Microsoft

Microsoft Dynamics 365

2021 RELEASE WAVE 2 PLAN

Features releasing from October 2021 through March 2022

Contents

Dynamics 365 and industry clouds: 2021 release wave 2 plan

The Dynamics 365 and industry clouds release plan for the 2021 release wave 2 describes new features releasing from **October 2021** through **March 2022**. You can either browse the release plan online or download the document as a PDF file. The PDF file also includes information about Power Apps, Power Automate, Power Virtual Agents, Microsoft Dataverse, Microsoft Power Platform governance and administration, and data integration.

The Microsoft Power Platform features coming in the 2021 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

2021 release wave 2 overview

The 2021 release wave 2 for Dynamics 365 and industry clouds brings new innovations that provide you with significant capabilities to transform your business. The release contains hundreds of new features across Dynamics 365 applications, including Marketing, Sales, Customer Service, Field Service, Finance, Supply Chain Management, Human Resources, Commerce, Fraud Protection, Business Central, Connected Store, Guides, Remote Assist, Customer Insights, Customer Voice, and Microsoft Cloud for Healthcare, Financial Services, and Nonprofit.

Marketing

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

Sales

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

Service

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

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

Finance and Operations

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

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

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

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

Human Resources

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

Commerce

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

Fraud Protection

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

SMB

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

Connected Store

Dynamics 365 Connected Store introduces new capabilities using AI models and insights that provide store analytics to make data-driven decisions to measure the effectiveness of promotions. It also helps to determine cashier queue lengths and wait times to improve queue management.

Guides

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

Remote Assist

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

Customer Insights

Audience insights adds capabilities to eliminate data silos and build a unified customer profile to provide intelligent insights and action for their B2C and B2B customers. In the B2B area, in addition to churn predictions for individual customer records, audience insights will predict the likelihood of churn for accounts in the same straightforward guided experience. Data ingestion enhancements in Customer Insights include additional Power Query connectors and improvements to the data ingestion process.

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

Customer Voice

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

Microsoft Cloud for Industry Solutions

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

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

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

Key dates for the 2021 release wave 2

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

Here are the key dates for the 2021 release wave 2.

Milestone	Date	Description
Release plans available	July 14, 2021	Learn about the new capabilities coming in the 2021 release wave 2 (October 2021 – March 2022) across Dynamics 365 and industry clouds and Microsoft Power Platform.

Milestone	Date	Description
Early access available	August 2, 2021	Test and validate new features and capabilities that will be part of 2021 release wave 2, coming in October, before they are enabled automatically for your users. You can view the Dynamics 365 [2021 release wave 2 early access features]() now.
Release plans available in 11 additional languages	August 13, 2021	The Dynamics 365 and industry clouds and Microsoft Power Platform release plans published in Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	October 1, 2021	Production deployment for the 2021 release wave 2 begins. Regional deployments will start on October 1, 2021.

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

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

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

We've done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We're looking forward to engaging with you as you put these new services and capabilities to work, and we're eager to hear your feedback as you dig into the 2021 release wave 2 plan.

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

Change history

This topic is updated when a feature's release date changes or when a feature is added or removed. You can see the full topic in the [Dynamics 365 2021 release wave 2 change history]() online.

2021 release wave 2 features available for early access

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

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

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

The features from these apps update the existing user experiences. You can opt in early to enable these features in your environment. This will allow you to test these features and then adopt them across your environments. For information on how to enable these features, see Opt in to 2021 release wave 2 updates.

IMPORTANT If you are using Unified Interface or Power Automate, there might be early access features that could impact your users.

For Microsoft Power Platform early access features, see 2021 release wave 2 features available for early access.

Dynamics 365 Sales

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

Feature	Enabled for	Early access	General availability
Worklist and workspace improvement	Users, automatically	✔ Aug 2, 2021	Oct 2021

Dynamics 365 Customer Service

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

Feature	Enabled for	Early access	General availability
Modern control for subject entity	Users, automatically	Aug 1, 2021	Oct 2021
Scheduling and IoT capabilities in Customer Service workspace	Users, automatically	Aug 2, 2021	Oct 2021
Usability improvements for agent workspaces	Users, automatically	Aug 2, 2021	Oct 2021
Usability improvements in knowledge management	Users, automatically	Aug 2, 2021	Oct 2021

Dynamics 365 Field Service

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

Feature	Enabled for	Early access	General availability
Collaborate throughout the work order lifecycle with embedded Microsoft Teams	Users, automatically	Oct 1, 2021	Jan 2022
Functional location and asset tree improvements	Users, automatically	✔ Aug 2, 2021	Oct 2021
Improved user experience with new schedule board enhancements	Users, automatically	✔ Aug 2, 2021	Oct 2021
Work order form simplification	Users, automatically	Aug 2, 2021	Oct 2021

Dynamics 365 Finance

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

Feature	Enabled for	Early access	General availability
Configurable business documents – delegated account setup for emailing via electronic reporting destinations	Users by admins, makers, or analysts	✔ Aug 1, 2021	Oct 2021
Configurable business documents – specific destinations via printer management settings	Users by admins, makers, or analysts	✔ Aug 1, 2021	Oct 2021
Configurable business documents – support for configurable images in headers and footers	Users by admins, makers, or analysts	✔ Aug 1, 2021	Oct 2021
Create collections activities based on payment predictions	Users by admins, makers, or analysts	Aug 2, 2021	Oct 2021
Display lease ID on fixed asset record	Users by admins, makers, or analysts	Aug 2, 2021	Oct 2021
Electronic reporting – query reuse for performance improvements	Users by admins, makers, or analysts	✔ Aug 1, 2021	Oct 2021
Pass service life from Asset leasing to Fixed assets	Users by admins, makers, or analysts	Aug 2, 2021	Oct 2021
Tax Calculation service	Users by admins, makers, or analysts	✔ Apr 16, 2021	Oct 2021
Tax Calculation service – enabling tax calculation parameters by tax jurisdiction	Users by admins, makers, or analysts	✔ Apr 16, 2021	Oct 2021
Tax Calculation service – integration with free text invoice	Admins, makers, marketers, or analysts, automatically	✔ Apr 16, 2021	Dec 2021

Feature	Enabled for	Early access	General availability
Tax Calculation service – integration with general journal	Admins, makers, marketers, or analysts, automatically	✓ Apr 16, 2021	Mar 2022
Tax Calculation service – sales tax group determination	Users by admins, makers, or analysts	✓ Apr 16, 2021	Oct 2021
Tax Calculation service – supporting multiple VAT IDs	Users by admins, makers, or analysts	✓ Apr 16, 2021	Oct 2021
Tax Calculation service – supporting tax in transfer order	Users by admins, makers, or analysts	✓ Apr 16, 2021	Oct 2021
Tax reporting – supporting multiple tax registration numbers	Users by admins, makers, or analysts	✓ Apr 16, 2021	Oct 2021

Dynamics 365 Supply Chain Management

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

Feature	Enabled for	Early access	General availability
Create and view certifications on the vendor collaboration interface	Users by admins, makers, or analysts	Aug 1, 2021	Oct 2021
Edge scale units to run distributed workloads at your facility	Users by admins, makers, or analysts	✓ Apr 23, 2021	Nov 2021
Global Inventory Accounting Add-in for Dynamics 365 Supply Chain Management	Users by admins, makers, or analysts	✓ Jun 18, 2021	Oct 2021
Post on-hand adjustments using codes connected to offset accounts	Users by admins, makers, or analysts	✓ Aug 2, 2021	Oct 2021
Sales quotation referenced data export policy	Users by admins, makers, or analysts	Aug 2, 2021	Oct 2021

Feature	Enabled for	Early access	General availability
Scan barcodes in the warehouse using GS1 format standards	Users by admins, makers, or analysts	Aug 2, 2021	Oct 2021
Updates to inventory and logistics feature states with version 10.0.21	Users by admins, makers, or analysts	Aug 2, 2021	Oct 2021
Updates to manufacturing feature states with version 10.0.21	Users by admins, makers, or analysts	Aug 2, 2021	Oct 2021
Updates to planning feature states with version 10.0.21	Users by admins, makers, or analysts	Aug 2, 2021	Oct 2021
Updates to product information management feature states with version 10.0.21	Users by admins, makers, or analysts	Aug 2, 2021	Oct 2021
Warehouse Management mobile app step instructions	Users by admins, makers, or analysts	Aug 2, 2021	Oct 2021

Finance and Operations cross-app capabilities

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

Feature	Enabled for	Early access	General availability
Change feeds in data lakes	Users by admins, makers, or analysts	✔ Apr 30, 2021	Oct 2021
Enhanced support for full feature lifecycle in Feature management	Users, automatically	Aug 2, 2021	Oct 2021
Improved legal entity support for saved views	Users by admins, makers, or analysts	Aug 2, 2021	Oct 2021
New scenarios enabled with Power Platform convergence	Admins, makers, marketers, or analysts, automatically	✔ Jun 30, 2021	Oct 2021

Feature	Enabled for	Early access	General availability
Updates to client feature states with version 10.0.21	Users, automatically	Aug 2, 2021	Oct 2021
WCAG 2.1. accessibility support for the Finance and Operations apps web client	Users, automatically	Aug 2, 2021	Oct 2021

Dynamics 365 Commerce

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

Feature	Enabled for	Early access	General availability
Commerce localization for Russia	Users by admins, makers, or analysts	Aug 2, 2021	Oct 2021
Enforce custom query change tracking configurations on retail transaction tables due to performance impacts	Admins, makers, marketers, or analysts, automatically	✓ Aug 2, 2021	Oct 2021
Enhanced reordering experience in e-commerce	Users by admins, makers, or analysts	✓ Aug 2, 2021	Oct 2021
Support inventory movement between in-store locations from POS	Users by admins, makers, or analysts	✓ Aug 2, 2021	Oct 2021
Updates to Commerce globalization feature states with version 10.0.21	Users, automatically	Aug 2, 2021	Oct 2021

Dynamics 365 Business Central

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

Feature	Enabled for	Early access	General availability
Centralized Deployment of Office add-ins	Admins, makers, marketers, or analysts, automatically	✔ Aug 1, 2021	Oct 2021
Enhancements to the Outlook add-in	Users, automatically	✔ Aug 1, 2021	Oct 2021
Performance improvements to the Business Central web client	Users, automatically	Aug 1, 2021	Oct 2021
Profiling AL performance with snapshot debugger	Admins, makers, marketers, or analysts, automatically	✔ Aug 1, 2021	Oct 2021
Transactional installation and sync of extensions on-premises	Admins, makers, marketers, or analysts, automatically	✔ Aug 1, 2021	Oct 2021

Marketing

Overview of Dynamics 365 Marketing 2021 release wave 2

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

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

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

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

Personalize engagement for **each customer**:

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

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

- Create email content easily and efficiently with AI-based content ideas.

What's new and planned for Dynamics 365 Marketing

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Analytics and AI

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

Feature	Enabled for	Public preview	Early access*	General availability
Create email content easily and efficiently with AI-based content ideas	Admins, makers, marketers, or analysts, automatically	Oct 2021	-	-

Moments-based

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

Feature	Enabled for	Public preview	Early access*	General availability
Use account-based profile data from Customer Insights as part of your customer journeys	Admins, makers, marketers, or analysts, automatically	Oct 2021	-	-
Connect Customer Insights and your own data lake with customer journey orchestration	Admins, makers, marketers, or analysts, automatically	Dec 2021	-	-
Send SMS messages using Twilio and TeleSign integration	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2021
Visualize customer journey interactions on the Customer Insights activity timeline	Users by admins, makers, or analysts	-	-	Oct 2021

Feature	Enabled for	Public preview	Early access*	General availability
Create a webinar registration experience in Teams, then design the participants' journey in Marketing with a few clicks	Admins, makers, marketers, or analysts, automatically	Oct 2021	-	Dec 2021

Personalization

Personalize engagement for each customer.

Feature	Enabled for	Public preview	Early access*	General availability
Deliver rich customer experiences across Dynamics 365, Office and other apps by augmenting customer journeys with Power Automate	Admins, makers, marketers, or analysts, automatically	Nov 2021	-	-
Create segments for leads and custom entities in the new segmentation builder	Admins, makers, marketers, or analysts, automatically	Dec 2021	-	-

* You are able to opt in to some features as part of early access on August 2, 2021, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Analytics and AI

Overview

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

Create email content easily and efficiently with AI-based content ideas

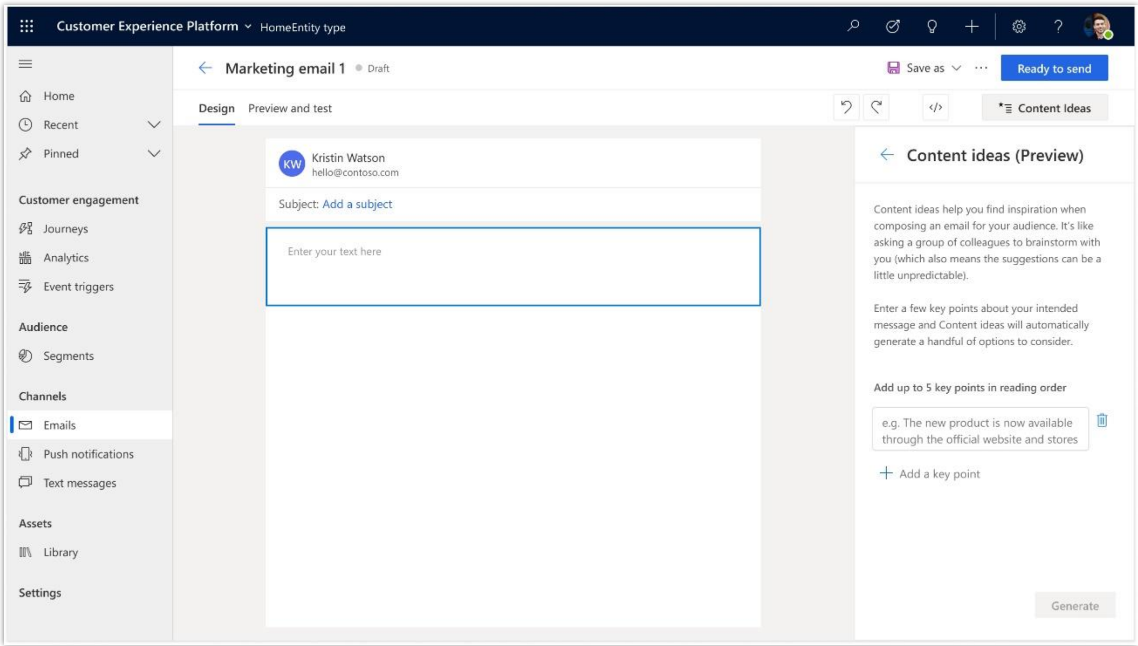
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2021	-	-

Business value

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

Feature details

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



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

Moments-based

Overview

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

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

Use account-based profile data from Customer Insights as part of your customer journeys

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

Business value

Focus your marketing efforts on accounts using Dynamics 365 Customer Insights account-based profiles which combine account data from multiple data sources to generate unified account profiles that can be enriched with first and third-party data. Use those profiles to target accounts with automated customer journeys and use the enriched account information to provide a highly personalized experience.

Feature details

B2B customers can power their account-based marketing campaigns using unified and enriched account profiles/segments from Customer Insights through journeys. Use the wealth of account data from Customer Insights to provide a deeply personalized and holistic experience to your target accounts.

