Report Selection in Business Central] (docs)

Set default dimensions on locations

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

Dimensions are values that categorize entries so you can track and analyze them on documents, such as sales orders. For example, dimensions can indicate the department or project an entry came from. That can help people avoid making a mistake and having to enter dimension manually on the transaction level if all goods are coming out of a single location and department.

Feature details

You can now set default dimensions for a location on the **Location Card** page by choosing **Location**, and then **Dimensions**. The location's default dimensions are copied to journals and documents when you specify the location on a line, but you can delete or change the dimension on the line if needed. You can require that people specify dimensions for specific locations before they can post an entry. You can also include location dimension values in **Default Dimension Priorities** and **Dimension Combinations** for combinations of priority and dimension rules.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Set Up Locations (docs)

Support inventory pick and warehouse pick operations for jobs

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

Enable internal warehouse activities for jobs to ensure an effective flow through the warehouse and to organize and maintain company inventories.

Feature details

The warehouse activity of picking items before they are consumed is performed in different ways, depending on how warehouse management features are configured. The complexity can rank from no warehouse features, through basic warehouse configurations for order-by-order handling in one or more activities, to advanced configurations where all warehouse activities must be performed in a directed workflow.

If you decide to organize and record your picking activity with warehouse documents, you choose the **Require Pick** field on the **Location Card** page. This field specifies whether you must perform pick activities in the warehouse at this location.

NOTE Although the setting is called **Require Pick**, you can still post consumption directly from the job journal line at the location. If your location is set up to require pick processing but not shipment processing, you use the **Inventory Pick** page to organize and print the picking information, and enter and post the result of the pick, which in turn posts the consumption of the items.

If your location is set up to require both pick and shipment processing, meaning that you have chosen both the **Require Pick** and **Require Shipment** fields on the **Location Card** page, you use the **Warehouse Pick** page to handle the pick. The warehouse pick functions similarly to the inventory pick, except that instead of posting the picking information you register the pick. This registration process does not post the consumption, but merely makes the items available for post. As a warehouse manager, you can use a pick worksheet to organize pick information before creating the individual warehouse pick instructions.

Tell us what you think

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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.

Create bank deposits

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 7, 2022	Apr 2022

Business value

With bank deposits, you post all transactions that are included in a single bank deposit. If you post a lump sum, it makes bank reconciliations easier to do. Also, if you need to register deposits that cover more than one business transaction, you'll probably find that you prefer to use deposits instead of general journal entries.

Feature details

With bank deposits, you can maintain a transaction record that contains information that can be applied to outstanding invoices and credit memos.

By using bank deposits, you can easily view all transactions included in a deposit. And it makes bank reconciliation easier. This makes deposits the preferred approach, compared to normal general journal entries for registering deposits that cover more than one business transaction.

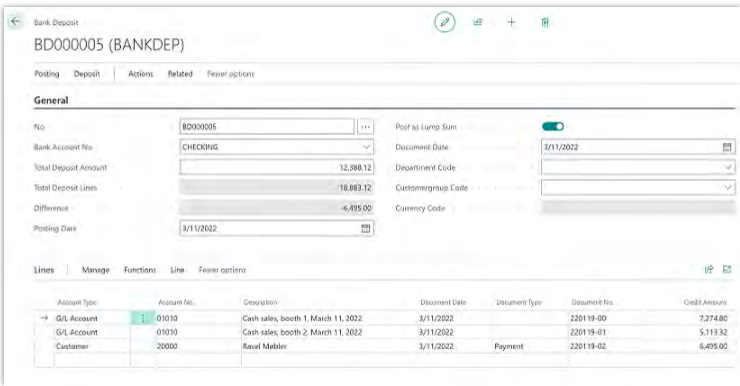
The **Bank Deposit** page specifies the bank account deposited into, total deposit amount, posting date, document date, dimensions, currency code, as well as the deposit lines.

Deposit lines contain information about the individual deposited items, such as checks from customers, cash sales revenue, or refunds from vendors. This information includes the document date and number, account type and number, and amount. The total of the amounts on the deposit lines must add up to the total amount of the deposit entered on the deposit header before posting the deposit.

After you enter information about a deposit and add deposit lines, you must post the deposit to update the relevant ledgers, such as the bank ledger, general ledger, or customer ledger. The details about posted bank deposits are stored for future reference and are available on the **Posted Bank Deposits** page. Alternatively, you can also access the details when you do bank reconciliations.

The **Deposit** report displays customer and vendor deposits with the original deposit amount, the amount of the deposit that is still open, and the amount applied. The report also shows the total posted deposit amount to reconcile.

Find the bank deposits capabilities under **Cash Management** on the Business Manager and Accountant Role Centers, but you can also use Tell Me to search for the **Bank Deposits** page.



Bank deposit card page

Tell us what you think

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Standardizing the bank reconciliation process in North American versions

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 7, 2022	Apr 2022

Business value

Bank reconciliation in North American versions is now done through the standard Bank Reconciliation page, which has been improved to support the same tasks as the Bank Rec. Worksheet did in those versions. The Bank Rec. Worksheet page that was specific to North American versions will be removed in April 2023.

Feature details

Bank reconciliation in the North American (NA) versions for the United States, Canada, and Mexico can be done either through the standard Bank Reconciliation page or with the Bank Rec. Worksheet page, which was missing some of the newer features that the Bank Reconciliation page offers. To standardize the bank reconciliation process, we have modified the Bank Reconciliation page, added a feature for deposits that is the same as we provide for the NA version today, and added capabilities to allow users to reconcile deposits.

In addition, header and footer fields help ensure that users have the same overview of outstanding checks and payments as they had in the NA versions. The Bank Statement Report (posted bank reconciliations) is improved to show more detailed information on the G/L balance and outstanding checks and payments than the current NA version of the Test reports. The standard version of the Test report is improved accordingly.

In the standard side-by-side bank reconciliation, all users can import bank statements (.csv files), use automatic matching, post and reconcile deposits, and get a better overview of related data during bank reconciliation through on-page information such as a test report as well as a more audit-friendly report for posted bank reconciliations.

A standardized version of deposits, called **Bank Deposits**, is available to all users. When you turn on the standardized bank reconciliation feature on the **Feature Management** page, you will also turn on Bank Deposits. You can still view posted deposits made with the old feature.

If you have used the Bank Reconciliation Worksheet page to do bank reconciliations you can still review your posted bank reconciliations and print reports for them.

In April 2023, users must use the Bank Reconciliation page for bank reconciliations. The Bank Rec. Worksheet and Deposits will no longer be available.

By default, the Bank Reconciliation page is turned on for new customers. To turn on the Bank Reconciliation Worksheet page and use it instead, you must turn off the new feature in **Feature Management**.

The following pages and reports are marked as Obsolete in this release:

- PAG 10120 Bank Rec. Worksheet
- REP 10407 Bank Rec. Test Report
- REP 10406 Bank Rec. Process Lines

For the Deposits feature, the following objects are marked as obsolete in this release:

- Page 10140 Deposit
- Table 10140 "Deposit Header"
- Page 10146 "Deposit List"
- Codeunit 10140 "Deposit-Post"
- Codeunit 10142 "Deposit-Post + Print"
- Codeunit 10141 "Deposit-Post (Yes/No)"
- Page 36646 Deposits
- Page 10141 "Deposit Subform"
- Report 10402 "Deposit Test Report"

Tell us what you think

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Two-digit year evaluates to 1950-2049 range

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

Business value

Users that enter a year as a two-digit number will get results that are closer to the year they expect.

Feature details

With 2022 release wave 1, users that enter a two-digit year in Business Central online see that input render in the range 1950-2049.

In previous releases, the default behavior was to follow the Windows settings, which would give different behaviors depending on the operating system.

For Business Central on-premises, no change is imposed, but you can use the server setting `CalendarTwoDigitYearMax` to achieve the same experience.

Shopify connector

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

Business value

Microsoft Dynamics 365 Business Central is teaming up with Shopify to help our customers create a better online shopping experience. Shopify provides merchants with an easy-to-use e-commerce solution, and Dynamics 365 Business Central offers comprehensive business management across finance, sales, service, and operations teams in a single application. Seamless connection between the two systems will synchronize order, stock, and customer information to ensure that merchants can fulfill orders faster and better serve their customers. The joint effort furthers the commitment of Business Central to connect data to help businesses adapt faster, work smarter, and perform better.

Feature details

Adapt faster

Connecting Dynamics 365 Business Central with Shopify will help merchants around the world to implement more agile online business processes, while keeping people focused on selling. With connected data across your online stores and business operations, you can rapidly respond to consumer demands to adjust product pricing and merchandising. With support for multi-tier pricing structures and multiple currencies, companies, and entities, Business Central easily supports multiple Shopify store scenarios.

Work smarter

Eliminating manual processes improves accuracy and lets people focus on taking care of customers. Connecting Shopify and Business Central improves visibility into stock, pricing, existing customers and their order histories, order status, billing, and payments. Better visibility means faster response to customer inquiries, timely returns and refunds, and more accurate order processing.

Perform better

Enhanced operational efficiency not only saves you time and reduces costs, it can also translate into better results and faster decision-making. You'll have the confidence to expand your online presence while minimizing overhead with automatic synchronization between systems for price changes, product updates, and customers. At the end of accounting periods, Business Central will help with the financial reporting and tax reporting required by local legislation.

Shopify Connector Features

Multiple Shopify shops connected to the same Business Central

- Each shop has its own setup, including a collection of products, locations used to calculate inventory, and prices lists.

Bi-directional synchronization of items/products

- Sync images, item variants, barcodes, vendor item numbers, extended texts, and tags.
- Export item attributes to Shopify.
- Use selected customer price groups and discounts to define prices exported to Shopify.
- Decide whether items can be created automatically or to only allow updates to existing products.

Synchronization of inventory levels

- Choose some or all of the available locations in Business Central.
- Update inventory levels on multiple locations in Shopify.

Bi-directional synchronization of customers

- Smart-map customers by phone and email.
- Use country-specific templates when creating customers, which helps ensure that tax settings are correct.

Import of Orders from Shopify

- Create customers on-the-fly, or use fixed retail customer to keep customer data in Shopify.
- Include orders created in other channels, such as Shopify POS or Amazon.
- Shipping costs, gift cards, tips, shipping and payment methods, transactions, and risk of fraud.
- Receive payout information from Shopify Payments.

Send fulfillment information to Shopify

- Include item tracking information.

Availability

This feature is available only for the online version of Business Central. It is not available for on-premises versions. We expect this feature to be available as an extension in all countries where Business Central is available. The extension will be pre-installed for new customers. Existing customers can download and install the extension from AppSource.

Tell us what you think

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Release and reopen multiple documents

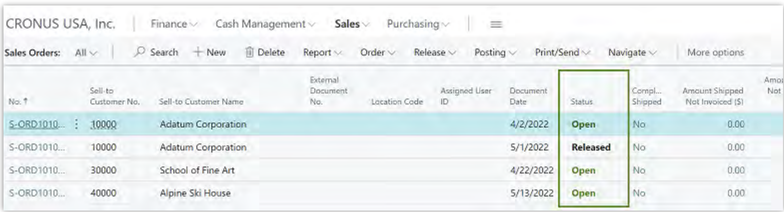
Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	May 2022

Business value

The status of documents indicates whether they're open, waiting to be approved, have been invoiced for prepayment, or have been released to the next stage of processing. When you finish working on a batch of documents, you can release all or some of them to the next stage in the process or reopen them for further processing, all in one go.

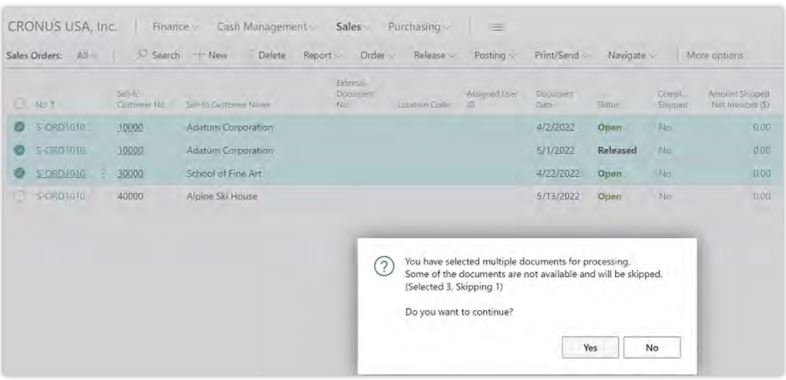
Feature details

To make it easier to quickly identify documents that are open or released, especially when viewing a list of documents, the Open and Released statuses have different font colors.



Shows different styling of Status column (Open in green, Released in bold).

When you release or reopen multiple documents, a confirmation will show the number of documents that are selected and the number that remain unchanged.



Shows new dialog confirming selection of documents to be released.

Progress is shown during the process of releasing and reopening documents, and if there are errors, they are shown on the **Errors Messages** page.

NOTE While this feature is in preview, you can only release and reopen sales documents in bulk. When 2022 release wave 1 is available, the feature will support all types of documents.

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.

Sync sales orders both ways in Business Central and Sales

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

Business value

Keep your sellers informed about possible shipment delays, inventory shortages, or other changes to the sales quotes and orders that you synchronize between Business Central and Dynamics 365 Sales.

Feature details

You can now synchronize sales orders between Business Central and Dynamics 365 Sales in both directions. For example, if a customer changes their mind about the product or quantity they ordered in Sales, you can automatically process the change to the order in Business Central by archiving the sales document and creating a new one. The same is true for changes in Business Central. For example, when prices, tax amounts, or expected shipment dates change, the changes are automatically synchronized to Sales. That helps keep your sellers up-to-date with the latest changes and the status of quotes and orders.

To enable synchronization of sales orders in both directions, choose the **Bidirectional Synch of Sales Orders** field on either the **Dynamics 365 Connection Setup** page or in the **Set up a connection to Dynamics 365 Sales** assisted setup guide.

The **Integration Table Mappings** page contains new mappings for the sales order header and lines. When you set up the initial connection for Sales, you can synchronize active orders between Business Central and Sales by using the **Full Synchronization** or **Match-based coupling** actions.

NOTE This feature and existing sales order integrations are mutually exclusive. You can use one or the other, but not both.

NOTE You must have the **Feature Update: Bidirectional Synchronization of Sales Orders** feature enabled in the [Feature Management](#) page to use this capability.

Tell us what you think

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Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Integrating with Dynamics 365 Sales (docs)

Improved and extensible Adjust Exchange Rates batch job

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 1, 2022	Jun 2022

Business value

When companies operate in multiple countries or regions, it's important that they can do business and run financial reports in more than one currency. Because exchange rates often change, businesses must periodically update the rates in Business Central. This feature update gives accountants additional control over how they adjust exchange rates. At the same time, it allows partners to extend and customize an exchange rate adjustment to meet the needs of specific industries or markets.

Feature details

You can now preview the effect that an exchange rate adjustment will have on posting before you actually post by choosing **Preview** on the **Adjust Exchange Rates** report request page. You can select whether you want a detailed (per entry) or summarized (per currency) posting to general ledger by choosing **Summarize Entries** on the **Adjust Exchange Rates** report. You can also pick how Adjust Exchange Rates will handle dimensions for unrealized gains and losses postings by choosing one of the following options in the **Transfer Dimension Values** field:

- **Source Entry**: G/L entries for unrealized gains and losses will have dimensions values transferred from the entry being adjusted.
- **By G/L Account**: G/L entries for unrealized gains and losses will have dimensions values transferred from the unrealized gains and losses G/L account's dimension settings source entry.
- **No Transfer**: G/L entries for unrealized gains and losses won't have dimensions values.

NOTE Feature is currently available only for developers and can't be turned on in production environments yet.

Tell us what you think

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Thank you for your idea

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Use different G/L accounts for payables and receivables transactions

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Mar 1, 2022	Jun 2022

Business value

Sometimes businesses want to post payable and receivable transactions to a different G/L account than the one that is specified on the customer or vendor posting group—for example, in a case where a transaction is for a bad debt. Controllers can define policies for posting these non-standard transactions, and accountants can change them during posting.

Feature details

You can enable alterations of default customer or vendor posting groups by choosing **Allow Alteration of Posting Group** on the **Sales and Receivable Setup** and **Service Mgt. Setup** pages for customer posting group changes, and the **Purchases and Payables Setup** page for vendor posting group changes.

On the **Customer Posting Groups** or **Vendor Posting Groups** pages, you can specify the posting groups to allow as substitutes by choosing **Substitutions**. Substitute posting groups can replace the default customer or vendor posting group specified for a customer or vendor.

After you set this up, you can pick among allowed substitute posting groups and change customer or vendor posting group when posting sales or purchase documents and journals. Changed, non-default, customer or vendor posting groups are copied to posted documents and journals, and payable or receivable G/L entries are posted to the G/L accounts specified for the substitutes.

When applying, for example, an invoice and payment that are posted to with different customer or vendor posting groups (different G/L accounts), Business Central transfers amounts between the G/L accounts to balance them.

A **Suggest Vendor Payments** report can now also be run using Vendor Posting Group as criteria for suggesting payments.

NOTE Feature is currently available only for developers and can't be turned on in production environments yet.

Tell us what you think

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Thank you for your idea

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Better with Microsoft 365

Overview

In 2022 release wave 1, we invest in a stronger reporting story through better integration with Excel where we'll use the Excel layout capabilities. We also further improve the support for collaborative business processes in Teams so you can bring Business Central pages into a Teams channel. Finally, we also enrich the information from Business Central that we present in Teams.

Enhancements to Microsoft Teams integration

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

Business value

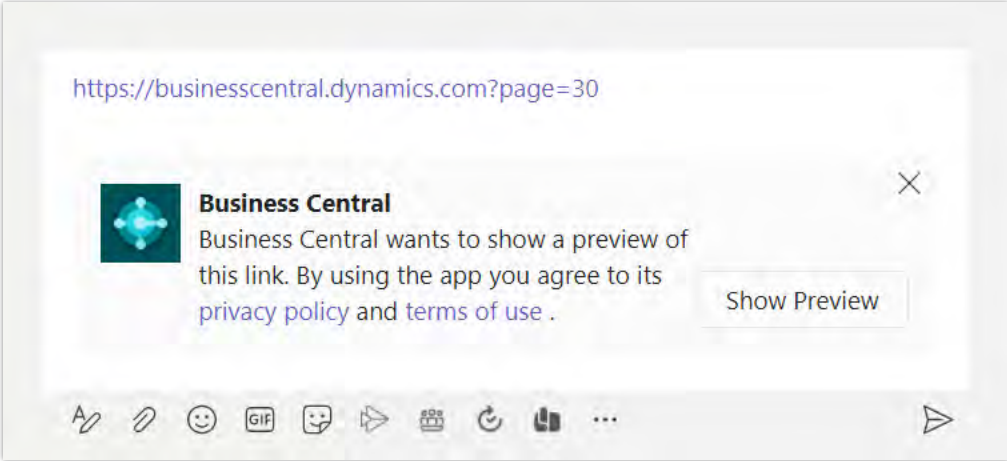
Teams perform better when they have access to insights and actions within their flow of work. The Business Central app for Teams allows users to access business data and act on it directly from Microsoft Teams.

Customers benefit from reduced context-switching and collaboration efficacy when they can do more inside Microsoft Teams.

Feature details

Easier app acquisition

When pasting a link to Business Central in the message compose area in Teams, a banner is now automatically displayed that suggests installing the Business Central app, so that a preview of the link can be shared as a compact and elegant card. This makes it easy for users to get the app with fewer steps.



The compose area in Teams showing the banner after a Business Central link was pasted.

More workspace

When a card is shared to a Teams channel, meeting, or group chat, the card includes a **Details** button that displays the details window inside Teams.

- This window now occupies more space on the screen, showing more fields and actions at once for greater efficiency.
- From the **Details** window, you can now open the full Business Central experience in the browser.
- To simplify the experience and allow a clear progression from card to details to separate window, the **Popout** button on cards has now been removed.

These enhancements are only available to Business Central online.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Outlook add-in – add email attachments to Business Central records

Enabled for	Public preview	General availability
Users, automatically	✔ Feb 1, 2022	Apr 2022

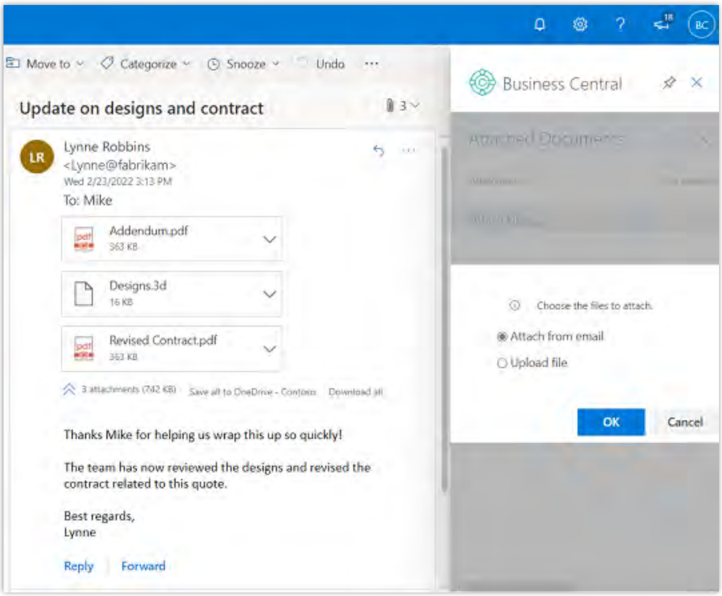
Business value

The email inbox often serves as a source of incoming files that initiate or unblock workflows, such as PDF invoices for payment, photos of damaged goods, customer requirements in Word documents, or part specifications listed in Excel. With the Business Central add-in for Outlook, you can remain in your flow of work and efficiently connect incoming files to business processes without leaving Outlook.

Business Central saves time and reduces context switching by helping you quickly connect email attachments to the business record they relate to, without leaving Outlook.

Feature details

The Outlook add-in now offers the option to copy email attachments to the record displayed in the add-in. For example, the add-in will automatically display the contact record that matches the current email sender, from which you can navigate to that customer's latest sales order. Once you have identified the order that the email relates to, the attachments feature can be used to copy files from the current email to that order.



A screen snippet showing an email in Outlook alongside the add-in copying files.

- Review and choose some or all of the email attachments to add to the record.
- After attaching a file, coworkers can instantly download and view the file from the Attachments FactBox in any of their Business Central clients. Or, they can open the file in OneDrive to share and collaborate with their department.
- The feature is available for any records that use the Attachments FactBox, such as a vendor, customer, purchase invoice, or sales order.
- Alternatively, purchase invoices can be sent to the incoming documents feature for processing.

Tell us what you think

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Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Using Business Central as your Business Inbox in Outlook (docs)

Share a file through OneDrive

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 7, 2022	Apr 2022

Business value

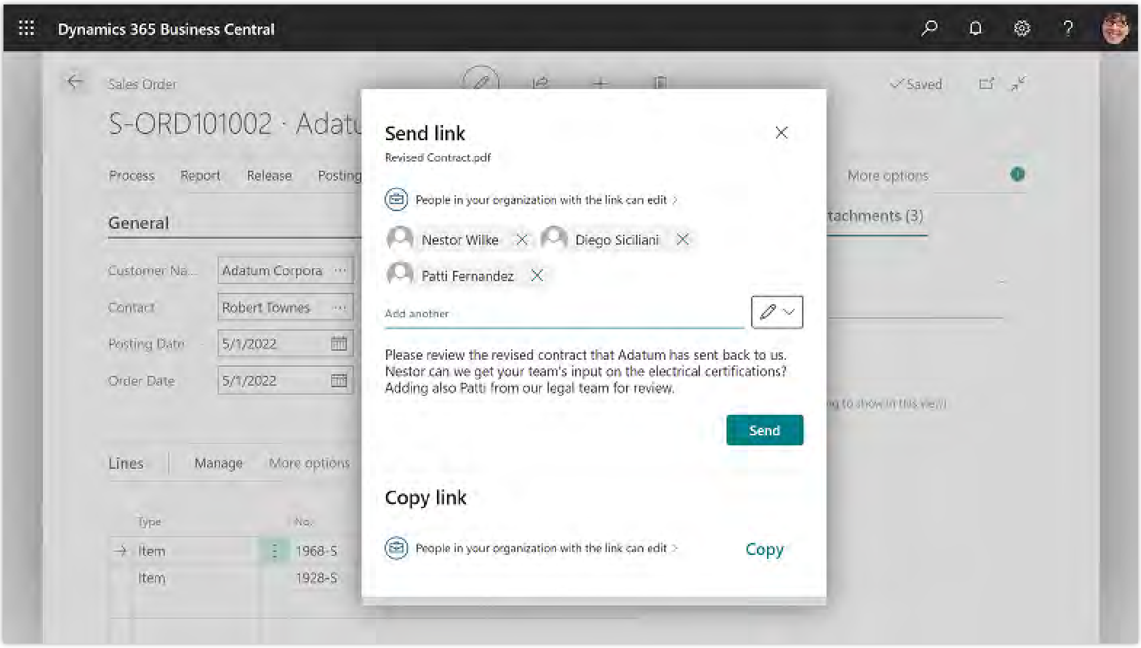
Bring the best of Microsoft's business and productivity suites together to initiate collaborative, review, and sharing activities without having to leave Business Central. Users benefit from a familiar sharing experience and reduce the need to download files to their device. This makes it easy to share files from the Report Inbox and document attachments through OneDrive for Business.

Feature details

For business users

To share a report from the Report Inbox or to share an attachment to a record, you can now choose the **Share** action. This action copies the file from Business Central to **OneDrive for Business**, then displays the file sharing dialog in Business Central with numerous options. At launch, these options include:

- Sharing a link to the document with one or more internal or external recipients.
- Copying a link to the document, so that you can send it using your preferred application.
- Adjusting whether recipients can view or edit the document.
- Preventing download of the file.
- Specifying the people who can use the link, such as only people in your organization with the link.



Business Central showing the OneDrive file sharing dialog.

Business Central grants access to the file in OneDrive for your chosen recipients: the permissions to the current record and file in Business Central remain unchanged.

For administrators

Global and SharePoint admins in Microsoft 365 can change their organization-level sharing settings that govern external sharing and the type of links that can be shared in the new file sharing window. If you have already configured this for your organization's use of OneDrive, SharePoint, and other Office applications, this will automatically also apply to Business Central.

File sharing is available for both Business Central online and on-premises. With Business Central online, file sharing is automatically enabled, but on-premises administrators must first configure the connection to OneDrive.

For developers

Business Central offers AL objects in the system and base applications that integrate with OneDrive. These have now been enhanced with the ability to display the new **Share** window and accompanying experiences. Developers have to write only minimal AL code when they need to share a Business Central file through OneDrive. This functionality is intended for interactive scenarios where users initiate the action during their session and not for automating silent file sharing.

A documented AL code pattern and guidelines are provided that developers can apply to any page or process used to represent files. This pattern consists of a **Download** action, **Open in OneDrive** action and **Share** action that developers can apply consistently across their extensions. For an example of this pattern applied in the business application, see the **Attachments** FactBox.

Try it out now

To experience sharing a file attached to a record, sign in to your Business Central online, open a sales order, and choose Attachments from the Order menu. Upload a file that applies to that order, then use the Share action in the Attachments page.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Opening Business Central Files in OneDrive (docs)

Outlook add-in popout window enhancements

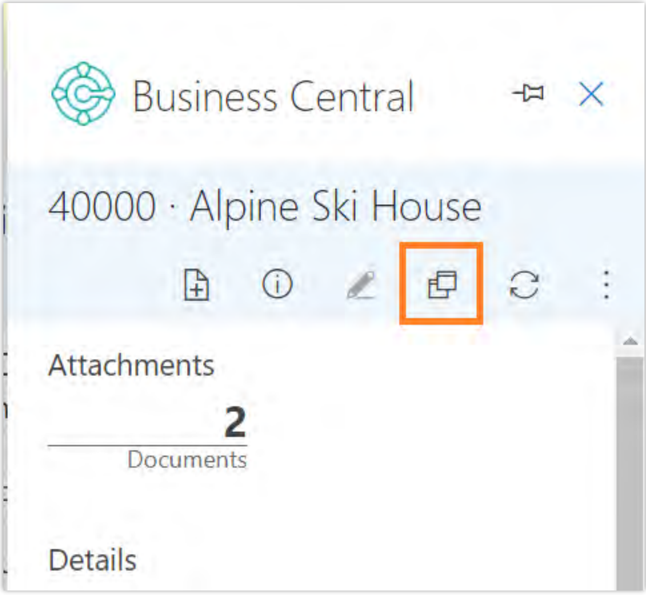
Enabled for	Public preview	General availability
Users, automatically	✔ Mar 9, 2022	Apr 2022

Business value

Business users who work in Outlook can take advantage of the Business Central add-in that surfaces insights directly in the workflow. While contact insights sit neatly in a slim pane alongside email, acting upon insights, such as creating a sales quote or adjusting a purchase invoice from within Outlook, often needs more workspace. The Outlook add-in now provides a richer experience when opening a record in its own window.

Feature details

Most pages displayed in the Outlook add-in include an action to open the page in a new window that can be resized or docked alongside Outlook.



The action to open in a new window from the Outlook addin contact insights pane.

The window now displays Business Central's signature user experience, similar to the Web client, and includes full capabilities that desktop users enjoy today, such as:

- Access to reports, wizard pages, and the FactBox pane.
- Modern list experience with filter pane, filtered views, on-demand data loading, faster scrolling, and resize columns.
- Improved efficiency with unhindered data entry, keyboard shortcuts, peek on related records, and cloud printing,
- Collaboration and sharing features such as Share to Teams, Copy link, Open in Excel, and opening or sharing files through OneDrive.
- A more flexible and accessible experience that adapts to the available space, whether you dock the window alongside Outlook or resize to full screen.

Tell us what you think

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See also

View a document from an email using the Document View add-in (docs)

A single tile to go to Business Central

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

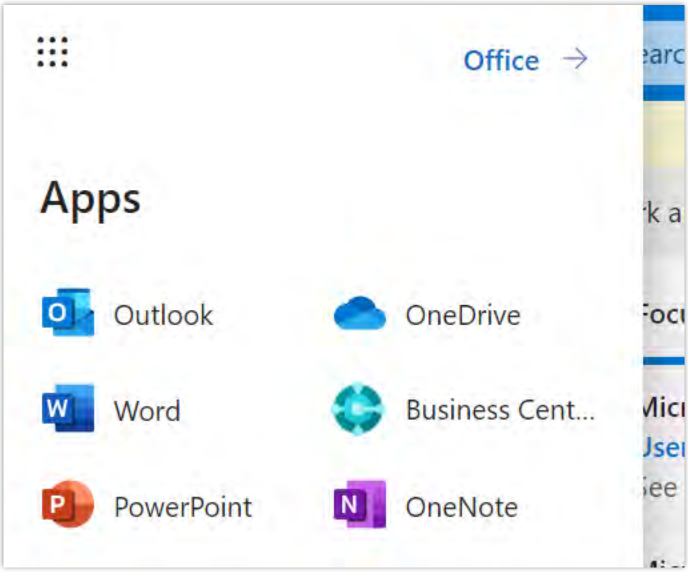
Business value

Users need a simple and familiar way to access the Business Central web application from across Office 365.

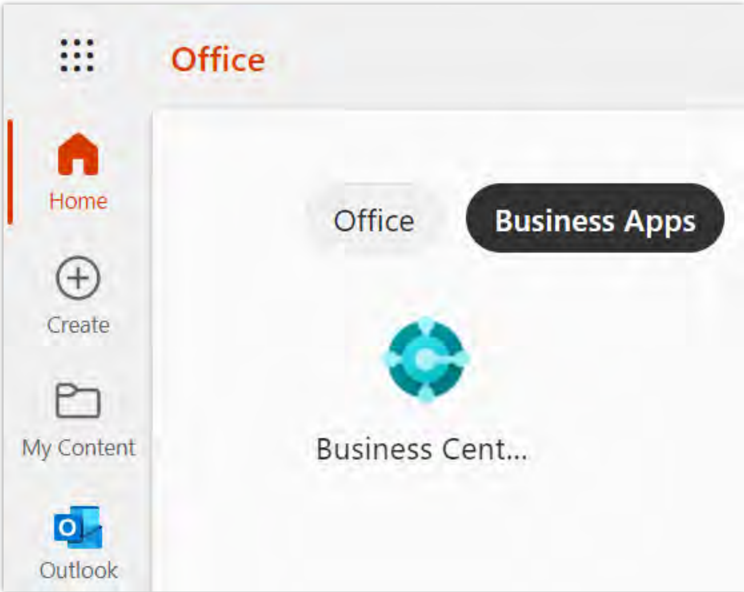
Feature details

Previously, customers operating both production and sandbox environments could use two separate Business Central tiles to access the Business Central web client from another Office application.

Later in this wave, the sandbox tile will be removed from both the app launcher and the Office home portal. Instead, both of these places will display only one tile as the means to access the Business Central web client.



The app launcher showing a single Business Central tile.



The Office home screen showing a single Business Central tile.

For customers operating more than one environment, users accessing Business Central from the tile will be able to pick from production or sandbox environments before proceeding.

Country and regional

Overview

More countries are added to bring Business Central to more than 70 countries. Expansion to more countries and regions is achieved through partner-led localization. Our partners create the relevant localization apps and publish them to AppSource. In combination with the built-in language offerings, Business Central is available to serve customers in over 70 countries and regions worldwide.

Country/regional expansion - Angola

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

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to more countries and regions 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 new customers.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Country/regional availability and supported languages (docs)

Country/regional expansion - Bahrain

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

Business value

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Feature details

Expansion to more countries and regions 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 the new country/region.

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Country/regional expansion - Bosnia and Herzegovina

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

Business value

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Feature details

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Country/regional expansion - Botswana

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

Business value

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Feature details

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Country/regional expansion - Costa Rica

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

Business value

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Feature details

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Country/regional expansion - Cyprus

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

Business value

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Country/regional expansion - Dominican Republic

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

Business value

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Country/regional expansion - Ecuador

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

Business value

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Country/regional expansion - El Salvador

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

Business value

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Country/regional expansion - Guatemala

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

Business value

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Country/regional expansion - Honduras

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

Business value

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Country/regional expansion - Jamaica

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

Business value

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Feature details

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Country/regional expansion - Maldives

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

Business value

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Feature details

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Country/regional expansion - Mauritius

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

Business value

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Feature details

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Country/regional expansion - Nicaragua

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

Business value

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Feature details

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Country/regional expansion - Panama

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

Business value

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Feature details

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Country/regional expansion - Paraguay

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

Business value

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Feature details

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Country/regional expansion - Trinidad and Tobago

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

Business value

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Feature details

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Country/regional expansion - Uruguay

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

Business value

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Feature details

Expansion to more countries and regions 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 the new country/region.

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Country/regional expansion - Zimbabwe

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

Business value

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Feature details

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Development

Overview

We continue to invest in a rich spectrum of extensibility tooling capabilities for developers, including making the AL language even stronger, providing developers with a great experience.

Demo tool and demo data for manufacturing scenarios

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

Business value

To help partners demonstrate the premium capabilities of Business Central, we are making the demo tool and demo data available for manufacturing scenarios.

Feature details

The demo tool and demo data set will be available for scenarios in manufacturing as a Contoso Coffee extension that you can install in any environment. Presales specialists can run the tool on top of Cronus or My Company and get the setup and demo data they'll need when they demonstrate various scenarios in the manufacturing space. Both the demo tool and the demo data set are available on product media as source code.

The Contoso Coffee app provides four products that are optimized for different scenarios:

- **SP-SCM1009 Airpot**: This product has *BOM* with subassembly *Routing*. You can use it to demonstrate standard production flow. It uses *Standard* costing, and it has alternative routings that can be used to demonstrate various scenarios involving subcontractors.
- **SP-SCM1011 Airpot Duo**: This product requires item tracking and uses the *Special* costing method. It includes a component that also requires item tracking.
- **SP-SCM1004 Autodrip**: This product has *BOM* with subassembly *Routing*. It's excellent for demonstrating various flushing methods, both for components and operations.
- **SP-SCM1008 AutoDripLite**: This product has 3 variants and 3 bills of material (BOMs) that can be assigned to stock-keeping units. It uses the phantom BOM concept.

The manufacturing activities for all scenarios use the *NORTH* location.