- Customer journeys can use segments of account-based profiles from Customer Insights
- Customer journeys can be personalized using account-based profile data from Customer Insights

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

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

Business value

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

Feature details

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

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

Send SMS messages using Twilio and TeleSign integration

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

Business value

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

Feature details

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

Visualize customer journey interactions on the Customer Insights activity timeline

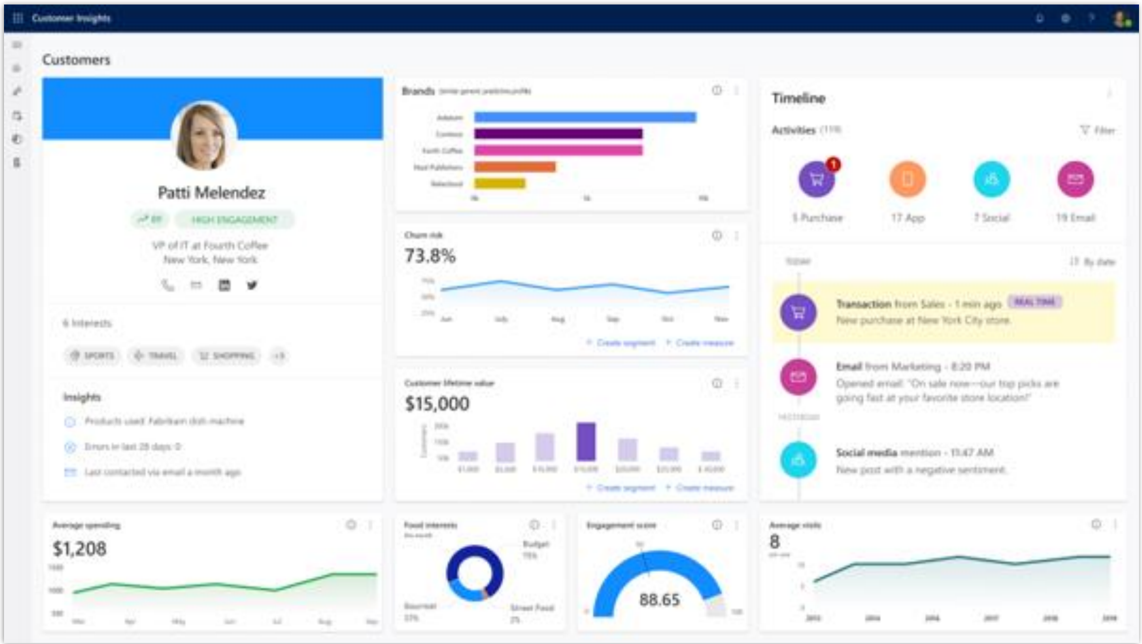
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Oct 2021

Business value

Create a timeline to visualize all customer activities chronologically by combining customer interactions with Dynamics 365 Marketing customer journeys and other data sources in Dynamics 365 Customer Insights. Empower sales, service, and other frontline agents to deeply personalize relationships through knowledge of every customer's engagement history.

Feature details

When Customer Insights and Dynamics 365 Marketing are connected, all marketing interactions (such as message sent, opened, clicked) are available as activities in Customer Insights. Admins can add any or all of these interactions into the Customer Insights timeline. You can include this combined timeline in Dynamics 365 apps with the Customer Card add-in solution or in a Power BI dashboard. Marketing interactions can be viewed alongside other data sources like CRM, ERP, popular data warehouses, POS systems, your websites, and so on.



Customer journey interactions showing on Customer Insights timeline.

Create a webinar registration experience in Teams, then design the participants' journey in Marketing with a few clicks

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

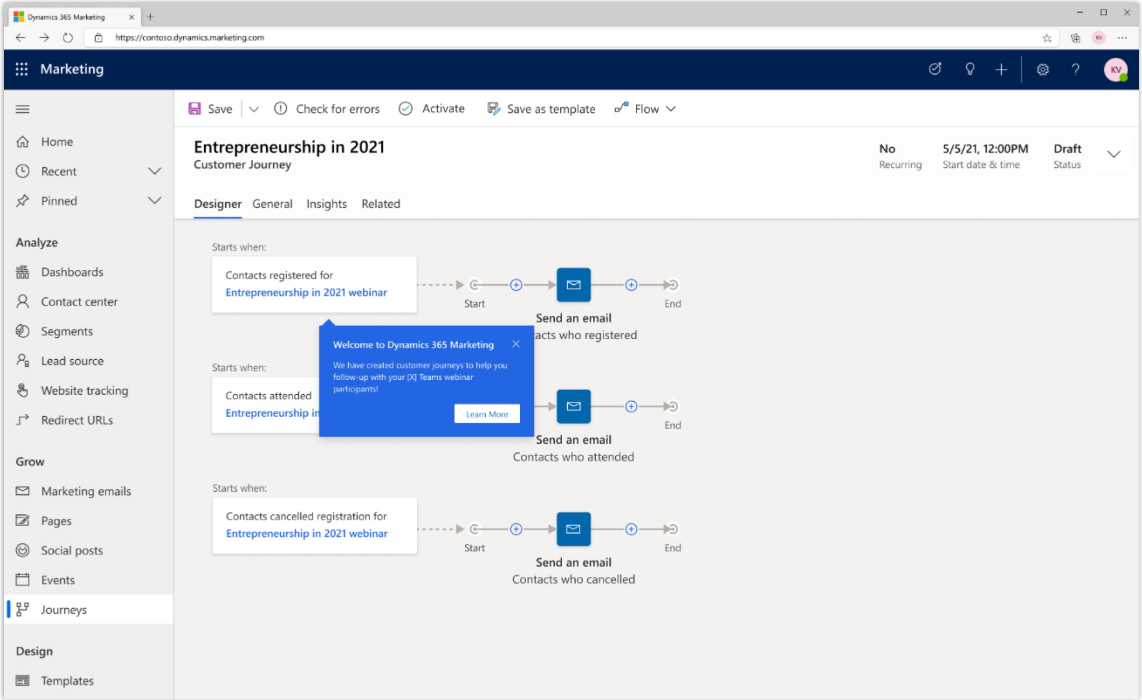
Business value

Create webinars and manage participant registrations in Microsoft Teams that are seamlessly connected to Dynamics 365 Marketing. In Dynamics 365 Marketing, create rich, personalized messages and send automated emails to webinar participants based on registration and attendance triggers, and use analytics to optimize results.

Feature details

- Create branded registration pages in Microsoft Teams that are integrated out of the box with Dynamics 365 Marketing
- Manage registrations, including approve, decline, and waitlist functionality

- Easily trigger journeys in Dynamics 365 Marketing based on user behaviors in Microsoft Teams



Screen shot of Marketing customer journey created to follow up with Teams Webinar participants.

Personalization

Overview

Personalize engagement for **each customer**:

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

Deliver rich customer experiences across Dynamics 365, Office and other apps by augmenting customer journeys with Power Automate

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

Business value

Because every business is unique, connecting systems and leveraging existing flow is critical. Enable limitless customization and fine-grained control of your customer experience by using Power Automate flows to enhance customer journeys. Power Automate flows can raise events that can trigger a journey or steps within a journey. You can call a Power Automate flow from the journey canvas to connect with proprietary and external business systems. This end-to-end integration allows you to leverage the entire Power Automate ecosystem of connectors and controls to deliver the unique experience your customers demand.

Feature details

Use Dynamics 365 Marketing as the hub of your automation, leveraging first and third-party data sources through Power Automate triggers to react to important customer interactions with your brand. Then, use Power Automate connectors to deliver the best experience with a digital or physical channel.

- Invoke a Power Automate flow from any point in the customer journey and access the rich ecosystem of actions and triggers from proprietary and external business systems, as well as actions from hundreds of apps. For instance, from a customer journey that seeks feedback with a survey, update your team via a Teams channel in real-time as feedback comes in.
- Trigger a customer journey from a Power Automate flow. For instance, when a back-ordered item is back in stock, trigger a marketing campaign for customers who previously attempted to buy the item.

Create segments for leads and custom entities in the new segmentation builder

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

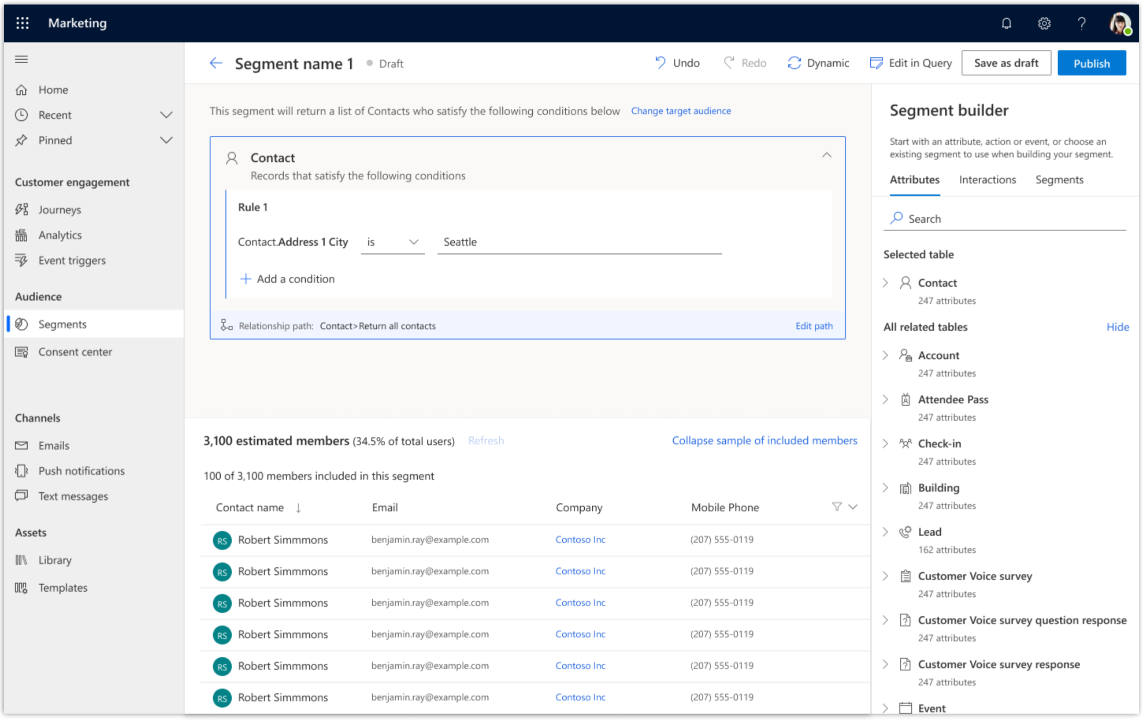
Business value

To improve marketing return on investment, it is important to target the right audience. The segmentation builder not only enables you to build dynamic segments for contacts, but now you can also build segments that include leads and custom entities (such as patient or donor). Use the query builder or use natural language to build your segment and identify your target audience quickly and easily.

Feature details

- Directly create segments based on attribute and behavioral data for contact, lead, and custom entities

- Redesigned experience for segment creation that is powerful, yet easy to use
- Use natural language to specify an attribute-based segment



Shows the new Segmentation builder that can be based on contacts, leads and/or custom entities.

Sales

Overview of Dynamics 365 Sales 2021 release wave 2

Dynamics 365 Sales is the market-leading sales application that empowers every organization to sell more by understanding their customers and the way they want to buy—powered by data, intelligence, and experiences that people love. Dynamics 365 Sales is centered on the customer relationship. It helps organizations understand customer needs and drives more relevant and authentic engagements, enabling sellers to sell more efficiently.

With the 2021 release wave 2 of Dynamics 365 Sales, we're launching some exciting new functionality and updates based on valuable customer feedback. Please continue to reach out at Sales Ideas because your feedback is invaluable to us.

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

Enable you to collaborate better with improvements to Teams calling with Dynamics 365

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

Manage your pipeline more efficiently with deal manager

Deal manager will become generally available. Some updates and enhancements with the general availability release will include manager workspace for accounts, contacts, and leads, visually updating deals with the Kanban control, and improvements to quick filters with hierarchy and date-based filters.

Build better relationships with enhancements to the LinkedIn experience with Dynamics 365

Easy access to Sales Navigator, and several LinkedIn integration improvements.

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

Account-based Who knows whom will be released in wave 2, along with a big update to streamline activity capture with Auto capture. For forecasting, enhanced capabilities for sharing and viewing a specific forecast, attribute insights for driving predictive scoring model clarity, more admin controls for managing and deploying forecasts, and support for new forecast views and yearly and weekly forecasts.

Guided selling gets a boost with sales accelerator enhancements and data hygiene

Lead generation and nurturing for guided selling.

Enhance the mobile experience for sellers on the go

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

What's new and planned for Dynamics 365 Sales

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Accelerator workspace

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

Feature	Enabled for	Public preview	Early access*	General availability
Seller KPIs and manager dashboards to encourage productivity	Users by admins, makers, or analysts	Dec 2021	-	-
Advanced filtering and sorting	Users by admins, makers, or analysts	-	-	Oct 2021
Sequence management and connected screen enhancement	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2021
Show sequence details in grid	Users by admins, makers, or analysts	-	-	Oct 2021

Feature	Enabled for	Public preview	Early access*	General availability
Worklist ownership enhancement	Users by admins, makers, or analysts	-	-	Oct 2021
Worklist and workspace improvement	Users, automatically	-	✔ Aug 2, 2021	Oct 2021
Template sequences	Admins, makers, marketers, or analysts, automatically	-	-	Dec 2021
Smart sequence - LinkedIn integration	Users by admins, makers, or analysts	-	-	Dec 2021
Transport sequence between systems	Admins, makers, marketers, or analysts, automatically	-	-	Dec 2021
Worklist card enhancement	Users by admins, makers, or analysts	-	-	Dec 2021
Improving leads quality with data hygiene	Users by admins, makers, or analysts	Nov 2021	-	Jan 2022
Lead routing	Admins, makers, marketers, or analysts, automatically	-	-	Jan 2022

Collaboration using Microsoft Teams

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

Feature	Enabled for	Public preview	Early access*	General availability
Drive seller productivity with Teams meeting integration	Users by admins, makers, or analysts	Jan 2022	-	

Feature	Enabled for	Public preview	Early access*	General availability
Send automated chat notifications from Dynamics 365 to Teams	Users by admins, makers, or analysts	Feb 2022	-	
Teams message extensions and actions are generally available	Users by admins, makers, or analysts	Mar 2022	-	-
Embedded Teams collaboration is generally available	Users by admins, makers, or analysts	Sep 2021	-	Jan 2022
Engage in contextual collaboration on Teams	Users by admins, makers, or analysts	Sep 2021	-	Jan 2022
Enhancements to Suggested Contacts system for embedded Teams collaboration	Users by admins, makers, or analysts	Oct 2021	-	Jan 2022

Engagement platform and productivity intelligence

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

Feature	Enabled for	Public preview	Early access*	General availability
Seamless experience with Teams, Outlook, 3P calling	Users by admins, makers, or analysts	Feb 2022	-	Mar 2022

Forecasting and pipeline analytics

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

Feature	Enabled for	Public preview	Early access*	General availability
Filter users from forecast hierarchy	Users by admins, makers, or analysts	-	-	Oct 2021

Feature	Enabled for	Public preview	Early access*	General availability
Share and delegate access to forecasts	Users by admins, makers, or analysts	-	-	Oct 2021
Improve predictive scoring by enabling intelligent field augmentation	Users by admins, makers, or analysts	Aug 2021	-	Oct 2021
Expand visibility of your forecast with annual view and weekly and yearly periods	Users by admins, makers, or analysts	-	-	Jan 2022
Quota inline editing and rollups	Users by admins, makers, or analysts	-	-	Jan 2022

Mobile

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

Feature	Enabled for	Public preview	Early access*	General availability
Come prepared to customer engagements	Users by admins, makers, or analysts	Dec 2021	-	Mar 2022
Find, interact, and create CRM information easily	Users by admins, makers, or analysts	Dec 2021	-	Mar 2022
Log and share information effortlessly	Users by admins, makers, or analysts	Dec 2021	-	Mar 2022
Never miss a detail in your customer engagements	Users by admins, makers, or analysts	Jan 2022	-	Mar 2022

Pipeline management

The new deal manager workspace provides an optimized and user-centric experience to empower sellers to effectively keep their pipeline healthy.

Feature	Enabled for	Public preview	Early access*	General availability
Deal manager workspace is generally available	Users by admins, makers, or analysts	-	-	Jan 2022

Relationship intelligence

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

Feature	Enabled for	Public preview	Early access*	General availability
Account-based contact discovery with Who knows whom	Users by admins, makers, or analysts	Jan 2022	-	-
Include custom activities in relationship analytics	Users by admins, makers, or analysts	-	-	Dec 2021

* You are able to opt in to some features as part of early access on August 2, 2021, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Accelerator workspace

Overview

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

Seller KPIs and manager dashboards to encourage productivity

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

Business value

Keeps sales organizations up to date on important KPIs and enables sellers to be more data-driven with their decision making.

Feature details

Manager dashboard: Allow managers to view their team's performance and coach and guide sellers:

- Number of active leads in the org versus previous periods.
- The conversion ratio between leads and opportunity.
- Leads by sources types.
- Leads per sellers.

Real-time seller KPIs: The ability for organizations to define key performance indicators for sellers and allow them to see progress in real time:

- Number of qualified leads.
- Number of calls.
- Number of meetings.
- Estimated value.

NOTE This feature is available in Unified Interface only.

This functionality might require a separate add-in license. See Dynamics 365 Sales pricing to compare plans.

Advanced filtering and sorting

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

Business value

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

Feature details

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

Sequence management and connected screen enhancement

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

Business value

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

Feature details

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

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

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

NOTE This feature is available in Unified Interface only.

Show sequence details in grid

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

Business value

This enhanced experience will allow sales enablement managers (SEMs) to easily manage the sequences and have a quick view of the status of attached entities.

Feature details

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

NOTE This feature is available in Unified Interface only.

Worklist ownership enhancement

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

Business value

This functionality will enable each to user stay on top of his or her activities and would declutter the entity owner's worklist. For example, if the opportunity is owned by a seller and the product expert has to prepare for the demo. Product experts will see the demo preparation activity and would be able to perform it from within the Sales Accelerator feature.

Feature details

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

Worklist and workspace improvement

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

Business value

Boost sales productivity with an intelligent worklist. Get suggestive actions and stay on top of your to-do list. Focus on the right leads with the prioritized pipeline, automated outreach recommendations, and simple integrated engagement channels.

This functionality will help organizations reduce lead qualification time. It will improve productivity and work satisfaction. This will also help sellers focus on the key task at hand while similar tasks can be bundled and completed in one click.

Feature details

The worklist user interface is being enhanced to make it more usable and improve the seller's productivity. The filtering and sorting capabilities will also be enhanced. Going forward, the visibility of items in the worklist will depend on ownership of the activity, not just on ownership of the entity.

See also

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

Template sequences

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

Business value

Template sequences can help customers to accelerate their sales accelerator implementation. These sequences are defined based on industry best practices and can help you define a consistent approach to connect with your customers.

Key business benefits:

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

Feature details

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

Smart sequence – LinkedIn integration

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

Business value

LinkedIn integration with sales accelerator will allow you to bring your most important social selling functions directly into your sequences. You can leverage LinkedIn's vast network and recommend the next best action to your sellers.

Feature details

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

- InMail
- Connect request
- Introduction

NOTE This feature is available in Unified Interface only.

Transport sequence between systems

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

Business value

This functionality will ease the deployment of the sales accelerator solution. Administrators will be able to easily move finalized sequences to test environments.

Feature details

This feature allows sequences to be transported between systems. For example, if you create a sequence in a development environment, you can move it to quality assurance (QA) and production environments.

Worklist card enhancement

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

Business value

The intent is to help sales development representatives (SDRs), business development representatives (BDRs), and account managers to perform their activities efficiently and maximize the business impact. To do so, the system should help these users to quickly identify which customer to contact; having more information on the card will enable users to quickly make those decisions.

Feature details

SDRs, BDRs, and account managers have different focuses and need ways to be able to quickly identify which customer to contact to maximize the business impact.

Worklist cards will be enhanced to have more relevant information for each scenario. For example, an opportunity will have information on title, a contact will have information on role, and an account will have information on open opportunity. This would allow users to make decisions by looking at a worklist card.

Improving leads quality with data hygiene

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Nov 2021	-	Jan 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.
  - Detection of leads-related records (including account or contact resolution).
  - Detection of leads' additional available data.
- Enable automated actions upon detection of any of the above:
  - Update, close, or delete a lead.
  - Merge two (or more) leads.
  - Notify user about detection (seller or admin).

- Configuration: User ability to choose and define a lead's characteristics for detection and type of actions as a result.
- User-based decision or resolution interaction (advanced merge and advanced enrichment capability).

Lead routing

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

Business value

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

Quickly growing businesses require more sophisticated automation to ensure operational efficiency, proper distribution of leads among their sales team, and to make sure no leads slip through the cracks. The functionality will provide the following business benefits:

- Maximize operational efficiency
- Improve lead qualification time
- Improve sellers productivity
- Timely lead assignment
- Improve lead conversion ratio

Feature details

This feature covers following functionalities:

- Define rules for automatic assignment. The following components are included:
    - **Segments**: This is a group of leads that can be assigned to the rule.
    - **Lead attribute**: Lead attributes that need to be considered should be maintained here.
    - **Seller attribute**: The attributes and skills of the sellers that need to be evaluated for lead distribution should be mentioned in the rule.
    - **Distribution method**: Lead can be distributed either through round robin or load balancing methods.

- Ability to define seller attributes and assign to the seller: Seller attributes can be specifically defined for lead routing.
- Create segment for the assignment rules.
- Maintain sales team and capacity. The user can maintain the sellers who would receive the leads. The capacity of the sellers can also be used, which would be taken into consideration when distributing the leads.

Collaboration using Microsoft Teams

Overview

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

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

Drive seller productivity with Teams meeting integration

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

Business value

Sellers have meetings all day throughout the week and are asking for a more integrated experience to create and join Microsoft Teams meetings directly from Dynamics 365. Additionally, while conducting meetings, sellers want to be able to keep their sales records up to date more seamlessly. By having direct access to these records as well as streamlined note-taking capabilities during a Teams meeting, sellers can save time, be more productive, and drive more revenue while providing organizations with far better data. Finally, premium conversation intelligence enables sellers to conduct more valuable, meaningful customer conversations.

Feature details

As a seller, you can:

- Create a Teams meeting when scheduling an appointment from Dynamics 365.
- Join Teams meetings in a single click from Dynamics 365.
- Access and update sales records seamlessly during a Teams meeting.
- Capture notes seamlessly during a Teams meeting, and have these notes automatically sync back to records in Dynamics 365.
- Leverage premium conversation intelligence for real-time call analysis and insights during a Teams meeting.

Send automated chat notifications from Dynamics 365 to Teams

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

Business value

As a sales organization, you can:

- Shorten sales cycles by ensuring sellers are kept abreast of key sales activity changes as they happen.
- Increase team collaboration efficiency by enabling sellers to view and update sales data from within Microsoft Teams.

Feature details

The following capabilities are available to sellers and managers:

- Use @mentions in the timeline of a record and be assured that the user will be notified automatically in their Teams chat through the Dynamics 365 Sales bot.
- Get notifications of AI-driven insights from Dynamics 365 Sales assistant; automatically push updates of insights configured in Dynamics 365 Sales Assistant Studio key—for example, email follow-up alerts.
- Get Teams chat notifications for the records you're following; use the follow/unfollow feature in Dynamics 365 to get automatic notifications about the updates to sales records.
- Configure the notifications that you want to receive within Teams, where, and at what frequency.

Teams message extensions and actions are generally available

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

Business value

As a seller, you can experience a seamless collaboration between Dynamics 365 and Microsoft Teams. You can search for information in Dynamics 365, share with other participants in their chats or channels, and even allow them to perform tasks from within the conversation. This feature helps with the following:

- Increase seller efficiency by streamlining a path for saving key discussion points to Dynamics 365.
- Ensure Dynamics 365 is current with key updates.
- Save decisions, notes, and other key sales events quickly to Dynamics 365 without having to context-switch out of Teams.

Feature details

The following capabilities are available with this feature:

- Send a quick summary of a record in a Teams chat or channel as an interactable card.
- Search for Dynamics 365 records organized by relevance.
- Search and filter for Dynamics 365 records to share with your conversation participants.
- Allow conversation participants to add an activity or note to a record through interactable cards.
- Ensure only those with proper security permissions can view or update the record.
- Allow conversation participants to quickly update or edit a record from within a Teams conversation.
- Allow conversation participants to change the state of a record from within a Teams conversation.
- Support customized forms and business rules specific to an organization.
- Add a note or task to a record's timeline from the context of a Teams message in a chat or channel.

Embedded Teams collaboration is generally available

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

Business value

- Increase efficiency by leveraging the structure of CRM data to organize your sales collaboration activities.
- Accelerate deal velocity by connecting sellers with key stakeholders and information.
- Reduce app switching and stay in context.

Feature details

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

Engage in contextual collaboration on Teams

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

Business value

The embedded Microsoft Teams collaboration solution that launched to preview in 2021 release wave 1 provides a contextual collaboration experience for users needing to interact with colleagues directly from within Dynamics 365. With this feature, you get increased context-driven features such as the ability to automatically inject CRM context directly within the message.

As a seller, you can be more efficient and productive in Teams with the latest updates to the embedded collaboration experience in Dynamics 365.

Feature details

This feature has the following capabilities for sellers:

- Inject record context into messages.
- Render an adaptive card to message participants that allows for a record to be viewed and edited within Teams.
- Launch a Teams chat window from user names within a record in a single click.

Enhancements to Suggested Contacts system for embedded Teams collaboration

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

Business value

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

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

Feature details

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

As an administrator, you can:

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

Engagement platform and productivity intelligence

Overview

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

Seamless experience with Teams, Outlook, 3P calling

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

Business value

Gain business-critical insights on top of any customer interaction. In addition, make calls, receive calls, and send emails seamlessly from Dynamics 365 Sales.

Feature details

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

Forecasting and pipeline analytics

Overview

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

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

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

Filter users from forecast hierarchy

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

Business value

Complex organizations are supported by employees in a variety of roles. While these roles may be essential for the success of the business, not all of them are opportunity owning or need to forecast future sales revenue.

As an administrator, you can filter user records from the forecast hierarchy. This will allow sellers and managers to view only the user records that are of interest for the sales forecasting process, decluttering the forecast grid.

Feature details

The following capability is available in this feature: Filter user records from forecast hierarchy.

Share and delegate access to forecasts

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

Business value

During a forecast cycle, sales leaders must be able to include some of their colleagues in the forecast process. As a sales manager, you'll be able to share your forecast with any other Dynamics 365 user. You'll also be able to view a forecast as one of your directs for those times when you need to share the screen.

Feature details

The following capabilities are available as part of this feature:

- Administrators can delegate access to forecast records to any other Dynamics 365 user.
- Managers can provide access to and remove access from their forecast for any other Dynamics 365 user.
- Managers can view the forecast as one of their directs.

Improve predictive scoring by enabling intelligent field augmentation

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

Business value

Organizations collect a vast amount of CRM data as part of their regular course of business. This data becomes a powerful source of insight when used to train an AI predictive scoring model. Certain attributes may have key values that, when recognized by the model, can further its efficacy and exclude confounding data points.

Using field augmentation, you can identify the fields and key values for training the AI model.

Field augmentation could include:

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

Feature details

As an administrator, you can select an attribute as an augmented field from the edit fields page.

NOTE This feature is available in Unified Interface only.

Expand visibility of your forecast with annual view and weekly and yearly periods

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

Business value

As sales operations deploy their forecast process across their sales organizations, it's important to ensure that sellers can view the data in a way that makes the most sense to them.

As a seller, you'll be able to get an annual or year-to-date view of the forecast at period lengths that are relevant to your organization. Your administrator can configure forecasts spanning weekly or yearly periods.

Feature details

As a seller, you can:

- Get an annual or year-to-date view of the forecast.
- Visualize period-over-period progress.
- View forecasts for weekly and yearly periods.

As an administrator, you can configure forecasts with weekly and yearly periods.

Quota inline editing and rollups

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

Business value

When planning for a coming sales period, organizations may need to access various disparate sources for quota information. Often, sellers are responsible for inputting their own quota information into a forecasting system. By providing the ability to edit simple columns in line, such as the quota column, organizations will now be able to allow team members that have access to the most current information to update the forecast.

In addition, forecasting will now support the ability to roll up a simple column from child to parent node. This is useful in the case that a manager's quota needs to remain current as sellers may move from team to team and take their quota with them. This capability extends beyond quota information and allows for the insertion of a simple column within the forecast that can be edited by sellers to keep track of a variety of values.

Feature details

The following capability is now available:

- quota inline editing and rollups

Mobile

Overview

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

Come prepared to customer engagements

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

Business value

Sellers are constantly engaging with their customers, often intensively, with little time to prepare in advance. Getting the needed information about the customer and the relevant deal can be the difference between winning and losing, and doing that with less effort can give you a much higher chance of success.

Feature details

- Smart lookup that helps to quickly connect the meeting to a relevant record.
- Organized meeting cards that streamline the data from the Dynamics 365 appointment on top of the Exchange data.
- LinkedIn information for contacts.
- Relationship insights for contacts.

NOTE This feature is available in Unified Interface only.

Find, interact, and create CRM information easily

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

Business value

CRM systems shouldn’t be rigid databases that are painful to interact with from mobile devices. When sellers can naturally interact with customer information, find relevant data quickly, and take follow-up actions promptly, they gain more for the sales organization and sell more successfully.

Feature details

- Notifications center support.
- View or add Dynamics 365 appointments within the agenda experience.
- Show activities in a record's form.
- Active records smart list.
- View or add contacts from phonebook.
- View or add contacts from Outlook.
- Bottom-bar alignment across the application.

NOTE This feature is available in Unified Interface only.

Log and share information effortlessly

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

Business value

The value of a CRM system is critically dependent on what information sellers are logging into it. The less effort the logging and sharing of actions take, the more likely the actions will happen, and the more valuable the CRM system will become. This added value attracts sellers to repeatedly visit, consume, respond, and log more information.

Feature details

- Activity summary support.
- Scan business cards support in a lightweight create-a-contact form.
- Scan handwritten notes.
- Contextual-sensitive create-a-record experience.
- Suggested action items when filling in notes.
- In-house voice notes.

NOTE This feature is available in Unified Interface only.

Never miss a detail in your customer engagements

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

Business value

Sellers can conduct hundreds of weekly customer engagements—often from their mobile phone. Each engagement has implicit and explicit information, some of which can be easy to overlook, especially if the deal is new, the seller is new at their job, the seller's attention is on multiple items while speaking, or the situation doesn't allow for taking notes.

Feature details

- Create an activity record after a phone call.
- Create activity records from recent calls.
- Automatic transcription for Microsoft Teams calls and online meetings.
- Conversation insights and action item extractions.

NOTE This feature is available in Unified Interface only.

Pipeline management

Overview

Managing the sales pipeline is a high-impact activity. It requires rapid consumption of data and tools for quick edit actions, data visualization, collaboration, task management, and more.

In this release, we're introducing a new, personalized workspace optimized for pipeline management. This workspace empowers sellers to view, manage, and execute on their opportunities by providing the in-context experiences needed to quickly filter their deals, view necessary information, and directly take action – all without navigating away from their work surface.

With the new deal manager workspace, sellers are more empowered to keep their sales pipeline healthy.

Deal manager workspace is generally available

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

Business value

The deal manager workspace offers a new experience that is intuitive, modern, and personal. The workspace is optimized for sellers. As a seller, you can quickly find the right deals and take action. You can also personalize your experience and manage your pipeline effectively. The new experience removes a lot of steps that you typically need to take and streamlines everything into a single workspace to maximize efficiency.

Feature details

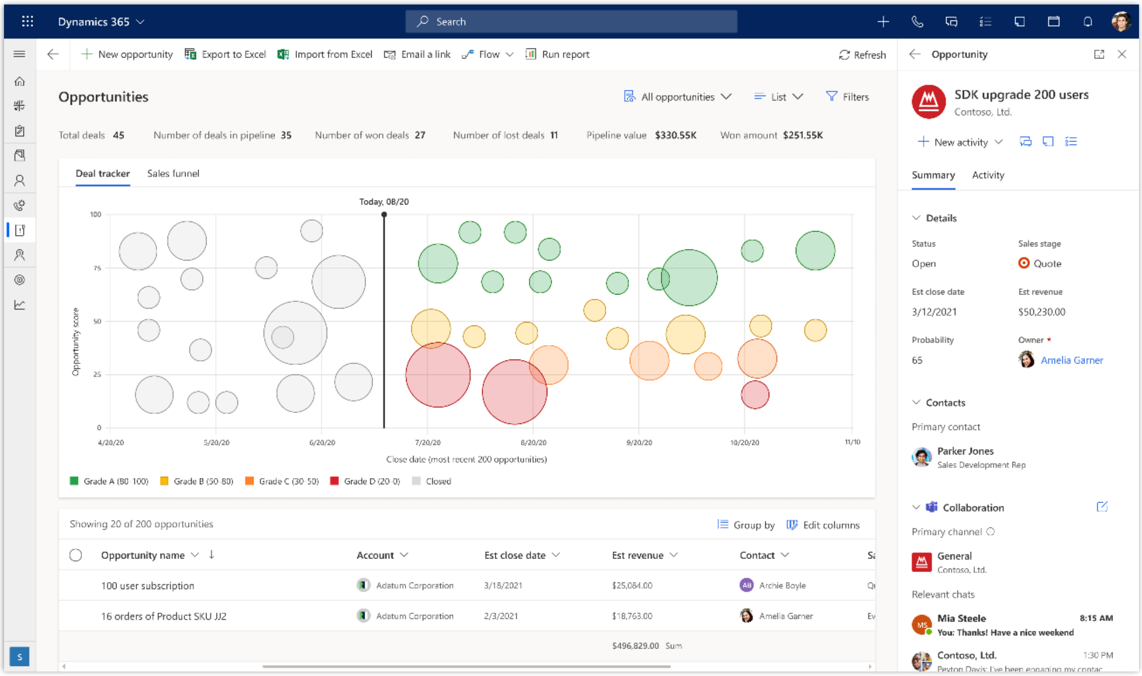
As a seller or manager, you can:

- Get a quick view of the opportunity, contact, lead, and account entities using the side panel.
- Edit values in the grid inline.
- Filter, sort, and search data in the grid.
- Show or hide columns in the grid.
- Add columns to the grid.
- See aggregations for numeric columns.
- Get an optimized filtering experience.
- Manage notes and tasks effectively.