Before running any of the scenarios for Contoso Coffee, you should post any item journal lines with opening balances.

Scenarios

The Contoso Coffee demo data currently supports the following scenarios for test and training:

- Create a New Production BOM and BOM Version
- Create a New Routing
- Create a Firm Planned Production Order and Change It
- Combine Automatic and Manual Flushing
- Use Order Planning to Create and Reserve Supply

- Set up and Process a Subcontracting Operation
- Set Up New Capacity
- Variants

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.

Isolated events

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

Business value

AL developers can raise an event that is guaranteed to invoke all event subscribers—even if some subscribers fail—and continue executing.

Feature details

Extensions shouldn't be able to block critical processes such as sign-in or opening role centers.

A failing extension should result in a degraded experience—not no experience at all.

Isolated events work like Codeunit.Run:

- Each subscriber is executed in its own transaction.
- Failures cause the transaction to be rolled back.
- Errors are trapped and execution continues.

New isolated event OnCompanyOpenCompleted

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

Business value

This event is raised after sign-in and company open have completed. Any subscribers to this event can fail but will not block the sign-in process.

Feature details

Without this event, extensions can break the sign-in process.

The OnCompanyOpenCompleted event is raised during sign-in, when trying to open the company. It is of type *Isolated*, which means that a failure in a subscriber cannot propagate to blocking the sign-in process.

New reporting events

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

Business value

In 2022 release wave 1, we add new business events so that AL developers can react when a file has been generated from a report request page or if a file is ready for download.

Feature details

Three new business events will be added to codeunit 44 ReportManagement:

- OnAfterDocumentReady
- OnAfterDocumentDownload
- OnCustomDocumentMerger

The *OnAfterDocumentReady* event is raised by the Business Central platform when a document is ready after it has been scheduled from a report request page.

The *OnAfterDocumentDownload* event is raised by the Business Central platform after a user has generated a report artifact from code or from a request page action.

The *OnCustomDocumentMerger* event is raised by the Business Central platform when the user has specified a custom report layout type which will be rendered into an artifact in application code.

In-client performance profiler

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

In 2022 release wave 1, we add new capabilities to the AL performance profiler. In this release wave, we are going to empower functional developers/consultants, as well as customer administrators and power users to capture a user flow from within the web client, and view high-level information about time spent in the web client. This way, people can investigate which involved extensions consume the most time, including top-consuming method calls, for example.

Feature details

In 2021 release wave 2, we added the AL performance profiler to the Visual Studio Code AL experience. The performance profiler has empowered pro developers to investigate performance as part of developing new functionality, as well as help troubleshoot performance issues in AL code in customer environments, even in production.

In 2022 release wave 1, we are going to take this even further. Having this tool will make it easy for consultants and customer administrators to seamlessly perform initial performance investigations without involving pro developers, to be able to pinpoint performance issues and file support cases to the most likely owners of the app, be that a per-tenant extension, an AppSource app, or the Dynamics 365 Business Central core app. It will also be possible to share the resulting capture, making it faster for a pro developer to do further analysis without having to perform a repro of the issue locally.

The in-client performance profiler will be a new app page that can be reached on its own or from the **Help & Support** page. It can be opened in another browser window side-by-side with the user experience that you want to profile so that you can make sure the capture is as concise as possible and only contains the relevant steps. The page will contain actions to start and stop the capture of a user flow. You will be able to see the performance results of a capture, including time spent per involved extension, top method calls, and other metrics. You'll also be able to download the capture so that you can share it with technical support or a pro developer, for example, for viewing in the Visual Studio Code AL profiler. Note that when exporting such profile captures, you should comply with local privacy laws, such as the General Data Protection Regulation.

In this release wave, it will only be possible to capture the current session for the user who starts the profiler.

Multiple layouts of the same type in reports and report extensions

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Mar 1, 2022	Apr 2022

Business value

In earlier versions, you could only embed a single layout of each report layout type (RDLC or Word) in a report or report extension. If there was a need to have additional layouts, these would have to be added as data in the custom report layouts table. With the introduction of a new rendering section in reports and report extensions, you will now be able to include multiple different layouts of the same type.

This opens up for providing customers with alternative layout options. You'll also be able to create report layout packages, such as an extension that contains multiple report extensions, each providing a number of report layouts options.

Feature details

A new top-level section for rendering in report and report extension objects makes it possible to specify multiple layouts, including layouts of the same type.

```
rendering
{
    0 references
    layout(myFirstRDLCLayout)
    {
        Type = RDLC;
        Caption = 'A caption';
        Summary = 'A summary';
        LayoutFile = 'myFirstRDLCLayout.rdl';
    }
    0 references
    layout(mySecondRDLCLayout)
    {
        Type = RDLC;
        Caption = 'Another caption';
        Summary = 'Another summary';
        LayoutFile = 'mySecondRDLCLayout.rdl';
    }
}
```

Example of the new top level rendering section in report and report extension objects.

The old properties for defining RDLC, Word, and the default layout, still exist, but you cannot use them in combination with the new rendering section. Use one or the other.

A new code action for converting from the old layout properties to layouts in the new rendering section is also available.

Telemetry - monitor health and uptake of features

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 1, 2022	Apr 2022

Business value

Partners can get insights into the usage of their features, including information about their uptake (how they've been discovered, set up, or used) and where users experience issues with their features.

Feature details

The `Telemetry` codeunit allows developers to send enriched telemetry. Contextual information about the state of the system (common custom dimensions) can be added to every message emitted through this codeunit.

The `Feature Telemetry` codeunit makes it easier to monitor the health and uptake of application features. It is built on top of the `Telemetry` codeunit. Therefore it sends telemetry that's enriched with common custom dimensions.

Using simple calls in Feature Telemetry, partners can emit telemetry to gain insights about:

- Feature uptake - to track how many customers or users have discovered, setup, or tried to use the feature.

- Feature usage - to track how many customers or users are actively using your feature.
- Feature issues - to track how many customers or users experience issues with your feature.

More information about feature telemetry, sample code, and sample Power BI reports can be found on our BCTech GitHub repository.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Feature Telemetry (docs)

Ability to elevate permissions in AL code

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

Business value

AL developers can now elevate specific permissions in the critical code paths, such as company initialization or the login process.

Feature details

We're introducing a new attribute for procedures, `InherentPermissions`, which is available for on-premises deployments only in this release.

Example:

```
al
[InherentPermissions
(PermissionObjectType::Table, Table::"Retention Period", 'ri’)]
```

Within this method, all users will have at least indirect permission to read and to insert into the specified table.

AL-Go for GitHub - modern DevOps for partners

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

Business value

By making continuous integration and continuous delivery (CI/CD) virtually free in terms of investment, more partners adopt this practice, which leads to a higher quality in apps for Business Central.

Feature details

When you create a new GitHub repository, you can base it on either the PTE or the AppSource App template repository. Both types of repos give you a fully functional GitHub repository for AL projects, in which you can create your new app or add your existing app.

- Create a new app by using the **Create a new app** or the **Create a new test app** workflow.
- Add an existing app by simply uploading the .app file to the **Add existing app or test app** workflow.
- Apps added are automatically included in the **CI/CD** workflow.
- Test execution and reporting is automatically handled for all test apps, and every successful build produces artifacts that are stored on the build for 90 days, which is the GitHub default period.
- Create an actual release by using the **Create Release** workflow.
- Every successful release is stored indefinitely, and the source for this release is available indefinitely as well.

A customer environment can be linked to the GitHub repository for continuous or manual deployment setup.

The **Update AL-Go System Files** workflow ensures that repositories always use the latest version of the workflows and actions and never get stale.

You can create local **Docker-based** and online **SaaS** development environments with all apps prepublished and ready for Rapid Application Development.

Read about the supported scenarios at AL-Go for GitHub and try it today.

Deploy dependent projects in workspace

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

Business value

When working with AL workspaces and projects in Visual Studio Code, it's common to open the workspace and deploy a given project. Currently, however, if the NST server doesn't have all the extensions that the project depends on, they must be manually traversed and installed, because dependency publishing only works if there's a baseline to calculate from.

To optimize the experience and remove unnecessary manual work, a new deployment command can be used to deploy required projects in the workspace.

Feature details

To optimize the experience and remove unnecessary manual work, a new command will be available to traverse a project dependency graph in the workspace and install any required projects if these aren't already deployed to the NST server. Note that this will only handle project and app references covered by the workspace. If the deployed AL project has dependencies to apps that aren't included in the workspace, these will still have to be present or manually deployed in advance.

Telemetry - company name as a custom dimension in AL LogMessage

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

Business value

Partners can get more detailed insights into the telemetry that is emitted from AL LogMessage methods.

Feature details

The Business Central server will now emit the following additional custom dimension with every call to AL LogMessage methods.

- Company name

This new dimension will make troubleshooting and analytics much better for telemetry that is emitted from AL, both for telemetry emitted from the base application or system modules, and also for telemetry emitted from per-tenant extensions and app source apps.

Telemetry - votes on whether error messages are useful

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

Business value

When a user sees an error dialog, they can vote yes or no to the question about the usefulness of the message. The result is logged to telemetry. This way, partners can get insights into which error messages users find hard to understand. The partners can then follow up with the customer to help out.

Feature details

If an error message is shown to the user, the error dialog will show the wording *Was this message useful?* with a choice to vote Yes or No. The result is then logged to telemetry.

Using telemetry, partners can get insights into which error situations users have problems understanding.

Partners or tenant administrators can also set up alerts in Azure Monitor to get notified if many users experience errors they cannot understand.

Users can export report datasets to XML

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

Business value

Users and developers can get report datasets in XML that they can then use to either archive the data for compliance or integration scenarios, or to troubleshoot the reports during development.

Feature details

Similar to the **Export dataset to Excel (no layout)** capability that was added in 2021 release wave 1, business users and developers can now get report datasets in XML directly from the request page.

The **Export dataset to XML** feature will show up the same place in the request page and will also require the same privileges.

Governance and administration

Overview

Business Central 2022 release wave 1 delivers a set of admin and governance capabilities to help admins and IT pros set up, secure, manage, govern, and monitor customer environments. Areas of investments include improving the error messages to include additional details and support information.

Security administrators can define default permission set assignments when users sign up

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Feb 1, 2022	Apr 2022

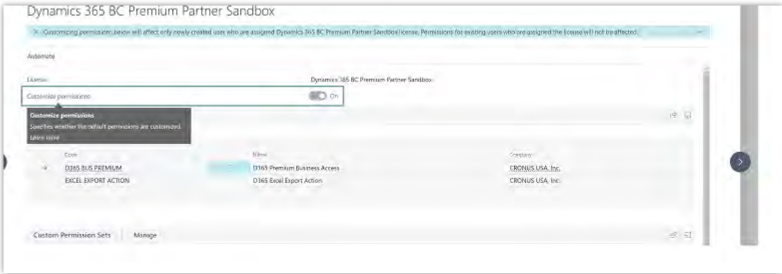
Business value

We've given Business Central security administrators improved control over who has access to what. The administrators can specify which permission sets or user groups are relevant for different product licenses and plans. Then, when someone signs up, they are automatically granted the permissions that the administrator specified for their license or plan.

Feature details

Business Central security administrators can define which permission sets or user groups are assigned by default to a user when they sign up. Specifying which permission sets or user groups are relevant for a license or plan helps the administrator ensure that the user has the right access from the start.

You can access new **License Configuration** from Administrator of Users, User Groups, and Permissions role center.



Shows new License Configuration page.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Create Users According to Licenses (docs)

Set user email policies to control who can read email sent from Business Central

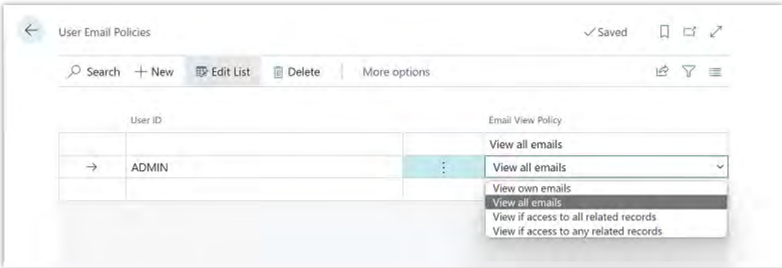
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 1, 2022	Apr 2022

Business value

It's not uncommon that multiple people or teams work on single transaction. Usually one prepares draft emails and others complete and send emails to customers or vendors you work with. Administrators now have more control over who gets to see which emails by setting email view policies.

Feature details

From the **Users** list, you can now specify user email policies by choosing the **Related** menu, and then choosing the **Email View Policy** action.



Shows new User Email Policies page that allows you to set different policies for viewing sent emails.

On the **User Email Policies** page, you can choose from the following options:

- View all emails
- View own emails
- View if access to all related records
- View if access to any related records

NOTE If you leave the User ID field empty and then choose the **Email View Policy** action, the policy that you define applies to all users.

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.

Support for granular delegated admin privileges (GDAP)

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

Business value

We enhance the security posture of Business Central online customers that work with Microsoft Cloud Solution Provider (CSP) partners. Customers can now approve least-privileged, granular, and time-bound access to their environments.

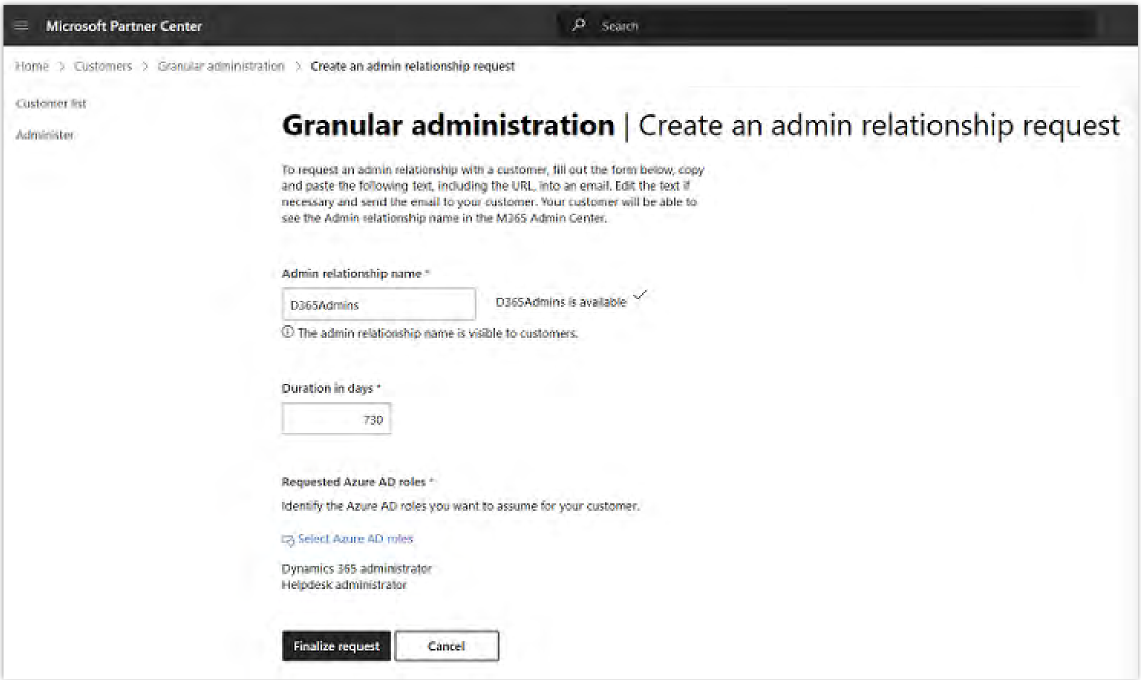
Feature details

Granular delegated admin privileges (GDAP) is a security feature of Microsoft Partner Center that provides partners with least-privileged, granular, and time-bound access to their customers' workloads in production and sandbox environments. This least-privileged access must be explicitly granted to partners by their customers.

In particular, Business Central customers are no longer required to grant *Global Admin* privileges to the partners in their Azure Active Directory. The partner can request access for least-privileged roles, such as *Dynamics 365 Administrator* or *HelpDesk Agent*. The level of access that the partners get to their customers' Business Central environments using GDAP is identical to the level of access they used to be getting in the past. However, by using one of these two roles, partners get significantly less access to other customers' workloads and within their Azure Active Directory.

Find out more about GDAP in the Partner Center documentation.

Read the Partner Center announcement about the technical release of granular delegated admin privileges, published in January 2022.



Creating GDAP request in Partner Center

See also

Delegated Administrator Access to Business Central Online (docs)

Telemetry for environment lifecycle events

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

Business value

When changes happen to an environment, such as updates, restores, renames, or deletion, the signal is emitted to the environment telemetry resource in Application Insights.

This allows the tenant administrator to set up alerts on important event types using Azure Monitor, Power Automate, or third-party tools and then send notifications using a text message, email, Microsoft Teams message, or to third-party tools.

Feature details

When changes to an environment happen, the signal is emitted to the environment telemetry resource in Application Insights, provided that Application Insights have been configured for the environment.

The following event types are currently planned:

- Update available
- Environment update scheduled
- Environment update validation finished successfully
- Environment update validation failed
- Environment update started
- Environment update finished successfully
- Environment failed to update
- Environment restored to point-in-time
- Environment renamed
- Environment deleted
- Environment configuration changed

Using Azure Monitor, Power Automate, or third-party tools, the tenant administrator can now set up alerts on some of these event types. The admin can send a message to a channel of their choice, such as text message, email, or Microsoft Teams message, or they can interact with bug tracking software, such as Azure DevOps or GitHub.

Updating only licensed users from Microsoft 365 runs faster and more efficiently

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

Business value

Updating users from Microsoft 365 runs faster and more efficiently with this update.

Feature details

In large organizations with many users, Azure Active Directory often includes a large number of user accounts. With this update, only users who have a valid Business Central license will be queried and updated when the admin runs the **Update users from Microsoft 365** process. As a result, the process runs faster.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Delegated admin's job queue entries are run by user

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

Business value

Microsoft partners use the delegated admin role to set up and manage certain aspects of Business Central on behalf of their customers. However, the role is restricted in some ways. In earlier release waves, one of these restrictions was the ability to create job queue entries and set them as ready to run for customers. The job queue is an important tool for setting up and configuring companies in Business Central. With this update, delegated admins can create job queue entries and request approval from a licensed user.

Feature details

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.

See also

Delegated admin access to Business Central online (docs)

Telemetry for permission error dialogs

Enabled for	Public preview	General availability
Users, automatically	Jun 2022	Jun 2022

Business value

When a user gets an error dialog due to a permission error, it is now logged to telemetry. Partners can get insights into which permission errors users get in their setup and help users get unblocked.

Feature details

If a permission error message is shown to the user, the Business Central server will log it to partner telemetry.

Using telemetry, partners can get insights into which permission setups trigger error situations for users.

Partners or tenant administrators can also set up alerts in Azure Monitor to get notified if many users experience permission errors.

Permission set handling enhancements

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2022	Jun 2022

Business value

Improve the administrator's capabilities to add support for creating, customizing, and managing permission sets to control user access to capabilities in Business Central.

Feature details

The new permission system capabilities in Business Central that became generally available in 2021 release wave 1 allow developers to establish a hierarchy of permission sets, include sets inside other permission sets, and extend permission sets. In 2022 release wave 1, admin users can leverage the permission sets and group them based on a tenant's needs, visualize which permission sets are included in a given set, include others, and finetune them as needed.

We also deliver a new capability to subtract permissions with a permission set scope in this release wave. This capability lets the admin specify that an object cannot be accessed, unless access is not granted by another permission set.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Entitlements and Permission Sets Overview (docs)

Microsoft Power Platform

Overview

In 2022 release wave 1, we improved the integration with Microsoft Dataverse and Microsoft Power Platform so that users can be more productive and self-sufficient when they use Power Apps, Power Automate, and Power BI with Business Central. For example, we made it simple and intuitive to trigger a Power Automate flow from a specific Business Central page. In another example, this update makes it possible to use data change events from Dataverse virtual tables in the Power Automate flows.

Dataverse data change events

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

Business value

Business Central virtual tables will emit data change events, just as the native tables do. This enables Power Automate triggers to execute when data changes for the virtual table.

Feature details

With the Business Central virtual tables solution for Dataverse, the Business Central API is exposed as tables in Dataverse. This way, makers can build apps with Power Apps that leverage the virtual tables as if they were native Dataverse tables.

Version 0.9 of the Business Central Virtual Table (preview) app adds support for data change events:

- Record added

- Record modified
- Record deleted

This unblocks using Dataverse virtual tables from Business Central in any flows created with Power Automate. The data change events (also known as CUD events) are visible with the standard Dataverse connector and the Dataverse trigger.

Action group to run chosen instant Power Automate flow

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

Business value

Power Automate empowers customers to create their own workflows using a low-code/no-code approach with a vast amount of connectors that make it easy to integrate systems. Dynamics 365 Business Central is no exception and provides multiple integration features that are already released. One new and valuable scenario added now is the ability to trigger a flow manually from inside Business Central. This opens up a possibility for every customer and citizen developer to automate tasks and workflows precisely when and how they need them.

With this release, you can boost your business management system by customizing using Power Automate instant actions launched from any card page. Run workflows of your choice and command Business Central to trigger actions based on Power Automate, e.g., send an update via Teams or email, update the order status, notify your warehouse about changed delivery, etc.

Feature details

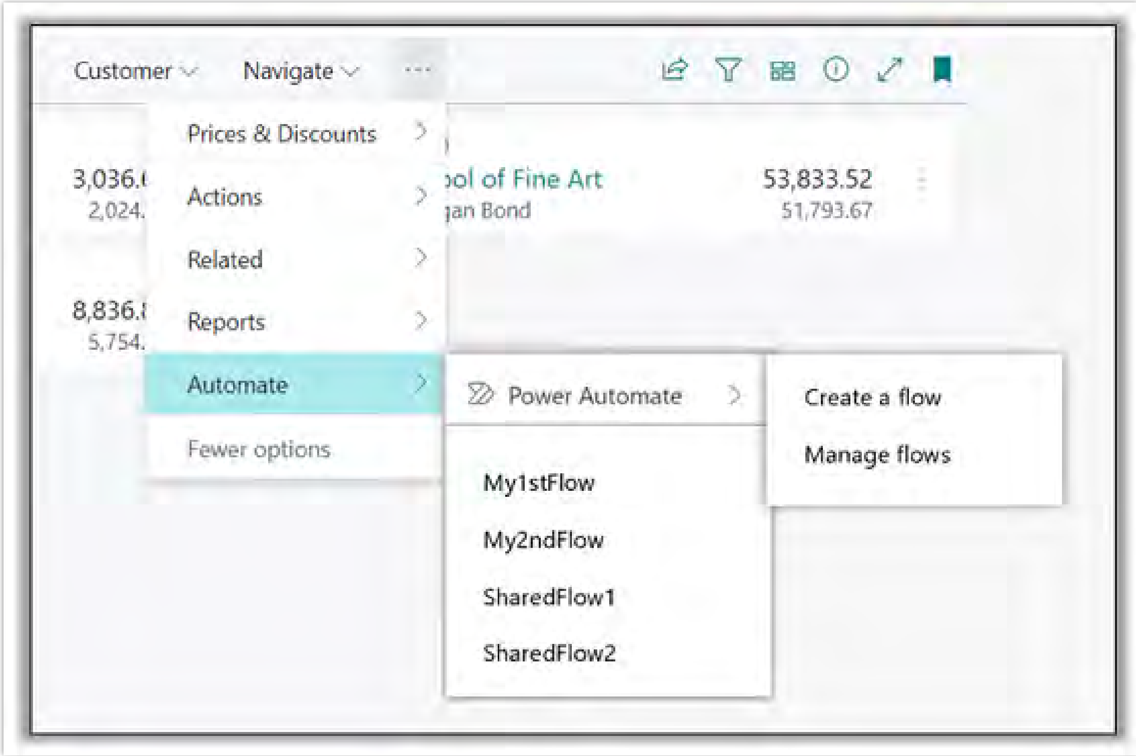
This feature adds a new ability for users to create and then manually trigger an instant Power Automate flow for a given record, such as a customer, item, or sales order. Every customer can now create flows that integrate Business Central with other products in a seamless and no-code approach.

Every list, card, and document page that runs in the context of a data table now features a new **Automate** group in the action bar. From that group, users can run manual flows defined for Business Central.

The first action in the **Automate** group adds a new flow based on a new Business Central trigger for Power Automate. While they create the flow in Power Automate, the citizen developer is presented with a choice of values that are passed from Business Central, including the record ID, environment, company, and more. Once added and defined in Power Automate, the new flow shows up on the card or document page. From this moment, users can run the flow from Business Central through a special Power Automate flyout pane where they can specify extra values.

NOTE This feature is not switched on by default, so an admin must go to the **Feature Management** page first to switch it on.

NOTE This feature is not available in on-premises version of Business Central.



The new Automate group on list 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.

Improvements to the Power Automate and Power Apps connector

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

Business value

Being able to use Business Central and Power Platform with great confidence is essential these days. Users are empowered to enhance and integrate Business Central using no-code/low-code tools such as Power Automate or Power Apps.

Feature details

In this release wave, we add new capabilities to the Power Automate and Power Apps connector, so you can start using Business Central with Power Automate and Power Apps with greater confidence. The following list shows the specific enhancements to the connector:

- Support for finding data, filtering, and sorting
- Support for adding related records (data from both header and lines of documents)
- Improved reliability
- Potential removal of the *Preview* label

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Modern clients

Overview

In 2022 release wave 1, we make improvements to our extensive portfolio of clients with the focus on better usability, accessibility, performance, and stability.

Copy link from Share menu

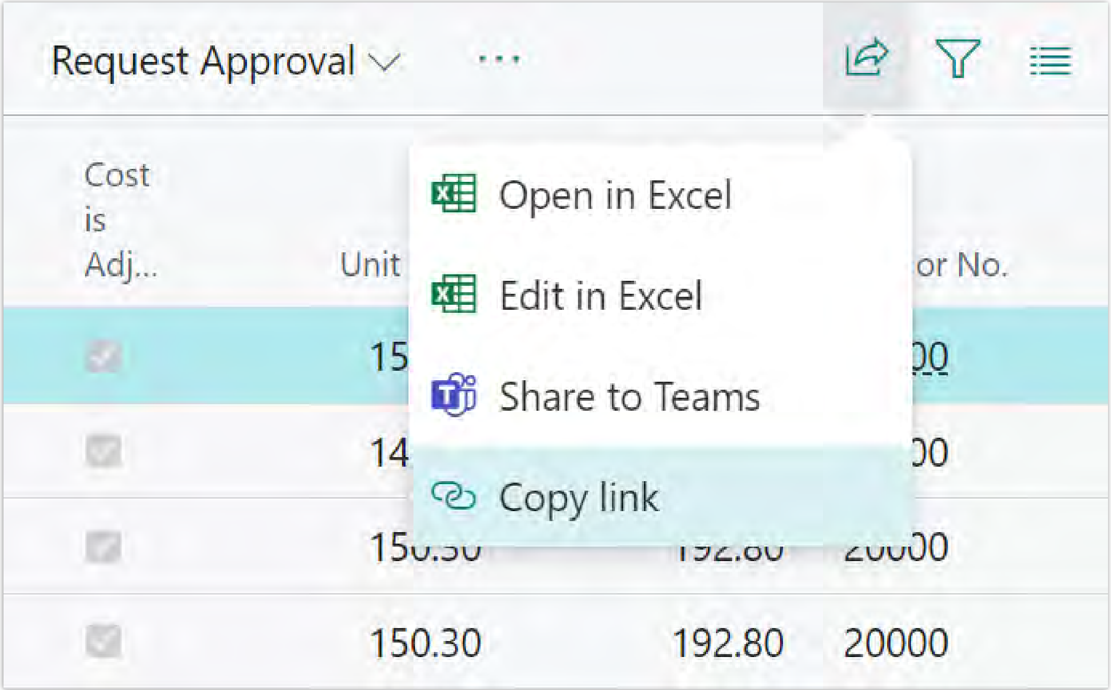
Enabled for	Public preview	General availability
Users, automatically	✔ Feb 1, 2022	Apr 2022

Business value

Users often need to share or store links to business data as part of organizing their work, sharing with others, or initiating collaborative tasks. With the introduction of this feature, users benefit from quicker access to page links, similar to how this is done in Office applications. Users can also copy page links from the installable app or when Business Central is embedded in other apps, such as in Microsoft Teams.

Feature details

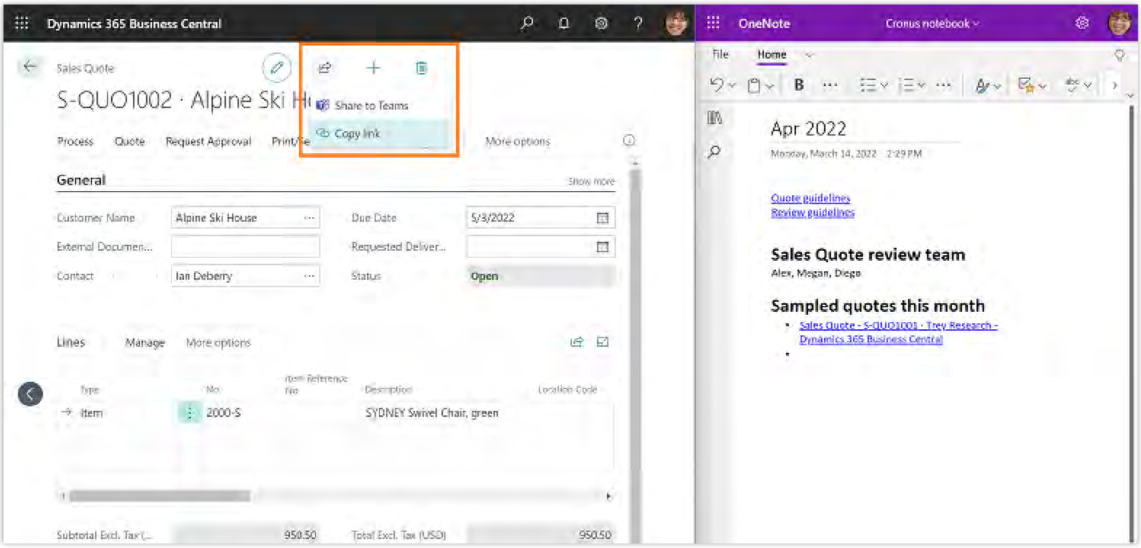
The **Share menu** in the Business Central web client now includes a **Copy link** action that copies the current page link to the clipboard.



A screen snippet of a list page showing the new Copy link action.

- On entity pages, such as the **Item** card, the action will copy a link to the current record.
- On collection pages, such as the **Items** list, the action will copy a link to the page that includes the currently selected view and currently selected record.
- Similar to other features that rely on page links, **Copy link** is a system action that is automatically shown on most pages.
- The **Share** menu is not available on mobile apps or in the Outlook Contact Insights pane.

Pasting after using the Copy link action will paste a readable hyperlink instead of plain text if the area into which you are pasting supports it. For example, pasting a sales order link into a OneNote page or into an Outlook email will paste something like Sales Order - S-ORD101001 · Adatum Corporation - Dynamics 365 Business Central instead of the plain text https://businesscentral.dynamics.com/?bookmark=ABCD&page=42.



Business Central and OneNote side by side, showing how copy link can be used to paste readable links

Try it out

To experience copying and pasting a link, [sign in to your Business Central online and go to an Item card](), then use the Share menu at the top of the page to get to the Copy Link action.

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.

New desktop app delivering full web client experience on desktop is listed in the Microsoft Store

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

Having access to Business Central as an app installed on your device is preferred by many users. In 2021 release wave 2, it became possible to install Business Central as an app from the browser window. With this release wave, we make this app easily discoverable in the Microsoft Store.

Feature details

The Progressive Web App-based desktop app is in the Microsoft Store and can be installed for both Business Central online and on-premises solutions. It offers a full web client experience on the desktop (including features like multitasking, personalization, and cloud printing) while allowing customers to retain app-like behavior on their desktop (like pinning to the Start menu or taskbar). This app replaces the legacy desktop app based on older technology (UWP) for Business Central online. At the same time, the old app will be maintained only for supported previous versions of Business Central on-premises.

For more information and to install the app, see [Get Business Central Desktop App]

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.

Control add-in resiliency

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 9, 2022	Apr 2022

Business value

Business users need a consistently reliable experience when working with Business Central. New resiliency controls are in place to ensure misbehaving features do not affect performance.

Feature details

Control add-ins are custom controls added to the client that typically visualize data as a chart, display web content, or embed a web application.

Business Central now detects unhealthy control add-ins that are impacting the overall performance of the page and takes one of the following actions:

- A warning is displayed near an add-in that generates many consecutive requests to Business Central.
- The add-in is automatically disabled, either partly or fully, if the amount of requests exceeds the threshold.

Customers should contact the add-in developer if the problem persists.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Usability improvements to the web client

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 9, 2022	Apr 2022

Business value

With a growing and diverse workforce relying on the Business Central web client to perform critical business tasks, we continually invest in improving productivity and usability based on customer feedback and user research.

Feature details

The 2022 release wave 1 includes the following improvements to the web client.

Navigation

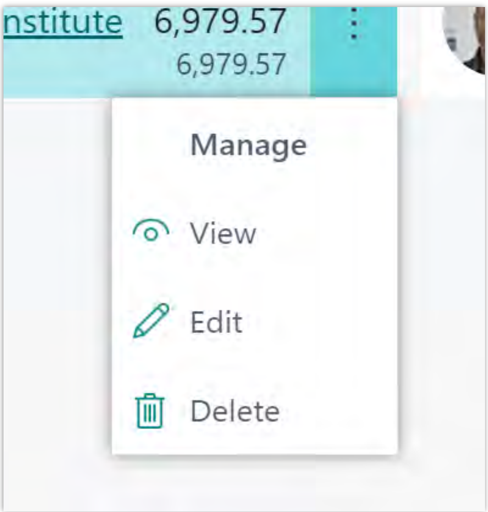
- When you navigate to related entities using the *Peek* feature for entities where the card or document page is not present, the *Peek* feature offers a new **Open full list** option so that you can go to the relevant list.
- When a FastTab expands, the page scrolls up so the next FastTab caption is visible.

Data entry

- Improved behavior of lookups on fields with table relations, such as the **Description** field on sales documents. The new behavior creates a distinction between fields that are simply a lookup to a related table and fields that allow free text with the assistance of a dropdown menu to choose from a predefined value.
- When a message dialog interrupts typing into the next field, the characters you entered are no longer discarded.
- The web client preserves a few empty lines at the end of an editable list so that filling out data vertically across rows never runs out of space.

General look and feel

2022 release wave 1 includes minor visual updates, such as a refreshed loading screen and updated iconography for specific system actions.



Fluent icons displayed for system action images.

Decimal Separator

As announced in 2021 release wave 2, customers upgrading to update 20.0 now benefit from improved predictability when using the decimal separator key on the numeric keypad. Business Central relies on the region setting in **My Settings** to determine the default output character for this key. For example, when the region is set to Italy, the key now outputs a comma (,) character that matches how decimal values are displayed.

For added efficiency, version 20.0 also introduces a keyboard shortcut, **Alt + Decimal Separator**, to help users toggle between their default character and a period (.) character. This simple but powerful toggle allows users to quickly transform their numeric keypad into an efficient tool for entering codes that are separated by periods, ranges such as 01/01/2022..04/01/2022, or anything using a period as standard notation.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Onboarding

Overview

Onboarding is a key focus in every release wave. The aim is to make the onboarding of new customers faster, but also the onboarding of new users. In the most recent release waves, we have removed some of the friction in the onboarding of new customers by empowering partners to deliver uniform onboarding experiences at scale. This way, our partners can deliver more valuable services to their customers. Partners can use a combination of in-product artifacts, such as the Get Started checklist, teaching tips, configuration packages, and assisted setups.

In 2022 release wave 1, onboarding to Dynamics 365 Business Central will be even easier because we will focus on people-centric experiences. Business Central becomes able to provide easy access to context-specific content. This way, we flatten the learning curve and unblock individual users in performing their business processes. Users will also be guided to understand how they can personalize Business Central to their needs.

The access to the context-specific content will be powered by a new and modern Help pane similar to that of other Microsoft offerings. The context-specific content that users get access to through the Help pane will include Microsoft-hosted content and partner-hosted content so that the Help pane is the go-to place to get unblocked.