- Choose from three out-of-the-box interactive charts (bubble, funnel, and bar chart).
- Configure chart fields according to each seller's needs.
- View and configure stats or key performance measures that are predefined.
- Drill in to contacts and accounts within an easy-to-access record side panel form.

As an administrator, you can:

- Configure a workspace for custom apps.
- Customize the record side panel forms with custom attributes.
- Add support for business rules.
- Support server-side plug-ins.
- Configure the charts.



Deal manager

Relationship intelligence

Overview

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

Account-based contact discovery with Who knows whom

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

Business value

Institutional contact information captured through emails and meetings in Outlook are directly brought to CRM, allowing sales organizations to instantly discover new contacts and expand their networks.

Personas:

- Account executives who manage connections within an account and want to identify new contacts and build up their relationships within the account.
- Sellers working on a deal and looking for potential stakeholders who may not already be stored as contacts inside CRM.

Feature details

- Leverage an organization's exchange data to find new contacts while working inside Dynamics 365.
- Discover contacts while working on new leads and accounts.
- Find and add new connections in existing accounts that weren't captured to CRM.
- See who in your sales organization is best connected to a contact.
- Request introduction to the contact and be notified of initial contact.

NOTE This feature is available in Unified Interface only.

Include custom activities in relationship analytics

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

Business value

Organizations can now analyze how custom activities impact their engagement KPIs by giving a holistic view of their team's communication status with the target accounts and contacts.

Personas:

- Sales managers reviewing the status of an engagement with an account, opportunity, lead, and contact.

- Sellers who want to track their communications with their customers.

Feature details

As an administrator, you can:

- Pick which activities should be part of relationship analytics charts.
- Pick custom activities to be included in relationship analytics charts.
- Customize default time taken for each activity to allow for accurate computation of engagement KPIs.

NOTE This feature is available in Unified Interface only.

Service

Overview of Dynamics 365 Customer Service 2021 release wave 2

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

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

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

What's new and planned for Dynamics 365 Customer Service

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Agent experiences

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

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

Agent productivity

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

Feature	Enabled for	Public preview	Early access*	General availability
Increase agent productivity with contextual collaboration using embedded Microsoft Teams	Users by admins, makers, or analysts	Aug 2021	-	Jan 2022

Case management

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

Feature	Enabled for	Public preview	Early access*	General availability
Modern control for subject entity	Users, automatically	-	Aug 2021	Oct 2021
Improvements to the Universal Resource Scheduling-based service scheduling experience	Users by admins, makers, or analysts	Aug 2021	-	Oct 2021
Scheduling and IoT capabilities in Customer Service workspace	Users, automatically	-	Aug 2021	Oct 2021

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
AI-suggested keywords and brief description for knowledge articles	Users by admins, makers, or analysts	Oct 2021	-	-
Relevance search integration for knowledge management in portals	Users by admins, makers, or analysts	Oct 2021	-	-
Usability improvements in knowledge management	Users, automatically	-	Aug 2021	Oct 2021

Omnichannel voice

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

Feature	Enabled for	Public preview	Early access*	General availability
Call intelligence	Users by admins, makers, or analysts	-	-	Nov 2021
Call recording	Users by admins, makers, or analysts	-	-	Nov 2021
Call transcription and real-time sentiment analysis	Users by admins, makers, or analysts	-	-	Nov 2021
Consult and transfer	Users by admins, makers, or analysts	-	-	Nov 2021
Direct outbound calling	Users by admins, makers, or analysts	-	-	Nov 2021
Embedded analytics for voice channel	Users by admins, makers, or analysts	-	-	Nov 2021

Feature	Enabled for	Public preview	Early access*	General availability
Intelligent voice bot via Power Virtual Agents and Microsoft Bot Framework	Users by admins, makers, or analysts	-	-	Nov 2021
Modern administration experience for Omnichannel voice (number management)	Users by admins, makers, or analysts	-	-	Nov 2021
Modern administration for Omnichannel SMS via Communication Services (number management)	Users by admins, makers, or analysts	-	-	Nov 2021
Supervisor monitoring and barge	Users by admins, makers, or analysts	-	-	Nov 2021
Topic clustering for voice	Users by admins, makers, or analysts	-	-	Nov 2021
Voice channel powered by Azure Communication Services	Users by admins, makers, or analysts	-	-	Nov 2021

Timeline

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

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

Unified routing

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

Feature	Enabled for	Public preview	Early access*	General availability
Improved historical analytics for unified routing scenarios	Users by admins, makers, or analysts	-	-	Oct 2021
Routing diagnostics for supervisors	Users by admins, makers, or analysts	-	-	Oct 2021

* You are able to opt in to some features as part of early access on August 2, 2021, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Agent experiences

Overview

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

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

Agent workspace inbox view

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

Business value

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

Feature details

The inbox view is integrated into the Customer Service workspace and Omnichannel Engagement Hub and allows agents to effectively navigate their emails or conversations and address their customers' issues in a timely manner while using the core productivity features of their agent desktop, such as timeline, recent cases, AI-based suggestions, and knowledge search.

Usability improvements for agent workspaces

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

Business value

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

Feature details

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

- Simplified navigation that currently needs to be enabled by administrators will be available by default. More information: Simplify navigation in Customer Service workspace
- Migration of productivity tools to the new extensible App side pane. See the Power Platform 2021 wave 2 release notes for details on the App side pane.

Also, the Case form in Customer Service apps is enhanced with the option to reorder command buttons in case entity ribbon for better user experience.

Agent productivity

Overview

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

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

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

Increase agent productivity with contextual collaboration using embedded Microsoft Teams

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

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

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

Case management

Overview

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

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

Modern control for subject entity

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

Business value

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

Feature details

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

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

Improvements to the Universal Resource Scheduling-based service scheduling experience

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

Business value

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

Feature details

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

- The new schedule board will be the default view, with an option to switch back to old schedule board if preferred.
- Requirement groups allow you to define groups of resources that would be appropriate for a job and to then schedule all of those resources with a single search. The new schedule board will now support requirement groups, enabling users to directly make or update a booking.

Scheduling and IoT capabilities in Customer Service workspace

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

Business value

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

Feature details

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

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

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

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

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 while helping customers to speed up support delivery.

AI-suggested keywords and brief description for knowledge articles

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

Business value

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

Feature details

Key capabilities for this feature include:

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

Relevance search integration for knowledge management in portals

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

Business value

The search engines that power portal search and Dynamics 365 Customer Service search are different, which leads to inconsistent knowledge article search results across the two surfaces for the same queries. Relevance search support for knowledge management in the portal brings consistent and seamless search experiences and search results. Portal users can now benefit from the steady stream of improvements being made to relevance search.

Feature details

This feature will enable portal users to use relevance search to search the knowledge base. Relevance search support will replace the current portal global search, and will support the following key capabilities:

- **Content access levels**: Provides another level of control that is separate from web roles to control access to knowledge articles in a portal.
- **Product filters**: Filter knowledge articles by product.
- **Language filters**: Filter knowledge articles by language.

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

Usability improvements in knowledge management

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

Business value

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

Feature details

Key capabilities of the feature include:

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

- A reordered knowledge article command bar to allow easier access to frequently used actions.

Omnichannel voice

Overview

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

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

Call intelligence

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

Business value

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

Feature details

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

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

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

Call recording

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

Business value

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

Feature details

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

Call transcription and real-time sentiment analysis

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

Business value

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

Feature details

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

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

Consult and transfer

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

Business value

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

Feature details

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

Direct outbound calling

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

Business value

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

Feature details

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

- Cases
- Customer profiles
- Call back activities

- Ongoing chat conversations
- Via a phone dialer

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

This feature includes the following key highlights:

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

Embedded analytics for voice channel

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

Business value

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

Feature details

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

With these views, supervisors can:

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

Geographic areas

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

- United States
- Canada

Intelligent voice bot via Power Virtual Agents and Microsoft Bot Framework

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

Business value

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

Feature details

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

The key highlights of this feature include:

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

- Use bots for post-call surveys.

Modern administration experience for Omnichannel voice (number management)

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

Business value

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

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

Feature details

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

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

The key highlights of this feature include:

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

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

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

Business value

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

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

Feature details

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

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

The key highlights of this feature include:

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

Supervisor monitoring and barge

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

Business value

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

Feature details

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

In this feature the supervisor can:

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

Topic clustering for voice

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

Business value

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

Feature details

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

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

Voice channel powered by Azure Communication Services

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

Business value

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

Feature details

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

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

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

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

Timeline

Overview

The timeline is used across Dynamics 365 applications to capture activities such as notes, appointments, emails, tasks, and more, to ensure that all interactions with the customer are tracked and visible over time. Agents use the timeline to quickly catch up on all of the latest activity details with the customer to provide the most personalized support experience.

Bring your own data to timeline

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

Business value

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

Feature details

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

Unified routing

Overview

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

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

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

Improved historical analytics for unified routing scenarios

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

Business value

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

Feature details

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

Routing diagnostics for supervisors

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

Business value

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

Feature details

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

Overview of Dynamics 365 Field Service 2021 release wave 2

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

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

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

For official product documentation and training, see:

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

What's new and planned for Dynamics 365 Field Service

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy].

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

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

Empower frontline workers

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

Feature	Enabled for	Public preview	Early access*	General availability
Functional location and asset tree improvements	Users, automatically	-	✔ Aug 2, 2021	Oct 2021
Collaborate throughout the work order lifecycle with embedded Microsoft Teams	Users, automatically	-	Oct 2021	Jan 2022

Engage end-customers

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

Feature	Enabled for	Public preview	Early access*	General availability
Engage your customers with the new customer experiences homepage	Users by admins, makers, or analysts	-	-	Oct 2021
Enable customers to schedule service visits with a simple web experience	Users by admins, makers, or analysts	✔ Apr 25, 2021	-	Oct 2021

Optimize service operations

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

Feature	Enabled for	Public preview	Early access*	General availability
Enable location sharing and analytics capabilities by default for new organizations	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2021
New feature spotlight in the Field Service Get Started hub	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2021

Feature	Enabled for	Public preview	Early access*	General availability
Work order form simplification	Users, automatically	-	Aug 2021	Oct 2021

Resource scheduling

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

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

* You are able to opt in to some features as part of early access on August 2, 2021, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Empower frontline workers

Overview

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

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

Functional location and asset tree improvements

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

Business value

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

Feature details

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

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

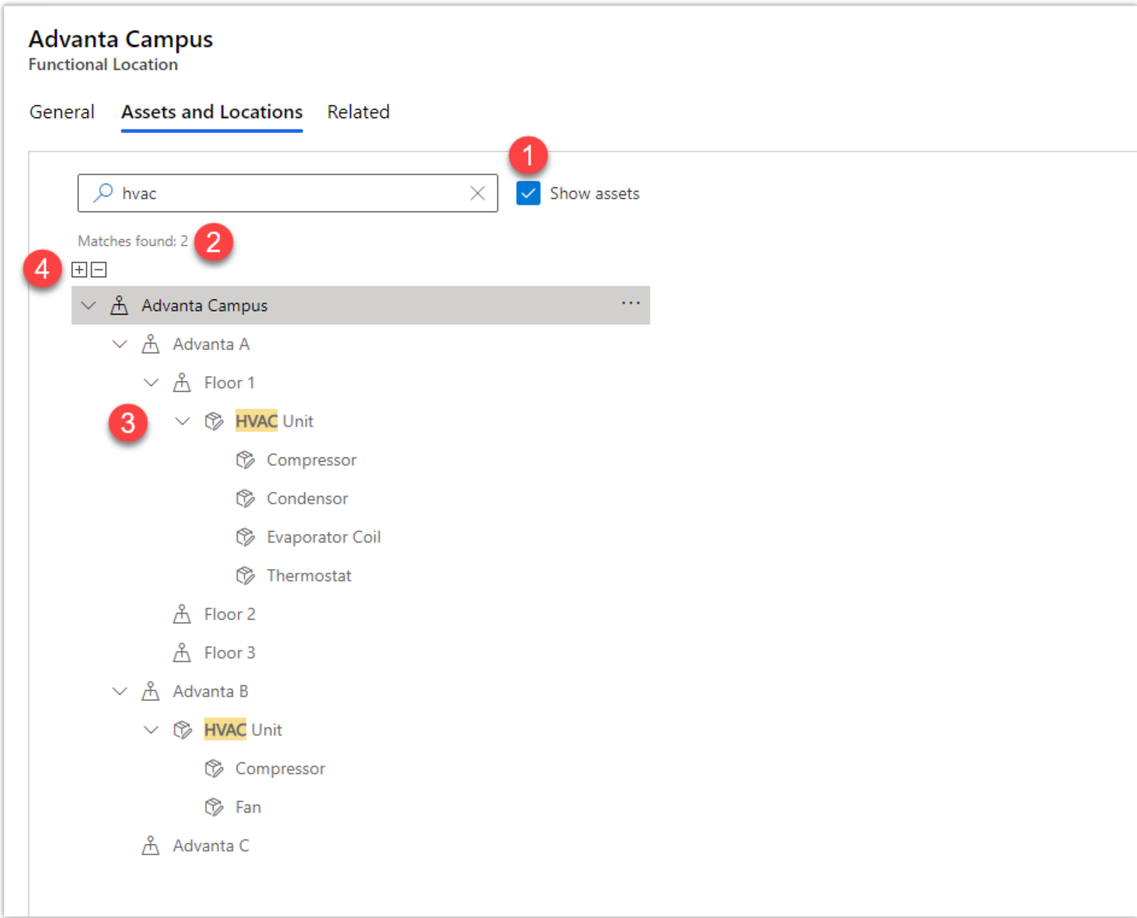


Image showing four enhancements to the assets and locations tree.

Collaborate throughout the work order lifecycle with embedded Microsoft Teams

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Oct 2021	Jan 2022

Business value

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

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

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

Feature details

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

Teams integration includes the following capabilities:

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

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

Engage end-customers

Overview

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

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

Engage your customers with the new customer experiences homepage

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

Business value

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

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

Feature details

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

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

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

NOTE This feature is available in Unified Interface only.

Enable customers to schedule service visits with a simple web experience

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Apr 25, 2021	-	Oct 2021

Business value

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

Feature details

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

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

Your customers will gain access via direct invitations, which can be automatically sent to new or existing customers. When customers are scheduling, they will be offered available time slots based on real-time resource availability, location, and skills. Suitable resources are automatically assigned to optimize for least travel duration. This logic is based upon the resource setup that you have already configured in Dynamics 365 Field Service.

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

See also

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

Optimize service operations

Overview

Optimizing field service operations starts with empowering field service admins to quickly deploy Dynamics 365 Field Service while empowering service managers to successfully manage service work orders to ensure frontline workers are set up for success to meet customer requirements on time.

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

Enable location sharing and analytics capabilities by default for new organizations

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

Business value

By enabling location sharing for new organizations, dispatchers can schedule service appointments based on nearby frontline workers; your customers will receive service reminders that include estimated technician arrival times on the service day. This functionality maximizes field service operations while minimizing missed appointments. And by enabling our out-of-the-box analytics and insights, you'll have information to help you track and optimize your field service operations.

Feature details

Admins deploying new Field Service organizations will be ready to monitor and optimize their service operations with location sharing and our dashboard analytics and insights included with Dynamics 365 Field Service.

Key notes about this functionality:

- Location sharing and dashboards will be enabled for new organizations only.
- This update won't impact existing deployments, nor organizations in the sovereign cloud.
- Admins can disable location sharing or the dashboards analytics; for more information, see our Field Service documentation.
- When frontline workers download the Dynamics 365 Field Service mobile app, they will get the mobile OS prompts to control how they share their location.

- For location sharing, your data will flow outside your organization's compliance and geographical boundaries. See Microsoft Privacy statement for more information.

NOTE This feature is available in the legacy web client only.

New feature spotlight in the Field Service Get Started hub

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

Business value

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

Feature details

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

NOTE This feature is available in the legacy web client only.

Work order form simplification

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

Business value

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

Feature details

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

This release includes a few important work order form simplifications:

- *Work order completion dialog*: Historically, when a user set the work order to complete, if the work order had bookings in an incomplete state, Field Service would present the user with an error message. With this improvement, we've implemented a dialog to help the user understand why they're blocked and provide them with a simple action to complete or cancel their open bookings and successfully set the work order to complete. This change will help both back-office staff and frontline workers in the field as they navigate a work order through its lifecycle.
- *Simplifying time commitments on work order*: Customers have expressed confusion with the multiple fields currently available to track work order time commitments. In this release, we are hiding the **Date Window Start** and **Date Window End** fields so that time commitments for all use cases leverage the **Time From** and **Time To Promise** fields, including on the Field Service agreements.
- For all new implementations, this updated behavior will be the default; existing customers will not be impacted by this change unless their Field Service administrators or system administrators change the **Pre/Post Booking Flexibility Date Field Population** setting in the **Agreements** tab of their Field Service settings.

Resource scheduling

Overview

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

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

Resource work hours extensibility

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

Business value

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

Feature details

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

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

NOTE This feature is available in Unified Interface only.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Improved user experience with new schedule board enhancements

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

Business value

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

Feature details

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

- Find availability functionality for finding the best available resources to schedule jobs, which could last from a few minutes to as much as a few months. Single resources (such as accounts, contacts, users, and equipment) or multiple resources (such as crews, pools, and facilities) can be scheduled to jobs.

- Make the settings available on the schedule board tab so users can create and configure their tabs, and don't need to switch back to the old schedule board.
- Custom fields on a work order or requirement can be displayed as a filter on the schedule board, and can also be considered while finding the best available resource via custom attributes by using the Universal fetchXML queries.
- Custom fields on the work order or requirement can be displayed on the booking information or booking alerts that are displayed on hourly view of the new schedule board.
- Customers can use custom JavaScript methods that can be executed prior to creation or update of the bookable resource booking records on the hourly view of the new schedule board.
- The schedule board functionality in hourly view can be extended via different client-side extensions such as scripts, stylesheets, and localization.

Finance and Operations

Overview of Dynamics 365 Finance 2021 release wave 2

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

Driving action through intelligent insights

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

Enhanced usability on everyday activities

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

Expanding global coverage, decreasing global complexity, and simplifying extensibility

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

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

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

What's new and planned for Dynamics 365 Finance

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Core financials

This release for Finance is focused on bringing additional enhancements to core financial capability, including preparing customers for a successful year-end close.

Feature	Enabled for	Public preview	General availability
Prevent automatic one-voucher usage in fixed assets	Users by admins, makers, or analysts	-	Oct 2021
Prevent posting depreciation to the same period twice	Users by admins, makers, or analysts	-	Oct 2021
Create collections activities based on payment predictions	Users by admins, makers, or analysts	Aug 2021	Oct 2021
Display lease ID on fixed asset record	Users by admins, makers, or analysts	Aug 2021	Oct 2021
Pass service life from Asset leasing to Fixed assets	Users by admins, makers, or analysts	Aug 2021	Oct 2021
Edit Asset leasing journals	Users by admins, makers, or analysts	-	Nov 2021
Financial Dimension service	Users by admins, makers, or analysts	-	Nov 2021

Feature	Enabled for	Public preview	General availability
General ledger year-end enhancements	Users by admins, makers, or analysts	-	Jan 2022
Allow positive asset depreciation	Users by admins, makers, or analysts	-	Feb 2022
Enhancements around ledger settlements	Users by admins, makers, or analysts	-	Feb 2022

Finance insights

This release focuses on accelerating digital transformation with AI and automation.

Feature	Enabled for	Public preview	General availability
Customer payment predictions	Users by admins, makers, or analysts	-	Oct 2021
External data for cash flow forecasting	Users by admins, makers, or analysts	-	Oct 2021
Forecast bank balance	Users by admins, makers, or analysts	-	Oct 2021
Intelligent budget proposal	Users by admins, makers, or analysts	-	Oct 2021
Treasurer workspace	Users by admins, makers, or analysts	-	Oct 2021

Globalization

In 2021 release wave 2, globalization focuses on two main areas—further out-of-the-box global expansion, and simplifying compliance and globalization extensibility via no-code/low-code globalization services.

Feature	Enabled for	Public preview	General availability
Electronic Invoicing service – configurable e-invoice submission to Italian SDI system	Users by admins, makers, or analysts	Oct 2021	-
Electronic Invoicing service – Microsoft Dataverse integration	Users by admins, makers, or analysts	Feb 2022	-
Tax Calculation service	Users by admins, makers, or analysts	✔ Apr 16, 2021	Oct 2021
Tax Calculation service – sales tax group determination	Users by admins, makers, or analysts	✔ Apr 16, 2021	Oct 2021
Tax Calculation service – supporting multiple VAT IDs	Users by admins, makers, or analysts	✔ Apr 16, 2021	Oct 2021
Tax Calculation service – supporting tax in transfer order	Users by admins, makers, or analysts	✔ Apr 16, 2021	Oct 2021
Tax reporting – supporting multiple tax registration numbers	Users by admins, makers, or analysts	✔ Apr 16, 2021	Oct 2021
Configurable business documents – delegated account setup for emailing via electronic reporting destinations	Users by admins, makers, or analysts	✔ Aug 1, 2021	Oct 2021
Configurable business documents – specific destinations via printer management settings	Users by admins, makers, or analysts	✔ Aug 1, 2021	Oct 2021
Configurable business documents – support for configurable images in headers and footers	Users by admins, makers, or analysts	✔ Aug 1, 2021	Oct 2021
Electronic reporting – query reuse for performance improvements	Users by admins, makers, or analysts	✔ Aug 1, 2021	Oct 2021
Tax Calculation service – enabling tax calculation parameters by tax jurisdiction	Users by admins, makers, or analysts	✔ Apr 16, 2021	Oct 2021

Feature	Enabled for	Public preview	General availability
Electronic Invoicing service – configurable Saudi Arabian e-invoice	Users by admins, makers, or analysts	-	Nov 2021
Electronic reporting – enhanced parameters per legal entity	Users by admins, makers, or analysts	-	Nov 2021
Tax Calculation service – integration with free text invoice	Admins, makers, marketers, or analysts, automatically	✔ Apr 16, 2021	Dec 2021
Electronic Invoicing service – configurable Indonesian e-invoice	Users by admins, makers, or analysts	-	Dec 2021
Electronic Invoicing service – configurable Mexican e-invoice (CFDI)	Users by admins, makers, or analysts	-	Dec 2021
Global expansion – Indonesian localization	Users, automatically	-	Dec 2021
Electronic Invoicing service – configurable Indian e-invoice	Users by admins, makers, or analysts	-	Feb 2022
Tax Calculation service – integration with general journal	Admins, makers, marketers, or analysts, automatically	✔ Apr 16, 2021	Mar 2022

Description of **Enabled for** column values:

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

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

Core financials

Overview

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

Prevent automatic one-voucher usage in fixed assets

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

Business value

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

Feature details

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

Prevent posting depreciation to the same period twice

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

Business value

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

Feature details

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

Create collections activities based on payment predictions

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

Business value

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

Feature details

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

Display lease ID on fixed asset record

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

Business value

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

Feature details

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

Pass service life from Asset leasing to Fixed assets

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

Business value

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

Feature details

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

Edit Asset leasing journals

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

Business value

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

Feature details

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

Financial Dimension service

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

Business value

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

Feature details

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

General ledger year-end enhancements

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

Business value

This feature comprises a number of enhancements that give you more control over the year-end close process, help ensure the accuracy of account balances, and improve overall performance of the year-end close process.

Feature details

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

- Moves the setup of the year-end closing templates to a new setup page. The existing year-end close page will change, 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 vouchers' numbers when closing a year, where this was optional (based on a parameter setting in the general ledger) in previous versions.
- Lets you 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.

Allow positive asset depreciation

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

Business value

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

Feature details

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

Enhancements around ledger settlements

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

Business value

The ledger settlement process will be enhanced to reduce the number of manual steps through an automated settlement process. Reports and processes, such as year-end close and foreign currency revaluation, will better use the ledger settlement records.

Feature details

This feature includes enhancements that improve processing of ledger settlements and the year-end close. These enhancements include the following:

- Enhancing the year-end close to account for settled transactions.
- Providing the option to perform settlements automatically, based on rules. You can define and run the rules by using a timeframe configured from the process automation framework.
- Enhancing reports and inquiries to use the settlement flag and date, providing an accurate picture of the detailed transactions that encompass the ledger account balance.

Finance insights

Overview

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

Customer payment predictions

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

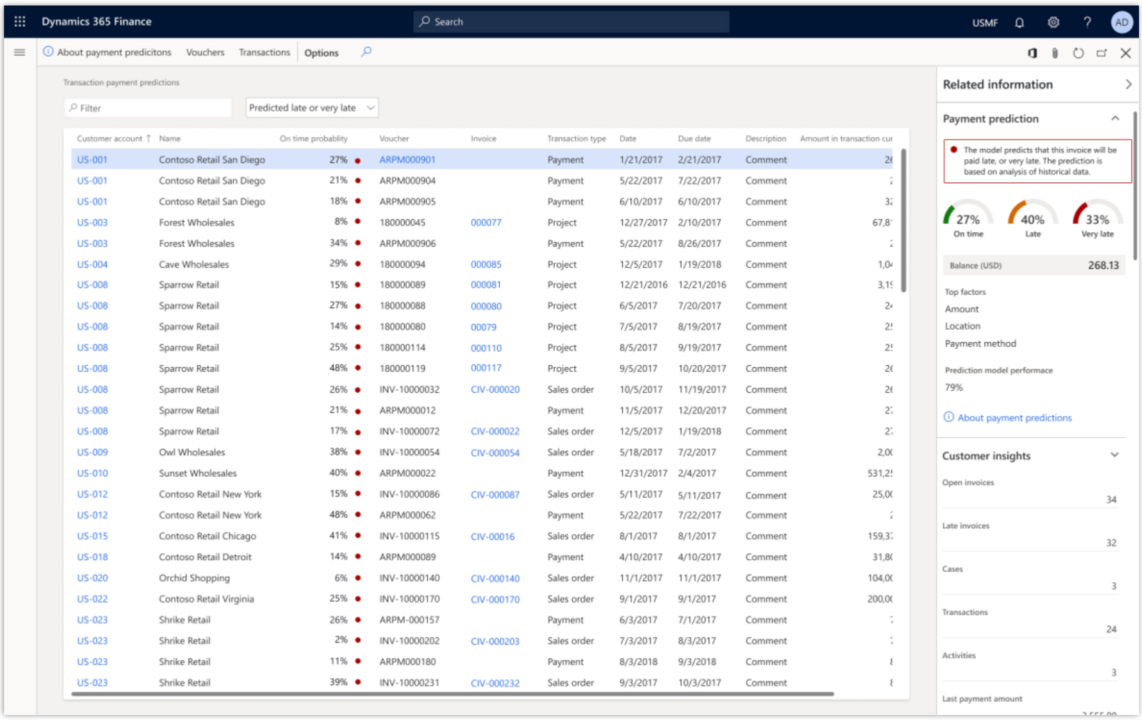
Business value

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

Feature details

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

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



Screenshot showing customer payment predictions.

External data for cash flow forecasting

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

Business value

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

Feature details

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

Forecast bank balance

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

Business value

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

Feature details

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

Intelligent budget proposal

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

Business value

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

Feature details

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

Treasurer workspace

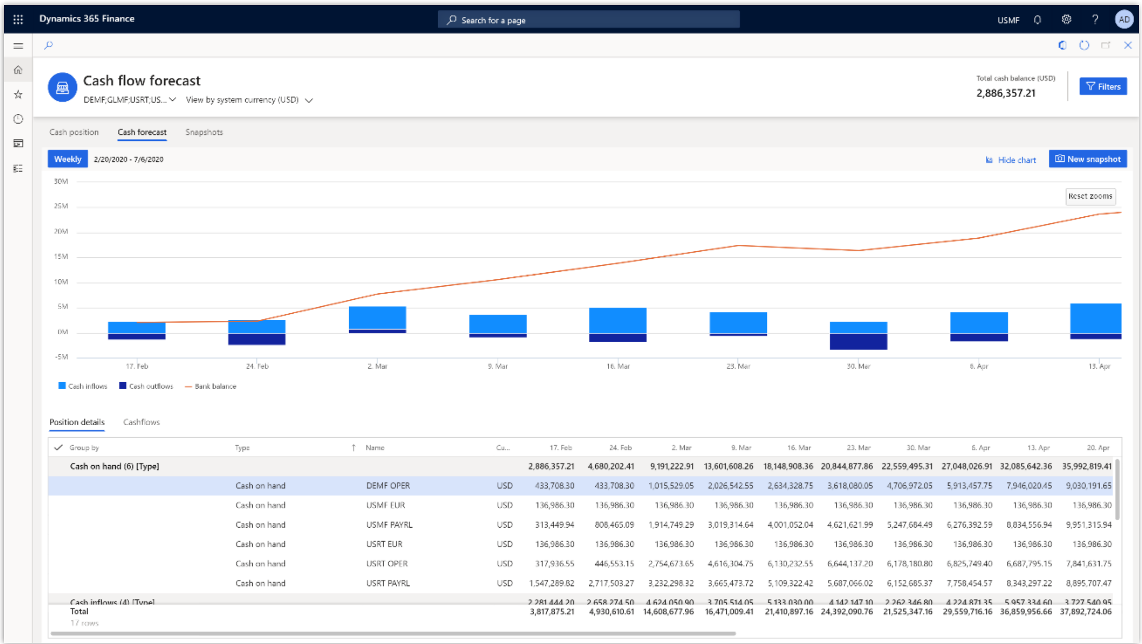
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2021

Business value

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

Feature details

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



Screenshot showing projected cash flow.

Globalization

Overview

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

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

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

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

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

Business value

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

Feature details

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

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

The feature enables one or multiple channels for direct transmission.

Electronic Invoicing service – Microsoft Dataverse integration

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

Business value

Enable cross-app support of the Electronic Invoicing service for any first-party or third-party app.

Feature details

The Electronic Invoicing service is now integrated with Microsoft Dataverse by using virtual tables and business events to easily share the service functionality and content with any application from Microsoft and others. The Electronic Invoicing service extends the existing no-code/low-code Dynamics 365 e-invoicing capabilities to provide better scalability, agility to align with changing legal requirements, and a consistent experience across the growing number of countries and regions (more than 60) that demand e-invoicing and business-to-business scenarios. The capabilities include exporting and importing configurable e-invoices and transporting messages to and from external web services that are configured by using Regulatory Configuration Service (RCS).

For public preview, the export of sales invoices for supported EU countries and regions and Mexico will be supported, with more countries and regions, document types, and import to follow later.

Tax Calculation service

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

Business value

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

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

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

Feature details

Tax Calculation capabilities include:

- Out-of-the-box integration with Dynamics 365 Finance and Dynamics 365 Supply Chain Management.

- No-code/low-code configuration through the Regulatory Configuration Service (RCS).
- A configurable tax matrix to automatically determine tax rates.
- A configurable tax matrix to automatically determine VAT ID.
- A configurable tax calculation designer to define formulas and conditions.
- Shared tax rates and determination rules across legal entities.

See also

Tax Calculation (docs)

Tax Calculation service – sales tax group determination

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

Business value

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

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

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

Feature details

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

- Sales tax group and item sales tax group is still populated with the default value on the transaction header and line.
- When tax calculation starts, the value of the sales tax group and the item sales tax group is sent to the Tax Calculation service.

- The Tax Calculation service will provide two matrices, one to determine the sales tax group and one to determine the item sales tax group.
- If a new sales tax group or item sales tax group value can be determined from the matrices, the Tax Calculation service will replace it with the default value. Otherwise, the default values will continue to be used.
- The Tax Calculation service uses the intersection of sales tax group and item sales tax group to determine tax codes and rates.

Tax Calculation service – supporting multiple VAT IDs

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

Business value

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

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

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

Feature details

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

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

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Multiple VAT registration numbers (docs)

Tax Calculation service – supporting tax in transfer order

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

Business value

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

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

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

Feature details

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

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

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Tax feature support for transfer orders (docs)

Tax reporting – supporting multiple tax registration numbers

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

Business value

Businesses can configure a legal entity in the system, and then associate it with multiple sales tax/VAT registration numbers. When you execute tax reports, you can select a specific tax registration number and run the reports for that number. When you execute the VAT Declaration, EU Sales List, and Intrastat, you can select the necessary tax registration number, filter the required report transactions based on the number, and then create country-specific report formats of the tax report. The functionality is activated together with the Tax Calculation service where the exact tax number for a transaction is determined and saved in the system.

Feature details

Businesses can configure a legal entity in the system and then associate it with multiple sales tax/VAT registration numbers. When you execute tax reports, you can select a specific tax registration number and run the reports for that number. When you execute the VAT Declaration, EU Sales List, and Intrastat, you can select the necessary tax registration number, filter required report transactions based on the number, and then create country-specific formats of the tax report. The functionality is activated together with the Tax Calculation service where the exact tax numbers for a transaction are determined and saved in the system.

In the 2021 release wave 2 general availability (October 2021), the following countries are supported:

- Austria
- France
- Germany
- Netherlands
- Spain
- Sweden

- Switzerland

Support for more countries will be provided in subsequent updates after 2021 release wave 2 general availability. Those countries are:

- Belgium
- Czech Republic
- Denmark
- Estonia
- Finland
- Hungary
- Italy
- Norway
- Latvia
- Lithuania
- Poland

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Multiple VAT registration numbers (docs)

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

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

Business value

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

Feature details

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

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

Configurable business documents – specific destinations via printer management settings

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

Business value

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

Feature details

Before this feature, all print management settings were set based on the related electronic reporting destination in a legal entity.