Additionally, teaching tips will be able to include clickable links so that page- and control-level teaching tips can refer to documentation or other in-app pages.

Context-aware links in the Help pane from Microsoft and partners

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

Users can self-educate and self-unblock in their journey with Business Central. This is especially relevant in the onboarding phase when customers historically relied on our partners and their consultants for training.

Feature details

In 2022 release wave 1, Dynamics 365 Business Central will be able to serve context-aware links to guidance and learning to help flatten the learning curve and unblock the individual user in performing business processes. The context-aware content will be powered by a new and modern Help pane, similar to the experience in other Microsoft offerings. Also, partners can configure their content to be available to the Help pane. This way, the Help pane becomes the go-to place to get unblocked.

We aim to make the Help pane able to surface links to conceptual Microsoft documentation, Microsoft Learn content, and partner-hosted documentation, provided that the partner content is built and stored according to our guidelines.

In this release wave, support for partner-hosted content is driven by the existing AL-supported engine for context-sensitive help. In a later release wave, we plan to provide tools and guidance for partners to connect their content to the Help pane through a search index in the same way as we connect our docs to the Help pane.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Configure Context-Sensitive Help (docs)

Guided tour that helps users find settings and personalization tools

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

Personalization is a powerful capability in Business Central. By being shown the options for personalization in a tour of the Role Center, the user is more likely to discover this capability early on so they can get productive with Business Central as fast as possible and decrease their onboarding time.

Feature details

Today, some roles can take a tour of their Home page, the Role Center, as the first task in their Get Started checklist. This tour will now be expanded with more steps to highlight where to find settings and options for personalization in the **Settings** menu. This is important, especially in non-evaluation companies where users want to dive into settings or change their role to a more relevant one.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Support for rich text in teaching tips and tours

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

Lower the entry bar by helping users understand how to use and be successful with a complex and comprehensive business solution.

Feature details

In 2021 release wave 1, Dynamics 365 Business Central got the capability of showing in-product teaching tips to help and guide the user to understand concepts, pages, and controls. In 2022 release wave 1, we expand the capability to allow Microsoft and partners to mark up rich text in the teaching tips to provide even clearer descriptions. You can also add a link to other in-app entities from a teaching tip, which supports users in finding and understanding business process flows more easily.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Tour of the Role Explorer and how to filter it

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

By choosing the best match role, users can be more productive with Business Central. In Business Central, users can get an overview of the functionality by navigating to the Role Explorer.

Feature details

Dynamics 365 2022 release wave 1 adds a Role Center tour that nudges users to navigate the Role Explorer. When they go there, they'll be offered a mini-tour that explains how the Role Explorer is structured and how they can filter the view to see, for example, **Reporting & Analysis** or **Administration**. Once they understand the filtering mechanism, it's easier for users to see the breadth of reporting options or get a view of all setup-related pages.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Reporting

Overview

Reporting is top-of-mind for many business users, both as a way to get insight into new growth opportunities but also as a way to share data as a foundation for business planning discussions. We will deliver a better experience with Excel layouts. We'll also provide improvements to the account schedules capability. Finally, we will improve our Power BI analytics story by enabling more Power BI dashboards to be shown on the Home page of business users.

New capabilities for financial reporting with account schedules

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2022	Apr 2022

Business value

The presentation of financial reports is an important part of how people consume them. Reports must provide business insights in a way that enables people to easily recognize the report and quickly identify the important data. In Business Central, account schedules are the main tool for creating user-defined financial reports. This release provides new capabilities for account schedules that make it easier for people to produce reports in the layout they desire.

Feature details

Financial reports can be generated using new capabilities for account schedules:

- You can control how the number zero is printed (as "0", "-", or (blank)). When skipping zero-lines you can now keep Headers, Begin-totals, and End-Total in order to keep the schedules structure legible.
- When you define account schedules, you can use G/L account categories as Totaling filter for columns.
- The Account Schedules Overview supports 15 columns so that you can view budgets for 12 months and a total.
- You can export and import account schedules to or from files, which makes it easier to reuse them between companies.
- Headings (Begin-totals) are kept when printing to keep the structure of the account schedule. You can also choose to print lines marked as not to be shown, which makes validating the account schedules easier to do when you're designing them.

Example of an account schedule with 13 columns presented in the overview matrix.

The new Totaling Type option Account Categories in account schedules.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

Thank you for submitting [this idea](). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Prepare Financial Reporting with Account Schedules and Account Categories (docs)

New pages for report layout administration

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

Business value

Users can use new and improved pages for report layout administration.

Feature details

A new page, **Report layouts**, provides users with an overview of the different available layouts for reports. Both built-in layouts and layouts that are uploaded by the user are listed here. On this page, the user can export layout files and upload new versions of report layouts.

The **Report layout selection** page has been changed to make it easy to set the default layout to be used for a report.

Use Excel to design layouts for reports

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

Business value

Users can now use Excel to create and edit layouts for reports.

Feature details

Excel layouts work the same way as Word and RDLC layouts in that they can be edited and saved back again into Business Central.

With Excel layouts for Business Central reports, users can now create and edit report layouts simply by using the full palette of capabilities in Excel such as sliders, diagrams, charts, and pivot tables.

To create an Excel layout from scratch, open the report request page, and then run the report with the option *Excel document (data only)*. The report generates an Excel file with sample data and the fields that are available in the report definition. Then you add your layout to additional tabs in the Excel file. To test the layout, simply import it as a custom layout in Business Central. After the system has validated that the layout is valid for use, you can now go to the request page and run the report with your new layout.

Service and platform

Overview

No matter the industry type of a small or medium-sized business (SMB), business users expect a dependable service and platform that they can run their business on. In every release wave, we improve performance. In this release wave, we provide more insight by enabling an in-product performance advisor and in-client performance profiler. We also continue the effort of improving the client's rendering time and the performance of data entry.

Performance - partners can get insights into database wait statistics

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

Business value

Developers and administrators can get insights into database performance.

Feature details

The database for a Business Central environment makes performance counters and information about SQL queries available through Dynamic Management Views (DMVs). It requires direct database access to be able to obtain this information, and for Business Central online environments, this is not possible due to security restrictions.

With this capability, the Business Central platform will make data about database wait statistics as a virtual table, so that the data can be accessed from AL code. We will also add a page on top of the new table to make it easy to get the data without having to write code.

Performance-related insights into missing indexes

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

Business value

Developers and administrators can get insights into missing indexes in the database. They can then use a per-tenant extension to add the indexes.

Feature details

The database for a Business Central environment makes performance counters and information about SQL queries available through Dynamic Management Views (DMVs). It requires direct database access to be able to obtain this information, and for Business Central online environments, this is not possible due to security restrictions.

With this capability, the Business Central platform will make data about missing indexes available as a virtual table, so that the data can be accessed from AL code. We will also add a page on top of the new table to make it easy to get the data without having to write code.

Telemetry - error dialogs are logged to telemetry

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

Business value

When a user gets an error dialog, it is logged to telemetry. Partners can get insights into which errors users get in their setup and help users get unblocked.

Feature details

If an error message is shown to the user, the Business Central server will log calls to the ERROR method to partner telemetry.

Using telemetry, partners can get insights into which AL code paths trigger error situations for users.

Partners or tenant administrators can also set up alerts in Azure Monitor to get notified if many users experience errors.

Telemetry - support engineers can now see user IDs in telemetry

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

Business value

A support engineer can now easily find data in telemetry for a given user. This makes troubleshooting much easier.

Feature details

The Business Central platform will emit a pseudo user ID to telemetry. This will allow a troubleshooter to identify which data in telemetry corresponds to a given user.

The pseudo user ID is a new field on the **User Card**. To support good privacy practices, it is possible to rotate the pseudo user ID to remove the link from a user to the entries in telemetry.

Telemetry - the action of enabling detailed telemetry is logged to telemetry

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

Business value

Partners can get easier troubleshooting for a session that has enabled detailed telemetry.

Feature details

When a user enables detailed telemetry from the Help and Support page, the action is also logged to telemetry. A follow-up event is logged when the session leaves detailed logging.

This will make troubleshooting much easier for a support employee because it will be easy to identify the session that had detailed logging enabled.

Telemetry - when a database deadlock occurs, it is logged to telemetry

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

Business value

Partners can get insights into database deadlocks in an environment and help users be unblocked.

Feature details

If a database deadlock occurs, the Business Central server will log an event to partner telemetry.

Using telemetry, partners can get insights into which AL code paths trigger database deadlock situations for users.

Partners or tenant administrators can also set up alerts in Azure Monitor to get notified if many users experience these types of errors.

Connected Spaces

Plan and prepare for Dynamics 365 Connected Spaces in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. 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 turnkey software as a service (SaaS) solution that gathers and analyzes observational signals and line-of-business data to create insights and automate actions. Connected Spaces brings together computer vision and AI to help transform the operational experience. By using data from video cameras, Connected Spaces delivers real-time actionable recommendations that can make operations more efficient, improve customer experiences, and bridge the physical and digital divide by offering benefits that are traditionally available only in online spaces.

Dynamics 365 Connected Spaces enables you to:

- **React to environmental triggers**: Ensure that customer needs are met effectively and quickly by equipping managers and employees with actionable alerts triggered by activity. Access to automated, sensor-driven reporting is standardized and available for immediate action.
- **Understand and optimize your space**: Take advantage of real-time and historical dashboards that inform you on the status of your space and the change that occurs within it. Optimize staffing and merchandising decisions using AI-driven insights around the activity in the space on any given day and time. Reports are accessible to employees, managers, and even stakeholders outside of the immediate environment, such as a regional manager.
- **Empower long-term decision making**: Predict the ideal future behaviors as your environment status changes over time. Get stronger insights with each passing day.

Connected Spaces achieves this by using the following hybrid approach:

- **Intelligent edge**: A managed on-premises gateway that converts camera streams into observational data sent to the cloud.
- **Intelligent cloud**: A multitenant SaaS solution that correlates observational signals from the edge to provide insights and trigger actions.
- **Prebuilt AI models**: Out-of-the-box AI models tailored for the retail industry that apply computer vision and AI to a physical space.

We'll provide more information on upcoming features soon.

Guides

Plan and prepare for Dynamics 365 Guides in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Guides**.

Overview

Dynamics 365 Guides empowers employees with the critical information and on-the-job guidance that they need to achieve greater operational efficiency. Easy-to-author guides provide step-by-step holographic instructions for employees to standardize processes, reduce errors to increase yield, upgrade skills, and ensure compliance while keeping employees safe. Remotely connect with experts and bring critical information into view to help troubleshoot, audit, or support dangerous and delicate procedures.

- **Improve employee productivity with advanced guidance**: Accelerate learning, standardize processes, and reduce errors to increase yield with step-by-step holographic instructions and hands-on training that show employees how to use tools and stay safe on the job.
- **Solve problems in real time with expertise and ease**: Seamlessly collaborate, share knowledge, and problem solve with a remote expert and bring critical data into view while in the flow of work.
- **Adapt at the speed of change**: Author guides for training or day-to-day processes and quickly disseminate information across your organization, with no programming or 3D skills necessary.
- **Maximize operational efficiency with data-driven insights**: Incorporate guides into workflows to gain visibility and insight into performance data to maximize operational efficiency over time across your organization.

Dynamics 365 Guides addresses the needs of three key personas: content authors, operators, and managers/analysts.

- Authors can easily create guides without 3D or programming skills by using a simple PC app and a HoloLens app.
- Operators use guides on HoloLens in training and on the job to get guidance while they work in a heads-up, hands-free style.
- Trainers and managers can analyze usage data to optimize their workflows.

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.
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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2021 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
Support for mobile devices	Admins, makers, marketers, or analysts, automatically	Aug 2022	-
Grant guide access to third parties	Admins, makers, marketers, or analysts, automatically	-	May 2022

Description of **Enabled for** column values:

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

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

Support for mobile devices

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

Business value

Customers have use cases that would benefit from deploying Dynamics 365 Guides to mobile devices. Being able to review guide content on mobile will make Dynamics 365 Guides more versatile, enabling customers to address more scenarios for more people in their organizations.

Feature details

Customers will be able to review their content (instruction text, pictures, videos, and 3D models) directly on their mobile devices. On a mobile device, content will look a lot like it does in the PC app. Mobile device content cannot be anchored to the real world.

Grant guide access to third parties

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

Business value

This feature will enable admins to grant content access to partners or customers. This way, content never leaves the customer's environment and access is strictly controlled. This simplifies workflows as duplication or migration of content isn't needed.

Feature details

Customers willing to grant access to content in their own Microsoft Dataverse environment to third parties will be able to do so. For example, partners will be able to create content directly in their customers' environments.

Remote Assist

Plan and prepare for Dynamics 365 Remote Assist in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Remote Assist**.

Overview

Microsoft Dynamics 365 Remote Assist is a mixed-reality application that empowers technicians to solve problems faster the first time. Whether in a heads-up, hands-free environment on Microsoft HoloLens, or using an iOS or Android device, technicians can collaborate with remote experts to troubleshoot issues in context. This modernizes field-service operations so technicians can make the most of their time.

Dynamics 365 Remote Assist is used in the following scenarios:

- **Service and repairs**: Enable companies to service assets faster by doing the right remote collaboration fast and capturing the right fix to perform further analysis.
- **Surveys and walkthroughs**: Perform tasks such as inspections, quality assurance, project reviews, and other field service and operations activities by capturing asset information with augmented reality.
- **Knowledge and service insights**: Empower your technicians to capture the right information and make it available for your broader organization. Use repair data from your technician operations to improve your business processes.

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 Remote Assist** 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 Remote Assist

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 Remote Assist.
Product documentation	Find documentation for Remote Assist.
User community	Engage with Remote Assist experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Remote Assist.

What's new and planned for Dynamics 365 Remote Assist

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

For a list of the previous wave's release plans, go to 2021 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
Support for screen sharing in the mobile app	Users, automatically	-	Apr 2022
Enable a customer or vendor to join a one-time call	Admins, makers, marketers, or analysts, automatically	-	Aug 2022

Description of **Enabled for** column values:

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

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

Support for screen sharing in the mobile app

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

Business value

The ability for mobile users to share their mobile device screen will enable them to collaborate on a document that's been shared with them and opened locally on their mobile device. This enhanced collaboration with remote experts can speed up problem resolution.

Feature details

Sharing a mobile device screen is particularly useful when a document has been sent to a technician and is opened locally on their device. The technician and remote expert can then collaborate by sharing the same view of the document.

Enable a customer or vendor to join a one-time call

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

Business value

Customers want an easy way to remotely assist B2B vendors and customers or B2C customers through a mixed-reality video call. For example, a customer might want to remotely assist a vendor field engineer to resolve an issue or remotely assist a customer trying to repair an asset. Previously, only vendors and customers with a Dynamics 365 Remote Assist license in the correct tenant could use Dynamics 365 Remote Assist. Now, vendors and customers without a Dynamics 365 Remote Assist license can join a one-time call using Dynamics 365 Remote Assist mobile. This simplifies the deployment process required for customers to provide support through a Dynamics 365 Remote Assist call.

Feature details

The one-time-call feature, which had previously been released as a preview feature, will now be available for general availability (GA).

This feature includes the following capabilities:

- A customer support agent or field expert can create a one-time-call link.
- A vendor or customer can use the one-time-call link to download the Dynamics 365 Remote Assist mobile app and join the call.
- All call participants can view and create mixed-reality annotations.

See also

Vendors and customers use full Dynamics 365 Remote Assist capabilities (docs)

Customer Insights

Plan and prepare for Dynamics 365 Customer Insights in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Insights**.

Overview

Dynamics 365 Customer Insights is an industry-leading customer data platform that enables organizations to understand the data about their customers and drive personalization for them. Customer Insights empowers organizations to consolidate, enrich, understand, and harness their B2C and B2B customer data for intelligent insights and actions.

With Customer Insights, organizations can unify customer profiles from disparate data sources, harmonize the customer consent from each of those sources, and create powerful AI-driven predictions, segments, and measures. This information can be activated across Microsoft and external systems. Leveraging integrations with Dynamics 365, Microsoft Power Platform, Azure Synapse Analytics, and Microsoft Dataverse, Customer Insights lowers the cost, configuration complexity, and time to value for organizations.

We are making several investments to enhance Customer Insights capabilities as a part of 2022 release wave 1:

- New templates and libraries of industry standard metrics to get started faster.
- Accelerate B2B sales and increase return on marketing spend through intent data, account-based insights, and lead matching.
- Extended semantic types for activities and entities.
- New automated transaction churn out-of-the-box model.
- Near real-time consent data harmonized from third-party consent management services.
- Enrich your customer data safely with clean rooms.

Investment areas

B2B
Work with business accounts and their related contacts in Customer Insights. In addition to individual consumers, you can leverage the features of Customer Insights for business accounts. Several feature areas support B2B scenarios if your environment is configured for B2B.

Activities
Your data sources can include entities with transactional and activity data. Identify these entities and select the combined activities you want to view on the customer timeline for a chronological view.

Consent management
We expand the footprint of consent enablement features across more areas within Customer Insights. This enables customers to integrate and harmonize consent data from multiple consent systems and data sources. For example, we introduce close to real-time data import, extend the data sources coverage, and the regional footprint.

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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to [2021 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.

Activities

Activity enhancements include improvements such as additional semantic types and intelligent semantic mapping.

Feature	Enabled for	Public preview	General availability
Expand semantic type support for activities and entities	Users by admins, makers, or analysts	Sep 2022	

B2B

Get more actionable insights for both organizations and individuals by creating them side by side.

Feature	Enabled for	Public preview	General availability
Accelerate sales through intent data and account prospecting	Admins, makers, marketers, or analysts, automatically	Sep 2022	
Provide templates and libraries of industry standard metrics	Users, automatically	Sep 2022	

Consent management

Expanding the coverage of consent enablement features that enable the harmonization of consent data across multiple consent data sources.

Feature	Enabled for	Public preview	General availability
Import consent data almost in real time	Users by admins, makers, or analysts	Sep 2022	

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.

Activities

Overview

Your data sources can include entities with transactional and activity data. Identify these entities and select the combined activities you want to view on the customer timeline for a chronological view.

Expand semantic type support for activities and entities

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

Business value

Capture meaningful attributes from your data by mapping it to predefined activity and entity schemas. You can use this data in prediction models, segments, and measures.

Feature details

Map your data to more semantic types for activities and entities. It helps you enable insights, such as out-of-the-box prediction models, segments, and measure templates. By mapping data to schemas of semantic types, you can configure models, segments, and measures with attributes defined in the semantic type schemas they use.

B2B

Overview

Work with business accounts and their related contacts in Customer Insights. In addition to individual consumers, you can leverage the features of Customer Insights for business accounts. Several feature areas support B2B scenarios if your environment is configured for B2B.

Accelerate sales through intent data and account prospecting

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

Business value

Focus your activities on the right B2B account.

Feature details

This feature builds on partnerships with third-party data providers to purchase intent data and tailor your messaging to your audience at the right time. It provides a mechanism to match contacts with accounts if a relationship doesn't already exist. Through probabilistic matching, anonymous profile matching, and B2C and B2B data matching, the feature helps to provide proper account context and insights for better decision-making.

Provide templates and libraries of industry standard metrics

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

Business value

Use templates and libraries of industry-specific standard metrics to get business value right away.

Feature details

This feature introduces a set of identified industry-specific standard metrics that are readily available in Customer Insights. No prior knowledge is required to use the templates. We identify the metrics based on close collaboration and input from sources in the industries and additional market research.

Consent management

Overview

We expand the footprint of consent enablement features across more areas within Customer Insights. This enables customers to integrate and harmonize consent data from multiple consent systems and data sources. For example, we introduce close to real-time data import, extend the data sources coverage, and the regional footprint.

Import consent data almost in real time

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

Business value

This feature enables you to integrate your consent management platform with Dynamics 365 Customer Insights.

Feature details

Consent management adds support for the integration of consent data almost in real time. It helps to ensure that consent permissions and preferences of your customers are honored during real-time personalization scenarios in Customer Insights, Microsoft's customer data platform.

Supply Chain Insights

Plan and prepare for Dynamics 365 Supply Chain Insights in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Supply Chain Insights**.

Overview

Our vision is to help businesses build the supply chain of the future that is resilient, efficient, and sustainable. Dynamics 365 Supply Chain Insights will be capable of sensing, predicting, and mitigating disruptions before they occur without sacrificing efficiency or sustainability.

Organizations with complex supply chains such as manufacturers and retailers will be able to create a digital representation of their physical supply chain and achieve end-to-end real-time visibility. They will break down data silos inside their organization as well as across the broader ecosystem. They will be able to take advantage of AI to analyze the huge amounts of data that are surfaced and get recommendations that are predictive as well as prescriptive. Finally, they will be able to collaborate within and across company boundaries, and take actions to simultaneously improve resilience, achieve efficiency, and drive sustainability by closing the loop around supply chain execution systems.

To help businesses achieve this vision, we are bringing to market a software as a service (SaaS) product that enables them to:

- Get end-to-end holistic visibility into in-house manufacturing processes, assets, multiple tiers of suppliers and customers, service providers, distributors, 3PLs, and external factors such as natural catastrophes, the financial health of partners, and geopolitical and weather events.
- Consume AI-powered analytics that assess and surface insights and risks in a timely manner and recommend the next best actions for supply chain managers, sustainability officers, and business leaders.
- Do deep collaboration across internal and external stakeholders to take decisions and implement actions needed to effectively manage risks and optimize for resiliency, sustainability, and efficiency.

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 Supply Chain 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 Supply Chain 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 Supply Chain Insights.
Product documentation	Find documentation for Supply Chain Insights.
User community	Engage with Supply Chain Insights experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Supply Chain Insights.

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

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

For a list of the previous wave's release plans, go to [2021 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.

Feature	Enabled for	Public preview	General availability
Embedded Supply Chain Management experiences	Admins, makers, marketers, or analysts, automatically	Nov 2021	Apr 2022
Try smart case manager	Admins, makers, marketers, or analysts, automatically	Nov 2021	Apr 2022
Use AI-driven surveys in Dynamics 365 Supply Chain Insights	Admins, makers, marketers, or analysts, automatically	Nov 2021	Apr 2022
Use what-if analysis in Dynamics 365 Supply Chain Insights	Admins, makers, marketers, or analysts, automatically	Nov 2021	Apr 2022

Description of **Enabled for** column values:

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

Embedded Supply Chain Management experiences

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

Business value

This feature will significantly enhance the effectiveness of Dynamics 365 Supply Chain Management users. Supply chain risks can be found by using data from suppliers and purchase orders (POs). With this information, supply managers can adapt POs and create orders based on risk assessments from Dynamics 365 Supply Chain Insights.

Feature details

A supply manager can natively view the supply chain map, digital twin, and other risk signals inside Supply Chain Management without having to leave their Supply Chain Management instance. This functionality will significantly enhance the effectiveness of Supply Chain Management users by leveraging the data from suppliers and POs to find supply chain risks. Supply managers can therefore be more agile by adapting POs and creating orders based on risk assessments from Supply Chain Insights.

Try smart case manager

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

Business value

Users can get recommendations on the next best actions that align with best practices to avoid loss of revenue and delayed materials. All actions and resolutions will be encapsulated in a case, including the details of the disruptive event.

Feature details

From many areas within Dynamics 365 Supply Chain Insights, including Teams, analytics, digital twin, and more, a user will be able to capture the information from Supply Chain Insights into a case. The case can then recommend what is the next best action while also pulling in the relevant stakeholders to encapsulate the final agreement on how to manage the disruption.

Use AI-driven surveys in Dynamics 365 Supply Chain Insights

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

Business value

Participants will get direct feedback from one or many suppliers regarding a potential disruption and the potential impact to the supply chain.

Feature details

Companies using Dynamics 365 Supply Chain Insights will be able to create survey templates and enable AI to assess, survey, and understand the potential impact of a tier 1 participant.

Use what-if analysis in Dynamics 365 Supply Chain Insights

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

Business value

Users can identify vulnerabilities in their supply chain and create alternate supply chain scenarios to ensure that they continuously meet the needs of the business.

Feature details

Users will be able to leverage the digital twin to understand vulnerabilities and begin to input variable data regarding nodes in their supply chain. They will be able to better understand capability constraints and create digital twin replicas with alternate suppliers. This functionality also includes an overall supply chain health score.

Customer Voice

Plan and prepare for Dynamics 365 Customer Voice in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. 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. There are no new specific features for this release, but the product architecture will continue to evolve with general support and stability fixes.

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.

What's new and planned for Dynamics 365 Customer Voice

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

For a list of the previous wave's release plans, go to 2021 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
Get detailed email delivery status	Admins, makers, marketers, or analysts, automatically	Apr 2022	-
Share and co-author surveys with your team in a seamless way	Admins, makers, marketers, or analysts, automatically	Aug 2022	-

Description of **Enabled for** column values:

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

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

Get detailed email delivery status

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

Business value

This functionality provides the survey owner with a detailed delivery report for all the email surveys sent to the target customers through Power Automate flow or out-of-the-box email editor. This will help in understanding the actual reason for the survey not reaching the intended users. This information will enable survey owners to create effective survey reports and come up with a relevant plan for scheduling reminders and follow-ups.

Feature details

In the current Customer Voice setup, emails that are failed to be delivered display the status as either "Failed" or "Queued" as a part of the **Deliver** tab within the tool, based on the bounce type. This enhanced functionality will consolidate all the emails not delivered into the relevant bounce category (hard bounce or soft bounce) and, in addition, will allow the survey owner to view the detailed reason for failure as well.

Share and co-author surveys with your team in a seamless way

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

Business value

Sharing a project with multiple people in the organization helps collaborate on the structure and layout of surveys within the project. The people with whom the project is shared become the co-owners of the shared project. The business value of this capability is tremendous since this will ensure that none of the projects or collected customer feedback gets lost if the original survey owner leaves the organization after a project is shared. Thus long-running projects and surveys will be preserved when shared with a team, even if one or more owners leave the organization.

Feature details

The capability ensures the following behavior on sharing of a project:

- For the tenants where the user is allowed to create a Microsoft 365 Group, project sharing ensures:
    - A Microsoft 365 group is created automatically whenever a project is shared in AAD, and the person with whom the project is shared becomes part of the group along with the survey owner.
    - The ownership of all the surveys within the shared project gets transferred to the newly created group.
    - A project co-owner has the same level of permissions as the project owner. This means a co-owner can create, edit, update, delete, and share the project.
- For tenants where group creation is restricted, the sharing experience will present the survey owner with a list of existing groups for sharing the project, and the ownership of all the surveys within the shared project gets transferred to the selected group.

Microsoft Cloud for Industry

Plan and prepare for Microsoft Cloud for Healthcare in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Microsoft Cloud for Healthcare**.

Overview

Microsoft Cloud for Healthcare provides capabilities to manage health data at scale and makes it easier for healthcare organizations to improve the patient experience, coordinate care, and drive operational efficiency.

By bringing together capabilities from Microsoft Dynamics 365, Microsoft 365, and Microsoft Azure, Microsoft Cloud for Healthcare expedites a healthcare organization's ability to roll out solutions. Patients, providers, and care coordinators can perform daily duties in a modern yet familiar user interface.

Investment areas

Expand healthcare solutions to payor and pharma verticals
Currently most solutions in Microsoft Cloud for Healthcare focus on solutions targeted at healthcare providers. To be successful in the healthcare system end to end, payor and pharma companies need to be part of the data ecosystem.

Dynamics 365 2022 release wave 1 will start enabling select use cases to help with trial and claims management.

Improve clinical and operational insights
Healthcare data models and data ingestion provide the foundation for healthcare customers to be successful on Dynamics 365 and Power Platform.

To help customers of Microsoft Cloud for Healthcare accelerate use of Dynamics 365 and Microsoft Power Platform, we provide a starter healthcare data model. The data model aligns with HL7 FHIR standards to support data interoperability with other services. In addition, we provide tools to help with data ingestion.

For 2022 release wave 1, we're extending the data model and improving the data ingestion pipeline.

Security, compliance, privacy, and availability
To help customers protect their health information and access it more broadly, Microsoft Cloud for Healthcare continues to provide solutions and options.

Enhance patient engagement
Enables data to flow securely through every point of care to improve patient experiences with their providers.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Microsoft Cloud for Healthcare** 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 Cloud for Healthcare

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

For a list of the previous wave's release plans, go to 2021 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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Enhance patient engagement

Improve patient experiences with their providers.

Feature	Enabled for	Public preview	General availability
Patient insights	Users by admins, makers, or analysts	Jun 2022	-
Patient view updates	Users, automatically	✓ Dec 7, 2021	Apr 2022

Expand healthcare solutions to payor and pharma verticals

Enable pharma and payor customers to start participating in Microsoft Cloud for Healthcare.

Feature	Enabled for	Public preview	General availability
Payor data model support	Users by admins, makers, or analysts	Apr 2022	-
Decentralized clinical trials data model support	Users, automatically	Jun 2022	-

Improve clinical and operational insights

Healthcare provider solution connects data from across systems to improve patient care and operational efficiencies through data interoperability.

Feature	Enabled for	Public preview	General availability
Improve healthdata ingestion with FHIR mapping support	Users by admins, makers, or analysts	Apr 2022	-
Enhanced data model	Admins, makers, marketers, or analysts, automatically	-	Apr 2022
Enabling virtual entities for data ingestion improvement	Users by admins, makers, or analysts	✓ Dec 6, 2021	Apr 2022
Enhanced patient links	Users by admins, makers, or analysts	✓ Feb 1, 2022	Apr 2022

Security, compliance, privacy, and availability

Microsoft Cloud for Healthcare helps healthcare customers with safer solutions broadly.

Feature	Enabled for	Public preview	General availability
Global expansion phase 2	Users by admins, makers, or analysts	-	Apr 2022
Upgraded sample data for healthcare solutions	Users by admins, makers, or analysts	-	Apr 2022

Description of **Enabled for** column values:

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

Enhance patient engagement

Overview

Enables data to flow securely through every point of care to improve patient experiences with their providers.

Patient insights

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

Business value

Time-to-value for insights will be reduced for analysts. Insights, including from external data sources, will help users gain a 360-degree view of a patient.

Feature details

Insights templates will be provided for analysts, and will be made available for users in context of their workflows. In addition, the insights will be made available on the Patient 360 form for easy access by users of the patient view.

Patient view updates

Enabled for	Public preview	General availability
Users, automatically	✔ Dec 7, 2021	Apr 2022

Business value

Partners and customers will be able to use the patient view in their own solutions to find patient data for their users.

Feature details

The patient view will be made available as a standalone component, which partners can use in their own solutions. In addition, the view's layout and design will be updated to include a more visual approach to medication and allergies.

See also

Unified patient view: Interact with patient information (docs)

Expand healthcare solutions to payor and pharma verticals

Overview

Currently most solutions in Microsoft Cloud for Healthcare focus on solutions targeted at healthcare providers. To be successful in the healthcare system end to end, payor and pharma companies need to be part of the data ecosystem.

Dynamics 365 2022 release wave 1 will start enabling select use cases to help with trial and claims management.

Payor data model support

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

Business value

The Microsoft healthcare data model will begin supporting payor business processes.

Feature details

The Microsoft healthcare data model is the same foundation used by Microsoft Cloud for Healthcare model-driven apps and made available for Microsoft partners and Dataverse customers via Microsoft Cloud Solution Center.

Decentralized clinical trials data model support

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

Business value

The Microsoft healthcare data model will begin supporting pharma and life sciences with an initial focus of supporting decentralized clinical trials.

Feature details

The Microsoft healthcare data model is the same foundation used by Microsoft Cloud for Healthcare model-driven apps and made available for Microsoft partners and Dataverse customers via Microsoft Cloud Solution Center.

Improve clinical and operational insights

Overview

Healthcare data models and data ingestion provide the foundation for healthcare customers to be successful on Dynamics 365 and Power Platform.

To help customers of Microsoft Cloud for Healthcare accelerate use of Dynamics 365 and Microsoft Power Platform, we provide a starter healthcare data model. The data model aligns with HL7 FHIR standards to support data interoperability with other services. In addition, we provide tools to help with data ingestion.

For 2022 release wave 1, we're extending the data model and improving the data ingestion pipeline.

Improve healthdata ingestion with FHIR mapping support

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

Business value

This feature simplifies for customers the ingestion of FHIR data from their FHIR servers into Microsoft Dataverse.

Feature details

To improve the experience for ingesting FHIR data into Dataverse, this preview feature enables you to:

- Send FHIR bundles to Dataverse from any FHIR source.
- Extract FHIR bundles from Dataverse and send back to the calling service.
- Map FHIR bundles to Common Data Model with the Sync admin maps feature.

Enhanced data model

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

Business value

Microsoft's HL7 FHIR-based healthcare data model is being updated to address healthcare provider data model feedback.

Feature details

The Microsoft healthcare data model is the same foundation used by Microsoft Cloud for Healthcare model-driven apps and made available for Microsoft partners and Dataverse customers via Microsoft Cloud Solution Center.

Enabling virtual entities for data ingestion improvement

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 6, 2021	Apr 2022

Business value

Virtual entities behave largely the same as traditional data displayed from Dataverse. Users should experience little to no change in their user experience.

Feature details

Virtual health data tables (preview) allow customers to avoid paying for the same data twice. Instead of expensive and time-intensive integration projects, admins can now virtualize select Microsoft Cloud for Healthcare entities (expose filtered EHR data to users in real time).

See also

Configure Project virtual health data tables (docs)

Enhanced patient links

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Feb 1, 2022	Apr 2022

Business value

Users should be able to easily visualize data from linked patient records while reviewing one patient record in the tree.

Feature details

Enhanced patient links surface linked patient data, including observations, encounters, and other data.

Admins can enable patient links merge behavior. They can set link behavior to be none, links only, or links with rollup. When enabled, admins can set linking with rollup to a maximum depth for user experience and performance optimization.

See also

Patient links (docs)

Security, compliance, privacy, and availability

Overview

To help customers protect their health information and access it more broadly, Microsoft Cloud for Healthcare continues to provide solutions and options.

Global expansion phase 2

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

Business value

Based on customer demand, we'll further expand the availability of Microsoft Cloud for Healthcare across more regions.

Feature details

We'll expand the availability of the Cloud for Healthcare to regions such as Japan and India, and expand localization to additional languages, such as Japanese.

Upgraded sample data for healthcare solutions

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

Business value

Customers and partners can save time and effort involved in generating sample data in Microsoft Cloud for Healthcare solutions.

Feature details

Prioritized scenarios of Microsoft Cloud for Healthcare solutions will be more intuitive with upgraded sample data. Customers and partners can save time and effort when generating sample data. The updated sample data will help them to quickly onboard and understand the value of the solutions with scenario-centric sample data.

Plan and prepare for Microsoft Cloud for Financial Services in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Microsoft Cloud for Financial Services**.

Overview

Microsoft Cloud for Financial Services provides capabilities to manage financial services data at scale and makes it easier for financial services organizations to improve their customer experience, coordinate engagement, and drive operational efficiency. By bringing together capabilities from Microsoft Dynamics 365, Microsoft 365, and Microsoft Azure, Microsoft Cloud for Financial Services expedites a financial services organization's ability to achieve its digital transformation. Our commitment is to offer industry-relevant data gravity and interoperability that comes to life at the application layer in a consistent and meaningful way, while enabling high-value scenarios, seamlessly extended, and enriched by premier industry partners.

With 2022 release wave 1, we're focusing on three primary dimensions:

- **Data gravity, interoperability, and analytics**: Reduce barriers to entry by simplifying the flow of data into the Microsoft Cloud for Financial Services. Ensure consistency across operational and analytical applications to allow financial institutions the freedom to adopt capabilities as they're ready, with little to no effort—while streamlining the flow of data across applications.
- **New high-value scenarios**: Expand the value of Unified customer profile to offer deep customer understanding across wealth management and general insurance while capturing new views on the customer. Tune purpose-built AI-powered insights to meet the unique demands of new industries, while also improving employee productivity with cutting edge document intelligence to accelerate customer onboarding. Finally, improve customer engagement by leveraging high-value services in Dynamics 365 to streamline consultation appointment scheduling and intelligent customer outreach to engage with customers on their terms.
- **Rich partner network**: Enable our ecosystem to deeply integrate to the Microsoft Cloud for Financial Services and extend its value, helping to further accelerate the data flywheel. Align cloud assets and ecosystem by meeting the demands of specific verticals to ensure that Microsoft Cloud for Financial Services can support industry-relevant business outcomes.

For official product documentation and training for Microsoft Cloud for Financial Services, see:

- [Microsoft Cloud for Financial Services docs]
- [Microsoft Cloud for Financial Services training on Microsoft Learn]

Investment areas

Retail banking
We've further enhanced our offering for the retail banking industry, strengthening customer intelligence with new enhancements to Unified customer profile, Loan tracker, and Banking customer intelligence.

Financial services data models
To help banks and other financial services organizations take advantage of Microsoft Cloud for Financial Services quickly, with their business model supported out of the box, we're introducing extensions to Common Data Model and the Retail banking data model that are applicable across financial services.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Microsoft Cloud for Financial Services** 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 Cloud for Financial Services

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

change and projected functionality may not be released. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to 2021 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.

Financial services data models

Help banks and other financial services organizations quickly take advantage of Microsoft Cloud for Financial Services.

Feature	Enabled for	Public preview	General availability
General insurance data model	Users by admins, makers, or analysts	Sep 2022	-
Wealth management data model	Users by admins, makers, or analysts	Sep 2022	-

Retail banking

Strengthen customer intelligence with new enhancements to Unified customer profile, Loan tracker, and Banking customer intelligence.

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

Description of **Enabled for** column values:

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

Financial services data models

Overview

To help banks and other financial services organizations take advantage of Microsoft Cloud for Financial Services quickly, with their business model supported out of the box, we're introducing extensions to Common Data Model and the Retail banking data model that are applicable across financial services.

General insurance data model

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

Business value

A dedicated General insurance data model hosted in Microsoft Dataverse captures new dimensions, such as policies, coverages, and claims linked to customers. To help insurers take advantage of the benefits of Microsoft Cloud for Financial Services quickly, with their business model supported out of the box, we're introducing extensions to Common Data Model that are customized for insurance scenarios. These changes will accelerate time to value for financial institution solutions by ensuring that data structure and measures available out of the box are consistent and relevant for insurance business processes.

Feature details

- **Policy, coverage, claims schema**: Policies, coverages and claims are critical entities that are specific to insurance distributors and underwriters. We're providing relevant tables to help property and casualty insurers take advantage of Microsoft Cloud for Financial Services, with their business model supported out of the box. The new tables in the data model will cover insurance-related items: policies, coverages, and claims.
- **Claims filing schema**: We're introducing entities to Common Data Model allowing representation of claim flows to cover the claim filing process for insurers. The new attributes in the data model will support entities for the claim filing process and will include the claim submission table and related relationships to customer and policy.

Wealth management data model

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

Business value

A dedicated Wealth management data model hosted in Microsoft Dataverse captures new dimensions, such as financial goals, and investment instruments linked to customer portfolios. To help wealth managers take advantage of the benefits of Microsoft Cloud for Financial Services quickly, with their business model supported out of the box, we're introducing extensions to Common Data Model and the Retail banking data model that are customized for wealth management scenarios. These changes will accelerate time to value for financial institution solutions by ensuring that data structure and measures available out of the box are consistent and relevant for wealth management business processes.

Feature details

- **Financial goals schema**: Financial goals assessment and tracking are critical elements of financial advice in order to assess suitability and structure investment portfolios. We're providing the ability to track and capture financial goals values and time horizons as part of the wealth management domain of the Financial services data model.
- **Investment instruments schema**: Understanding the constituents of investment portfolios is critical for wealth managers to serve their customers. We're adding the ability to capture investment instruments (securities, funds or cash) as part of the wealth domain of the financial services data model.

Retail banking

Overview

We've further enhanced our offering for the retail banking industry, strengthening customer intelligence with new enhancements to Unified customer profile, Loan tracker, and Banking customer intelligence.

Customer onboarding enhancements

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

Business value

When applying for new services, whether loans, accounts or credit lines, applicants usually reach out to the bank via the official website or mobile application as a first step to explore available options and evaluate their fit. Ensuring that these applications are streamlined and immediately serviced is key to ensuring customers don’t turn to another bank.

Feature details

With Customer onboarding, we seek to offer self-service tools and productivity enhancing services to help banks accelerate and automate the application process, with a focus on lending. Tools and services are easily extensible and customizable, to meet each bank’s unique needs and requirements.

- **Loan tracker enhancements**: We're introducing enhancements to Loan tracker based on customer feedback.
- **Loan application sample portal enhancements**: The sample portal’s main goal is to demonstrate the end-to-end loan application flow from the applicant side, serving as an example for banks. In this release, banks will be able to leverage SDK and UI components to develop and improve their existing end user experience, including improvements that streamline the gathering of financial information.

Plan and prepare for Microsoft Cloud for Nonprofit in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Microsoft Cloud for Nonprofit**.

Overview

Microsoft Cloud for Nonprofit transforms Microsoft's industry-leading technologies—productivity and collaboration tools, business applications, cloud services, and infrastructure—by connecting them to the most common nonprofit scenarios. Built for fundraisers, volunteer managers, program managers, and other roles unique to nonprofit organizations, these products address the sector's most urgent challenges, including constituent and supporter engagement, award management, fundraising, volunteer management, program design and delivery, nonprofit operations, and data management.

This nonprofit-specific cloud unlocks the power of Microsoft Dynamics 365, Microsoft Power Platform, Microsoft 365, Azure, and LinkedIn, enabling organizations to realize an accelerated time to value. It is built on the Nonprofit Common Data Model, a flexible and robust framework created in partnership with nonprofit leaders and technologists to unify nonprofit data and connect technology across the organization. Common Data Model is a platform-agnostic set of nonprofit entities, attributes, and relationships for the most common nonprofit scenarios. It takes the guesswork out of relating nonprofit data across platforms and applications, helping organizations eliminate expensive data silos.

Microsoft Cloud for Nonprofit meets nonprofits where they are today, leveraging Microsoft applications that organizations may already own, including Microsoft 365, Azure, and Dynamics 365, alongside purpose-built Microsoft Cloud for Nonprofit solutions like Fundraising and Engagement, Volunteer Management, and Volunteer Engagement.

With unified data, nonprofits work smarter by raising more revenue, effectively delivering more programs and services to communities, and more easily measuring the impact they're making. Our ambition is to make it easier, faster, and less expensive for nonprofits to adopt modern technology so they can focus on what's important—their mission.

Investment areas

Know your donors and supporters
Nonprofit development operations and database administrators will benefit from faster and more secure donation processing. As we continue to invest in leveraging Microsoft platform capabilities, we have further redesigned the architecture of Fundraising and Engagement to ensure Azure is delivering real-time processing and market-leading transaction security.

Nonprofit organizations and UN agencies that leverage Dynamics 365 Marketing and Microsoft Cloud for Nonprofit will benefit from a nonprofit marketing template that will provide a guided journey to campaign segmentation and analysis.

Microsoft Cloud for Nonprofit provides:

- **Constituent management**: Attract, retain, and grow donor and supporter bases.
- **Personalized engagement**: Connect through compelling content by using the most proven channels.
- **Donation and award management**: Payment processing, fund accounting, and designation management to support fundraising efficiency for simple to complex funding types.

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

[Check out the release plan]

For application administrators

User-impacting features to the user experience enabled automatically
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Features that must be enabled by application administrators
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What's new and planned for Microsoft Cloud for Nonprofit

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

For a list of the previous wave's release plans, go to 2021 release wave 2 plan.

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Know your donors and supporters

Increase funding and support of your mission by aligning program needs with personalized supporter engagements.

Feature	Enabled for	Public preview	General availability
Automated Azure post-deployment configuration for Fundraising and Engagement	Users, automatically	-	Jun 2022
New Getting started experiences	Users, automatically	-	Jun 2022
Payment processing enhancements	Users, automatically	-	Jun 2022

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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](#).

Know your donors and supporters

Overview

Nonprofit development operations and database administrators will benefit from faster and more secure donation processing. As we continue to invest in leveraging Microsoft platform capabilities, we have further redesigned the architecture of Fundraising and Engagement to ensure Azure is delivering real-time processing and market-leading transaction security.

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- **Donation and award management**: Payment processing, fund accounting, and designation management to support fundraising efficiency for simple to complex funding types.

Automated Azure post-deployment configuration for Fundraising and Engagement

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

Business value

Nonprofit database administrators and implementation partners need a simpler way to deploy Fundraising and Engagement.

Feature details

Fundraising and Engagement in Microsoft Cloud for Nonprofit is dependent on the following features and products:

- Common Data Model for Nonprofits
- Dynamics 365 Sales Enterprise
- Microsoft Power Platform
- Azure

Azure is the critical infrastructure and foundation of Fundraising and Engagement. We leverage Azure infrastructure to process donations, set up and execute recurring donation logic, and calculate data and analytics that are viewed by users in the CRM user interface. In this release, we've listened to feedback from nonprofit database administrators and implementation partners to simplify and automate the required deployment of Azure in the same environment as the required Dynamics 365 tenant.

Now, citizen database administrators with little to no Azure experience will be able to deploy Fundraising and Engagement with a few simple clicks and a guided user workflow.

New Getting started experiences

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

Business value

Getting started experiences provide in-application guidance and help to nonprofit users, making it easier to adopt new systems, optimize workflows, and troubleshoot on the spot.

Feature details

Microsoft Cloud for Nonprofit is powered by Dynamics 365, Microsoft Power Platform, Azure, and Modern work and exists to help nonprofit organizations to empower scalable and transformative mission impact. The following products are part of Microsoft Cloud for Nonprofit today:

- **Fundraising and Engagement**: A constituent and donation management solution powered by Dynamics 365, Power Platform, and Azure.
- **Volunteer Management**: Equip volunteer managers with the tools they need to simplify volunteer recruiting, onboarding, retention, and reporting. Powered by Power Platform.
- **Volunteer Engagement**: Empower volunteers to discover, register for, and participate in nonprofit engagement opportunities. Help volunteers connect more easily with nonprofit volunteer coordinators and have a delightful volunteer experience. A Power Apps portal application.

We're introducing Getting started experiences for all products that make up Microsoft Cloud for Nonprofit. New and returning users who want to discover new feature and product information, leverage training materials, find out more about a workflow or a feature, or connect with other users or Microsoft staff will navigate to Getting started for the latest product information.

Payment processing enhancements

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

Business value

Microsoft Cloud for Nonprofit's Fundraising and Engagement product includes donation and transaction management as one of its core value drivers.

Feature details

In this release, we have strengthened the architecture between Dynamics 365 and Azure that allow nonprofit organizations to process donations in real time on their busiest fundraising days. One-time donations, recurring donations, payment schedules, and pledges are now more secure and reliable for all nonprofits.

Plan and prepare for Microsoft Cloud for Sustainability in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Microsoft Cloud for Sustainability**.

Overview

Drawing on the depth and breadth of the entire Microsoft cloud, Microsoft Cloud for Sustainability is a new cloud offering that is designed to help companies take control of their environmental initiatives. Microsoft Cloud for Sustainability offers a set of comprehensive, integrated, and automated insights for organizations to accelerate each stage of their sustainability journey.

With Microsoft Cloud for Sustainability, we're creating a whole new category, going beyond capturing data to helping customers aggregate sustainability data in an actionable way. It includes software as a service (SaaS) offerings that can discover and connect to real-time data sources, accelerate data integration and reporting, provide accurate carbon accounting, measure performance against goals, and enable intelligent insights for organizations to take more effective action.

Here are examples of scenarios that demonstrate how organizations will be able to leverage Microsoft Cloud for Sustainability to achieve their goals:

- CIOs will be able to easily report on IT carbon emissions from the cloud, devices, and applications as part of their department's environmental footprint. They will then be able to connect their emissions data sources into one view for reporting.
- Companies will be able to offer their customers a sustainability scorecard to track progress against their carbon emission reduction goals, inclusive of scope 1-3 emissions (that is, emissions from a company's owned sources, emissions from purchased energy, and all other emissions).
- Customers will be able to pinpoint specific emission areas and track if they are meeting their emission reduction goals. For instance, if an HVAC system is not on track to meet its prescribed emissions reduction target, the task can be assigned to operations to make the necessary improvements to reach that target.

Investment areas

Record
Near real-time connections across emissions sources enable Microsoft Cloud for Sustainability to automate ingestion of operational business activities that represent the customers' entire operations and value stream emissions footprint.

Reduce
Microsoft Cloud for Sustainability will go beyond basic dashboards. Many customers have set bold public commitments and are working toward them. Microsoft Cloud for Sustainability will help customers better understand the actions they should take to continue to reduce emissions, improve business processes, and make lasting changes in their organization.

Report
With a complete set of understandable data, customers can produce reports based on consumption, create an accurate baseline, and understand progress toward goals, while meeting strict regulatory and public reporting requirements.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Microsoft Cloud for Sustainability** 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 Cloud for Sustainability

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

For a list of the previous wave's release plans, go to 2021 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.

Record

Near real-time connections across emissions sources enable Microsoft Cloud for Sustainability to automate ingestion of operational business activities that represents the customers' entire operations and value stream emissions footprint.

Feature	Enabled for	Public preview	General availability
Common Data Model for Microsoft Cloud for Sustainability	Users, automatically	✓Oct 27, 2021	May 2022
Dynamic calculation service	Users, automatically	✓Oct 27, 2021	May 2022
Ecosystem of prebuilt data connectors	Users, automatically	✓Oct 27, 2021	May 2022

Reduce

Microsoft Cloud for Sustainability will help customers better understand the actions they should take to continue to reduce emissions, improve business processes, and make lasting changes in their organization.

Feature	Enabled for	Public preview	General availability
Data-driven scorecards and goals	Users, automatically	✓Oct 27, 2021	May 2022

Report

With a complete set of understandable data, customers can produce reports based on consumption, create an accurate baseline, and understand progress toward goals, while meeting strict regulatory and public reporting requirements.

Feature	Enabled for	Public preview	General availability
Emissions and operational-specific dashboards	Users, automatically	✔ Oct 27, 2021	May 2022
Public reporting	Users, automatically	✔ Oct 27, 2021	May 2022

Description of **Enabled for** column values:

- **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.

Record

Overview

Near real-time connections across emissions sources enable Microsoft Cloud for Sustainability to automate ingestion of operational business activities that represent the customers' entire operations and value stream emissions footprint.

Common Data Model for Microsoft Cloud for Sustainability

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 27, 2021	May 2022

Business value

Common Data Model for Microsoft Cloud for Sustainability provided customers with a common format for emissions activity and reference data. Emissions that are calculated and stored according to this schema can be easily used for allocation and reporting in a meaningful way, according to the Greenhouse Gas Protocol.

Common Data Model for Microsoft Cloud for Sustainability will be included in the overall Common Data Model libraries, published in an open-source fashion. The data model includes emissions for scopes 1, 2, and all categories in scope 3.

Feature details

Our data model schema will be open source and available for customers to see in the Industry Data Workbench. Customers can navigate to this schema and customize it using Azure Synapse Link. Data model entities include, but are not limited to, the ones listed below.

Emission sources

- Stationary combustion
- Mobile combustion
- Industrial process
- Fugitive emissions
- Purchased energy (includes heat, steam, and cooling)

Key subentities

- Fuel type
- Vehicle type
- Contractual instrument type

Emission categories

- Purchased goods and services
- Capital goods
- Fuel and energy
- Transportation and distribution
- Waste
- Business travel
- Employee commute
- Leased assets
- Sold products

- End of life
- Franchises
- Investments

Key subentities

- Fuel type
- Vehicle type
- Contractual instrument type

Emission factors

- Factor library
- Unit
- Unit group
- Emission factor
- Estimation factor
- Estimation factor type
- Parameter
- Greenhouse gas
- Supply chain emission factor

Organization

- Org unit
- Org hierarchy
- Facility
- Facility type
- Cooling type
- Heating type
- Org profile
- Industry classification
- Division master
- Major group master

Core functionality

- Data ingestion

- Calculation
- Reporting

See also

Emission factors (docs)

Dynamic calculation service

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 27, 2021	May 2022

Business value

With the dynamic calculation service, you can trust that you are using industry standards, which allow any easy way to streamline point-in-time calculation activities into ongoing, reliable emissions calculations. The result is a near real-time view of emissions.

Feature details

With the dynamic calculation service, you will receive recommended calculation algorithms that are specific to source and activity, with industry standard coefficients. You can also create custom calculations based on Microsoft Power Fx, which is a low-code language that helps to generate more accurate results for specific business needs. These calculations will cover scope 1, scope 2, and part of the scope 3 categories.

Calculation models

Calculation models enable both default and customizable calculation methods to be built and used, as needed. Models can be custom-built using an intuitive user interface with Power FX capabilities.

Default models include:

- Scope 1: Fugitive emissions, mobile combustion, stationary combustion.
- Scope 2: Purchased energy, purchased cooling, purchased steam and heat.
- Scope 3: Purchased goods and services, capital goods, upstream and downstream transportation and distribution, and business travel.

Calculation profiles

Note the following information about calculation profiles:

- Connect data to calculation models.
- Can be customized based on any entity within the data model.
- Set the frequency of calculation.

Emission factors and mappings

Emission factor sets can be added to Microsoft Cloud for Sustainability via the data ingestion service. Default factor sets will be added to Microsoft Cloud for Sustainability based on standards available.

Estimation factors are differentiated within Microsoft Cloud for Sustainability, but can also be added and customized.

Factor mappings map emission factors to reference data, so calculations can be scaled by factors such as facility location, fuel type, or spend code, without increasing the number of calculation models that need to be managed.

See also

Calculation models (docs)

Ecosystem of prebuilt data connectors

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 27, 2021	May 2022

Business value

Streamlined and automated data collection and mapping will enable complete and accurate data to be imported into Microsoft Cloud for Sustainability to calculate emissions. This will also create a framework to unlock mutual customers' data and help accelerate their journey to become more sustainable.

Feature details

This feature provides recommendations for data connections from a catalog of prebuilt connectors and operational data providers. The catalog includes business solutions, energy providers, cloud providers, travel tools, trading partners, systems telemetry, and Internet of Things (IoT).

The ecosystem includes provider solutions that can ingest and process data for all emission categories. Customers can connect to these solutions through the Microsoft Cloud for Sustainability product or through Microsoft AppSource or Azure Marketplace using metadata. This will eliminate manual data entry and ensure that updated and accurate data is available within Microsoft Cloud for Sustainability to provide current and accurate emissions information for our customers.

A detailed framework is available to solution providers to build connectors for Microsoft Cloud for Sustainability for a seamless deployment experience that includes listing and certification within our AppSource and Marketplace sites. Solution providers can also leverage the prototype connector that defines and documents the end-to-end flow.

See also

Import data (docs)

Reduce

Overview

Microsoft Cloud for Sustainability will go beyond basic dashboards. Many customers have set bold public commitments and are working toward them. Microsoft Cloud for Sustainability will help customers better understand the actions they should take to continue to reduce emissions, improve business processes, and make lasting changes in their organization.

Data-driven scorecards and goals

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 27, 2021	May 2022

Business value

This feature enables organizations to define, track, and meet their sustainability goals in a data-driven approach.

Feature details

Using the new goals capability embedded in Microsoft Cloud for Sustainability, customers can set and track incremental and long-term goals. Goals can be created based on current and target values that are manually entered or current values that are derived from connected data. Users can manually check in updates or have the system automatically update current values and status directly tied to their data. Scorecards and insights will help organizations stay on track and ensure they have a path to hit their targets.

See also

Scorecards and goals (docs)

Report

Overview

With a complete set of understandable data, customers can produce reports based on consumption, create an accurate baseline, and understand progress toward goals, while meeting strict regulatory and public reporting requirements.

Emissions and operational-specific dashboards

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 27, 2021	May 2022

Business value

Microsoft Cloud for Sustainability provides rich visuals and insights into the emissions patterns and trends occurring across your entire organization. These will help you quickly understand trends, key influencers, and summary statistics across scope 1, scope 2, and scope 3 emissions for your organization.

Feature details

The dashboards provide a summary view of total emissions along with key summary statistics. You can personalize your view by setting filters by reporting year, accounting method, and scope.

Cards

Cards on the dashboard allow you to quickly assess the following metrics:

- Total emissions.
- Percentage of renewable energy.
- Revenue intensity score, where revenue intensity equals emissions divided by revenue.

These cards come with a comparison marker comparing each metric to the previous year.

Charts

Charts showing total emissions by scope, including by country or region, enable organizations to visualize their emissions footprint. The charts enable you to quickly identify the amount and type of renewable energy investments made over time. You can drill into emissions by organizational unit to see the largest and smallest contributors.

Widgets

Widgets are available to explore emissions data by scope, source facility, and country or region. Additionally, users can identify what key influencers contribute to increases and decreases in emissions.

See also

Emissions overview dashboard (docs)

Public reporting

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 27, 2021	May 2022

Business value

This feature helps to streamline the process to meet public and regulatory requirements for reporting carbon emissions.

Feature details

The feature enables customers to streamline the preparation of quantitative data aspects of public reporting through built-in, preparatory reports. You can extract emissions and activity data out of Microsoft Cloud for Sustainability in an Excel format, which can be used to submit data to public disclosure agencies such as DEFRA, GRI, and CDP.

See also

Generate a quantitative preparation report (docs)

Change history

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

2022 release wave 1 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning **January 31, 2022**. Features from the following apps are available as part of early access:

- Power Apps

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

IMPORTANT If you are using Dynamics 365 apps, such as Sales, Service, Marketing, Finance, Supply Chain Management, Business Central, and Commerce, there are early access features that could impact your users. For Dynamics 365 early access features, go to 2022 release wave 1 features available for early access.

Power Apps

For a complete list of the Power Apps features, go to What's new and planned for Power Apps.

Feature	Enabled for	Early access	General availability
Offline Sync notification	Users, automatically	✔ Jan 31, 2022	Apr 2022
Power Apps read-only grid control is the default grid for read-only scenarios	Users, automatically	✔ Jan 6, 2022	Apr 2022
UI improvement for business process flows	Users, automatically	✔ Dec 9, 2021	Apr 2022

Power Apps

Plan and prepare for Power Apps in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Power Apps**.

Overview

Microsoft Power Apps is the industry-leading low-code application development platform that underpins Dynamics 365 extensibility, Microsoft 365 customization, and standalone custom line of business applications for customers around the world. Power Apps dramatically lowers the cost, complexity, and time of software development through a range of powerful low-code development tools, a deep data platform in Microsoft Dataverse, and hundreds of connectors to common business data sources.

Power Apps is investing in several areas as part of Microsoft Power Platform 2022 release wave 1:

- **Deliver modern business apps with unparalleled productivity for all users**: Power Apps will add built-in collaboration for end users and integration with Microsoft 365 to allow teams to collaborate and act on business data, as well as key updates to modernize user experiences.
- **Activate experts across the organization with advanced low code**: Makers and developers of all skill levels will be more productive over Dataverse, multiply their productivity with fusion teams, and leverage intelligence to assist development.
- **Power Apps is the safest way to digitally transform at whole-company scale**: Secure and governable enterprise apps are critical to creating trust with your users and enterprise IT teams.
- **Deliver flagship applications faster than ever**: Organizations can now build and deliver flagship apps to the entire company through Power Apps with offline and standalone apps.

For official product documentation and training for Power Apps, go to:

- Power Apps docs
- Power Apps training on Microsoft Learn

TIP Download the release overview guide and share with your team as you plan to onboard the new capabilities included in this release wave.

Download the overview guide (PDF)

* Overview guide available in English version only.

Investment areas

Deliver modern business apps with unparalleled productivity for all users
Users can take advantage of cohesive and modern experiences while collaborating with team members in Power Apps. Key updates include:

- **Apps built using Power Apps are now multiplayer with built-in collaboration**: Enable users to collaborate, chat, and start meetings directly within the app.
- **Act on business data in context across Microsoft 365**: See and act on Power Apps and Dynamics 365 data directly in Microsoft 365 by pasting a link.
- **Keep users on task with cohesive experiences and delightful UX**: Modern and cohesive control updates across Power Apps provides a delightful and productive experience.

Enable experts across the organization with advanced low code
Makers and developers of all skill levels can be more productive with Power Apps and Dataverse, enabling fusion teams and leveraging intelligence to simplify common tasks. Key updates include:

- **It's easier than ever to get started with Dataverse**: With simplified table creation and data load, the addition of Power Fx, and new modern low-code designers to simplify building apps over Dataverse.
- **Unleash fusion teams with collaborative development**: Allow multiple makers to work on a single app at the same time, accelerating the time of development and supporting with Microsoft 365 style tools, such as commenting.
- **Infuse intelligence for makers and end users alike**: Support developers to resolve common tasks and errors with intelligence.

Safest way to digitally transform at whole-company scale
Secure and governable enterprise apps are critical to creating trust with your users and enterprise IT teams. New capabilities are here to help you set the right policies to enable your enterprise apps across more places. Key updates include:

- **Solution quality and enforcement**: Continuing to evolve the checkers already in place in Power Apps, these will evolve to be more comprehensive and enforce quality in production environments.
- **Security updates**: Further updates on conditional access and providing more visibility to makers on security when sharing apps.

Rapid delivery of flagship applications
Organizations can now build and deliver flagship apps to the entire company through Power Apps. Key updates include:

- **Accelerate line of business app dev professionals**: Simplified development and management of offline apps.
- **Deliver standalone mission critical apps to every device**: Create standalone, native mobile apps with Power Apps.

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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to [2021 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.

Deliver modern business apps with unparalleled productivity for all users

Users can take advantage of cohesive and modern experiences while collaborating with team members in Power Apps.

Feature	Enabled for	Public preview	Early access*	General availability
Power Apps grid control support for editable scenarios in model-driven apps	Users by admins, makers, or analysts	May 2022	-	-
Enable model-driven app redirect from Internet Explorer to Microsoft Edge	Users by admins, makers, or analysts	Jun 2022	-	
Model-driven app in-app notifications	Users by admins, makers, or analysts	-	-	Apr 2022
Easy record sharing	Users by admins, makers, or analysts	✔Nov 4, 2021	-	Apr 2022
Explore data through modern advanced find	Users by admins, makers, or analysts	✔Dec 9, 2021	-	Apr 2022
UI improvement for business process flows	Users, automatically	-	✔Dec 9, 2021	Apr 2022
Power Apps read-only grid control is the default grid for read-only scenarios	Users, automatically	-	✔Jan 6, 2022	Apr 2022
Offline Sync notification	Users, automatically	-	✔Jan 31, 2022	Apr 2022
New activity dropdown to show only relevant activities	Users by admins, makers, or analysts	✔Mar 10, 2022	-	Apr 2022

Feature	Enabled for	Public preview	Early access*	General availability
Appointment description supports rich text	Users by admins, makers, or analysts	✔ Mar 17, 2022	-	Apr 2022
Create and join Teams meetings from in-app appointments	Users by admins, makers, or analysts	✔ Mar 17, 2022	-	Apr 2022
Use Lobe models in your apps and flows	Admins, makers, marketers, or analysts, automatically	✔ Nov 4, 2021	-	Apr 2022
Co-presence in records	Users by admins, makers, or analysts	✔ Nov 4, 2021	-	Sep 2022
Owner field has improved on-line presence indicator and contact card	Users by admins, makers, or analysts	✔ Nov 4, 2021	-	Sep 2022

Enable experts across the organization with advanced low code

Enable experts across the organization with advanced low code.

Feature	Enabled for	Public preview	Early access*	General availability
Intelligent formula repair in Power Fx	Admins, makers, marketers, or analysts, automatically	May 2022	-	
Makers can collaborate together on the same app by merging changes	Admins, makers, marketers, or analysts, automatically	Jun 2022	-	
Support for data sources with dynamic schema	Admins, makers, marketers, or analysts, automatically	Jun 2022	-	-

Feature	Enabled for	Public preview	Early access*	General availability
Quickly explore and create tables with the table hub and designer	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Command designer with Power Fx	Admins, makers, marketers, or analysts, automatically	✔ Jul 29, 2021	-	May 2022
Power Fx formulas provide richer and easier to use column calculations in Microsoft Dataverse	Admins, makers, marketers, or analysts, automatically	✔ Sep 23, 2021	-	May 2022
Build forms entirely using features available in the modern form designer	Admins, makers, marketers, or analysts, automatically	-	-	May 2022

Rapid delivery of flagship applications

Deliver flagship applications faster than ever.

Feature	Enabled for	Public preview	Early access*	General availability
Power Apps application on Windows running model-driven and canvas apps with full support for offline	Users by admins, makers, or analysts	✔ Feb 14, 2022	-	Apr 2022
Create standalone, native mobile apps with Power Apps	Users by admins, makers, or analysts	Apr 2022	-	Jun 2022

Safest way to digitally transform at whole-company scale

Power Apps is the safest way to digitally transform at whole-company scale.

Feature	Enabled for	Public preview	Early access*	General availability
Conditional access policies for individual Power Apps	Users by admins, makers, or analysts	✔ Aug 29, 2021	-	Apr 2022
Enable quarantine of non-compliant Power Apps	Users by admins, makers, or analysts	✔ Aug 29, 2021	-	Apr 2022
Solution checker enforcement improvements	Admins, makers, marketers, or analysts, automatically	May 2022	-	Jun 2022

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

Description of **Enabled for** column values:

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- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
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Deliver modern business apps with unparalleled productivity for all users

Overview

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- **Apps built using Power Apps are now multiplayer with built-in collaboration**: Enable users to collaborate, chat, and start meetings directly within the app.

- **Act on business data in context across Microsoft 365**: See and act on Power Apps and Dynamics 365 data directly in Microsoft 365 by pasting a link.
- **Keep users on task with cohesive experiences and delightful UX**: Modern and cohesive control updates across Power Apps provides a delightful and productive experience.

Power Apps grid control support for editable scenarios in model-driven apps

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

Business value

This grid control allows users to be more productive by letting them edit values directly in the grid.

Feature details

Building on the previous work with the [Power Apps read-only grid control](), the new **Power Apps grid control (preview)** for model-driven apps is available with two primary changes:

- **Infinite scrolling**: Users no longer need to page to see more records. Instead, users can continue scrolling to get to the row(s) they are interested in. Paging buttons will be available as an option for makers.
- **Inline editing within views and subgrids**: In addition to being available for read-only scenarios, this control can also be used as an editable grid. When editing is enabled by the maker, users can be more productive by making edits directly in the grid instead of having to make changes in the corresponding form.

This new control continues to align with the latest Microsoft design guidance for styling and continues to support the latest Microsoft accessibility standards.

See also

[Explore data in a view on a grid page]() (docs)

Enable model-driven app redirect from Internet Explorer to Microsoft Edge

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

Business value

Administrators can improve the user experience with a faster, more reliable experience in Unified Interface by redirecting to Microsoft Edge.

Feature details

Using the Power Platform admin center, administrators can enable users that open Unified Interface within Internet Explorer to be redirected to Microsoft Edge. This is the pattern that is used by other Microsoft applications to ensure users have the best experience.

We announced deprecation in Internet Explorer 11 support for Dynamics 365 and Microsoft Power Platform is deprecated and noted in Supported web browsers and mobile devices and Support for Microsoft Internet Explorer and Microsoft Edge Legacy.

The current experience for Internet Explorer users is a warning message that was announced in Unified Interface browser support changes.

Model-driven app in-app notifications

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

Business value

Users can be alerted to key items to address, which makes them more likely to be successful.

Feature details

The in-app notification feature that was announced for public preview July 2021 with Model-driven app adds in-app notifications is reaching general availability. Learn more about how makers send in app notifications and how users receive notifications.

Since public preview, we've improved the scalability of in-app notifications by uptaking the non-relational data storage and adding enhanced polling based on user navigation.

Easy record sharing

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Nov 4, 2021	-	Apr 2022

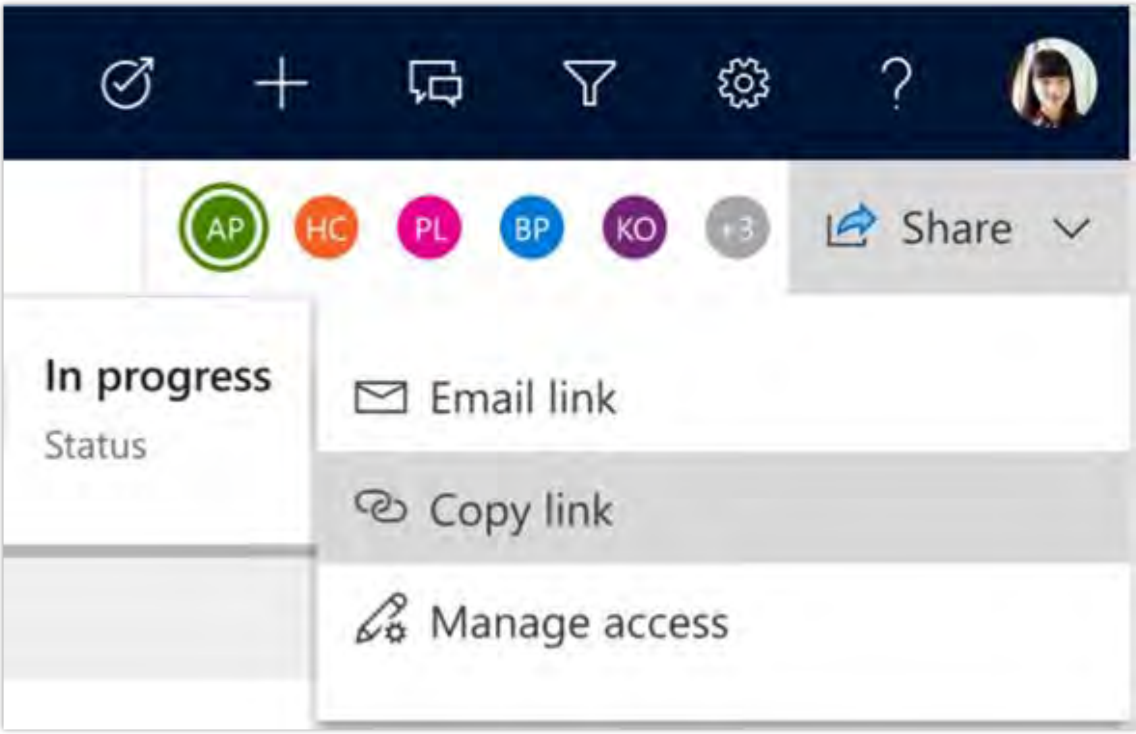
Business value

Easily share links to records with colleagues who may not have a link to the record.

Feature details

When you're working on a table such as **Account**, **Case**, **Opportunity**, or **Contact** you can now use **Share** button to email a link or copy the link and share it with someone else.

Note, the person that you share the link with needs to have permission to access the record.



New Share menu in app.

Explore data through modern advanced find

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Dec 9, 2021	-	Apr 2022

Business value

With modern advanced find, you can access any table in a model-driven app through search and use advanced filters to explore the data easily. Be more productive with navigation by searching for a view by its name in the enhanced view selector. The new view management experience will provide you options to share views so you can collaborate with your team easily. Managing views is simpler with personalization options to build your own set of views.