This feature enables the setup and edit of business document-specific destinations by using the print management user interface.

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

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

Business value

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

Feature details

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

Electronic reporting – query reuse for performance improvements

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

Business value

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

Feature details

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

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

Tax Calculation service – enabling tax calculation parameters by tax jurisdiction

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

Business value

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

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

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

Feature details

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

Two matrices will be provided in the Tax Calculation service:

- **Tax jurisdiction applicability**: This matrix determines the correct tax jurisdiction for the transaction.

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

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

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

Electronic Invoicing service – configurable Saudi Arabian e-invoice

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

Business value

The electronic invoicing service makes it easy to work with configurable invoices in countries and regions that your business is moving into, or is already doing business in, where there's an opportunity to process invoices in a more automated manner.

Feature details

The Electronic Invoicing service is a flexible microservice. You can use this service to export and import configurable e-invoices and transport messages to and from external web services that are configured using the Regulatory Configuration Service (RCS). The wide spectrum of supported scenarios is now extended with the Saudi Arabian format used to verify and register electronic invoices.

Electronic reporting – enhanced parameters per legal entity

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

Business value

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

Feature details

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

- Added validation when parameters or lookup conditions are missing.

- Automatic generation of conditions.
- Export from and import to Microsoft Excel for conditions.

Tax Calculation service – integration with free text invoice

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

Business value

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

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

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

Feature details

Free text invoice integrates with the Tax Calculation service to support the enhanced features in the Tax Calculation service for more flexible and configurable tax determination and calculation. This feature supports determining tax rates by tax applicability rules, and the multiple VAT IDs feature.

Electronic Invoicing service – configurable Indonesian e-invoice

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

Business value

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

Feature details

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

Electronic Invoicing service – configurable Mexican e-invoice (CFDI)

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

Business value

This new feature of our hyper-scalable multitenant service extends the existing Mexican CFDI functionality, and enables configurable formats and configurable document exchange.

Feature details

Configurability goals for CFDI can be met by using globalization features with submissions of e-invoices to external web services in the configurable Electronic Invoicing service and creating all the export/import configurations in Regulatory Configuration Service (RCS). Electronic billing in Mexico requires the Comprobantes fiscales digitales por internet (CFDI) electronic invoice format. An electronic invoice is a legally accepted digital tax receipt that your organization submits to the Mexican tax authority, Servicio de Administración Tributaria (SAT).

CFDI is the current method for generating electronic invoices in the format that SAT requires. In this method, the invoices are verified and certified by a digital signature service provider (PAC). Before you can use the CFDI method to generate electronic invoices, your organization must set up a web service connection to an authorized PAC. For the CFDI method, you send an XML message from Dynamics 365 Finance to the PAC. The PAC validates each invoice, assigns a folio number, and then incorporates the digital stamp that the service tax authorities provide. After the PAC completes the approval process, your organization receives the approved XML message, and can then submit the invoice to the customer in XML or PDF format. Integration with the PAC web service is not part of the Mexican localization.

This feature enables support for the following documents in the Electronic Invoicing service:

- Sales order packing slip
- Transfer order packing slip
- Settlement
- Withholding tax

- Global CFDI

Global expansion – Indonesian localization

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

Business value

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

Feature details

The country-specific functionality for Indonesia includes:

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

Electronic Invoicing service – configurable Indian e-invoice

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

Business value

Electronic invoicing for India is now supported by our new hyper-scalable multitenant Electronic Invoicing service.

Feature details

Electronic Invoicing is a flexible microservice for exporting and importing configurable e-invoices and transporting messages to and from external web services that are configured by using the Regulatory Configuration Service (RCS). The wide spectrum of supported scenarios is now extended with direct integration to the Indian Invoice Registration Portal, which is dedicated to verifying and registering electronic GST invoices.

Tax Calculation service – integration with invoice register, invoice approval, and invoice pool

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

Business value

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

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

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

Feature details

Invoice register, invoice approval, and invoice pool will be integrated with the Tax Calculation service to support the enhanced features in the Tax Calculation service for more flexible and configurable tax determination and calculation.

Overview of Dynamics 365 Supply Chain Management 2021 release wave 2

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

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

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

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

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Distributed hybrid topology

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

Feature	Enabled for	Public preview	General availability
Edge scale units to run distributed workloads at your facility	Users by admins, makers, or analysts	✓ Apr 23, 2021	Nov 2021
Enhanced manufacturing execution workloads on scale units	Users by admins, makers, or analysts	Nov 2021	Dec 2021
Enhanced warehouse execution workloads on scale units	Users by admins, makers, or analysts	Dec 2021	Feb 2022

Inventory and logistics

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

Feature	Enabled for	Public preview	General availability
Detailed pricing models for sales price calculations	Users, automatically	Mar 2022	-
Create and view certifications on the vendor collaboration interface	Users by admins, makers, or analysts	Aug 2021	Oct 2021
Post on-hand adjustments using codes connected to offset accounts	Users by admins, makers, or analysts	✓ Aug 2, 2021	Oct 2021
Sales quotation referenced data export policy	Users by admins, makers, or analysts	Aug 2021	Oct 2021
Scan barcodes in the warehouse using GS1 format standards	Users by admins, makers, or analysts	Aug 2021	Oct 2021
Updates to inventory and logistics feature states with version 10.0.21	Users by admins, makers, or analysts	Aug 2021	Oct 2021

Feature	Enabled for	Public preview	General availability
Soft reservation for the Inventory Visibility Add-in	Users by admins, makers, or analysts	✔ Aug 9, 2021	Oct 2021
Global Inventory Accounting Add-in for Dynamics 365 Supply Chain Management	Users by admins, makers, or analysts	✔ Jun 18, 2021	Oct 2021
Warehouse Management mobile app step instructions	Users by admins, makers, or analysts	Aug 2021	Oct 2021
Deduction and catch-weight enhancements for rebate management	Users by admins, makers, or analysts	Aug 2021	Oct 2021
Work breaks and tracking updates for Landed cost	Users by admins, makers, or analysts	Aug 2021	Oct 2021
Park tasks in the Warehouse Management mobile app	Users by admins, makers, or analysts	Oct 2021	Dec 2021
Inventory allocation for the Inventory Visibility Add-in	Users by admins, makers, or analysts	Jan 2022	Mar 2022

Manufacturing

For manufacturers, this release focuses on processes configured for distributed hybrid topology, new capabilities for integrating with third-party manufacturing execution systems, and production floor execution scenarios with emphasis on process industries.

Feature	Enabled for	Public preview	General availability
Updates to manufacturing feature states with version 10.0.21	Users by admins, makers, or analysts	Aug 2021	Oct 2021
Face recognition sign-in for production floor workers	Users by admins, makers, or analysts	Sep 2021	Oct 2021
Enhanced production floor execution interface for process manufacturing	Users by admins, makers, or analysts	Dec 2021	Jan 2022

Planning

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

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

Product information management

Details work to be enhanced for Product Life Cycle Management.

Feature	Enabled for	Public preview	General availability
Updates to product information management feature states with version 10.0.21	Users by admins, makers, or analysts	Aug 2021	Oct 2021

Description of **Enabled for** column values:

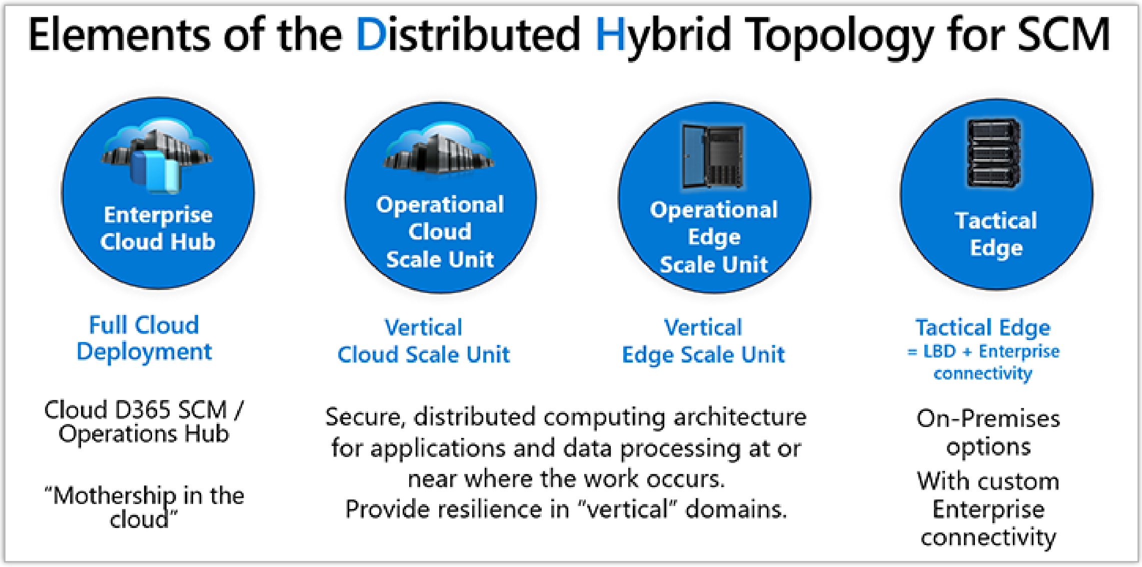
- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
-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

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

Distributed hybrid topology

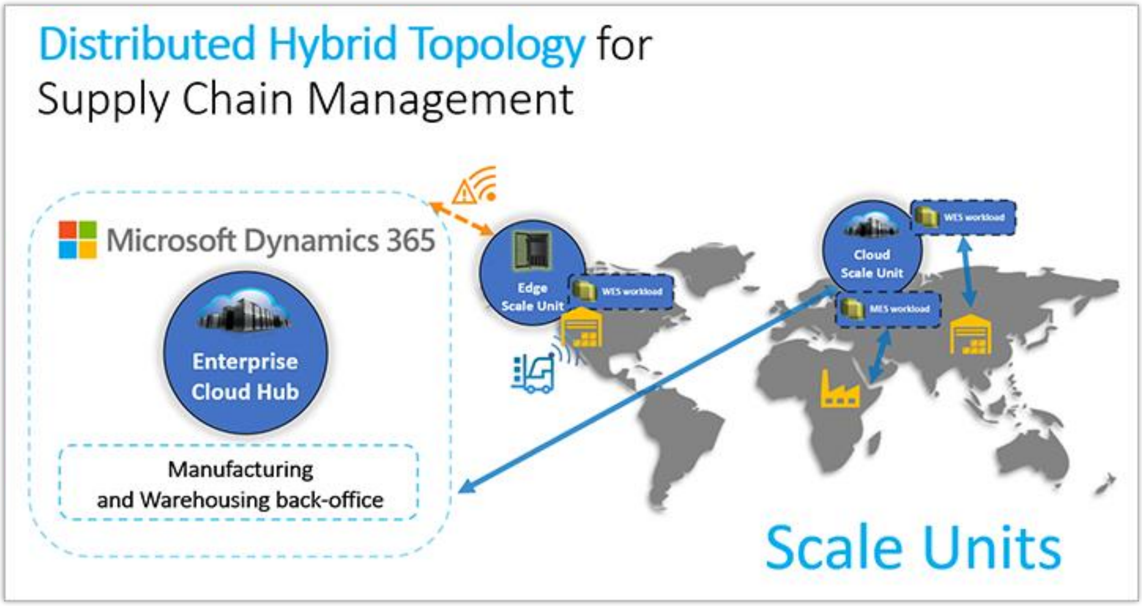
Overview

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



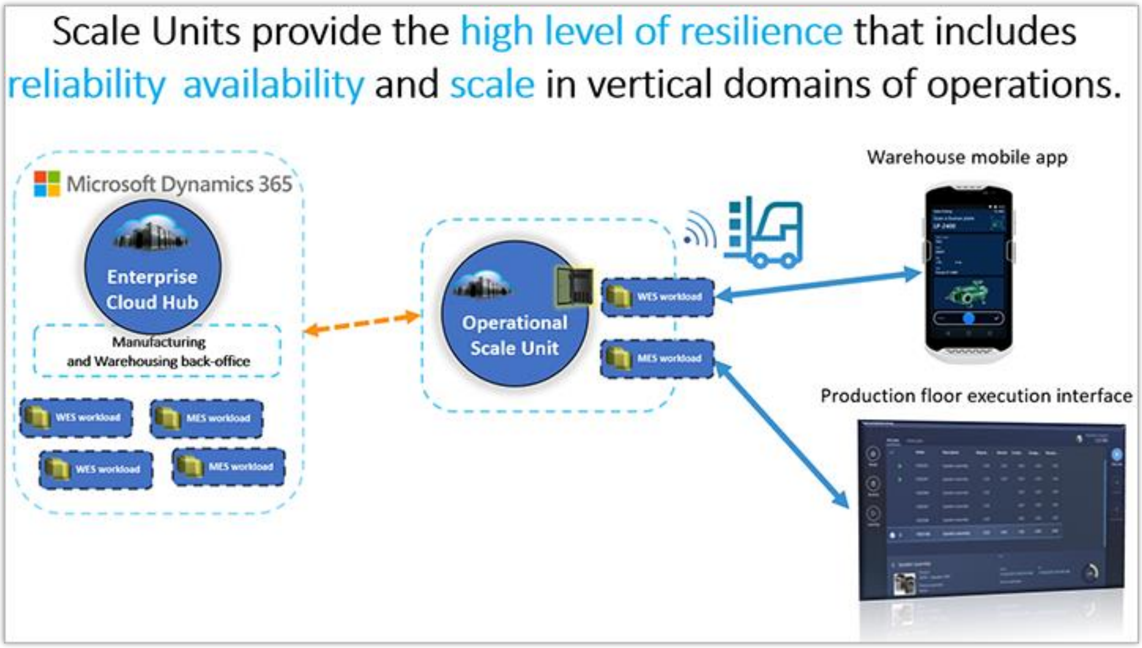
Elements of the distributed hybrid topology.

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



Distributed supply chain topology.

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



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

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

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

Edge scale units to run distributed workloads at your facility

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

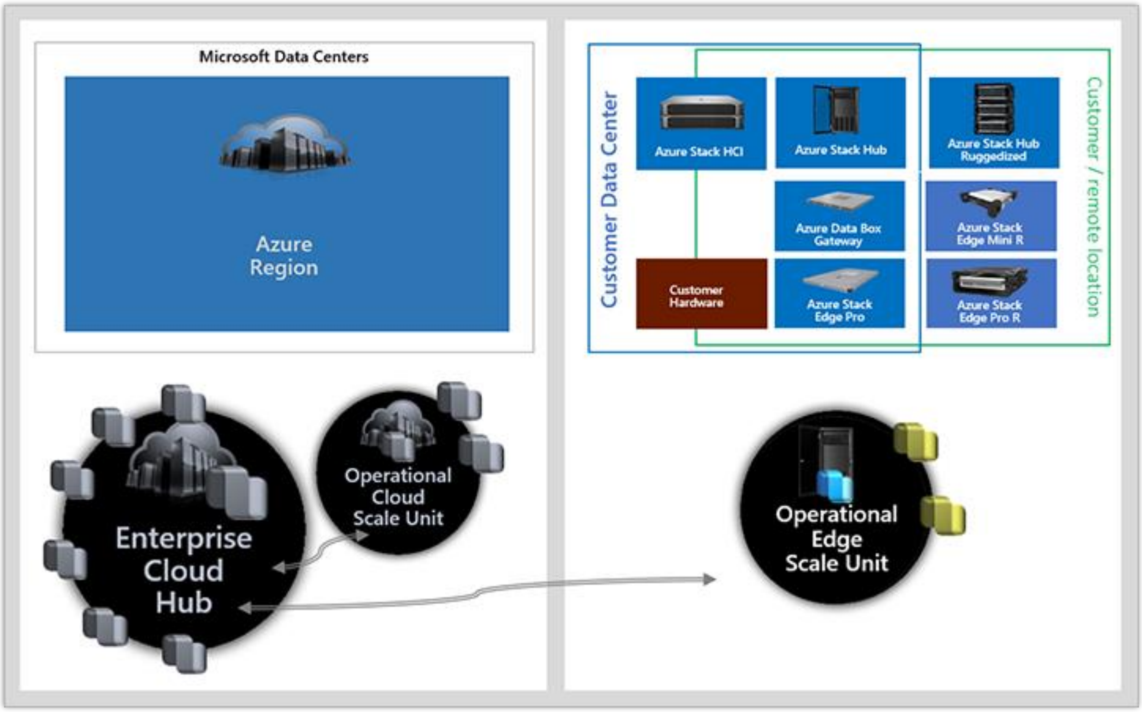
Business value

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

Feature details

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

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



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

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

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

See also

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

Enhanced manufacturing execution workloads on scale units

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

Business value

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. These processes can run without interruption even if the connection between the hub and scale unit 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 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.