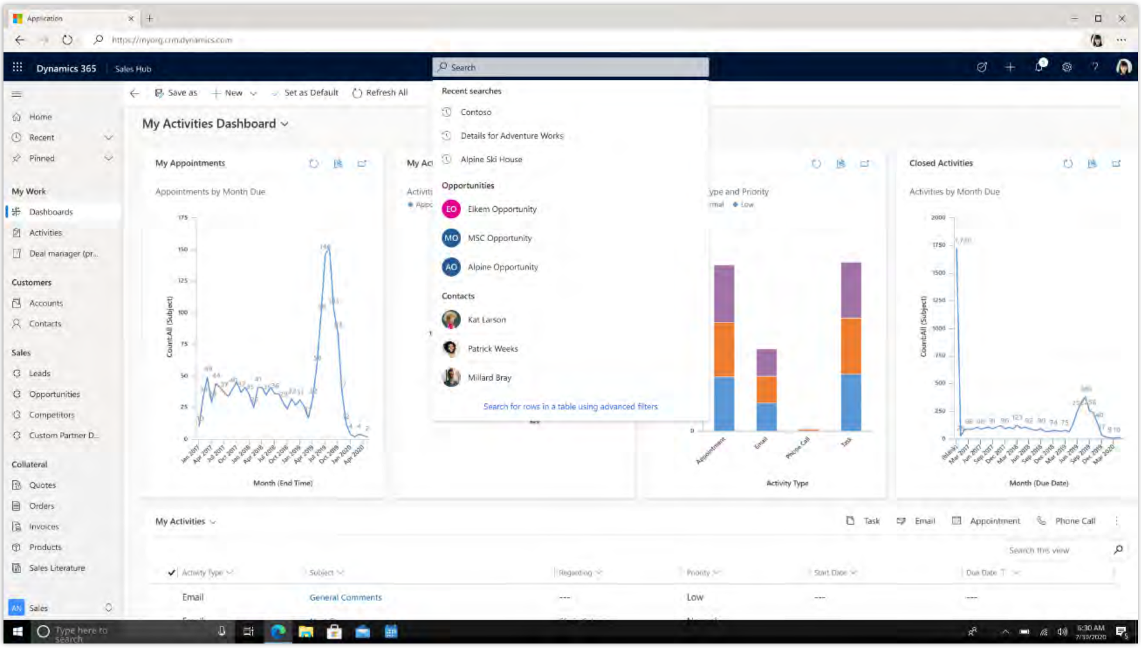
Feature details

Modern advanced find provides the following benefits:

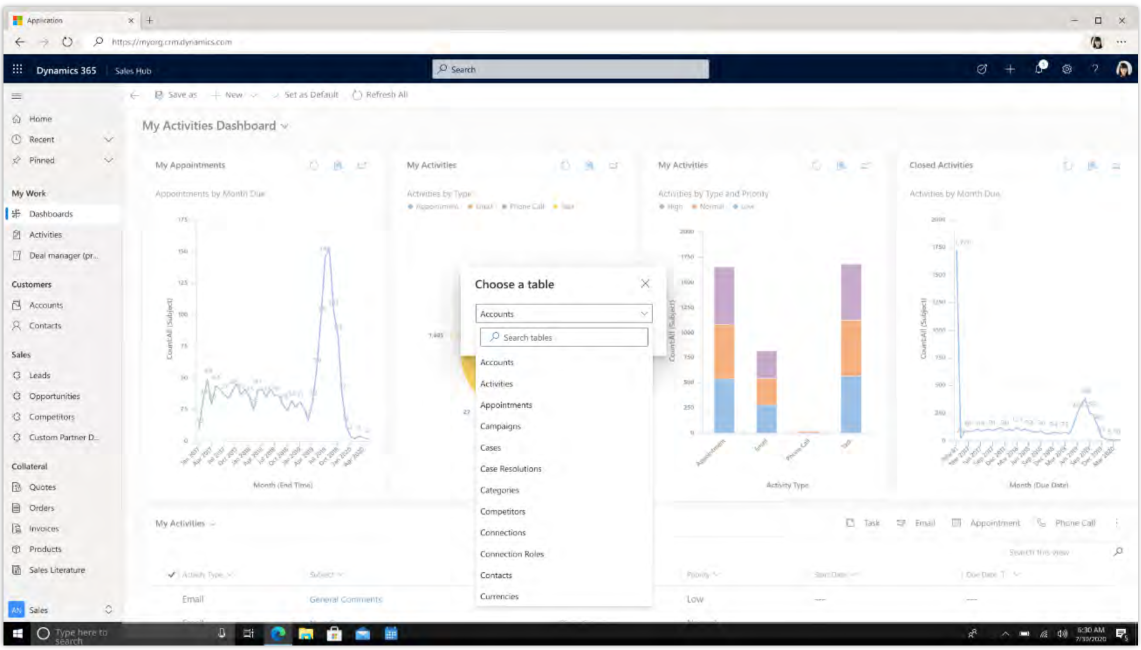
- Explore any table in a model-driven app through structured search and filters. Edit columns and filter data to construct views that help you apply the right lens on your data easily.
- Choosing the right view to access is easier with the latest enhancement to view selector having the ability for you to search for a view.

- Managing views is simpler with personalization options to build your own set of views, hide views, and order them differently. Your personalized view list travels with you across all apps and all devices, online and offline.
- Collaborate with your team by sharing views easily and managing the views shared to you.

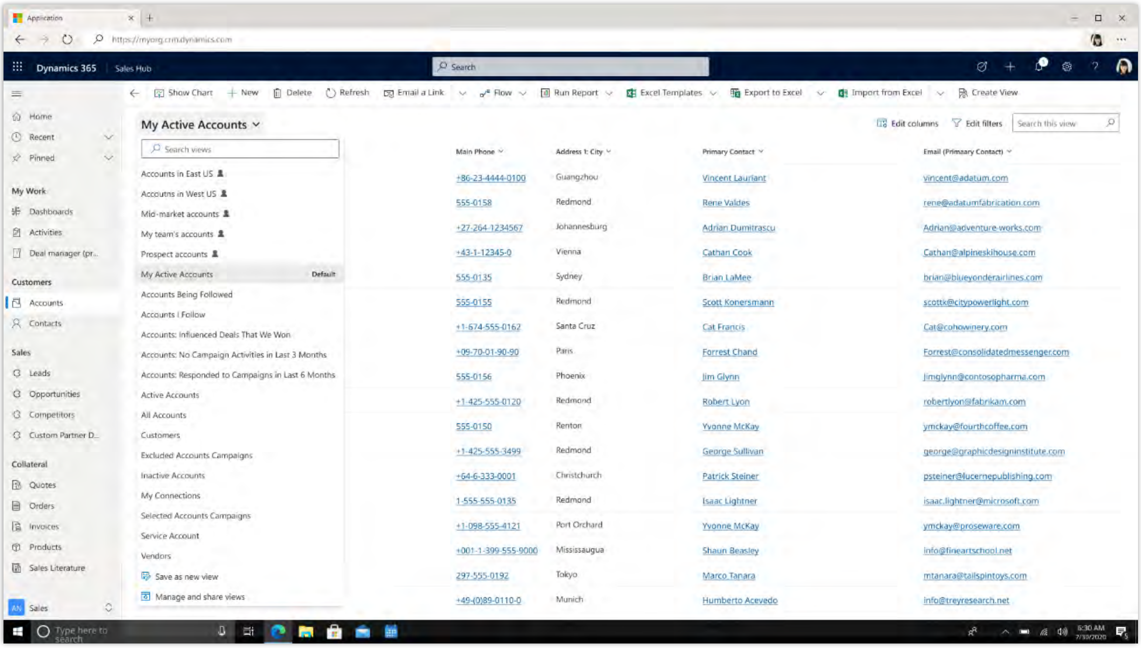
All of the capabilities mentioned above will replace the legacy advanced find experience.



Advanced find entry point through search.



Advanced find table picker.



Enhanced view selector.

See also

[Advanced find in model-driven apps](#) (docs)

UI improvement for business process flows

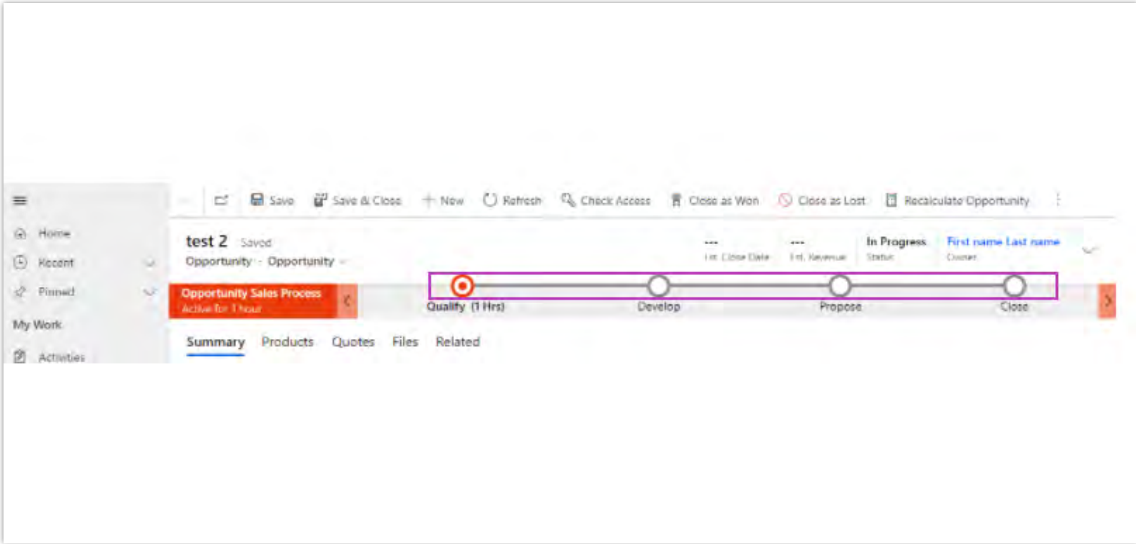
Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Dec 9, 2021	Apr 2022

Business value

Changing the business process flow path-line color to a darker shade to help users easily identify and follow each stage in a business process flow.

Feature details

We're updating the color contrast in the path-line between each stage in the business process flow to a slightly darker shade. This will help users easily identify and follow each stage in a business process flow when working with data on a form in a model-drive app.



Business process flow.

Power Apps read-only grid control is the default grid for read-only scenarios

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jan 6, 2022	Apr 2022

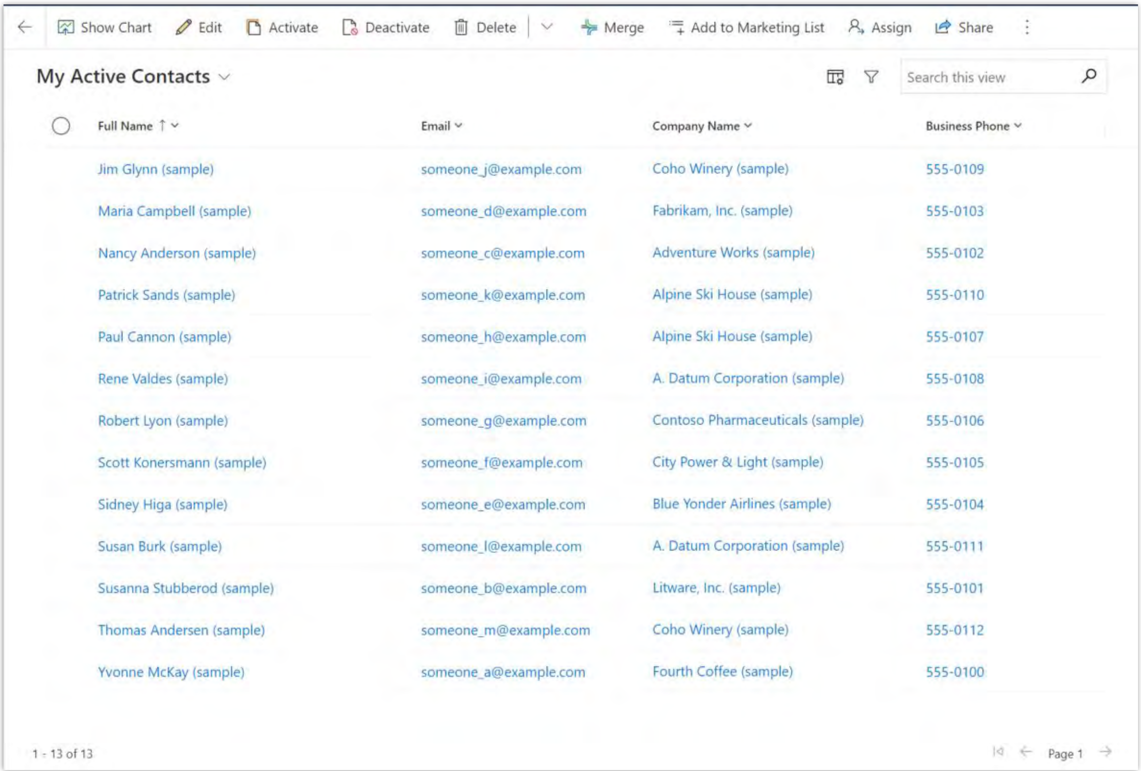
Business value

The Power Apps read-only grid control includes productivity and performance enhancements, alignment with the latest in Microsoft design, and compliance with Microsoft Accessibility Standards.

Feature details

The New Power Apps read-only grid control released in 2021 release wave 2 will be the default read-only grid experience for everyone on model-driven apps in 2022 release wave 1. This applies to grids inside view pages and sub grids in forms. When originally enabled, the jump bar row is not visible; however, this can be turned back on as needed.

All organizations will have the Power Apps read-only grid with the 2022 wave 1 release, including organizations that previously opted out. Note that organizations can opt out of this experience using the switch under the **Grids and views** section in the Power Platform admin center. Also, the legacy Wijmo read-only grid experience is deprecated with the 2022 wave 1 release but is targeted to be available as a fallback option until the 2022 wave 2 release.



Screenshot of Power Apps read-only grid control on the Contacts entity.

Offline Sync notification

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jan 31, 2022	Apr 2022

Business value

This feature gives users visibility into data that is being downloaded for offline support on Power Apps mobile.

Feature details

When you use Power Apps mobile in offline mode, data is downloaded in the background. In the past, the only way to check the status of the download was to manually go to the offline status page.

With the new **Offline Sync notification** feature, users can easily tell when the app is ready to use in offline mode. Notifications appear in the following scenarios:

- During the initial sync, you'll get a notification that tells you the number of rows downloaded and how much disk space is used. You'll also get the same notification when the app is used after some time.

- When you refresh the data on a grid view, you'll get a notification stating: *Refreshing your data*.

See also

Enable and use mobile offline-first (docs)

New activity dropdown to show only relevant activities

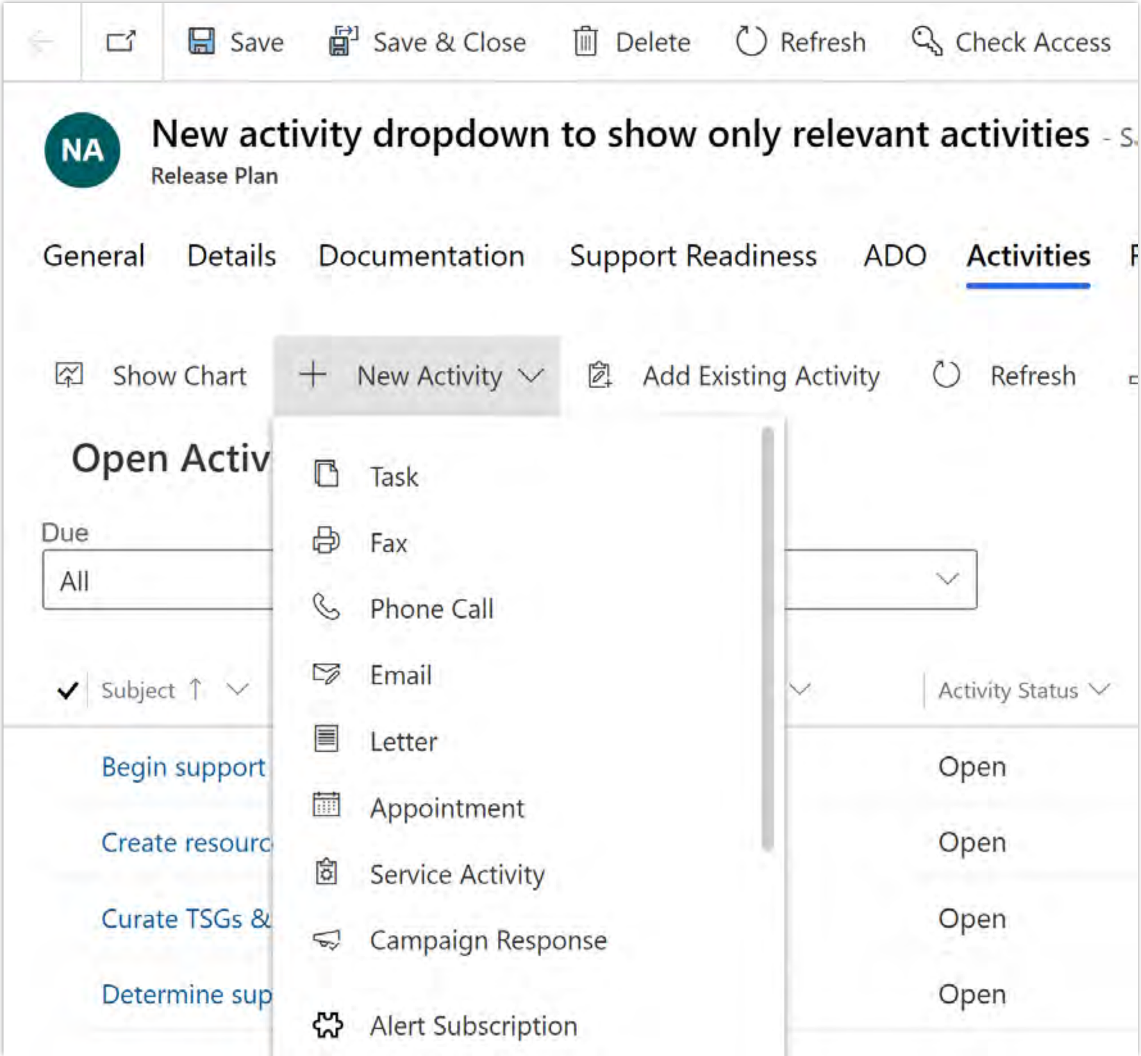
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Mar 10, 2022	-	Apr 2022

Business value

Improve productivity by showing only relevant tables in the drop-down list.

Feature details

The **New Activity** drop-down list will only show activities that are relevant to the app. Activities that are not included in the app metadata now are hidden from the **New Activity** command.



Options shown in new activity dropdown.

Appointment description supports rich text

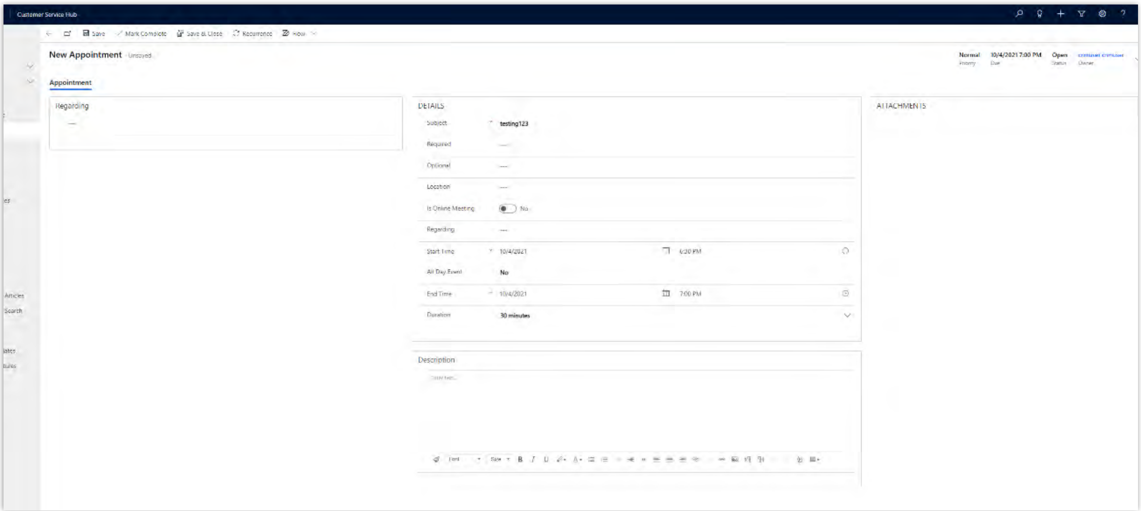
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Mar 17, 2022	-	Apr 2022

Business value

Include rich text descriptions in your appointments, including links to online meetings.

Feature details

You can now add links, lists, and other rich text in your appointment description with the new rich text editor control. The new rich text editor is supported for all model-driven apps and is the default standard editor for appointments and email activities.



Screenshot of updated appointment form.

Create and join Teams meetings from in-app appointments

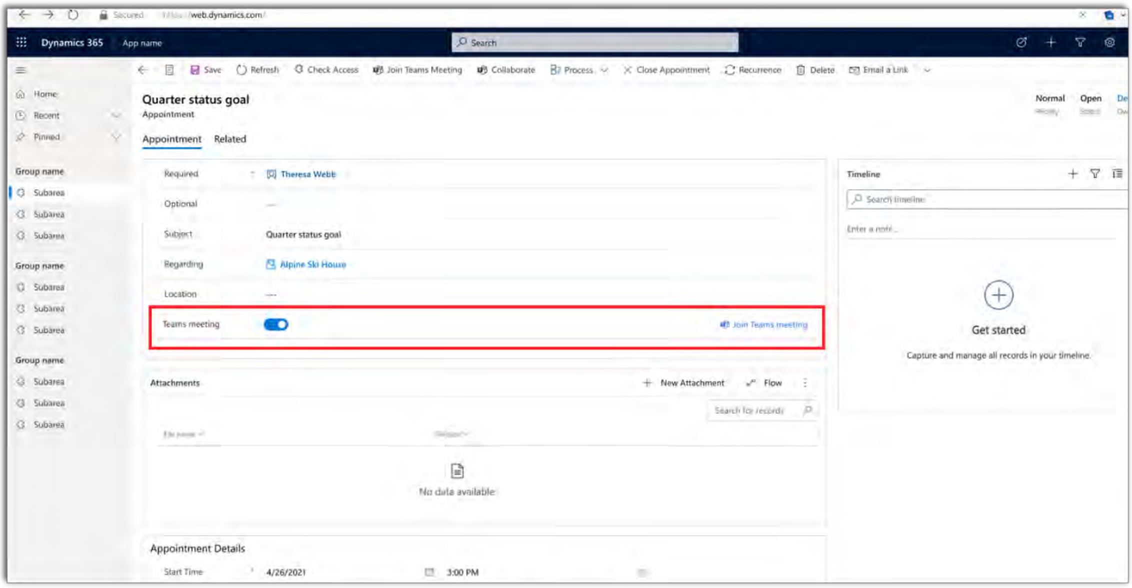
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Mar 17, 2022	-	Apr 2022

Business value

Provide customers with unified meeting experience by allowing them to create and join Microsoft Teams meetings from their model-drive app.

Feature details

Easily add Microsoft Teams meeting from an appointment in your model-driven app. You can also join a Teams meeting with a single click from the appointment or the timeline control.



Option to join Teams meeting highlighted in appointment form.

Use Lobe models in your apps and flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Nov 4, 2021	-	Apr 2022

Business value

Makers can use computer vision to improve a business process or workflow by using Lobe. We'll be unlocking a new machine learning problem type (image classification) with Lobe, which will allow Power Platform users to train models locally on their desktop without using any AI Builder credits and with an easy-to-use app.

Feature details

Enable Power Platform users to leverage Lobe to train image classification models, upload them to AI Builder, and use them in canvas apps and Power Automate flows. This will increase the consumption of AI models in apps and flows.

See also

Overview of image classification model by Lobe preview (docs)

Co-presence in records

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Nov 4, 2021	-	Sep 2022

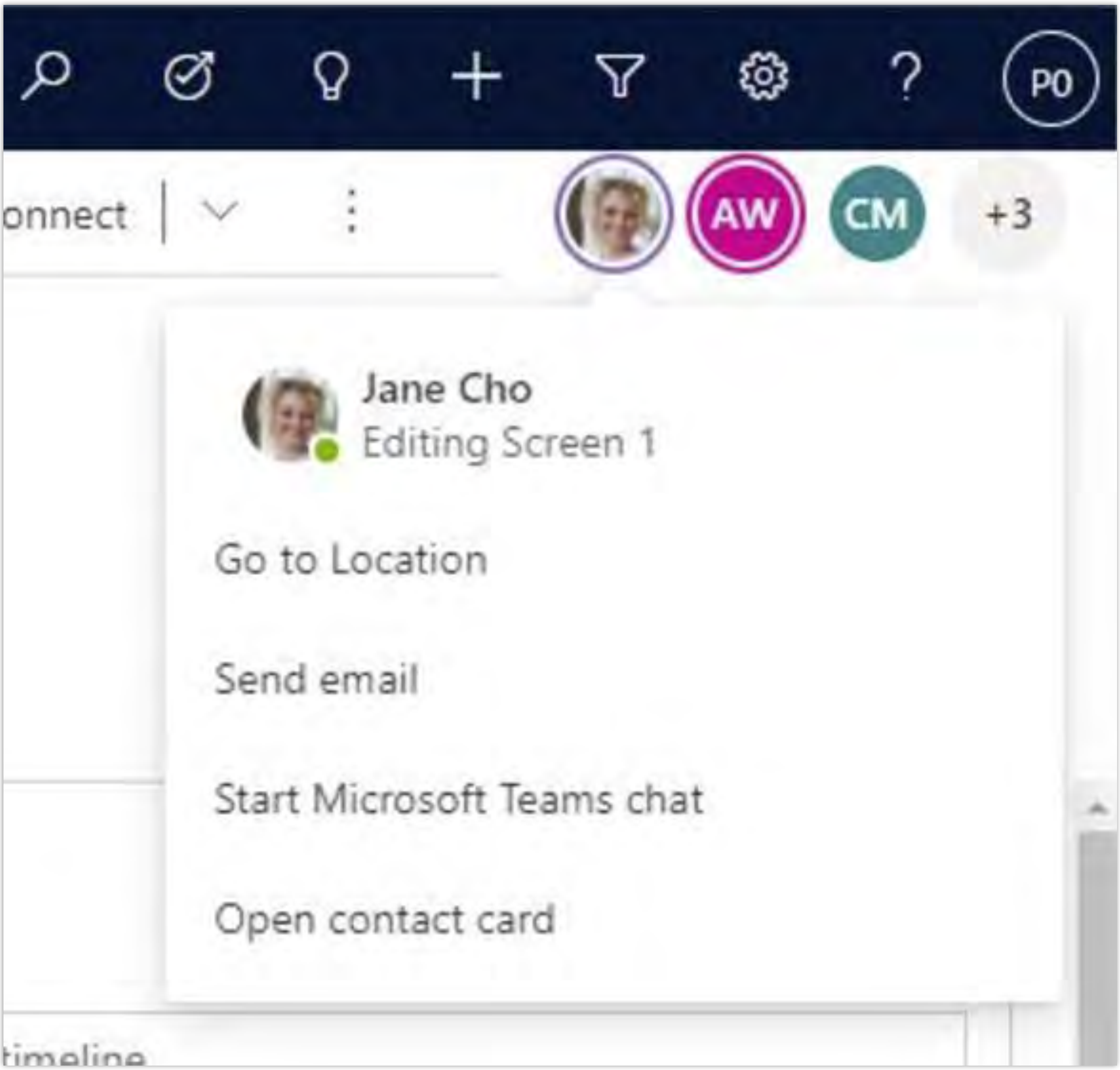
Business value

See colleagues who are currently working on a record and easily start chats with them.

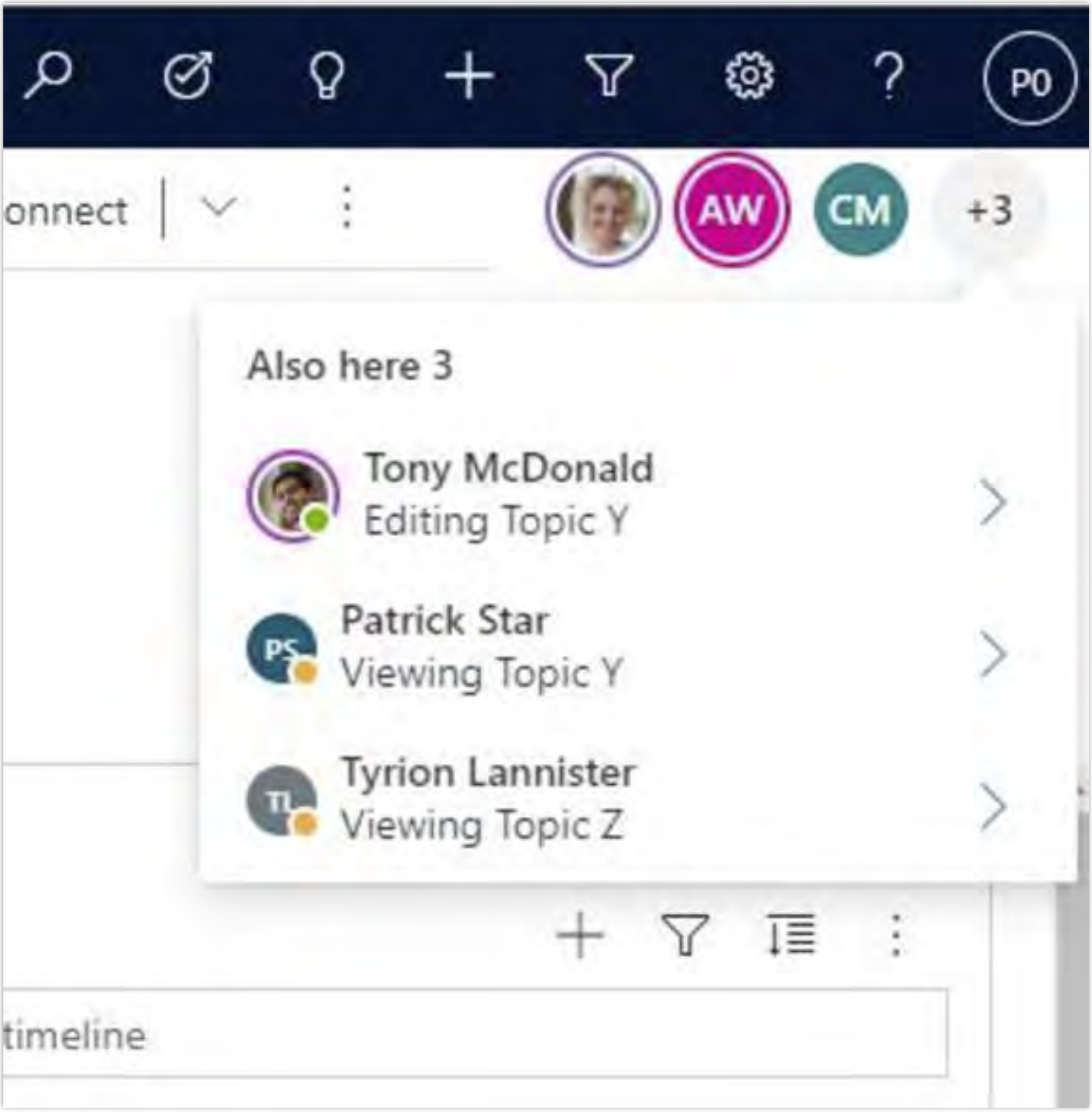
Feature details

Now you can see who's currently working on a record including their online status. You can also start a chat or send them an email and take collaboration to the next level.

This feature is currently available on the **Account**, **Case**, **Opportunity**, and **Contact** tables.



Facepile control expanded in model driven app.



Facepile overflow menu activated.

Owner field has improved on-line presence indicator and contact card

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓Nov 4, 2021	-	Sep 2022

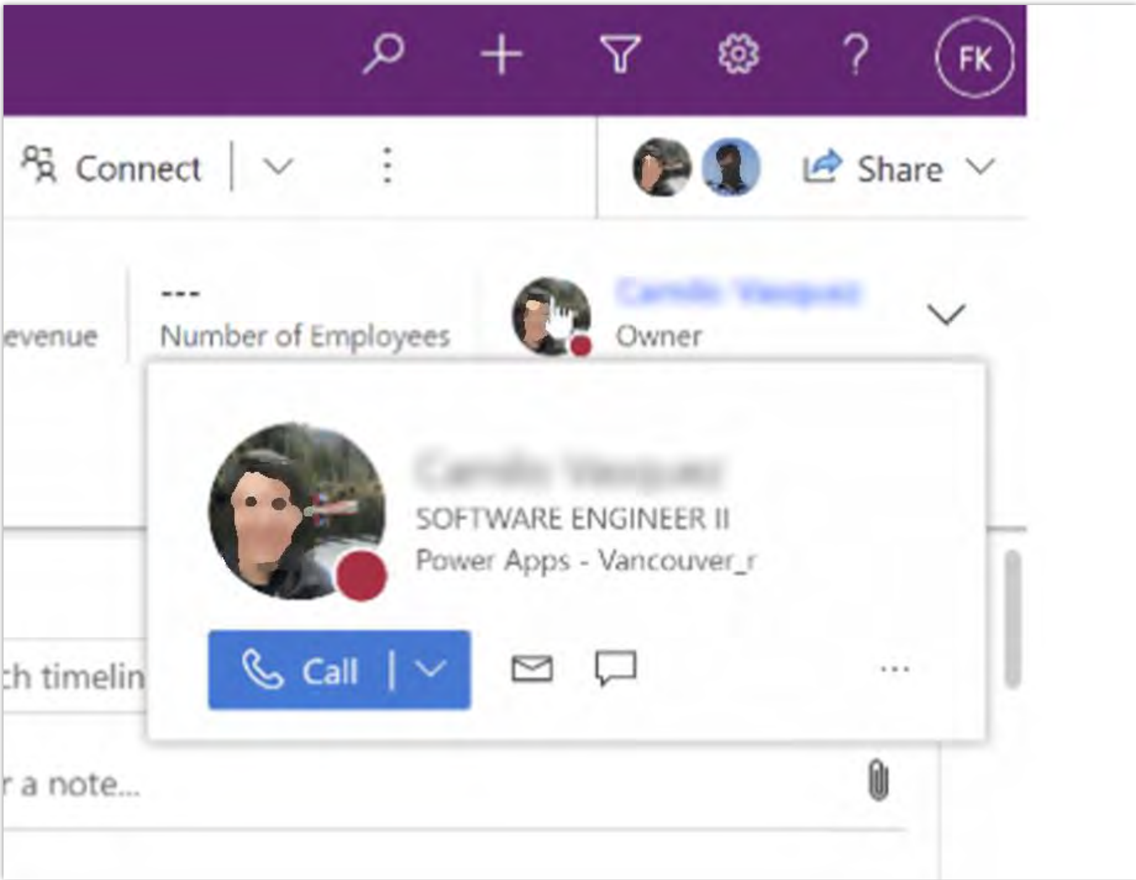
Business value

While you're working in your app, see your colleagues' online statuses and easily start a chat with them.

Feature details

When you're working on a record, you can see the person who owns the record and their online status. You can also select the user's photo and send them an email or start a chat.

This feature is currently available for the **Account**, **Case**, **Opportunity**, and **Contact** tables.



Persona card when clicking on the new owner field.

Enable experts across the organization with advanced low code

Overview

Makers and developers of all skill levels can be more productive with Power Apps and Dataverse, enabling fusion teams and leveraging intelligence to simplify common tasks. Key updates include:

- **It's easier than ever to get started with Dataverse**: With simplified table creation and data load, the addition of Power Fx, and new modern low-code designers to simplify building apps over Dataverse.
- **Unleash fusion teams with collaborative development**: Allow multiple makers to work on a single app at the same time, accelerating the time of development and supporting with Microsoft 365 style tools, such as commenting.

- **Infuse intelligence for makers and end users alike**: Support developers to resolve common tasks and errors with intelligence.

Intelligent formula repair in Power Fx

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

Business value

Power Apps uses AI to save time and suggest fixes to comment mistakes and errors in formulas, allowing makers to be more productive.

Feature details

When building apps, makers often encounter errors in formulas which can be time consuming for makers of all skill levels to investigate and resolve. Intelligent formula repair will use AI to review errors in formulas and recommend corrections immediately to the maker.

Intelligent formula report is supported by Program Synthesis using Examples (PROSE)—the same technology used in other Microsoft products like Excel—to help automatically suggest a fix for errors found in a formula. Instead of hours or days, makers can fix their formulas and improve business productivity within just a few seconds.

Makers can collaborate together on the same app by merging changes

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

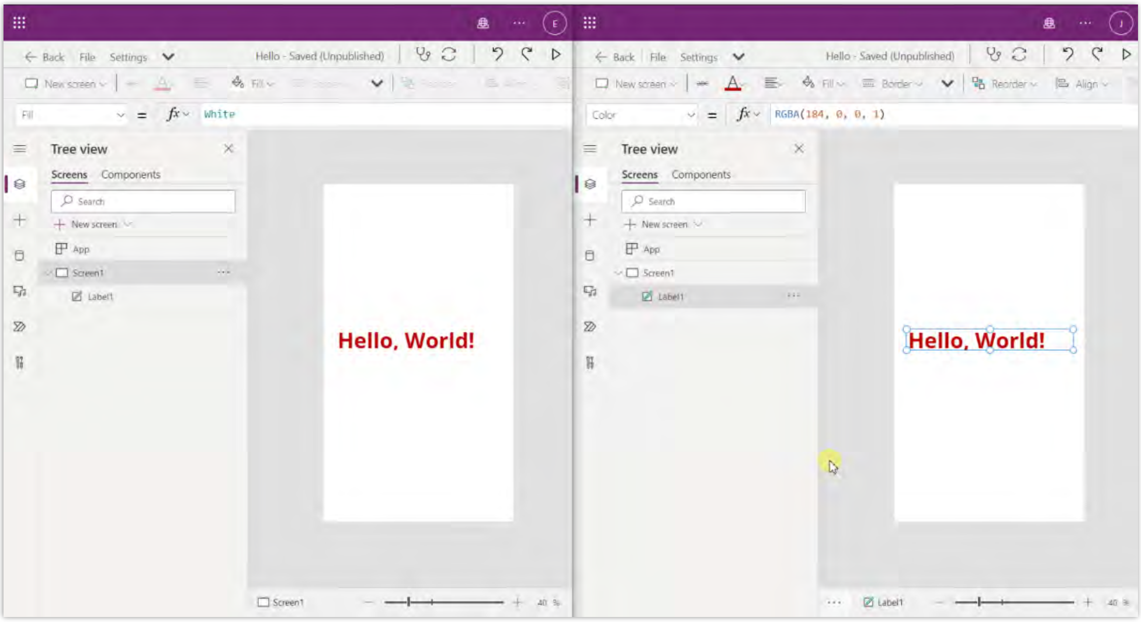
Business value

Enables multiple makers to simultaneously work on the same app and merge changes to accelerate development and track collaboration.

Feature details

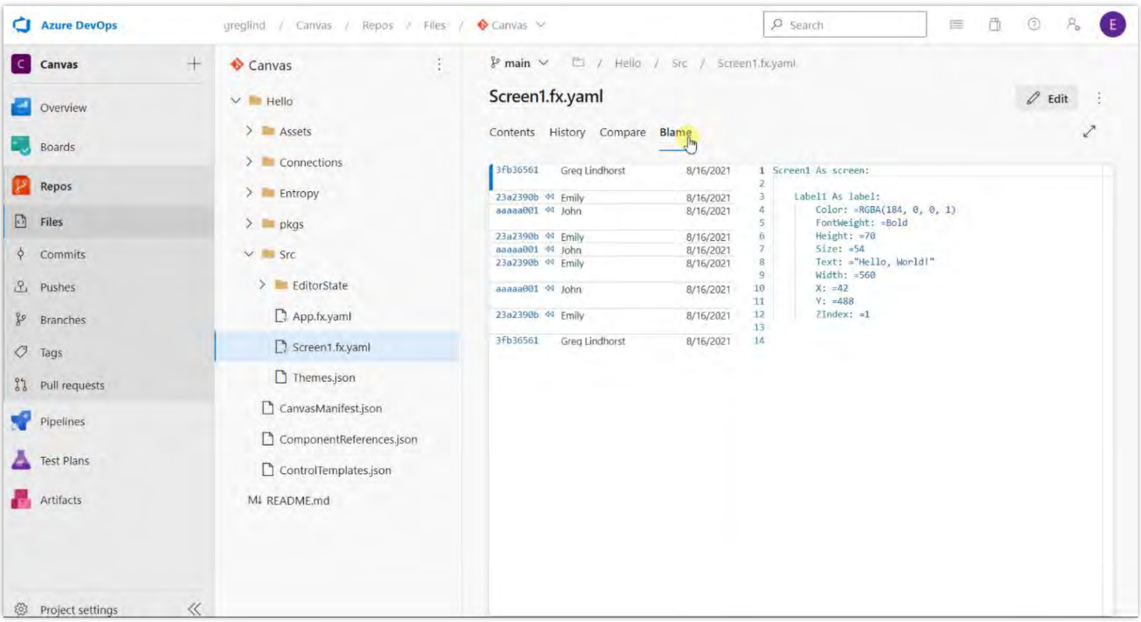
With this capability, makers will be able to work together on a single app to accelerate development, as well as track collaborating with tools, such as commenting, source code and version history.

The following image shows the same canvas app open in Power Apps Studio by two different makers at the same time, something that is not possible today. Changes are merged using rich semantic information about the app and the results are stored in Azure DevOps, GitHub, or any Git provider.



Screenshots of two makers working on the same canvas app at the same time.

We can see the changes in the following image—line by line—for each maker.



Screenshot of changes each user has made line by line.

Support for data sources with dynamic schema

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

Business value

Power Apps can access a data source's dynamic schema - flexible additional columns of data - enabling makers to create more powerful apps with more information.

Feature details

Power Apps now supports dynamic schema. Some connectors can return extra columns based on how the API is called. The dynamic schema feature gives authors the ability to access the extra columns. For instance, customers can customize Azure DevOps with additional columns beyond the ones shipped by default. Over 40% of Power Platform connectors have some form of dynamic schema (input or output) that are now accessible with this feature. Once defined, this additional type definition is reusable. This feature will also enable us to support SQL stored procedures in the future.

Quickly explore and create tables with the table hub and designer

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

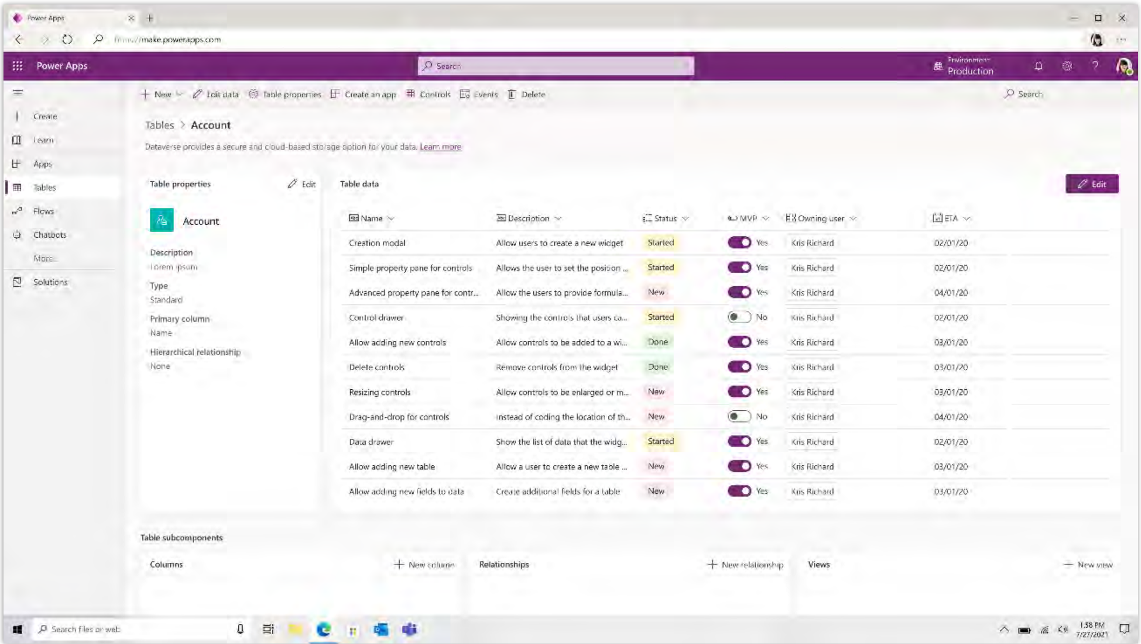
Business value

Bring table designer (currently only available in Power Apps for Teams app) to make.powerapps.com, to make creating and customizing tables more approachable for citizen developers. Enable quick create of an app over data from the table, publish and play immediately on web or using the phone app.

Feature details

Tables today are configured by diving directly into the list of columns, relationships, or other subcomponents that make up Microsoft Database tables. This feature introduces a hub view for a table to provide an overview of the table subcomponents and give the maker a view of the table data. New columns can be created in-line with that table data, and (with appropriate privileges) data can also be updated.

A quick way to generate an app starting from your table will allow you to create and play the app in your browser or on your mobile device by just supplying a name for the app, giving you a good idea of how your table is used in an app before jumping into editing the app to tailor the experience.



Dataverse table hub.

Command designer with Power Fx

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✓Jul 29, 2021	-	May 2022

Business value

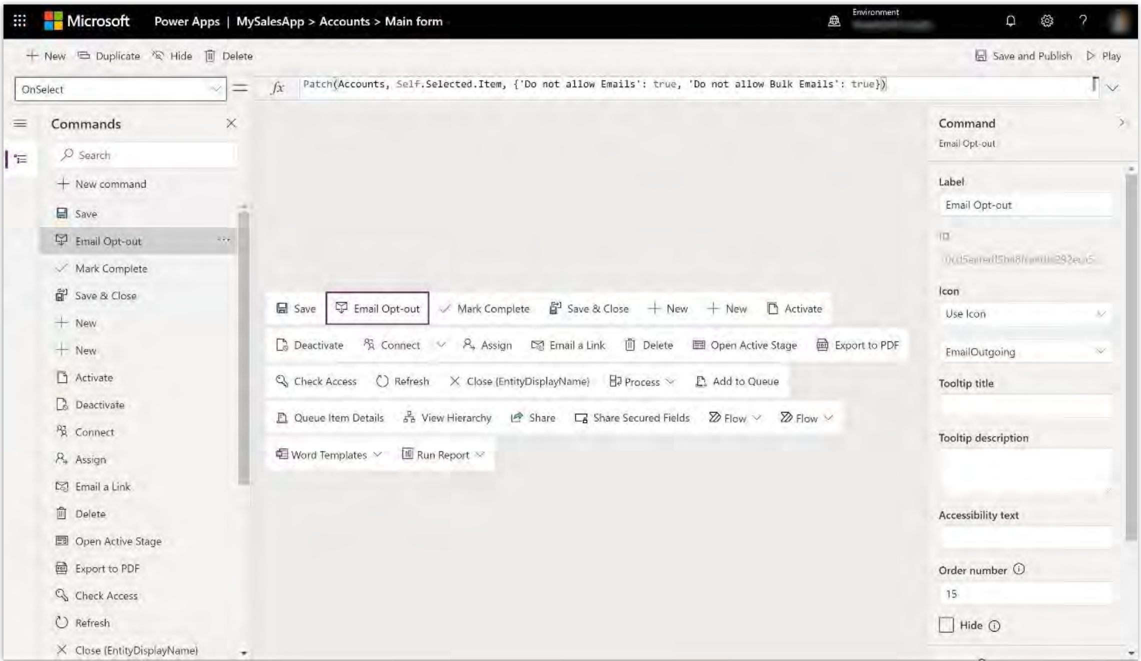
Power Apps makers can easily customize command bars and command buttons in model-driven and converged apps, including the ability to use low-code Power Fx formulas for command button visibility and actions.

Feature details

The new command designer simplifies command bar and command button customization for both low-code makers and pro-code developers:

- Use both low-code Power Fx formulas and JavaScript for command button visibility and action logic.
- Manage localization and error handling with Power Fx.

- Open a custom page as a dialog and trigger cloud flows using buttons on the custom page.
- Enhanced ALM support for the command designer enables standardized localization and presence in the solution interface.
- Better app-level control with commands applied to individual apps.
- Enhanced support for declarative programming patterns.



Command designer with Power Fx.

See also

[Using Power Fx with commands](#) (docs)

Power Fx formulas provide richer and easier to use column calculations in Microsoft Dataverse

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 23, 2021	-	May 2022

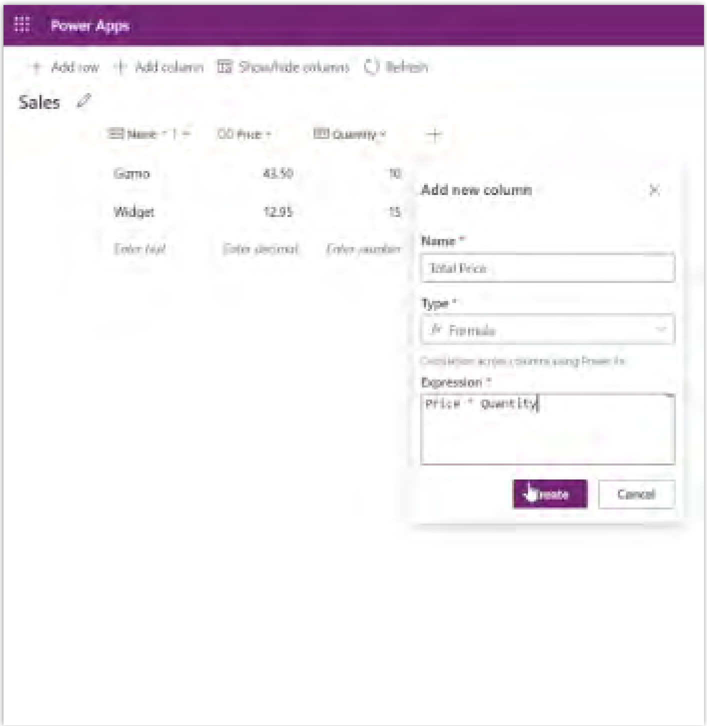
Business value

Power Fx dramatically expands what can be expressed in existing calculated columns and rollups, and adds the ability to perform calculations in real time.

Feature details

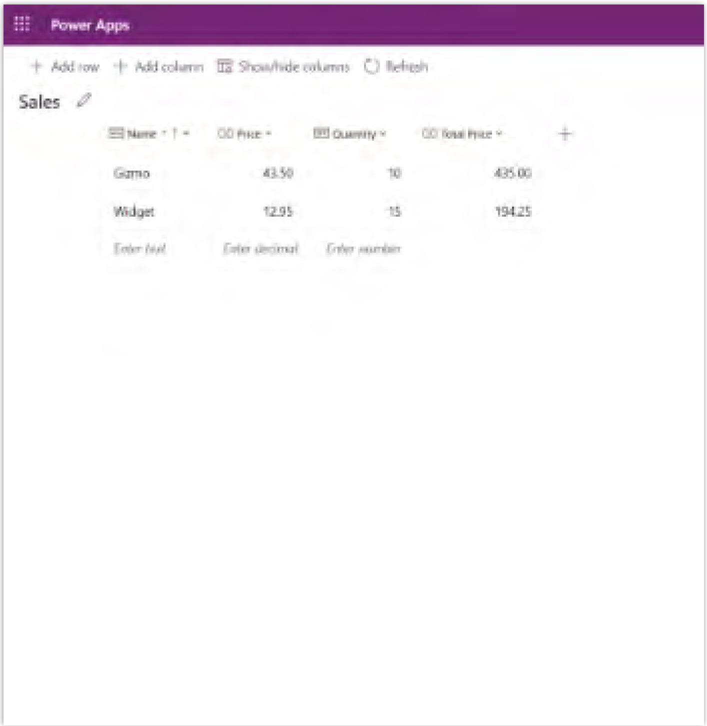
Power Fx picks up where existing Microsoft Dataverse calculated columns and rollups left off. The Power Fx formula bar has been directly integrated into the column settings, making it easy to see and edit the column's formula directly without needing to save or open another window. Power Fx adds many more functions and richer data type support than was previously available. Formula columns can also be calculated in real time, making available calculations with `Today()` and `Now()` functions for the first time.

For example, the following image shows a formula being entered for the "Total price" column with the formula of "Price * Quantity".



A formula is being entered for the column Total price.

And the result of the formula entered is available immediately.



The result of creating the formula column is immediately available.

See also

Work with formula table columns (docs)

Build forms entirely using features available in the modern form designer

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	May 2022

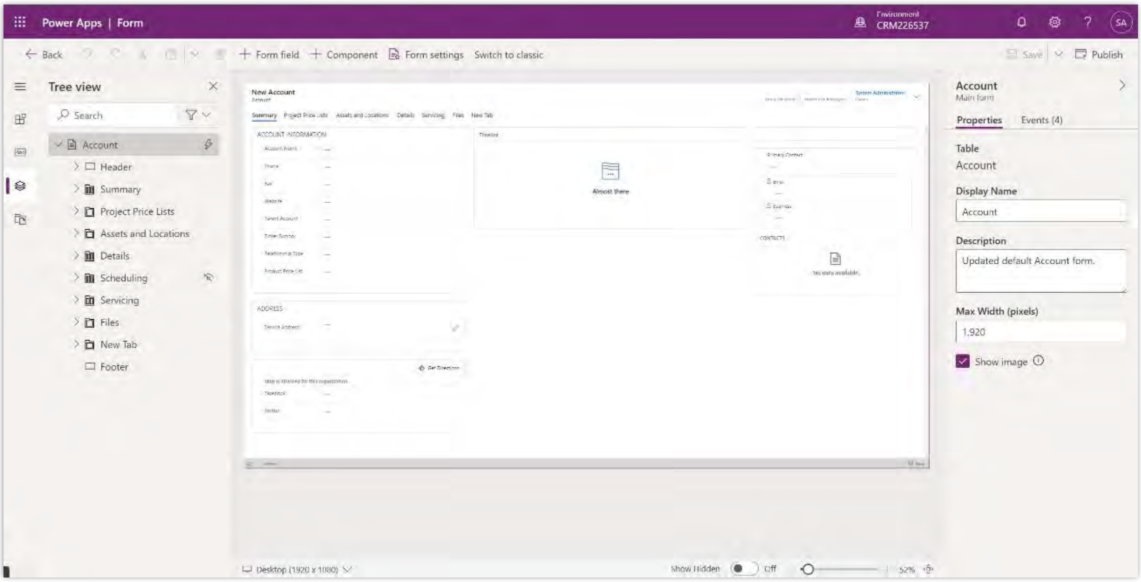
Business value

Provides an accessible modern form designer experience with full parity with classic forms. With this effort, we will soon be able to discontinue form designer with the web client.

Feature details

Makers can now build forms using the modern form designer with full parity with the classic form experience. With this update, makers will be able to customize their forms with all Power Apps component framework controls previously only available in classic, filter a lookup field based on another record through related record filtering, apply business logic to form fields through business rules, customize form elements with more formatting options, and more.

This will improve maker productivity and product accessibility removing the need for the legacy experiences. With this milestone, expect the classic form designer to soon be deprecated as makers can accomplish all the authoring tasks in the modern form designer.



Screenshot of modern form designer preview.

Rapid delivery of flagship applications

Overview

Organizations can now build and deliver flagship apps to the entire company through Power Apps. Key updates include:

- **Accelerate line of business app dev professionals**: Simplified development and management of offline apps.
- **Deliver standalone mission critical apps to every device**: Create standalone, native mobile apps with Power Apps.

Power Apps application on Windows running model-driven and canvas apps with full support for offline

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Feb 14, 2022	-	Apr 2022

Business value

The Power Apps for Windows is a new application in parity with iOS and Android. You can run both model-driven apps and canvas apps with full support for offline mode. Users can browse from the list of apps by recently used, favorites, featured, or search for a specific app. Power Apps for Windows also supports per app and per user licensing, native connection experience for Dataverse, and offline.

Feature details

With Power Apps for Windows you can work with your business data on any device from anywhere. You can also automate tasks to help users get more work accomplished quickly. Users can also run custom apps that are shared with them.

Power Apps for Windows supports these capabilities:

- Highly secured authentication with Azure Active Directory (Azure AD) support, Intune management, and Microsoft's System Center Configuration Manager (SCCM) app distribution.
- Access to Government Community Cloud (GCC) organizations.
- Access and run both model-driven and canvas apps.
- Find your apps using search or advanced browsing.
- Leverage devices capabilities, such as camera, microphone, file picker, geolocation, and barcode scanner from your apps.
- Access your data with the latest Dataverse native APIs.

See also

Mobile offline overview (docs)

Create standalone, native mobile apps with Power Apps

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Apr 2022	-	Jun 2022

Business value

Mobile Power Apps users have historically accessed company applications through the Power Apps mobile app for iOS and Android. With this feature, makers can publish their canvas apps as standalone, native mobile apps.

- Discoverability in the app store - your app gets its own unique Apple/Google app store identity (subject to channel policies).
- Provide your own home screen icon and app name.
- Set an image to show on the custom splash screen and sign in screens.

- Launch directly into your canvas app (no app list).
- Manage your app exclusively with Microsoft Intune policies.

Feature details

This feature provides the following benefits:

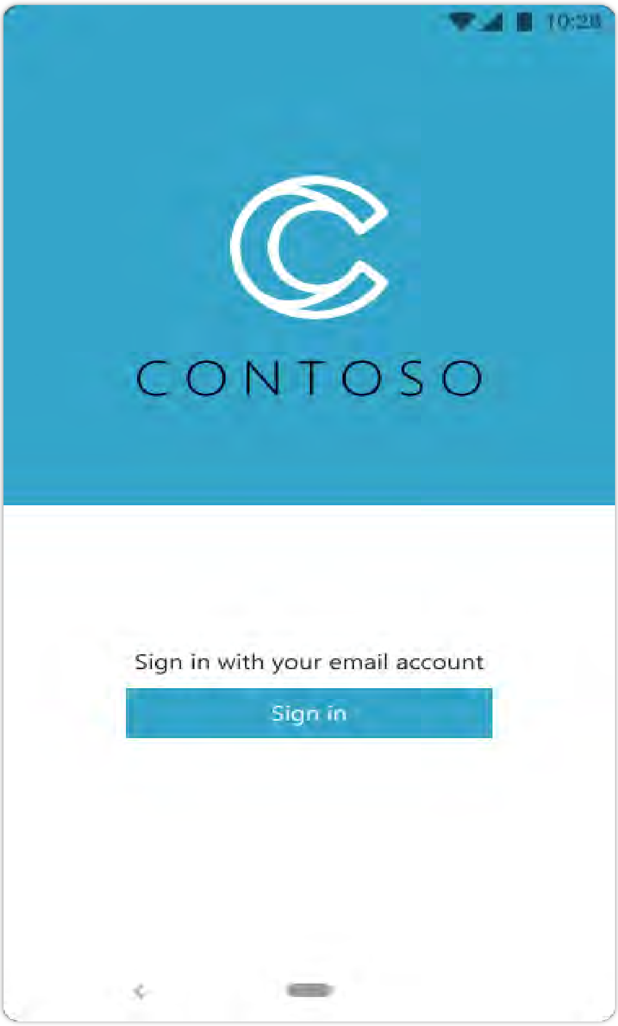
- You can distribute the app natively to your app users (for example, with Microsoft Intune).
- Provide your own home screen icon and app name.
- Set an image to show on the custom splash screen.
- Launch directly into your canvas app (no need to use app list).
- Manage your app directly with Microsoft Intune policies.

The following steps illustrate how the experience works with native mobile app created using Power Apps:

1. Open the app from its home screen icon.
2. App's native splash screen appears:

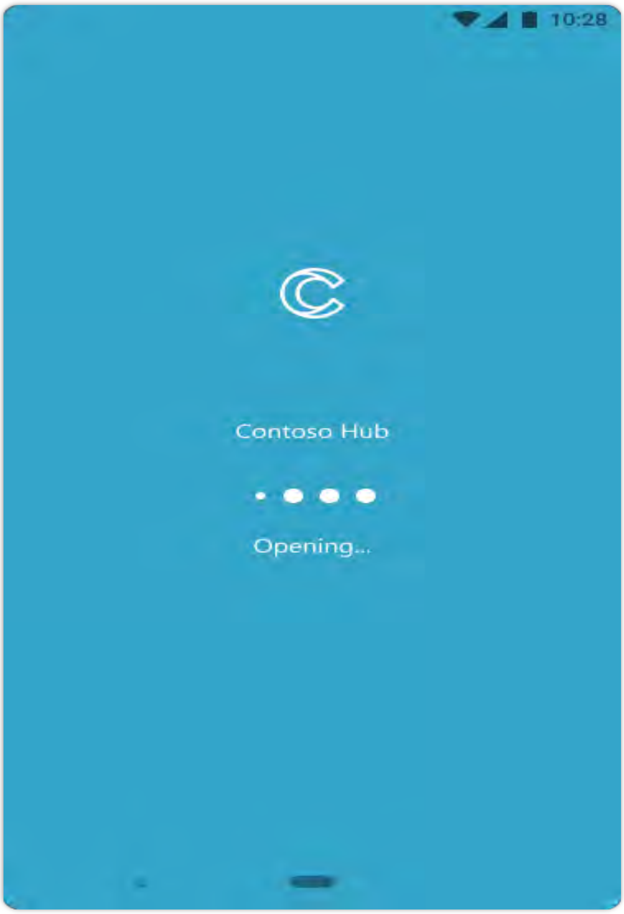
Shrink wrapped app native splash screen.

3. App shows the welcome screen with the prompt to sign in:



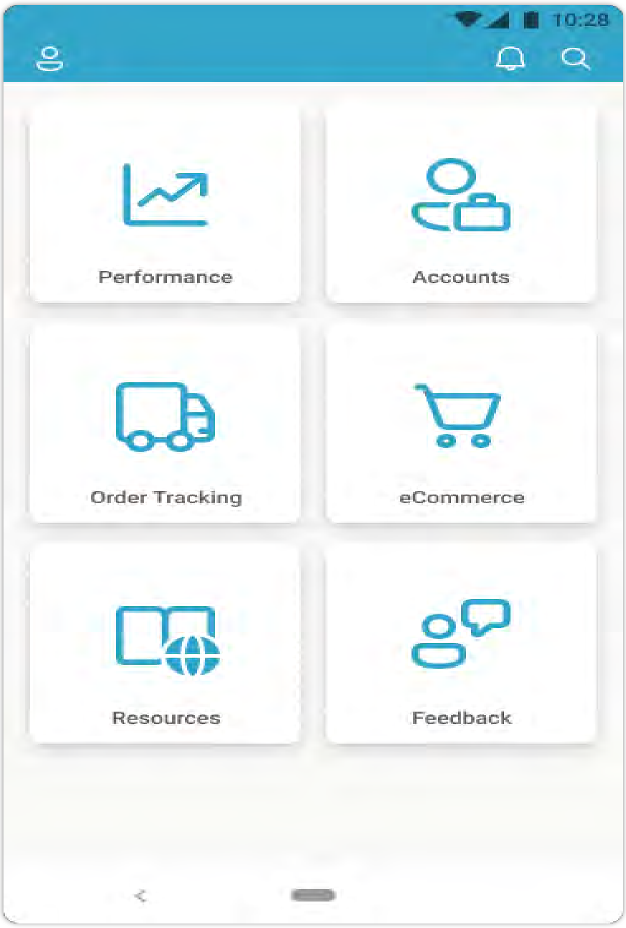
Shrink wrapped app customized sign-in screen.

4. App starts to load and shows the loading screen:



Shrink wrapped (embedded) Canvas app loading screen.

5. App landing/home screen appears:



Shrink wrapped app primary embedded Canvas app landing page/home screen.

Safest way to digitally transform at whole-company scale

Overview

Secure and governable enterprise apps are critical to creating trust with your users and enterprise IT teams. New capabilities are here to help you set the right policies to enable your enterprise apps across more places. Key updates include:

- **Solution quality and enforcement**: Continuing to evolve the checkers already in place in Power Apps, these will evolve to be more comprehensive and enforce quality in production environments.
- **Security updates**: Further updates on conditional access and providing more visibility to makers on security when sharing apps.

Conditional access policies for individual Power Apps

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Aug 29, 2021	-	Apr 2022

Business value

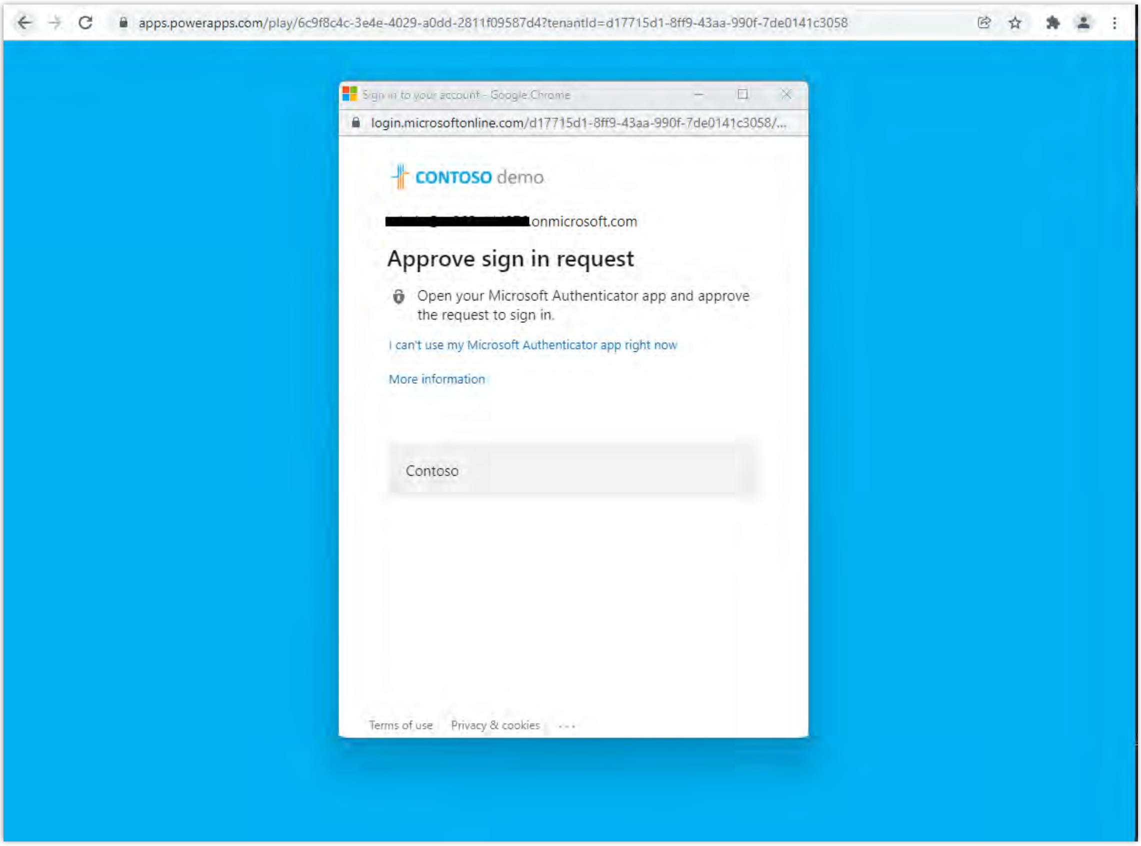
Enterprises can extend their use of Azure Active Directory Conditional Access to individual Power Apps by adding extra layers of security to apps containing sensitive data.

Feature details

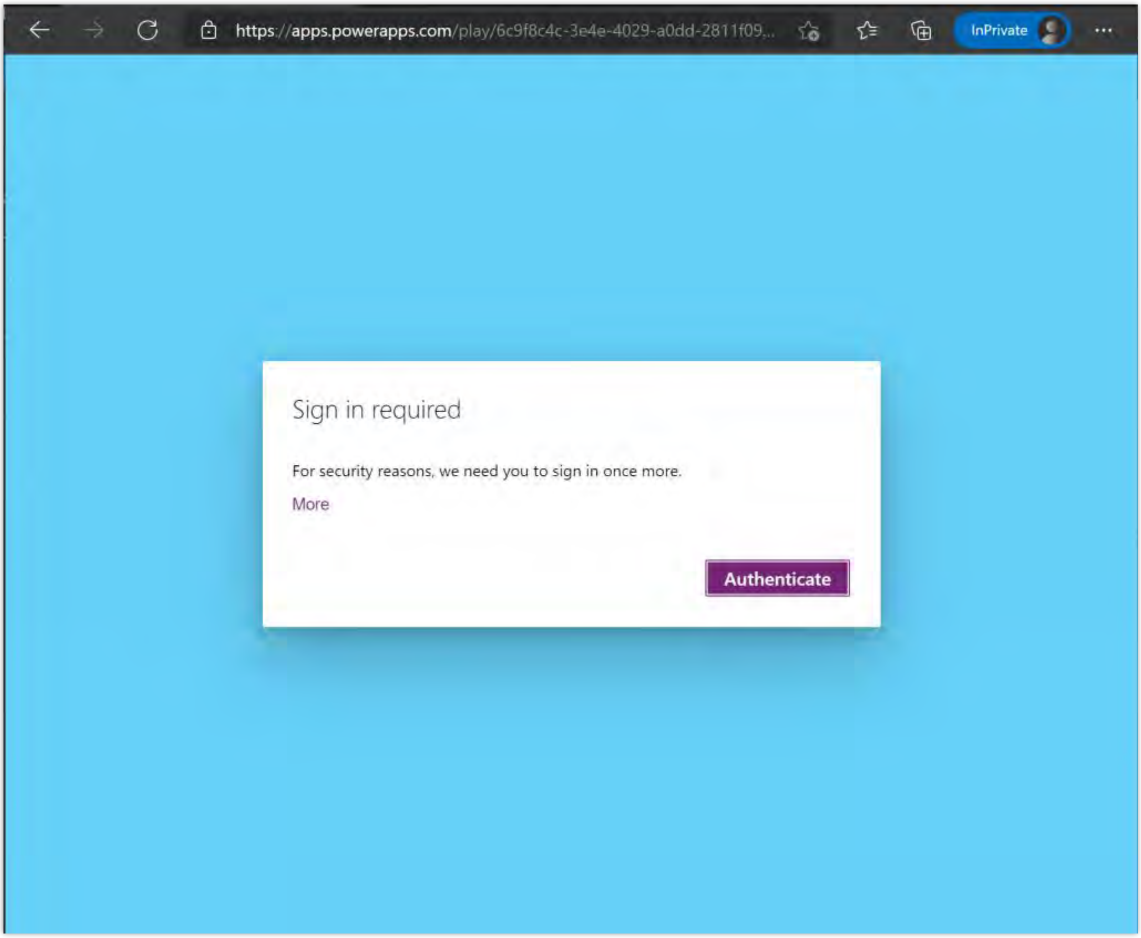
This finer granularity of Conditional Access on individual apps is available in public preview and leverages Azure AD's Conditional Access authentication context.

The granular application of Conditional Access enables many scenarios including:

- Designate specific apps to require users to perform multi-factor authentication.
- Designate specific apps to require users to be connected to their intranet to access the app.
- Designate specific apps to require users to connect from a device that is compliant with the organization's device management policies.
- Apply different Conditional Access requirements for apps available in Power Apps mobile. For example, the *Team Morale app* no longer needs to run on the intranet unlike the *Business Finance app*.
- For a given app, apply different Conditional Access policies per environment (for example, Dev, UAT, Production).



Experience when Power Apps individual app requires multi-factor authentication.



Experience when Power Apps prompts user to authenticate to satisfy Conditional Access requirement.

See also

Manage Power Apps (docs)

Enable quarantine of non-compliant Power Apps

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Aug 29, 2021	-	Apr 2022

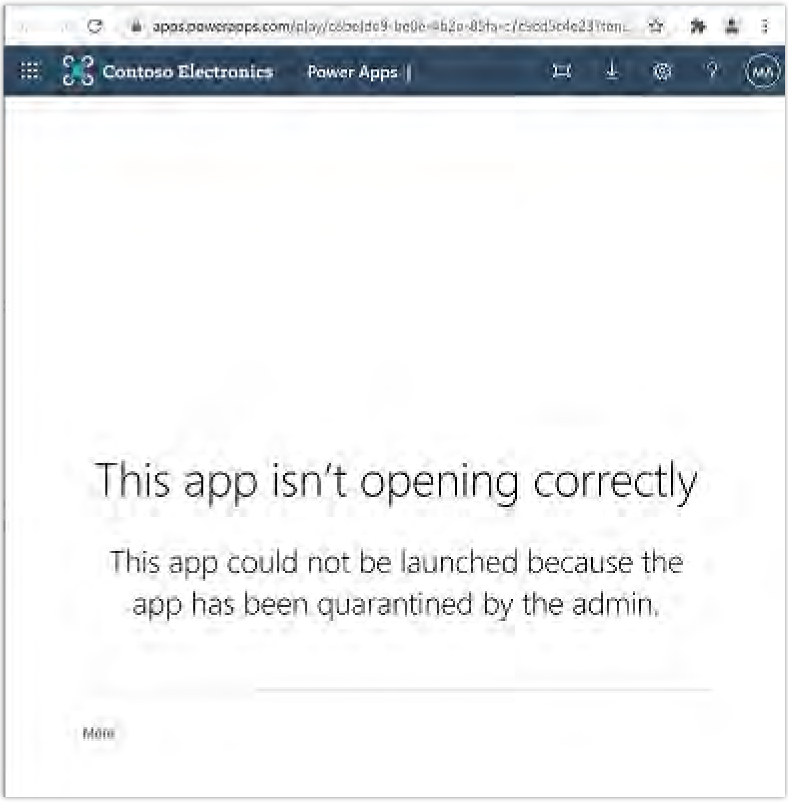
Business value

As a complement to Power Platform's data loss prevention policies, Power Apps enables admins to *quarantine* an app. This allows admins to directly limit the availability of apps that may need attention to meet an organization's compliance requirements, providing additional guardrails for low-code development.