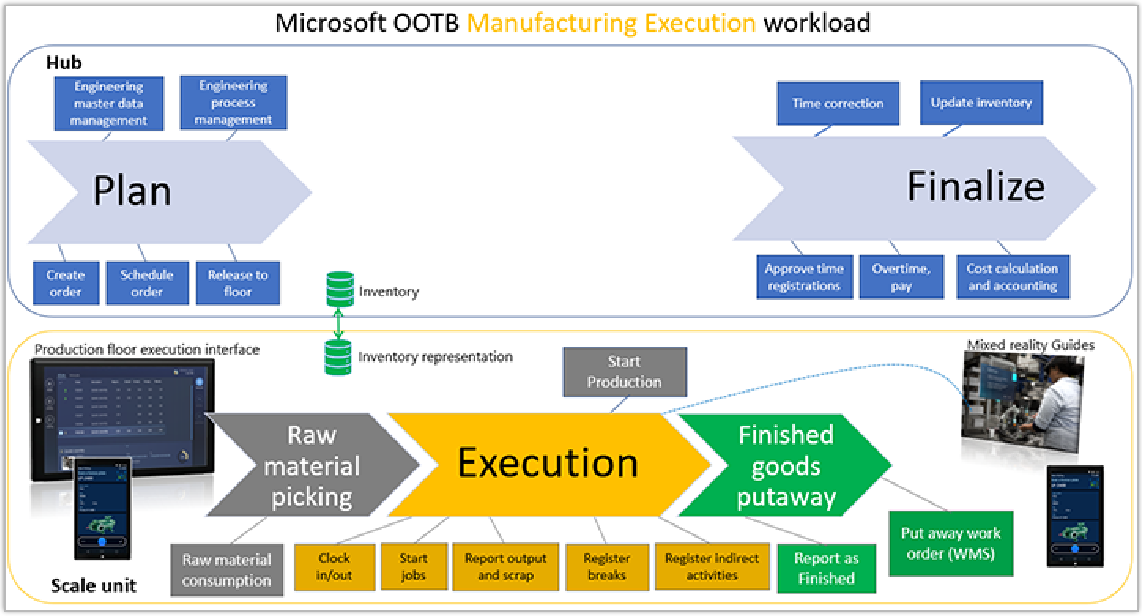
An open application programming interface (API) for registering material consumption is also provided. This is beneficial for organizations that want to integrate with a third-party manufacturing execution system (MES) that records the weight and tracking dimensions of consumed materials.

Start production and batch orders

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

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

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



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

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

Enhanced warehouse execution workloads on scale units

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

Business value

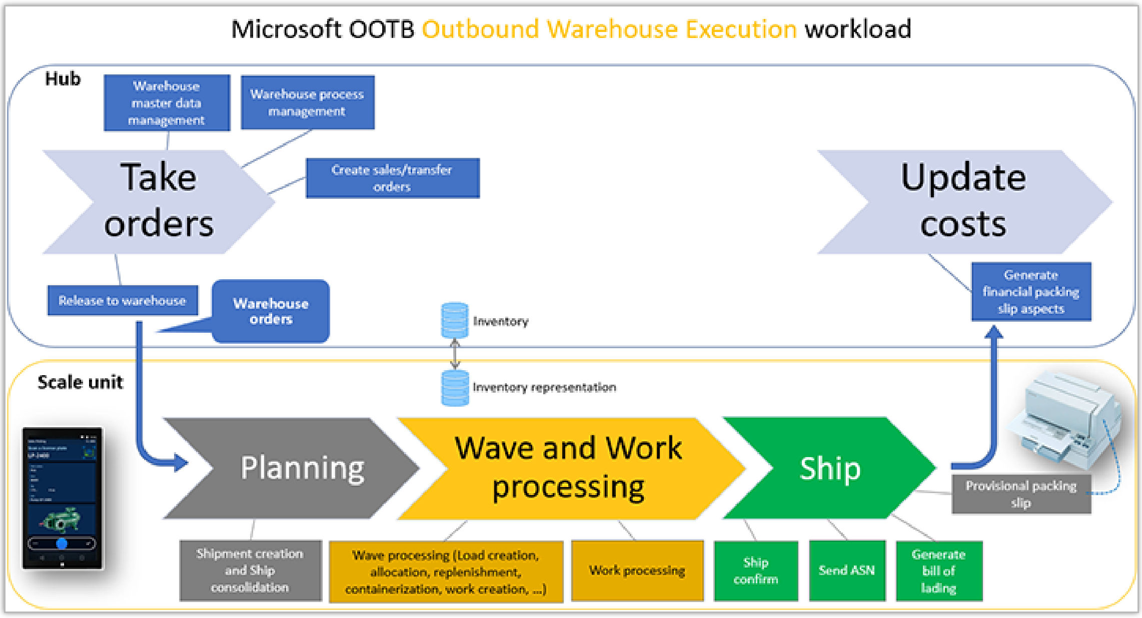
Warehouse execution workloads now provide expanded out-of-the-box capabilities for running scale units as part of a distributed hybrid topology.

Feature details

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

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

- Wave processing functionality that creates all work for a wave now runs entirely within the scale unit.
- Exception handling is available within the scale unit, and users profit from local processing such as the ability to reduce load line quantities after a short pick.
- Scale units can now generate local outbound shipment confirmation, including advanced shipment notices (ASNs).



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

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

Inventory and logistics

Overview

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

- **Global Inventory Accounting Add-in**: Lets you perform inventory account using multiple costing legers so you can comply with multiple accounting standards and internal management accounting at the same time. This is especially useful for international organizations.

- **Inventory allocation for Inventory Visibility Add-in**: Gives you more inventory fulfillment control by allowing you to use dimensions to subgroup available inventory within physical inventory locations, and to assign inventory to inventory allocation objects.
- **Soft reservation for Inventory Visibility Add-in**: Enables external systems to query Supply Chain Management for the inventory position of requested items. The system returns an accurate count of available inventory and temporarily reserves the requested item.
- **Rebate management module enhancements**: The new rebate workbench helps streamline rebate processing. The module now integrates with the existing deduction workbench to let you process rebates as customer deductions.
- **Landed cost module enhancements**: Provides warehouse managers with more control over putaway work for goods-in-transit orders. Improves the Landed cost module's ability to track the arrival dates of imported goods.
- **Post on-hand adjustments using configurable reason codes**: Warehouse and retail store workers doing on-hand inventory adjustments can select the reason for each adjustment while they work. The system can then automatically post each adjustment to the appropriate offset account based on the stated reason.
- **Pricing service**: Enables you to define prices and discounts using flexible price attributes. The service provides an omnichannel pricing engine that can find the product's right price based on the applicable price, discounts, promotions, trade agreement, and more.
- **Warehouse Management mobile app enhancements**: User-customizable step-by-step instructions and localized prompts for workers.
- **GS1 standard barcodes**: The system can now scan GS1 standard barcodes for facilitated warehouse processing.

Detailed pricing models for sales price calculations

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

Business value

The pricing service enables businesses to establish detailed pricing models for calculating the right sales price for the items included in each sales order. It adds significant flexibility and quickly performs calculations that consider a wide range of business factors including prices, discounts, discount priorities, promotions, trade agreements, and more.

Feature details

The pricing service is a centrally located omnichannel pricing engine. It calculates prices based on information found in and related to the product, customer, and sales order data entities. Final prices are calculated using detailed pricing models that you define.

You start by setting up a fallback base price calculation for each product, which applies in situations where no trade agreement is in place. For customers where you do have additional trade agreements, the pricing service lets you define margin components that establish the percentage or value to use when calculating the final price from the base price.

The pricing service supports pricing models that can consider a wide variety of product and customer attributes when calculating the final price. The models can calculate discounts based on concurrent modes using compete or compound rules. You can also set up mix-and-match discounts that support bonus buy and complex assortment-buy promotion scenarios.

The service lets you inspect the details of each final price calculation at the order level to confirm it has been done correctly.

The pricing service comes with an easy-to-use RESTful API that enables developers to integrate your ancillary systems. Supply Chain Management and the front-end omnichannel order management system also retrieves the calculated price by calling the service. The service is highly scalable and uses a flexible architecture that is able to maintain any combination of customer and product attributes.

Create and view certifications on the vendor collaboration interface

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

Business value

This feature enables vendors to use the vendor collaboration interface to submit or expire certifications that can be approved and then saved with the vendor record. It improves the accuracy of vendor certification and reduces internal maintenance overhead.

Feature details

With this feature, your vendors and suppliers can use the vendor collaboration interface to submit, view, or expire certifications. Each submission is sent through an approval process and is added to the record only after it has been approved at your company.

When a vendor submits a request, your procurement personnel must review it. On approval, the new certification is added for that vendor.

See also

Maintain vendor certification (docs)

Post on-hand adjustments using codes connected to offset accounts

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

Business value

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

Feature details

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

See also

Reason codes for inventory counting (docs)

Sales quotation referenced data export policy

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

Business value

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

Feature details

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

Scan barcodes in the warehouse using GS1 format standards

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

Business value

This feature greatly simplifies the scanning process in warehouses where pallets and containers are labeled with GS1 barcodes. Warehouse workers can simply scan the GS1 barcode to extract all the needed information in a single scan. This reduces the time associated with the task by eliminating the need to do multiple scans or input information manually, while ensuring accuracy of information logged at the point of scanning.

Feature details

The GS1 barcode format is a global standard for exchanging data between different companies. The standard defines the data format and the various kinds of data that can be encoded using it. GS1 barcodes can have multiple data elements, so a single barcode can include many types of product information including batch, expiration date, and more.

This feature enables the Warehouse Management mobile app to scan a single GS1 barcode and correctly extract all the information needed to process the task at hand.

See also

GS1 bar codes and QR codes (docs)

Updates to inventory and logistics feature states with version 10.0.21

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

Feature details

Mandatory features with Supply Chain Management version 10.0.21

- **Organization-wide work blocking.**
- Wave label printing.
- Task-based wave demand replenishment.
- Associate purchase order inventory transactions with load. This feature records inbound load IDs for purchase order inventory transactions as warehouse workers register inbound quantities using a mobile device.

Enabled-by-default features

These features will be turned on by default, but can still be manually disabled. These are all targeted to become mandatory with 2022 release wave 1.

Cost management

- Compare item prices storage.
- **Moving average, fallback cost sequence.** This feature enables the ability to select among three predefined fallback cost sequences for moving average. It impacts scenarios where inventory goes negative and a cost has to be assigned.
- **Show the items with not fully settled transactions in summary format.** This feature shows the items with not fully settled transactions in summary format in inventory closing. It hides the details of unsettled transactions.
- Change the label of Cancellation in Closing and adjustment to Reverse.

Inventory management

- **Create transfer order from sales line.** This feature provides the option in both product and supply menu and delivery alternatives form to directly create a transfer order from a sales line. The general information required to create a transfer order and transfer line will be automatically loaded to the creation dialog from the sales line.
- **Enable inventory quality management parameters warning feature.** This feature will enable a warning to the user that quality management is disabled when setting up the quality management policies.
- **Auto increment line numbers of inventory transfer order lines.** This feature ensures that line numbers of inventory transfer order lines are continuous integer values.
- **Allow empty batch attributes values.** This feature allows empty batch attribute values when closing the batch attributes form.
- **Using unit of measure and unit quantity in inventory journals.** This feature enables the use of unit of measure and unit quantity in inventory journal lines.
- **Inventory journal approve workflow.** This feature allows users to configure workflow for inventory journal's approval process.
- Inventory on-hand report storage.
- **Transfer Order Cancellation.** This feature provides the functionality to cancel shipped transfer orders.
- **Unlock Inventory Journal.** A new button will be added to inventory journals to allow a materials manager, quality control manager, or warehouse manager to unlock inventory journals that are created by other users and locked by the system.
- Saved views for Inventory management.

Warehouse management

- **Hide the Total Value field on the All Loads and Load Details pages.** When the **Total Value** field is visible, it has a performance impact on the **All Loads** and **Load Details** pages. This feature hides the field.
- Work line details.
- **Make mobile device inventory movement inventory status field editable.** This feature makes the **Inventory status** field editable in the warehouse mobile device inventory movement flow when moving inventory from a license plate-controlled location.
- Enhanced license plate label layouts.
- Control whether to display a receiving summary page on mobile devices.
- **Prevent reusing containers from different container build templates during containerization.** This feature prevents reusing containers created from a different container build template from being used by another container build template during containerization. For example, if a container was created using one container build template and a new item needs to be packed in a container where a different container build template needs to be used, the first container will not be used even if there is enough space in it to pack the new item.
- **Prompt to resolve ambiguous Loc/LP names.** This feature lets warehouse workers specify whether the value entered in a **Loc/LP** field in the Warehousing mobile-device app identifies a license plate or a location. If a worker enters (or scans) a **Loc/LP** value that is currently used as a name for both a license plate with physical on-hand and a warehouse location, the application will display a form that prompts the worker to select **Location** or **License plate**.
- Capture product variants and tracking dimensions in the warehousing app during load item receiving.
- Confirm outbound shipments from batch jobs.
- **Do not allow to create loads that do not meet wave load building template requirements.** This feature ensures that the load meets all requirements from the template. Also, if the load mix group is used, the templates should be created both for criteria codes and constraints to be able to create loads with any code.
- **Evaluate all actions for multi-SKU location directives.** For multi-SKU location directives, only one action is evaluated for every location directive line. When this feature is enabled, all actions are evaluated in sequenced order.

Procurement and sourcing

- **Bid submission success message.** This feature displays a success message when bids are submitted.
- RFQ reference link added to PO.

- **Ability to batch confirm accepted purchase orders from vendor collaboration.** This feature will allow users to batch confirm purchase orders that are accepted with no change via vendor collaboration. A new menu item will be available in the **Procurement and sourcing** module for batch scheduling, and a parameter will allow the batch run.
- **Purchasing cXML enhancements.** This feature includes a set of enhancements to the purchase requisition and purchase order processes when collaborating with suppliers. The external catalog is enhanced with a new trace function to allow the administrators to troubleshoot using external catalogs with purchase requisitions. New functionality allows for a purchase order to be sent back to the supplier after being confirmed.
- RFQ questions and answers.
- **Display the Open published requests for quotation link as a tile.** The vender bidding workspace provides a link that enables users to open published RFQs. This feature changes that link to a tile, which is more prominent and easier to find on the page. This is located in the **Vendor bidding** workspace.

Sales and marketing

- Charges allocation on a sales order.

Soft reservation for the Inventory Visibility Add-in

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

Business value

This feature enables order management and point-of-sale systems to communicate directly with Supply Chain Management to find and temporarily reserve requested inventory, thus helping to make sure the inventory can be delivered as promised.

Feature details

This feature adds a soft reservation feature to the Inventory Visibility Add-in for Dynamics 365 Supply Chain Management. It enables external systems to query Supply Chain Management for the inventory position of requested items, returns an accurate count of available inventory, and temporarily reserves the requested items. This temporary booking is called a *soft reservation*. The feature calculates the accurate ready-to-sell quantity by deducting the reserved quantity in near real-time.

The external system later creates a formal sales or transfer order, which it sends to Supply Chain Management for processing. Supply Chain Management then firms the soft reservation to create an actual reservation for fulfillment. The firmed reservation offsets the temporary soft reservation to prevent double deduction from inventory on-hand.

The feature is implemented as an API that external systems can access to learn whether inventory is available and then invoke the soft reservation.

See also

Inventory Visibility reservations (docs)

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	Oct 2021

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. Global Inventory Accounting 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 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)

Warehouse Management mobile app step instructions

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

Business value

Ramping up new or temporary workers can be challenging because it takes time for them to learn how to perform new tasks. Furthermore, even experienced warehouse workers can often feel uncomfortable when performing new tasks they have never done before. This feature helps workers ramp up faster on new tasks by providing configurable instructions for each step and focusing workers' attention on the most important fields as they work through a flow.

Feature details

Create and display custom instructions for each step of each task flow that you set up for the Warehouse Management mobile app. When provided with well-written instructions, your warehouse workers will be able to start using new flows right away, with no prior training. You can choose which field values to display for each step, and you can highlight the most important of them, which helps workers focus their attention on the most important fields as they work through a flow. With this feature, organizations can:

- **Ramp up workers faster by letting them follow simple instructions for each task step.** Each step of a flow provides instructions that allow front-line workers to understand the task.
- **Provide instructions that match your own processes.** Write your own instructions to match your own business and warehouse processes. You can make the terminology fit your physical space, local abbreviations, and so on.
- **Increase productivity by highlighting the most important parts of each step.** Choose which fields and information should be highlighted for each step to help focus workers' attention (first available in version 10.0.23).