Feature details

An app's quarantine state is managed by admins and controls whether a resource is accessible to users. The following table outlines how the quarantine state impacts experiences for admins, makers, and users.

Persona	Experience
Admin	Regardless of an app’s quarantine state, an app is visible to admins in the Power Platform admin center and using PowerShell cmdlets.
Maker	Regardless of an app’s quarantine state, an app is visible in https://make.powerapps.com and can be opened for editing in Power Apps Studio.
User	A quarantined app will present users that launch the app with a message indicating they’re unable to access the app.



Power Apps experience when users attempt to launch an app that is quarantined by an admin.

See also

Manage app quarantine state preview (docs)

Solution checker enforcement improvements

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	May 2022	-	Jun 2022

Business value

Customers can identify harmful configurations and customizations in their solutions early, as part of the application lifecycle management process, to help make their apps more reliable, secure, and performant.

Feature details

Solution checker is a great tool for makers and administrators to inspect the customizations within a solution to identify potential issues before the changes are deployed to production. You can run the solution checker from Power Apps (make.powerapps.com) and view the results. With some effort, you can automate it to be part of the deployment process.

With this enhancement, we're making it easy for you to enforce solution checker as part of the solution packaging, export, and import process. You'll be able to easily view the results and necessary information to address any issues before continuing the process.

Power Automate

Plan and prepare for Power Automate in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Power Automate**.

Overview

Microsoft Power Automate provides the tools you can use to improve your business' productivity by automating repetitive, time-consuming tasks. Power Automate provides a better way to get things done across your organization through cloud robotic process automation (RPA). It is deeply integrated with the Microsoft 365 ecosystem and the rest of Microsoft Power Platform.

Power Automate is investing in several areas as a part of Microsoft Power Platform 2022 release wave 1, including the following the following four themes:

- **Automation for everyone – exactly where you need it**: Today, the way that many people discover Power Automate is through our integrations in other products, like Windows 11, SharePoint, or Microsoft Teams. This wave, we're making it easier to get started with automation no matter what application you're using in Windows or Microsoft 365.
- **Hyperscale Cloud RPA**: From our biggest enterprise customers to our small and medium businesses, everyone is increasing the scale of their RPA deployments. We'll make it easier to roll out RPA at scale - with features to make it easier to manage your machines in Azure and the credentials of your users and accounts.
- **Automation that lets you sleep at night**: We're taking the burden of complexity and repetitive work away from you. That means, fundamentally, the service must never go down, we should deliver you consumer-quality end-to-end experiences, and ultimately, everything about our platform needs to "just work." All the features we have must be reliable and consumable, and automatable by default (adhering to the API-first approach), so that you can set it and forget it.
- **Anyone can get started**: We'll make it easier for anyone to get started with automation when they launch Power Automate for desktop or go to PowerAutomate.com for the first time. In addition to relevant first-run experiences, we'll be adding more intelligence throughout the product, making it easier to process even complex documents.

For official product documentation and training for Power Automate, go to:

- [Power Automate docs]

- Power Automate training on Microsoft Learn

TIP Download the release overview guide and share with your team as you plan to onboard the new capabilities included in this release wave.

Download the overview guide (PDF)

* Overview guide available in English version only.

Investment areas

Desktop flows
The need for accessing robotic process automation (RPA) capabilities becomes more and more urgent for organizations. Indeed, they are looking to help their employees be more productive by focusing on the most important tasks and avoid spending time on repetitive, time-consuming ones, which often can be automated. Building desktop automation can be complex hence it is critical to provide simple and intuitive user experiences for people who build or run automation flows. Desktop flow makers can either be advanced RPA developers or citizen developers with less technical skills but they both need to be able to build the automations they need. In this democratization journey, Power Automate for desktop comes now with Windows 11 making RPA easily accessible for both individual users as well as organizations.

In 2022 release wave 1, we'll keep investing heavily in Power Automate for desktop to make automation even easier with improvements like welcoming in-app tutorials and out of the box ready-to-run desktop flow examples. Additionally, we'll expand the Power Automate for desktop capabilities by addressing the main UI challenges like image-based automations. All those application enhancements come with platform improvements providing better governance, monitoring, and troubleshooting capabilities to help organizations with the deployment and management of their desktop automations.

Cloud flows
Cloud flows is a core automation capability in Power Automate that allows customers to focus on what matters and automate the rest. This product area includes:

- Integration with applications like Microsoft Teams, SharePoint, OneDrive, Dynamics 365 suite of applications, and more.
- Integration with the rest of Microsoft Power Platform, including the ability to invoke workflows from an app created using Power Apps, when a data alert is triggered in Power BI or to take an action in Power Virtual Agents.
- Mobile applications that help customers be notified, perform approvals, invoke, and monitor automation execution on the go.

This functionality was first released in 2016 and has been updated on a weekly basis. In 2022 release wave 1, we're focusing on making it easier to build, deploy, and share automation as well as help organizations drive adoption with confidence through deeper governance and privacy controls.

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.
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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to [2021 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
Improved home page experience	Admins, makers, marketers, or analysts, automatically	Apr 2022	-	
Resubmit multiple failed runs at once	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Undo feature in cloud flow designer	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Enhanced help topics in Power Virtual Agents	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Simplify how solution-aware flows are shared with Azure AD users	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Solutions list shows a warning for connection references	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Feature	Enabled for	Public preview	Early access*	General availability
Users can see solution references from the flow details page	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Solution-aware cloud flows are shown in the my flows list	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Use connections provided by run-only users with the Dataverse connector	Admins, makers, marketers, or analysts, automatically	-	-	May 2022
Troubleshoot multiple flow runs at the same time	Admins, makers, marketers, or analysts, automatically	-	-	May 2022
Flow ownership supported for Service Principals	Admins, makers, marketers, or analysts, automatically	-	-	May 2022
Handle null values in JSON	Admins, makers, marketers, or analysts, automatically	-	-	Jun 2022
OData editor improvements in cloud flows	Admins, makers, marketers, or analysts, automatically	-	-	Aug 2022
Improved Power Automate mobile app for Android	Admins, makers, marketers, or analysts, automatically	-	-	Sep 2022

Desktop flows

Use the new desktop flows features to automate tasks on the web or desktop.

Feature	Enabled for	Public preview	Early access*	General availability
Use credentials from CyberArk in desktop flow connections	Admins, makers, marketers, or analysts, automatically	Jul 2022	-	
Desktop flow machines and runs - status health, analytics, and error reporting improvements	Admins, makers, marketers, or analysts, automatically	Aug 2022	-	
Set screen resolution for unattended desktop flow runs	Admins, makers, marketers, or analysts, automatically	Aug 2022	-	
SharePoint connector in Power Automate for desktop	Admins, makers, marketers, or analysts, automatically	Sep 2022	-	
Use credentials from Azure Key Vault in desktop flow connections	Admins, makers, marketers, or analysts, automatically	Sep 2022	-	
Java automation in SWT framework applications	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022
Display custom form action in Power Automate for desktop	Admins, makers, marketers, or analysts, automatically	✔ Feb 21, 2022	-	May 2022

Feature	Enabled for	Public preview	Early access*	General availability
More data types for input and output variables	Admins, makers, marketers, or analysts, automatically	-	-	May 2022

* You are able to opt in to some features as part of early access on January 31, 2022, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the International availability guide. For more information about geographic areas and datacenters (regions), go to the Dynamics 365 and Microsoft Power Platform availability page.

Cloud flows

Overview

Cloud flows is a core automation capability in Power Automate that allows customers to focus on what matters and automate the rest. This product area includes:

- Integration with applications like Microsoft Teams, SharePoint, OneDrive, Dynamics 365 suite of applications, and more.
- Integration with the rest of Microsoft Power Platform, including the ability to invoke workflows from an app created using Power Apps, when a data alert is triggered in Power BI or to take an action in Power Virtual Agents.
- Mobile applications that help customers be notified, perform approvals, invoke, and monitor automation execution on the go.

This functionality was first released in 2016 and has been updated on a weekly basis. In 2022 release wave 1, we're focusing on making it easier to build, deploy, and share automation as well as help organizations drive adoption with confidence through deeper governance and privacy controls.

Improved home page experience

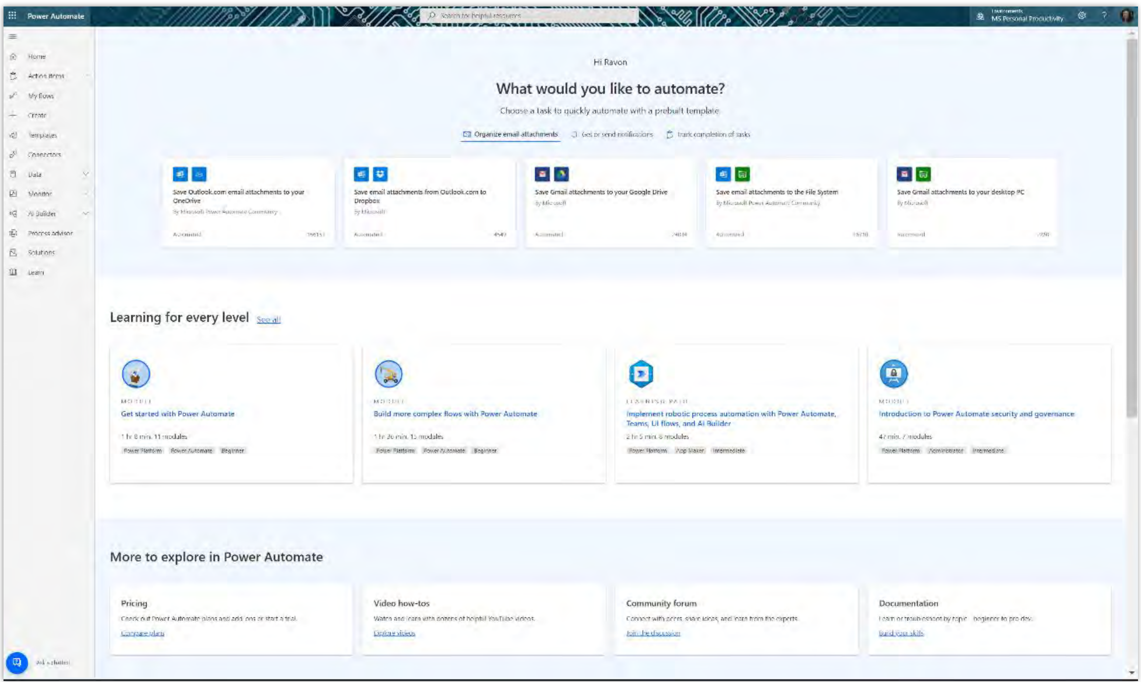
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2022	-	-

Business value

The new Power Automate home page makes it easier for users to learn how to build flows and discover more about Power Automate capabilities.

Feature details

With this feature, several improvements are being made to the Power Automate home page. This improved page makes it easier to get started making a flow. It has features and learning paths from Microsoft Learn that target new and intermediate users. There are resources for users to learn about pricing, interact with the community, access documentation, and watch how-to videos. Users can stay in the know by reading blog posts written by the Power Automate team.



Screenshot of the new home page.

Resubmit multiple failed runs at once

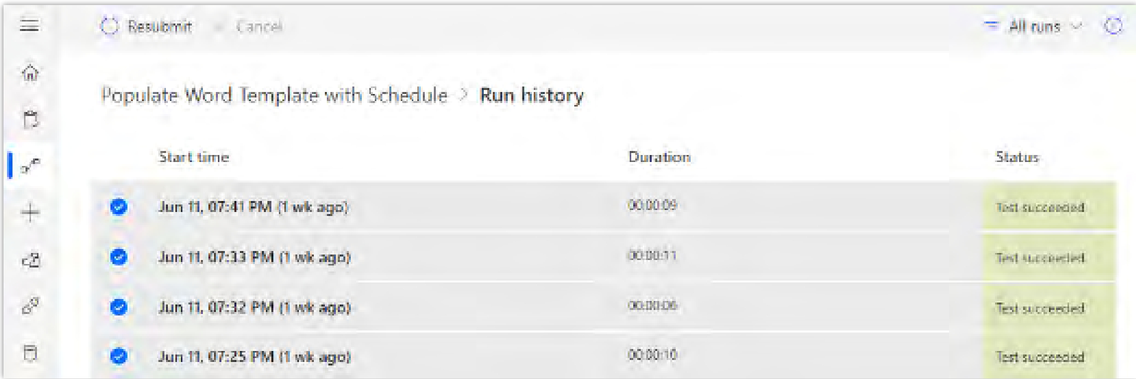
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

Improve the maker productivity by resubmitting several failed flows to rerun at the same time.

Feature details

Sometimes, you may have a flow with several failed runs. Currently, you must manually resubmit each run individually if you want to rerun them. In 2022 release wave 1, we're introducing a feature that allows you to select and resubmit multiple runs at once. This means if you have multiple failed runs, you can select all of these runs and resubmit them at the same time.



Screenshot of multiple runs selected to resubmit.

Undo feature in cloud flow designer

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

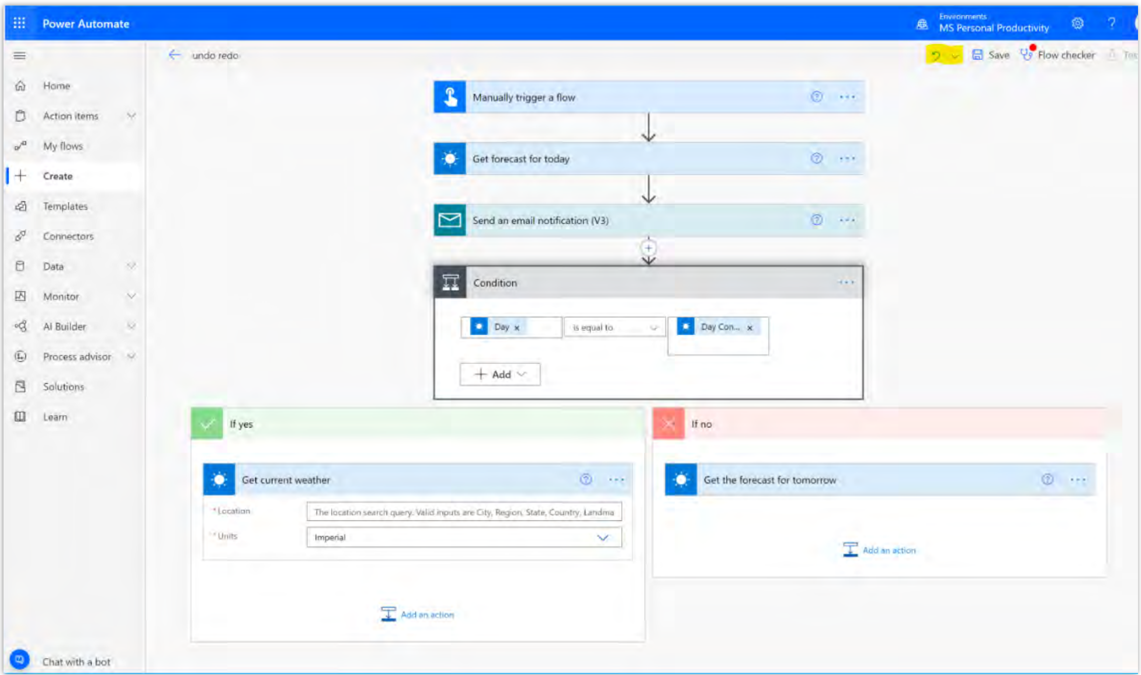
Many customers asked for an undo/redo capability. This feature helps users recover from situations where they've accidentally deleted actions and need to restore them.

Feature details

For organizations with robust source control, Microsoft recommends that they use solutions to manage the versions of their flows; however, sometimes makers simply want to have the undo/redo function support to revert some of their operations locally, such as adding, deleting, or editing some actions.

With this new feature, you can use the **Undo** and **Redo** buttons to easily revert some of your previous operations in the cloud flows designer.

![NOTE] This feature uses the local browser storage for design time only. It's not a server-side versioning support story.



Screenshot of the undo and redo feature in cloud flow designer.

Enhanced help topics in Power Virtual Agents

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

Power Automate includes a Power Virtual Agents-powered help bot to assist people while they build flows. We'll provide upgrades so that users can get more of their questions answered through the bot.

Feature details

Many users' questions are related to how to perform automation and other questions that are already documented. Instead of opening support tickets or asking users to search online for the documentation, we're adding more self-help topics on Power Virtual Agents so that users can quickly find answers.

Specifically, we're adding AI Builder, administration, and Dataverse topics to the Power Automate Power Virtual Agents chatbot. Customers will be able to find answers for "How-To" and troubleshooting content thru the chatbot.

Simplify how solution-aware flows are shared with Azure AD users

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

This feature allows for easy addition of users into Microsoft Dataverse and enables easier adoption of Microsoft Power Platform.

Feature details

When users share a solution-aware flow, they see a list of Microsoft Dataverse users. If they want to share the flow with other users in the organization's Azure Active Directory (Azure AD), those users have to first be added as Dataverse users.

With this feature, users can share solution-aware flows directly with users within the organization's Azure AD.

Solutions list shows a warning for connection references

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

Connection references are an important cornerstone of the application lifecycle management (ALM) process for solution-aware flows. This feature warns users when connection references are missing a connection.

Feature details

When a connection isn't ready for use, you see warnings about this status when you edit a flow that uses the connection; however, there's no central place in which you can see all connection reference problems for all flows. With this feature, we'll display warnings for all connection references that are missing connections.

Users can see solution references from the flow details page

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

This feature allows users to see solution references when they're looking at flow details, improving the ease of viewing and editing solution resources.

Feature details

When you build a solution, there can be many dependencies between different types of resources. Currently, users can't easily determine the list of solutions that are referencing flows or connection references. In 2022 release wave 1, we'll make solution references visible in the flow details page.

Solution-aware cloud flows are shown in the my flows list

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

We're updating the my flows experience so that users can find solution-aware cloud flows more easily.

Feature details

Flows must be solution-aware to participate in the application lifecycle management (ALM) process. Currently, solution-aware cloud flows aren't displayed in the my flows list, making them difficult to find. With this feature, the my flows list will contain solution-aware flows.

Use connections provided by run-only users with the Dataverse connector

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	May 2022

Business value

Users will be able to deploy flows more broadly without needing to manage shared accounts. They can now enable users to use their own connections when triggering flows with the Microsoft Dataverse connector.

Feature details

Flow makers can configure whether a stored or a user-provided connection is used for Microsoft Dataverse actions using the **Manage run-only permissions** settings for flows that are manually triggered.

Troubleshoot multiple flow runs at the same time

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	May 2022

Business value

This feature allows makers to easily identify a flow run using an identifier column in flow runs page.

Feature details

Currently, a maker can troubleshoot a flow run from the flow runs page by expanding a particular run and viewing the following data points about the run.

- How the flow ran.
- The trigger values passed into the flow run.
- Who triggered the flow.
- Where and why the flow failed.

If you have hundreds of runs, however, you need a more holistic view of them to troubleshoot more efficiently. Currently, this capability isn't available.

With this feature, makers can choose a trigger dynamic value output that appears on a custom column in the flow runs view. After the flow runs, the column gets populated with the runtime value that the maker specifies.

Flow ownership supported for Service Principals

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	May 2022

Business value

This feature allows Microsoft Power Platform to work in enterprise environments where Service Principals are leveraged.

Feature details

Currently, flows that Service Principals own cannot be enabled because connections cannot be shared with service principals. As a workaround, makers use shared "service accounts" when they want more than one person to own a flow.

In 2022 release wave 1, we're updating connection sharing capabilities to allow flow ownership by a user that represents a Service Principal.

Handle null values in JSON

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Jun 2022

Business value

Customers often use Power Automate to read in data from a variety of formats, including JSON. This feature will unblock customers who encounter null values in the JSON parsing action.

Feature details

Currently, cloud flows do not handle null values in the JSON parsing action. Instead, an exception is thrown and it is hard for users to troubleshoot, requiring a workaround in their flows to be resolved. In 2022 release wave 1, we'll add support to handle null values in the JSON parsing action.

OData editor improvements in cloud flows

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Aug 2022

Business value

This feature provides easier filtering in actions like the SharePoint **Get Items** action that previously required OData syntax.

Feature details

With this new feature, cloud flow actions will hide OData syntax by default. Makers can switch between basic and advanced mode, making it easier to filter items without in-depth knowledge. Advanced makers can still use OData if they choose. This feature will first be available in the SharePoint Online connector's **Get Items** action.

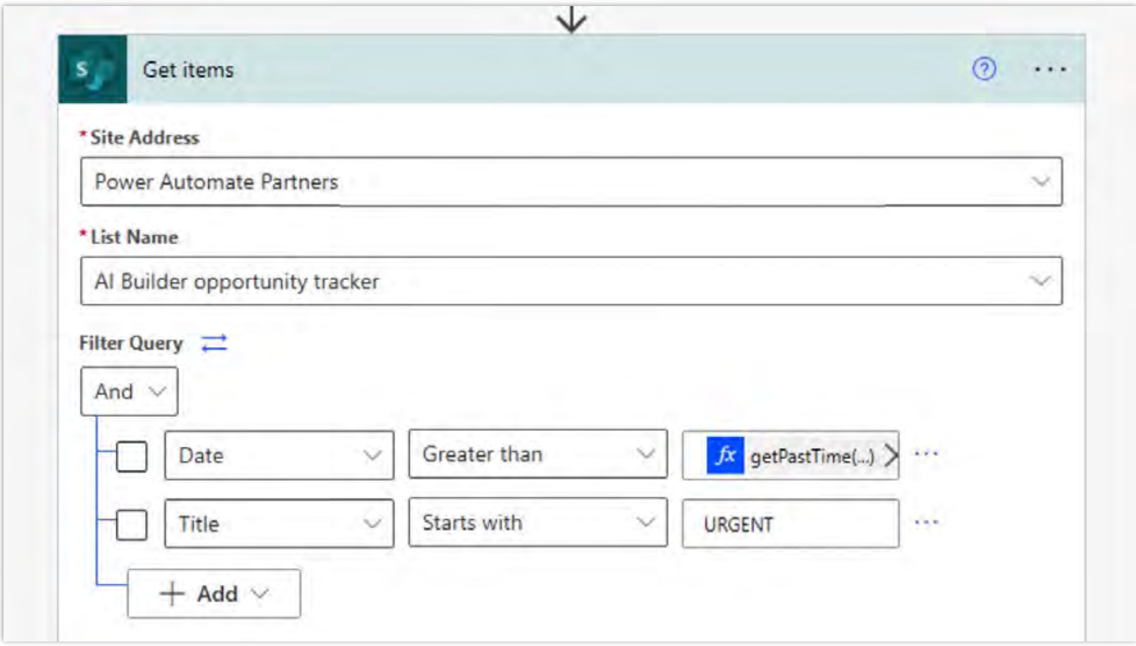


Image of the Get Items for SharePoint showing the new OData query options.

Improved Power Automate mobile app for Android

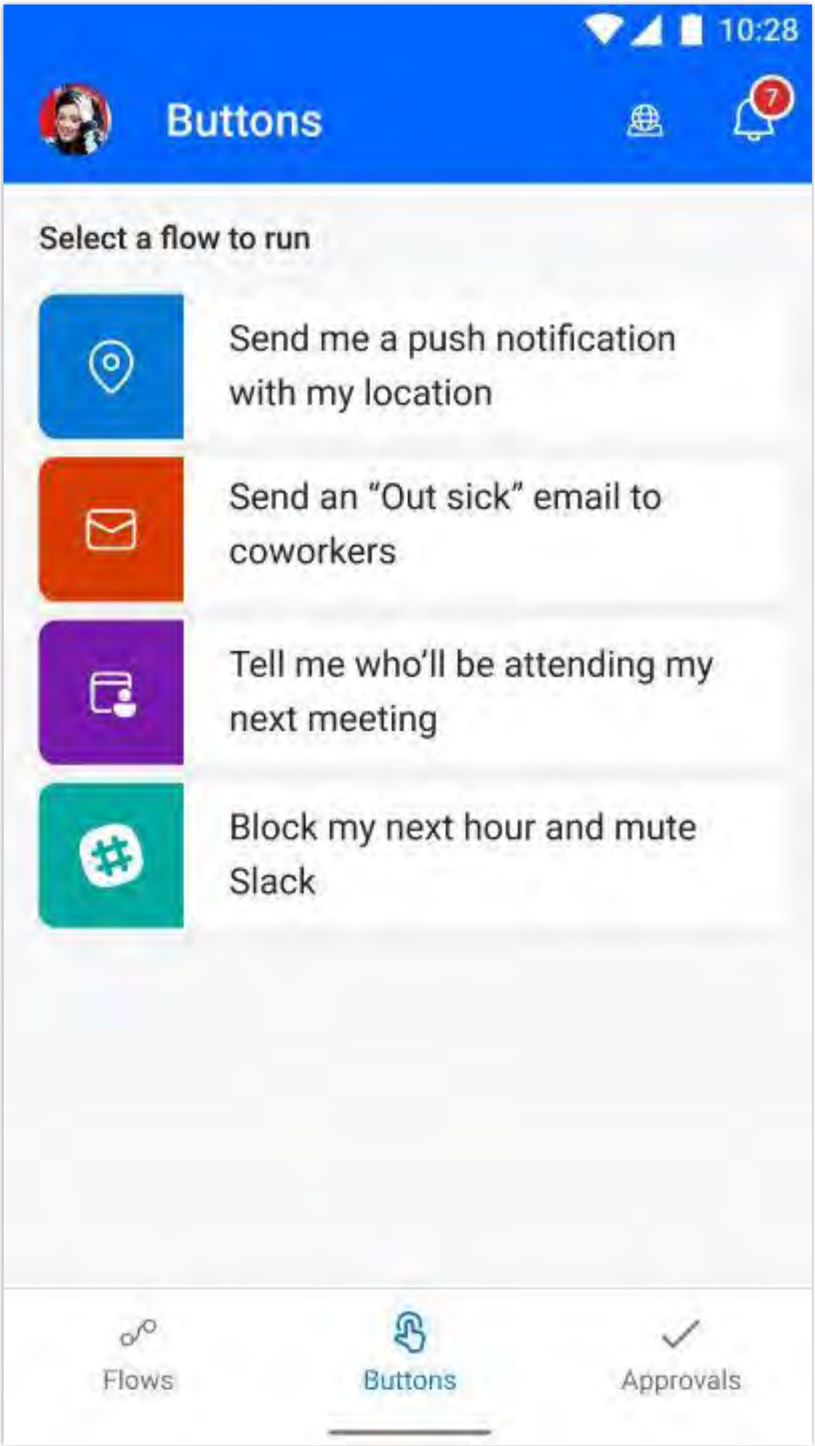
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Sep 2022

Business value

Improvements to the Power Automate mobile app for Android provides a more usable and modern experience.

Feature details

The new version of the Power Automate mobile app for Android provides an updated, modern experience for users on their Android devices. This experience aligns the mobile app with the Power Automate Web portal experience. Users can receive notifications, trigger instant flows on the go, and create widgets (shortcuts to trigger instant flows from your mobile's home screen). You can view your list of approvals more quickly with the new design too. The fast rollout of new features and updates will be supported.



Screenshot of the updated Android mobile Power Automate app.

Desktop flows

Overview

The need for accessing robotic process automation (RPA) capabilities becomes more and more urgent for organizations. Indeed, they are looking to help their employees be more productive by focusing on the most important tasks and avoid spending time on repetitive, time-consuming ones, which often can be automated. Building desktop automation can be complex hence it is critical to provide simple and intuitive user experiences for people who build or run automation flows. Desktop flow makers can either be advanced RPA developers or citizen developers with less technical skills but they both need to be able to build the automations they need. In this democratization journey, Power Automate for desktop comes now with Windows 11 making RPA easily accessible for both individual users as well as organizations.

In 2022 release wave 1, we'll keep investing heavily in Power Automate for desktop to make automation even easier with improvements like welcoming in-app tutorials and out of the box ready-to-run desktop flow examples. Additionally, we'll expand the Power Automate for desktop capabilities by addressing the main UI challenges like image-based automations. All those application enhancements come with platform improvements providing better governance, monitoring, and troubleshooting capabilities to help organizations with the deployment and management of their desktop automations.

Use credentials from CyberArk in desktop flow connections

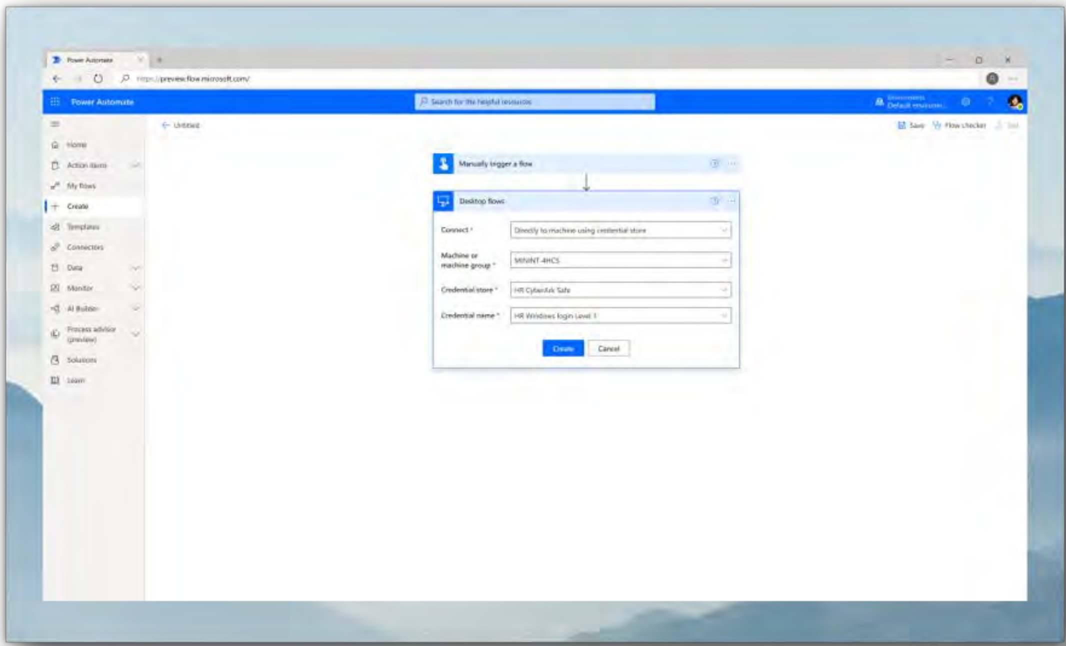
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2022	-	-

Business value

You can now leverage credentials from CyberArk to connect to Windows sessions on desktop flow machines. This feature supports rotating passwords without the need to update the connection.

Feature details

With this feature, users can now have their desktop flow automations run on Windows machines that are logged in with credentials from CyberArk. The machine will retrieve the latest credentials at runtime. This enables automations to keep running successfully even when the password is changed by the administrator.



Screenshot of username and password sourced from a CyberArk vault.

Desktop flow machines and runs - status health, analytics, and error reporting improvements

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2022	-	-

Business value

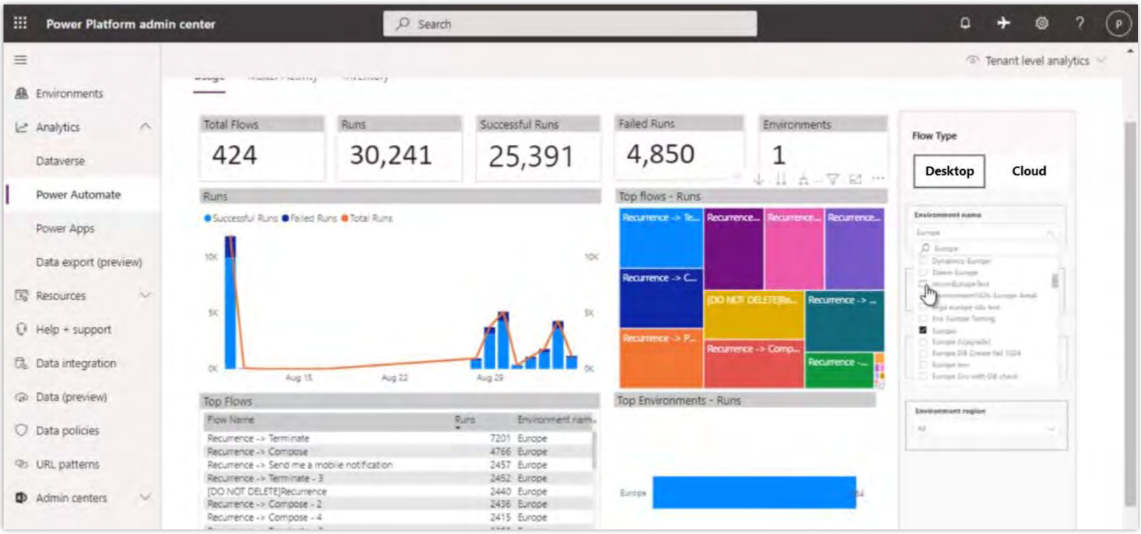
All customers need the ability to monitor and understand the health of their desktop flow setup. This includes analytics about machines configured to run them where they can quickly detect issues and be assisted in troubleshooting them as quickly as possible.

Feature details

CoE and admins have a way to monitor the health of their desktop flow machines and runs. They can get support in troubleshooting any issue surfaced with an end-to-end overview and additional capabilities.

New features will give you the ability to track/manage the health of machines and desktop flow runs end-to-end.

- The remediation pane and details run page shows up more meaningful and actionable error messages, including identifying in which step the error occurred.
- A new dashboard helps with tracking machines and flow runs health.



Screenshot of desktop flow analytics.

Set screen resolution for unattended desktop flow runs

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2022	-	-

Business value

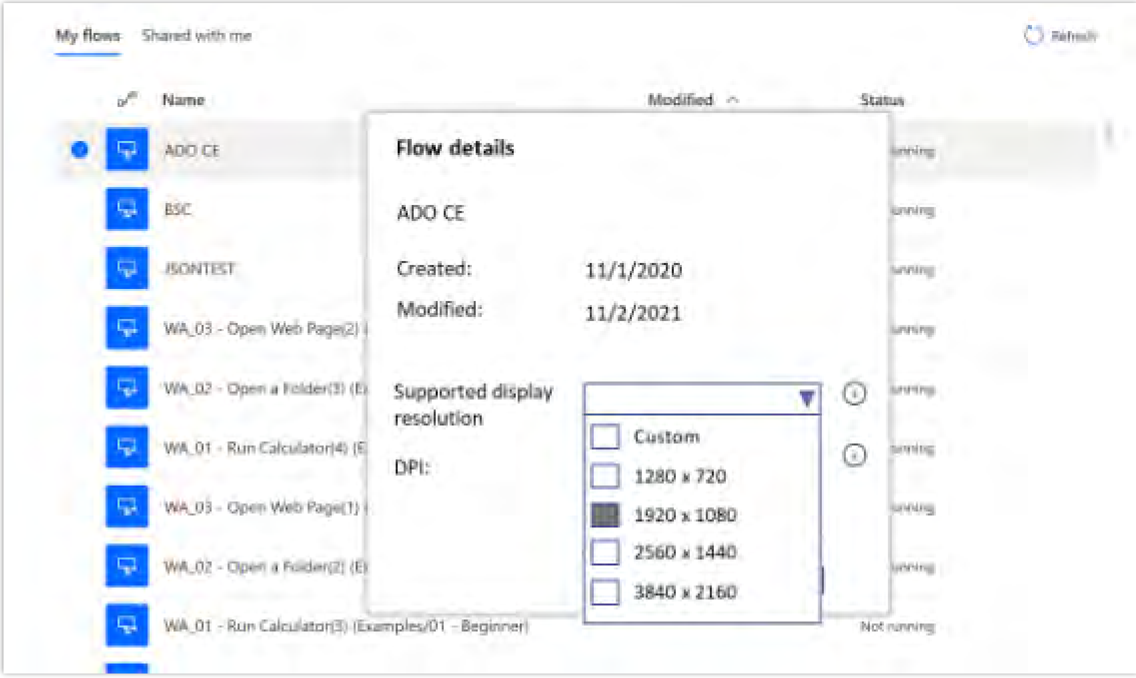
Some desktop flows can only run with a certain screen resolution. With this feature, customers can enforce a certain screen resolution to ensure their desktop flows won't fail because of a wrong screen resolution.

Feature details

Some desktop flows require a certain screen resolution to be able to run successfully. This feature allows users to define a static screen resolution to be enforced on all unattended flow runs.

From the flow details, flow makers can:

- Select between different screen resolutions
- Select between different scale settings (DPI)



Screenshot of options for desktop flows including setting resolution and DPI.

SharePoint connector in Power Automate for desktop

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-	-

Business value

The new SharePoint actions in Power Automate for desktop will increase the speed and ease of use of desktop automations.

Feature details

With the SharePoint connector in Power Automate for desktop, you can embed SharePoint cloud actions within desktop automations. Now, users can design and run desktop automations that loop over SharePoint lists and write into SAP as well as any other action from the SharePoint connector available in cloud flows.

Use credentials from Azure Key Vault in desktop flow connections

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-	-

Business value

Users can leverage credentials from Azure Key Vault to connect to Windows sessions on desktop flow machines. This feature supports rotating passwords without the need to update the connection.

Feature details

With this feature, users can have their desktop flow automations run on Windows machines logged in with credentials from Azure Key Vault. The machine will retrieve the latest credentials at runtime. This enables automations to keep running successfully even when the password is changed by the administrator.

Java automation in SWT framework applications

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Apr 2022

Business value

In 2022 release wave 1, Power Automate desktop supports Java automation scenarios related to Java apps that have the Standard Widget Toolkit (SWT) as underlying technology.

Feature details

Power Automate desktop capabilities for UI automation in Java apps and applets are now enhanced as Power Automate for desktop now supports UI automation scenarios based on Standard Widget Toolkit (SWT) Java apps.

The user experience for automation of Java apps will be seamless and independent of the underlying technology used and users will be able to cover most of the Java automation cases.

Display custom form action in Power Automate for desktop

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Feb 21, 2022	-	May 2022

Business value

With this action, users will be able to create their own dialogs, combining the controls and elements of their choices into a single dialog window.

Feature details

The custom form feature will be based on the adaptive cards technology. Makers can use an intuitive designer to configure this dialog in any way they'd like in order to meet their needs. For example, a maker can combine controls and elements into a single dialog. Makers can also provide input data in a flexible and dynamic way.

See also

Create custom forms (docs)

More data types for input and output variables

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	May 2022

Business value

Users will be able to pass more input/output variable types instead of basic strings like you can today.

Feature details

Power Automate for desktop flows will be able to work with more input and output variable types, including:

- Text
- Number
- Boolean
- Custom Object

- List
- Data table (a cloud flow can pass a datatable to a desktop flow, as a List of Objects)

Power Virtual Agents

Plan and prepare for Power Virtual Agents in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Power Virtual Agents**.

Overview

Power Virtual Agents enables 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.

The 2022 release wave 1 brings improvements in the authoring experience with topic suggestions from bot sessions, Power Apps Portals integration, data loss prevention options, proactive bot update messaging in Microsoft Teams, and more.

Creating a bot is typically a complex and time-intensive process, requiring long content update cycles and a team of experts. Power Virtual Agents gives anyone in your organization the ability to create powerful custom bots using an easy, code-free graphical interface, without the need for AI experts, data scientists, or teams of developers. A bot can interact with users, ask for clarifying information, and answer a customer's questions.

With deep integration with Power Automate and the Microsoft Bot Framework, authors can extend their bots to integrate with API backends, which will enable the bots to handle additional topics, limited only by the author's imagination. You can deploy bots to many channels, including websites, Microsoft Teams, and Facebook.

As users interact with a bot, the author can see which topics are performing well and which need improvement.

TIP Download the release overview guide and share with your team as you plan to onboard the new capabilities included in this release wave.

[Download the overview guide (PDF)]

* Overview guide available in English version only.

Investment areas

Service and runtime
Power Virtual Agents continues to ensure it meets strict compliance and governance needs. Power Virtual Agents will be available for US Government customers in the Government Community Cloud (High) environment, as well as in our Germany and United Arab Emirates regions.

Power Virtual Agents will make it easier to govern your Microsoft Teams-based environments costs by offering inactivity-based environment deletion, cleaning up those environments that are in disuse, allowing your organization to focus on only active projects.

Core authoring
Creating a bot with Power Virtual Agents is easy to do with the no-code authoring canvas, and there are several ways you can manage how topics interact, how you want the conversation to flow, and what it should feel like.

It's easy to test the bot without having to fully deploy the bot whenever you make a small change. There are also lesson topics that guide you through topic authoring from simple to complex scenarios as well as default system topics. You can choose what language you want your bot to use, too. Variables and entities make your bot more capable of understanding your users, and rich content makes your bot more relatable and easier to use.

Bot configuration
Bots can be configured to suit the individual needs of an organization and to provide further extensibility with other services and features. This includes authentication provider support, the use of Microsoft Bot Framework skills to augment the bot’s capabilities, integration with Microsoft Teams, Facebook, and other channels, and more.

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.

Helpful links	Description
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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to 2021 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
Support data loss prevention	Users by admins, makers, or analysts	Jul 2022	-
Use single sign-on with Dynamics 365 Customer Service	Users by admins, makers, or analysts	Sep 2022	-

Core authoring

Use the Power Virtual Agents conversational editor to construct your dialogs with rich content, variables, and powerful entity types.

Feature	Enabled for	Public preview	General availability
Start bot conversations with proactive triggers	Users by admins, makers, or analysts	Apr 2022	-

Service and runtime

Power Virtual Agents will be available for United States Government users in the Government Community Cloud (High) environment.

Feature	Enabled for	Public preview	General availability
Availability in Government Community Cloud (GCC) and GCC High	Users, automatically	-	Apr 2022

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the International availability guide. For more information about geographic areas and datacenters (regions), go to the Dynamics 365 and Microsoft Power Platform availability page.

Bot configuration

Overview

Bots can be configured to suit the individual needs of an organization and to provide further extensibility with other services and features. This includes authentication provider support, the use of Microsoft Bot Framework skills to augment the bot’s capabilities, integration with Microsoft Teams, Facebook, and other channels, and more.

Support data loss prevention

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2022	-

Business value

Power Virtual Agents will enable admins to protect their organization's data by supporting data loss prevention (DLP).

Feature details

Customers want to use Microsoft Power Platform's capabilities to safeguard their organization's data. In 2022 release wave 1, we'll enable admins to protect their enterprise data through DLP policies within Power Virtual Agents topics.

Use single sign-on with Dynamics 365 Customer Service

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2022	-

Business value

Improve your customers' experiences with your chatbots by removing the need for your customers to sign in multiple times.

Feature details

When using chat authentication settings in Dynamics 365 Customer Service, Power Virtual Agents chatbots will be aware of whether the bot user is signed in, and won't ask them to sign in multiple times.

Core authoring

Overview

Creating a bot with Power Virtual Agents is easy to do with the no-code authoring canvas, and there are several ways you can manage how topics interact, how you want the conversation to flow, and what it should feel like.

It's easy to test the bot without having to fully deploy the bot whenever you make a small change. There are also lesson topics that guide you through topic authoring from simple to complex scenarios as well as default system topics. You can choose what language you want your bot to use, too. Variables and entities make your bot more capable of understanding your users, and rich content makes your bot more relatable and easier to use.

Start bot conversations with proactive triggers

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2022	-

Business value

Proactive triggers help make your bots more relevant to your customers' actual needs, reducing their frustration, and deflecting support calls.

Feature details

Today, bot interactions require an explicit trigger phrase from your customers (for example, a bot user might ask, "How many vacation days do I have left?").

In this wave, we will add the ability for your customers to proactively trigger bot conversations with their full context, based on external trigger events (such as page navigation or button clicks).

Proactive triggers let you build engaging conversations with your customers that start the conversation with relevant information. For example, the bot might say, "You have 3 days left to pick your benefits. Can I help answer any questions?".

Service and runtime

Overview

Power Virtual Agents continues to ensure it meets strict compliance and governance needs. Power Virtual Agents will be available for US Government customers in the Government Community Cloud (High) environment, as well as in our Germany and United Arab Emirates regions.

Power Virtual Agents will make it easier to govern your Microsoft Teams-based environments costs by offering inactivity-based environment deletion, cleaning up those environments that are in disuse, allowing your organization to focus on only active projects.

Availability in Government Community Cloud (GCC) and GCC High

Enabled for	Public preview	General availability
Users, automatically	-	Apr 2022

Business value

Power Virtual Agents is available in Government Community Cloud (GCC) and GCC High, allowing public sector employees to build chatbots in their environments.

Feature details

Power Virtual Agents for Microsoft Teams enables customers to build chatbots within Microsoft Teams. The chatbots can use data stored in Microsoft Dataverse for Teams, or many other data sources using supplied standard connectors. Customers in Government Community Cloud (GCC) and GCC High will have to ability to build bots in these environments.

Microsoft Dataverse

Plan and prepare for Microsoft Dataverse in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. 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 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

Bridge Microsoft Power Platform to Azure data

Our customers have asked for a single, end-to-end way to work with data in Microsoft Dataverse, from running AI and machine learning and integrating with external datasets to slicing and dicing large volumes of Microsoft Dataverse data. Now, instead of using multiple tools to get the job done, you can accelerate time-to-insight with a single comprehensive solution Azure Synapse Link for Dataverse that can help you deliver on these goals end-to-end; something that is built-in and available out-of-the-box.

Azure Synapse Link for Dataverse enables Dataverse integration with Azure Synapse Analytics. With a few clicks, you can bring your Microsoft Dataverse data to Azure Synapse Analytics, visualize data in your Azure Synapse workspace, and rapidly start processing the data to discover insights using advanced analytics capabilities for serverless data lake exploration, code-free data integration, data flows for extract, transform, load (ETL) pipelines, and optimized Apache Spark for big data analytics. Seamless integration of Dataverse with Azure Synapse Analytics empowers our customers to analyze data in the lake.

Enterprise customers are now able to use the familiarity of T-SQL to analyze big data and gain insights from it, while optimizing their data transformation pipeline to leverage the deep integration of Azure Synapse with other Azure services such as Power BI Embedded, Azure Cosmos DB, and Azure Machine Learning.

Microsoft Dataverse data

Microsoft Dataverse is the data store for Microsoft business applications and Power Platform. Dataverse allows the storage of many types of data in customizable tables. Depending on your data needs, it's possible to store structured and unstructured data in one or many environments. Dataverse provides extensive security, filtering, and search capabilities within environment bounds. The Dataverse API and logic capabilities are used to build and maintain workflows for your application needs.

Microsoft Dataverse provides a cloud-based storage option for your data with these benefits:

- **Easy to manage**: Both the metadata and data are stored in the cloud in Dataverse logical tables.

- **Easy to secure**: Data is securely stored so that users can see it only when you grant them access. Role-based security allows you to control access to information within your organization.
- **Access your Dynamics 365 data**: Dynamics 365 applications data is stored within Dataverse, allowing you to quickly build apps that use your Dynamics 365 data and extend your apps with Power Apps, Power Automate, and more.
- **Logic and validation**: Define calculated columns, business rules, workflows, and business process flows to ensure data quality and drive business processes.
- **Productivity tools**: Seamlessly connect data with Dynamics 365, Microsoft 365, Azure, Visual Studio, Excel Power Query, and third-party services.

Microsoft Dataverse API
Microsoft Dataverse APIs are the "glue" that binds Microsoft Power Platform together.

- The data APIs provide capabilities to work with business data in your Microsoft Dataverse tables and perform specialized operations on that data.
- The Dataverse search API makes it possible to easily find relevant information that can span multiple tables.

Microsoft Power Platform depends on APIs exposed by Microsoft Dataverse. Canvas apps, model-driven apps, and Microsoft Power Automate depend on Dataverse APIs. ISVs and customers use our APIs to create integrations and custom applications.

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

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Bridge Microsoft Power Platform to Azure data

Bring Dynamics 365 data stored in Microsoft Dataverse into Azure.

Feature	Enabled for	Public preview	General availability
Access Dataverse choice labels directly from Azure Synapse Link for Dataverse	Admins, makers, marketers, or analysts, automatically	May 2022	
Receive notifications regarding the state of your Azure Synapse Link for Dataverse	Users by admins, makers, or analysts	Jun 2022	
Export Dataverse data in Delta Lake format	Admins, makers, marketers, or analysts, automatically	Sep 2022	
Azure Synapse Link for Dataverse - China Cloud	Admins, makers, marketers, or analysts, automatically	Jul 2022	Sep 2022

Microsoft Dataverse API

Web services provide APIs that apps use to interact with Microsoft Dataverse and are the glue that binds Microsoft Power Platform together.

Feature	Enabled for	Public preview	General availability
Instantly revoke users and enforce IP restriction with CAE	Users by admins, makers, or analysts	May 2022	Jul 2022

Microsoft Dataverse data

Microsoft Dataverse is the default data store for Microsoft Power Platform. It provides extensive security, filtering, and search within environment bounds.

Feature	Enabled for	Public preview	General availability
Power Platform solutions can now include Power BI reports and datasets	Admins, makers, marketers, or analysts, automatically	Jul 2022	-
Dataverse results in Microsoft Search	Users by admins, makers, or analysts	-	May 2022
Improvements to dual-write UI	Users, automatically	-	May 2022
Scan, classify, and label Dataverse data	Users by admins, makers, or analysts	Sep 2022	To be announced
Microsoft Dataverse data archival	Admins, makers, marketers, or analysts, automatically	Sep 2022	To be announced

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Bridge Microsoft Power Platform to Azure data

Overview

Our customers have asked for a single, end-to-end way to work with data in Microsoft Dataverse, from running AI and machine learning and integrating with external datasets to slicing and dicing large volumes of Microsoft Dataverse data. Now, instead of using multiple tools to get the job done, you can accelerate time-to-insight with a single comprehensive solution Azure Synapse Link for Dataverse that can help you deliver on these goals end-to-end; something that is built-in and available out-of-the-box.

Azure Synapse Link for Dataverse enables Dataverse integration with Azure Synapse Analytics. With a few clicks, you can bring your Microsoft Dataverse data to Azure Synapse Analytics, visualize data in your Azure Synapse workspace, and rapidly start processing the data to discover insights using advanced analytics capabilities for serverless data lake exploration, code-free data integration, data flows for extract, transform, load (ETL) pipelines, and optimized Apache Spark for big data analytics. Seamless integration of Dataverse with Azure Synapse Analytics empowers our customers to analyze data in the lake.

Enterprise customers are now able to use the familiarity of T-SQL to analyze big data and gain insights from it, while optimizing their data transformation pipeline to leverage the deep integration of Azure Synapse with other Azure services such as Power BI Embedded, Azure Cosmos DB, and Azure Machine Learning.

Access Dataverse choice labels directly from Azure Synapse Link for Dataverse

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2022	-

Business value

Easily read the user-friendly version from Dataverse choices text label data using Azure Synapse Link for Dataverse.

Feature details

Previously, Azure Synapse Link for Dataverse wrote an integer label rather than the text label for columns that use Microsoft Dataverse choices (option sets) to maintain consistency during edits. This approach required users to take extra steps to access the integer-to-text label mapping that is stored in the Microsoft.Athena.TrickleFeedService/table-EntityMetadata.json file to make it available with their Dataverse data.

Now, Azure Synapse Link for Dataverse customers have access to a separate table containing their Dataverse choices integer-to-text label mapping that can be easily joined with the raw Dataverse data to expose the text label for each Dataverse choice column. This helps citizen developers and data engineers alike to easily read the user-friendly version of their Dataverse data.

Receive notifications regarding the state of your Azure Synapse Link for Dataverse

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2022	-

Business value

Users can subscribe to notifications to stay on top of the state of their Azure Synapse Link for Dataverse, instead of manually checking the monitoring page.

Feature details

Azure Synapse Link for Dataverse has a detailed monitoring page describing link status and health. This includes synchronization status of each Microsoft Dataverse table, the number of records or changes, and details about link configuration strategy. Previously, users had to manually open the monitoring page and check the state of their link. With this feature, users can subscribe to customized notifications and easily stay informed about the health of their Azure Synapse Link.

Export Dataverse data in Delta Lake format

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Business value

This feature enables users to query and analyze Microsoft Dataverse data efficiently with Parquet.

Feature details

Delta Lake is an open source, widely used data format that is built off the Parquet data format. Parquet was designed for efficient storage and high performance, especially for large datasets. It utilizes columnar data storage as opposed to a row-based format like CSV and uses a specific compression technique for each column based on the data type. It is immutable, meaning that historical data is readily accessible, and provides flexibility with a wide variety of supported encoding types.

Delta Lake provides all the benefits of Parquet format in addition to guaranteed ACID (atomicity, consistency, isolation, and durability) transactions and time travel (data versioning). The ability to "undo" a change or go back to a previous version is one of the key features of transactions. Delta Lake provides snapshots of data enabling you to revert to earlier versions of data for audits, rollbacks, or to reproduce experiments.

With Azure Synapse Link for Dataverse, you can now efficiently store and query your Dataverse data in Azure Synapse Analytics with the Delta Lake format. This helps citizen developers and data engineers alike quickly query and analyze their Dataverse data, especially for large datasets.

Azure Synapse Link for Dataverse - China Cloud

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2022	Sep 2022

Business value

Azure Synapse Link for Dataverse will be available for China Cloud.

Feature details

Companies in China are looking to analyze their Dataverse data in Azure Synapse Analytics in a manner that's compliant with government regulations. With just a few clicks, China Cloud users can leverage Azure Synapse Link for Dataverse to quickly and continuously analyze their data securely.

Microsoft Dataverse API

Overview

Microsoft Dataverse APIs are the "glue" that binds Microsoft Power Platform together.

- The data APIs provide capabilities to work with business data in your Microsoft Dataverse tables and perform specialized operations on that data.
- The Dataverse search API makes it possible to easily find relevant information that can span multiple tables.

Microsoft Power Platform depends on APIs exposed by Microsoft Dataverse. Canvas apps, model-driven apps, and Microsoft Power Automate depend on Dataverse APIs. ISVs and customers use our APIs to create integrations and custom applications.

Instantly revoke users and enforce IP restriction with CAE

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2022	Jul 2022

Business value

Comply with Azure Active Directory (Azure AD) identity policy for user revocation and conditional access IP enforcement policy using Continuous Access Evaluation (CAE).

Feature details

Provides instant revocation of user in Microsoft Dataverse when an administrator revokes a user from Azure AD. Supports Conditional Access IP restriction policy to allow instant enforcement when IP address falls outside of approved IP ranges. In addition, this feature provides resiliency to Azure AD outages where logged in users can continue to work in an event of an Azure AD outage.

Microsoft Dataverse data

Overview

Microsoft Dataverse is the data store for Microsoft business applications and Power Platform. Dataverse allows the storage of many types of data in customizable tables. Depending on your data needs, it's possible to store structured and unstructured data in one or many environments. Dataverse provides extensive security, filtering, and search capabilities within environment bounds. The Dataverse API and logic capabilities are used to build and maintain workflows for your application needs.

Microsoft Dataverse provides a cloud-based storage option for your data with these benefits:

- **Easy to manage**: Both the metadata and data are stored in the cloud in Dataverse logical tables.
- **Easy to secure**: Data is securely stored so that users can see it only when you grant them access. Role-based security allows you to control access to information within your organization.
- **Access your Dynamics 365 data**: Dynamics 365 applications data is stored within Dataverse, allowing you to quickly build apps that use your Dynamics 365 data and extend your apps with Power Apps, Power Automate, and more.
- **Logic and validation**: Define calculated columns, business rules, workflows, and business process flows to ensure data quality and drive business processes.
- **Productivity tools**: Seamlessly connect data with Dynamics 365, Microsoft 365, Azure, Visual Studio, Excel Power Query, and third-party services.

Power Platform solutions can now include Power BI reports and datasets

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2022	-

Business value

Microsoft Power Platform application lifecycle management (ALM) now extends to Power BI reports and datasets. This allows deployment of comprehensive applications built using Power Apps, Power Automate, Microsoft Dataverse, and other Power Platform services.

Power BI reports and datasets can be included as part of a Microsoft Power Platform solution for import, export, and customization.

Feature details

Power Apps makers will be able to:

- Add Power BI reports and datasets to a solution.
- Connect Power BI mashup parameters to Power Apps environment variables.
- Import and export Power Apps solutions that include Power BI reports and datasets.
- Embed Power BI reports in model-driven apps.
- Use Power BI components to support managed and unmanaged Power Apps solutions operations.

Power BI creators will be able to:

- Include Power BI reports and datasets (import and DirectQuery) in Power Apps ALM solutions.
- Use Single Sign-On (SSO) for Microsoft Dataverse data sources deployed with the Power Apps solution.
- Customize deployed content in place with the ability to discard unmanaged changes.
- Create additive customization to managed solutions.

Power Platform admins will be able to:

- Deploy applications Power Platform solutions including Power BI reports and datasets.
- Have Dataverse data sources with SSO automatically configured with a solution.
- Configure other dataset data sources leveraging solution environment variables.

Dataverse results in Microsoft Search

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	May 2022

Business value

Users can see search results from Microsoft Dataverse in Microsoft 365 (Bing.com, Office.com, Sharepoint.com).

Feature details

Dynamics 365 federation with Microsoft Search provides a cohesive search experience with Dynamics 365 to intelligently help businesses search users as well as find, learn, operate, and navigate their customer and business relevant information.

Improvements to dual-write UI

Enabled for	Public preview	General availability
Users, automatically	-	May 2022

Business value

We've simplified the dual-write user interface (UI) by adding more information.

Feature details

In 2022 release wave 1, we'll address numerous dual-write UI issues. Some of these issues are:

- Improvements to mapping
- Improvements to error detection
- More detailed status information

Scan, classify, and label Dataverse data

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2022	To be announced

Business value

This feature will comply with Microsoft information protection and data governance.

Feature details

This feature onboards administrators to Azure Purview. Purview provides Microsoft Dataverse administrators the capability to perform these tasks:

- Register the data
- Scan the data
- Auto classify the data
- Add a label
- Set the data protection policy

Microsoft Dataverse data archival

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	To be announced

Business value

Customers can support regulatory-audit requirements for long term data storage and reduce non-active data in the transaction store. This will also provide customers with flexibility to gain business insights and drive actions based on combining the historical and active transactional data.

Feature details

Application admins will be able to define an archival policy for a root table. At the scheduled time, the root and child tables, including files, are moved from the transaction store to a long term storage within Dataverse. A dashboard will provide the capability to manage the lifecycle of the archival operations.

Read only access to the archived data will be provided. A new Dataverse connector for Power BI will enable customers to build custom reports. Managed Azure Synapse will enable customers to run advanced analytics.

For Finance and Operations applications, there will be apps for specific scenarios released in a phased manner on top of the native Dataverse platform capabilities. Customers can archive functional scenarios specific to a business process. Examples include general ledger, inventory transactions, and so on.

Governance and administration

Plan and prepare for Microsoft Power Platform governance and administration in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. In this article, you'll find the product overview and what's new and planned for **Microsoft Power Platform governance and administration**.

Overview

Microsoft Power Platform offers a range of governance and administration capabilities that span Power Apps, Power Automate, Power Virtual Agents, and Microsoft Dataverse. These capabilities are designed to help administrators and IT professionals set up, secure, manage, govern, and monitor the use and adoption of Microsoft Power Platform and its components across the enterprise. In addition to the Power Platform admin center, which is the unified user experience we aim to provide for Microsoft Power Platform administrators, a unified API surface and rich tooling like PowerShell cmdlets are also available to provide fully automatable management capabilities beyond the out-of-box portal experience.

Investment areas

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Microsoft Power Platform governance and administration** below:

[Check out the release plan]

For application administrators

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What's new and planned for Microsoft Power Platform governance and administration

This topic lists features that are planned to release from April 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to 2021 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.

Feature	Enabled for	Public preview	General availability
Reporting for Finance and Operations storage	Admins, makers, marketers, or analysts, automatically	May 2022	May 2022
Purchase Dynamics 365 and Power Platform ISV offers from AppSource	Admins, makers, marketers, or analysts, automatically	May 2022	Jul 2022

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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.

Reporting for Finance and Operations storage

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2022	May 2022

Business value

Admins will have access to Finance and Operations storage reporting directly in the Power Platform admin center. These reports will offer clarity on how much storage has been used and allow admins to take timely action if entitlement limits are exceeded.

Feature details

Within the Power Platform admin center, storage reporting will show how much storage a customer has used against their entitlement limit. Admins will be able to download the report in a Microsoft Excel format. Eventually, we'll enhance the experience with more visualized analytics, similar to what Microsoft Dataverse has in the Power Platform admin center today. For this release, the scope will cover database storage only.

Purchase Dynamics 365 and Power Platform ISV offers from AppSource

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2022	Jul 2022

Business value

Currently, customers can discover Dynamics 365 and Microsoft Power Platform independent software vendor (ISV) offers on AppSource but not purchase them. This new feature will allow customers to purchase these products from AppSource.

Feature details

This new feature allows customers to be able to purchase user-based licenses for ISV products from AppSource. The licenses they purchase will appear in the Microsoft 365 portal, where they can be assigned to users.

Data integration

Plan and prepare for data integration in 2022 release wave 1

IMPORTANT The 2022 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2022 to September 2022. 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 Data Cloud, enabling data connectivity, transformation, and integration across hundreds of critical enterprise cloud and on-premises data sources. Power Query enables users of Power BI, Excel, Power Apps, Insights Apps, and other Microsoft products and services to ingest and transform data from hundreds of sources.

In this upcoming release wave, we'll deliver improvements in our big data performance and high scale connectivity to Azure Synapse, Microsoft Dataverse, Snowflake, Databricks, BigQuery, and Redshift. You can expect several enhancements across connectors, gateway, and VNet. New capabilities will simplify data prep using the visual authoring environment and diagram view to create high-scale dataflows to Microsoft Cloud, supporting Power BI, Insights Apps, and Power Platform. We'll also deliver extract, transform, and load scenarios using Synapse Link to Dataverse, CosmosDB, and SQL.

Investment areas

Power Query connectors
The ability to connect to a wide range of different data sources is one of the core features of Power Query. In 2022 release wave 1, we're continuing to invest heavily in adding new data sources and expanding the reach of the existing sources into new applications, on the desktop and online.

Dataflows
Dataflows provide a low-code self-service data preparation experience using Power Query, including orchestration, automation, and monitoring capabilities that enable users across Microsoft Power Platform, Dynamics 365, and Azure to integrate data for downstream use by many other users and applications.

Power Query Online
Power Query continues to be the primary data connectivity and data preparation experience for users across a wide variety of Microsoft products and services. For 2022 release wave 1, we'll continue to expand the scope of data sources available in Power Query and continue to add new features that provide an enhanced data preparation experience for users.

Azure Virtual Network data gateways
This feature provides the ability for enterprises who subscribe to Azure Virtual Network connectivity for their data services to use Microsoft Power Platform seamlessly.

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

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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 2022 through September 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to 2021 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.

Azure Virtual Network data gateways

Azure Virtual Network connectivity for Microsoft Power Platform using VNet data gateways.

Feature	Enabled for	Public preview	General availability
VNet data gateway - connectivity for Power BI and Microsoft Power Platform dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Dataflows

Dataflows give users a low-code self-service data preparation experience using Power Query and enables them to integrate data across Power BI, Power Platform, Dynamics 365, and Azure.

Feature	Enabled for	Public preview	General availability
Public preview of the next generation Power BI dataflows	Admins, makers, marketers, or analysts, automatically	Jul 2022	
Connections page now lists dataflows used by connection	Users, automatically	Sep 2022	

Power Query connectors

Power Query connectors provide out-of-the-box connectivity to hundreds of sources.

Feature	Enabled for	Public preview	General availability
Amazon Redshift support for native queries in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	Sep 2022	-
Azure HDInsight HDFS connector available in Power Query Online, dataflows	Admins, makers, marketers, or analysts, automatically	Sep 2022	-
Google BigQuery support for native queries in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Feature	Enabled for	Public preview	General availability
Hive LLAP connector available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	Sep 2022	-
SharePoint Lists V2 connector available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	Sep 2022	-
Snowflake support for native queries in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	Sep 2022	-
Support for native queries in import and DirectQuery mode in the Power Query SDK	Admins, makers, marketers, or analysts, automatically	Sep 2022	-
Active Directory connector available in Power Platform dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022
Certified connectors available in Power BI dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022
Essbase connector available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022
Hadoop Distributed File System (HDFS) connector available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022
Informix connector available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022
OLE DB connector available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Feature	Enabled for	Public preview	General availability
Support for custom connectors in Power BI dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022
Sybase connector available in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022
Vertica connector available in Power Platform Dataflows	Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Power Query Online

Power Query is the primary data connectivity and data preparation experience across Microsoft products and services.

Feature	Enabled for	Public preview	General availability
Improvements for connecting to files stored in SharePoint Online	Admins, makers, marketers, or analysts, automatically	Jun 2022	-
Personal query gallery	Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the International availability guide. For more information about geographic areas and datacenters (regions), go to the Dynamics 365 and Microsoft Power Platform availability page.

Azure Virtual Network data gateways

Overview

This feature provides the ability for enterprises who subscribe to Azure Virtual Network connectivity for their data services to use Microsoft Power Platform seamlessly.

VNet data gateway - connectivity for Power BI and Microsoft Power Platform dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

This feature reduces the overhead of managing on-premises data gateways for virtual network (VNet) data sources.

Feature details

In 2022 release wave 1, we plan to make VNet connectivity for Power BI and Microsoft Power Platform dataflows to Azure data services, like Azure SQL, Synapse Analytics, and others, using VNet data gateways generally available.

VNet data gateways that are Microsoft managed eliminate the overhead of installing, updating, and monitoring on-premises data gateways for connecting to data sources associated with a VNet.

Dataflows

Overview

Dataflows provide a low-code self-service data preparation experience using Power Query, including orchestration, automation, and monitoring capabilities that enable users across Microsoft Power Platform, Dynamics 365, and Azure to integrate data for downstream use by many other users and applications.

Public preview of the next generation Power BI dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2022	-

Business value

Dataflows are a self-service, cloud-based data preparation technology that helps customers bring the world's data into Power BI. 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 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 will 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 the dataflow at a later time.
- The background publishing feature will defer query validation to the background, allowing customers 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.
- Support for loading dataflow output to new destinations.
- Support for loading data from data sources in VNets.

Connections page now lists dataflows used by connection

Enabled for	Public preview	General availability
Users, automatically	Sep 2022	-

Business value

This feature provides visibility to users on where their data is used.

Feature details

The detail page of a connection now lists all the dataflows that use the connection. This provides visibility into which artifacts depend on the connector, and where the data flows. In addition, if you try to delete the connection, you're shown a warning if there are dependent dataflows.

Power Query connectors

Overview

The ability to connect to a wide range of different data sources is one of the core features of Power Query. In 2022 release wave 1, we're continuing to invest heavily in adding new data sources and expanding the reach of the existing sources into new applications, on the desktop and online.

Amazon Redshift support for native queries in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Business value

Customers will be able to use native queries to access Amazon Redshift data.

Feature details

You can use native queries to access your Amazon Redshift data in the Power Query Online and dataflows experiences, leveraging another query option for various business scenarios. More information on native queries can be found at Import data from a database using native database query.

Azure HDInsight HDFS connector available in Power Query Online, dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Business value

Customers can connect to and load their business data from Azure HDInsight Hadoop Distributed File System (HDFS) for use in Power Query Online and 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 HDFS connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

Google BigQuery support for native queries in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Business value

Users will be able to use native queries to access their Google BigQuery data.

Feature details

You can use native queries to access your Google BigQuery data in the Power Query Online and dataflows experiences, leveraging another query option for various business scenarios. More information about native queries can be found at [Import data from a database using native database query](#).

Hive LLAP connector available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Business value

Customers can connect to and load their business data from Hive LLAP for use in Power Query Online and 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 Hive LLAP connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

SharePoint Lists V2 connector available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Business value

With the release of this connector in Power Query and dataflows, you can connect to and load your business data from SharePoint Lists through the V2 connector.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you can use the SharePoint Lists V2 connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

Snowflake support for native queries in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Business value

Use native queries to access your data in Snowflake in Power Query Online and dataflows experiences, leveraging yet another query option for various business scenarios.

Feature details

You can use native queries to query your Snowflake data in Power Query Online and dataflows experiences. More information about native queries can be found in [Import data from a database using native database query](#).

Support for native queries in import and DirectQuery mode in the Power Query SDK

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Business value

Connector developers will be able to implement native query support for their connectors in both import and DirectQuery modes using the Power Query SDK. This will allow users to query their data using this functionality in Power Query experiences.

Feature details

A common user ask is the ability to use native queries (custom SQL) in various connectors on our platform. This feature empowers custom and certified connector developers to implement native query support in their connectors for users to leverage.

Active Directory connector available in Power Platform dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

With the release of this connector in Power Platform dataflows, you can connect to and load your business data from Active Directory.

Feature details

It’s important to have similar experiences and functionalities in every Power Query instance. With this feature, you can now use the Active Directory connector in Power Platform dataflows, along with its availability in Power Query Desktop today.

Certified connectors available in Power BI dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

Certifying a custom connector will make it available by default in Power BI dataflows in addition to Power BI Desktop.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, certified connectors will be available by default in Power BI dataflows in addition to Power BI Desktop.

Essbase connector available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

With the release of this connector in Power Query and dataflows, you can connect to and load your business data from Essbase.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you can now use the Essbase connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

Hadoop Distributed File System (HDFS) connector available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

With the release of this connector in Power Query and dataflows, you can connect to and load your business data from Hadoop Distributed File Systems (HDFS).

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you can now use the HDFS connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

Informix connector available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

With the release of this connector in Power Query and dataflows, you can connect to and load your business data from Informix.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you can now use the Informix connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

OLE DB connector available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

With the release of this connector in Power Query and dataflows, you can connect to and load your business data from OLE DB.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you can now use the OLE DB connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

Support for custom connectors in Power BI dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

You'll be able to use your custom connectors in Power BI dataflows experiences through the use of an on-premises data gateway.

Feature details

We're adding support for custom connectors in Power BI dataflows through the use of an on-premises data gateway. This lets you validate and use your custom Power Query connector in Power Query Online and dataflows before certification.

Sybase connector available in Power Query Online and dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

With the release of this connector in Power Query Online and dataflows, you can connect to and load your business data from Sybase.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you can now use the Sybase connector in Power Query Online and dataflows, along with its availability in Power Query Desktop today.

Vertica connector available in Power Platform Dataflows

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2022

Business value

With the release of this connector in Power Platform dataflows, you can connect to and load your business data from Vertica.

Feature details

It's important to have similar experiences and functionalities across different Power Query experiences. With this feature, you can now use the Vertica connector in Power Platform dataflows, along with its availability in Power Query Desktop today.

Power Query Online

Overview

Power Query continues to be the primary data connectivity and data preparation experience for users across a wide variety of Microsoft products and services. For 2022 release wave 1, we'll continue to expand the scope of data sources available in Power Query and continue to add new features that provide an enhanced data preparation experience for users.

Improvements for connecting to files stored in SharePoint Online

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jun 2022	-

Business value

This feature enables users to browser SharePoint libraries and files directly in Power Query, which will increase customer satisfaction.

Feature details

Currently, when getting data from a file stored in SharePoint, you need to go through non-trivial steps to find the correct URL to use. In 2022 release wave 1, we're simplifying that process so, you'll have a way directly in Power Query to browse your SharePoint libraries and the files in them.

Personal query gallery

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-

Business value

This feature will increase satisfaction by giving users the ability to personalize their Power Query experience by allowing them to curate their own gallery.

Feature details

You'll have the ability to tailor your Power Query experience by curating your own *query* gallery so you can easily reuse queries at a later time. This gallery makes reusing queries easier than ever directly within Power Query instead of needing to copy and paste from other sources or manage.

You'll have the ability to add, edit, and remove queries from the gallery.

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