Deduction and catch-weight enhancements for rebate management

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

Business value

Keeping track of rebate and royalty programs and calculating them accurately can quickly become time consuming and tedious without the right tools. In addition to a central place to manage rebate agreements, this feature provides organizations with a central place to view and process rebates. It helps to increase customer satisfaction by allowing customers to choose to receive a deduction right away, rather than waiting for a rebate payout. In addition, this feature enables businesses working with catch-weight products to incorporate catch-weight units into rebate calculations.

Feature details

This feature enhances the **Rebate management** module for Dynamics 365 Supply Chain Management. It adds a central rebate workbench to help streamline rebate processing, and it integrates with the deduction workbench to let you process rebates as customer deductions. For catch-weight items, the feature also lets you set up rebate conditions based on the catch-weight unit.

This feature helps streamline the rebate process by adding the following elements to Supply Chain Management:

- **A new rebate workbench**: The workbench lets you view and process all provisions, rebates, and write-off transactions in a central place, rather than requiring you to open each rebate program separately. From the rebate workbench, you can quickly access all provisions and rebate claims, and process or purge the transactions.
- **New Procurement category**: This new category, which has a payment type of **Pay using account payable**, is added to the rebate management posting profile. You can use this category to create the target vendor invoice journal.
- **Rebate management details for sales and purchase order lines**: These new details enable you to view eligible rebates during the order entry process.
- **Deduction workbench enhancements**: This feature adds support for short payment scenarios by enabling users to transform rebates into a deduction.

The feature also provides rebate management support for catch-weight items by letting you specify a unit type of either **Inventory unit** or **Catch weight** for each rebate deal. The unit quantity can be based on a different unit type.

Please note the feature is available from 10.0.21

See also

Manage deductions using the deduction workbench (docs)

Work breaks and tracking updates for Landed cost

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

Business value

Businesses using the Landed cost module can automatically update estimated to actual arrival dates of imported goods based on existing putaway records in the system. This improves accuracy and reduces the need for manual data entry. It furthermore enhances goods-in-transit orders to enable warehouse managers to better manage warehouse work by leveraging functionality already available for purchase orders.

Feature details

This feature enhances the [Landed cost module] for Supply Chain Management by adding two important new capabilities: tracking updates and work breaks. The tracking update feature enables the system to automatically update the date of arrival of imported goods based on existing records of warehouse putaway work. The work breaks feature enables businesses to gain more detailed control over putaway work for goods-in-transit orders by leveraging familiar functionality already available for purchase orders.

Tracking updates

This feature enables the Landed cost module to accurately record the date of arrival for imported goods. It works by automatically updating the actual completion date for each relevant activity tracking record to match the date at which the related goods are put away at your warehouse. The feature helps to ensure accurate arrival records without relying on manual data entry.

Because this feature works based on inventory transactions, it can also make use of inventory arrival journals and therefore works with advanced warehouse management and the transportation management module.

Work breaks

Previously, the goods-in-transit order receiving process didn't support warehouse work templates with header breaks. This feature adds that support to enable inventory transactions to be split during the goods-in-transit receiving process, which provides the following benefits:

- Warehouse managers can establish work break rules to split large putaway jobs into smaller ones based on item, location, stocking limits, or other factors.
- Work break functionality correctly handles under- and over-deliveries and makes all appropriate adjustments to the underlying data.
- Workers can complete or cancel each work header independently.
- The system correctly handles canceled work for goods-in-transit orders, including after an over-delivery transaction and after applying work breaks. The related goods-in-transit and purchase orders are also automatically updated as appropriate.

See also

Update tracking for put away (docs)

Park tasks in the Warehouse Management mobile app

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

Business value

Increase the efficiency of warehouse workers by allowing them to stop their current task to perform another more important one, and then return to the original task without losing any information.

Feature details

Workers using the Warehouse Management mobile app can temporarily pause the current task. They can then start and complete another important task before safely returning where they left off with the previous work.

For example, a warehouse worker performing a sales picking flow might arrive at a specified location only to find that the required item is no longer present. Previously, the only option would be to abandon the current pick flow and do an item inquiry to find out if more of that item is available at some other location. As a result, the worker would lose their sales pick information and run the risk that another worker might grab and restart that same picking work, thus creating inefficiencies. With this feature, the worker can instead park the current task and go to a secondary flow (the item inquiry flow) to find a new location that contains the item, replenish the location, and then continue the sales pick work. This means that no information is lost and the warehouse pick work is more efficient.

Inventory allocation for the Inventory Visibility Add-in

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

Business value

Inventory allocation allows you to set aside dedicated inventory to make sure you can fulfill your most profitable channels.

Inventory levels constantly fluctuate, especially when you are running a sales promotion or are experiencing supply shortages. Inventory allocation lets you pre-allocate available inventory to make sure you can fulfill orders for key channels or key accounts. It helps you meet service level agreements (SLAs) and fulfill commitments to your key customers.

By providing global visibility over your inventory allocations, this feature helps you align your multi-channel inventory control strategy across legal entities.

Feature details

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.

Virtual inventory pools let you pre-allocate (ringfence) 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 dimension. 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 objects, which can be based on channels, sales origin, or customer groups. You can also create a hierarchical structure of allocation objects.
- Use allocate rules to define how inventory should be allocated on the location level. Each allocation rule contains the logic used to establish an inventory pool, and the reserved inventory can be calculated as a fixed quantity or a percentage of the available inventory.
- Set up a fallback shared inventory pool. Inventory in the common pool is allocated for all channels and customers. If a dedicated virtual pool is out of stock, you can use the common pool to fulfill the order.

Manufacturing

Overview

This release adds the following capabilities for manufacturers:

- Integrate Supply Chain Management with common manufacturing execution systems. The solution provides a simple and efficient no-code onboarding process, which reduces overall implementation and operating costs. It helps manufacturers to establish end-to-end visibility and control the production floor.
- The production floor execution interface now enables workers to register batch and serial numbers for raw materials and adjust the amount of material consumed. This ensures material traceability, provides accurate and up-to-date inventory levels, and increases the efficiency of shop-floor workers.
- Workers can now use the Warehouse Management mobile app running against a scale unit to register quantities, batch numbers, and serial numbers of consumed raw materials. This ensures material traceability, accurate inventory records, and shop-floor efficiency, while also enabling manufacturers to take advantage of the increased resiliency and performance offered by a distributed hybrid topology.

- Workers can use face recognition to sign in to the production floor execution interface instead of using a badge ID or password. This helps improve worker effectiveness and job satisfaction by making it faster and easier to sign in.

Updates to manufacturing feature states with version 10.0.21

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

Feature details

Enabled-by-default features with the 10.0.21 release

These features will be turned on by default, but can still be manually disabled. The features are all targeted to become mandatory with 2022 release wave 1.

- License plate for reporting as finished added to the Job Card Device.
- **Improvements to the Approve and Transfer jobs dialogs.** Two new fields, **Approval group** and **From date**, have been added to the **Approve and Transfer jobs** dialogs. These fields improve the overview of which jobs are going to be approved or transferred.
- **Enable automatic generation of license plate number when reporting as finished in the job card device.** This feature makes it possible to configure whether the license plate number should be automatically generated or entered manually when reporting as finished from the job card device.
- **Enable partial receipt of subcontracted items and fix an issue with the calculation of scrap for BOM lines of type Vendor.** This feature enables partial receipt of subcontracted items. Previously, when reporting a partial quantity on a purchase order for a subcontracted service item, the full quantity was updated on the related picking list journal on the production order. Now, the correct partial received quantity is updated. This feature also fixes an issue with an incorrect updated scrap quantity when using BOM lines of type **Vendor**.
- A new Stop break button has been added to the Job Card Terminal page. The new Stop break button 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 the user makes registrations. For example, when the user registers a break. With this configuration, the user must select Stop break when returning from a break in order to continue the current job or register on any other activity.
- Print label from Job Card Device. This feature enables printing a label when reporting as finished from the job card device. The label is part of document routing and enabled in the **Configure job card for devices** page.
- Feature for locking job card device and job card terminal so that they can be sanitized.

- Dynamics 365 Guides for Manufacturing.
- Saved views for production control.
- Production floor execution.

Face recognition sign-in for production floor workers

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2021	Oct 2021

Business value

This feature improves worker effectiveness and job satisfaction by making it faster and easier to sign in to the production floor execution interface. Workers can sign in by looking at a camera, without needing to pull out their badges or key in a password. This feature can also help reduce the need to reset forgotten passwords.

Feature details

Users of the production floor execution interface and users of the time and attendance functionality can sign in using face recognition instead of by scanning or keying in a personal badge ID.

Workers start by selecting the sign-in button in the interface, which opens a page where they can activate the device camera. The system recognizes when a worker is looking into the camera and then launches the face-recognition process. If the system recognizes the face, the worker is successfully signed in. In this release, the worker needs to make two touch interactions to sign in. In a future release, we plan to introduce a touchless sign-in experience.

Admins need to configure the connection to the face recognition service by entering an application key. Admins can also define worker groups based, for example, on each worker's shift or work area.

Each worker must set themselves up to use the face recognition service. Workers open a setup page on the production floor execution interface where they can select a button and have their pictures taken by the device camera. The system generates a face map, which is a mathematical model that describes the unique elements of a worker's face. The system doesn't store the photo, just the face map.

The system is designed to protect worker privacy. Workers can delete their face map at any time and revert to signing in using their badge IDs.

Enhanced production floor execution interface for process manufacturing

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

Business value

Provides a state-of-the-art and intuitive user experience for process manufacturers and manufacturers that need to report on batch orders and register material consumption. This will make shop floor workers more effective and reduce registration errors.

Feature details

These enhancements enable process manufacturers, and manufacturers that need to report on batch orders and register material consumption, to take advantage of the production floor execution interface.

Report on co-products and by-products

Workers can use the production floor execution interface to report progress on batch orders, including reporting on co-products and by-products.

Some manufactures, especially those within the process industries, use batch orders to manage their production processes. Batch orders are created from formulas, which can be defined to have co-product and by-product output. When reporting feedback on such batch orders, the amount of output needs to be registered on the formula item as well as the co-products and by-products.

Register material consumption, batch numbers, and serial numbers

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.

Planning

Overview

This release adds Planning Optimization support for production scheduling that respects finite resource capacity. Manufacturers can now:

- Use finite scheduling to detect potential future delays caused by limited resource capacity. This helps manufacturers to automatically update their material requirements accordingly and notify impacted customers.
- Allocate resources based on capabilities during scheduling. Instead of assigning specific resources or resource groups to a route operation, the required capabilities can be defined on the route operation. With this setup, scheduling will match the required capabilities with capabilities of available resources to determine the resource assignment for a given production job.
- Support process manufacturing scenarios while taking advantage of Planning Optimization. For process manufacturers, the system now supports batch orders, co-products, by-products, and items with limited shelf life.

Updates to planning feature states with version 10.0.21

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

Feature details

Enabled-by-default features with the 10.0.21 release

These features will be turned on by default, but can still be manually disabled. The features are all targeted to become mandatory with 2022 release wave 1.

- Parallel firming of planned orders.
- Master planning progress visualization.
- **Auto-firming for planning optimization.** This feature allows auto-firming of planned orders after planning optimization runs. This will automatically firm planned orders falling within the firming time fence in days from **Plan setup** under **Master planning parameters**.
- **Forecast model selection on demand forecast details.** On the **Demand forecast details** page, the user can select the forecast models to be included for the historical forecast.

Planning Optimization support for capability-based resource allocation

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2021	Nov 2021

Business value

Companies using Planning Optimization can optimize resource usage by deferring resource allocation until productions are scheduled. This flexible solution automates resource selection during production scheduling based on individual operation capabilities and requirements.

Feature details

Planning Optimization now supports production scheduling with flexible resource allocation based on resource capabilities. A *capability* is the ability of an operations resource to perform a particular activity. An operations resource can have more than one capability assigned to it, and a capability can be assigned to more than one resource. Capabilities can be assigned to all types of resources, including tools, vendors, machines, locations, facilities, and human resources. Each capability can be set to ensure the selected resource has the required capability level for a given operation. Capabilities can also include a priority, which is used during scheduling to optimize the resource selection based on highest available priority.

Instead of assigning specific resources or resource groups to a route operation, you can define the capabilities required for each route operation. With this setup, scheduling will match the required capabilities with the capabilities of available resources to determine the resource assignment for each production job.

Capability-based resource allocation is part of the materials resource planning II (MRP II) support provided by Planning Optimization. MRP II helps planners at manufacturing companies control their production schedule, control resource load, and determine delivery lead times. Because Planning Optimization runs as a separate service, it's able to facilitate high performance production planning without slowing down the rest of the system.

With Planning Optimization support for production scheduling, manufacturers can benefit from:

- Significantly improved performance and scalability with in-memory processing.
- Minimized system impact on other processes made possible by moving master planning to its own service.
- Near-real-time insights into requirement changes during office hours.

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

Geographic areas

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

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

Product information management

Overview

The product information management and sales configuration service provides a single source of product truth for all Dynamics 365 applications delivered by microservices. It provides customers with comprehensive category and attribute management, powerful product search and selection capabilities, and support for configurable products and bundles with end-user choices being governed by simple rules and constraints.

Updates to product information management feature states with version 10.0.21

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

Feature details

Enabled-by-default features with the 10.0.21 release

These features will be turned on by default, but can still be manually disabled. The features are all targeted to become mandatory with 2022 release wave 1.

- **Navigation to BOM version from BOM lines.** This feature enables navigation from BOM lines to the **BOM Version** page.
- Hazardous materials product information and shipping documentation.
- **Strict validation on default order quantities.** With this feature, the option to have strict validation on the default order quantities is introduced. 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 will apply to the purchase order, inventory, and sales order tab.
- Country of origin management feature.

Overview of Dynamics 365 Project Operations 2021 release wave 2

In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams to win more deals, accelerate delivery, empower employees, and maximize profitability. The application provides the necessary visibility, collaboration, and agility across the project lifecycle to drive success for project-centric businesses. Powered by Microsoft Power Platform, customers are provided with an unmatched set of capabilities that enable everyone to analyze, act, and automate across their organization to transform their services business from the ground up. It's everything you need to run your project operations, from deal management to financials, all in one application.

For 2021 release wave 2, we will deliver functionally rich experiences in the following areas:

- Ability to create and manage subcontracts with vendors for projects
- Task scheduling enhancements

What's new and planned for Dynamics 365 Project Operations

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have been released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Feature	Enabled for	Public preview	General availability
Task scheduling enhancements from Project for the web	Users, automatically	-	Oct 2021
Subcontractor Management for projects	Users by admins, makers, or analysts	-	Jan 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.

Task scheduling enhancements from Project for the web

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2021

Feature details

For details on scheduling enhancements that will be made in Project for the web, please review the Project for the web release details here: What's new in Project for the web

Subcontractor Management for projects

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

Business value

This feature provides better visibility and control over all aspects of work on a project.

Feature details

Subcontracting or outsourcing project work to vendors, and managing the vendor resource assignments and delivery of work is essential in every project-based organization. In this release wave, Project Operations will prioritize comprehensive experiences for managing subcontractors for project-based work. Key capabilities include:

- Billing agreements with vendors using time and material and fixed-bid models
- Pricing for subcontractor resources
- Staffing subcontractor resources and insights into resource choices between full-time vs. subcontractors
- Review and reconcile subcontractor time and clear vendor invoices for payment

Overview of Finance and Operations cross-app capabilities 2021 release wave 2

Finance and Operations cross-app capabilities apply to all Finance and Operations apps, including Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations.

To enable businesses everywhere to accelerate their digital transformation, we are continuously enhancing the platform and services that support Finance and Operations apps with new capabilities. As we add product enhancements at a rapid pace, we deliver frequent updates (eight updates per year) that help customers stay current in a consistent, predictable, and seamless manner.

The key driver for all of the new, core capabilities is to increase productivity and return on investment. The Finance and Operations cross-app capabilities in this release wave can be divided into the following categories:

- **Power Platform convergence features** are capabilities that bring Finance and Operations apps closer to Microsoft Power Platform. Environment provisioning, authorization and authentication, run-time events, and developer tools are areas that will enable new capabilities that takes convergence forward.
- **Cross-app features** provide ease of use to all users of Finance and Operations apps.
- **Data and process integration features** provide enhanced data exchange experiences between Finance and Operations apps, Microsoft Dataverse, and customer engagement apps in Dynamics 365.

What's new and planned for Finance and Operations cross-app capabilities

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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-app features

Capabilities and features that apply to all Finance and Operations apps.

Feature	Enabled for	Public preview	General availability
Visual Studio 2019 support X++ Development	Admins, makers, marketers, or analysts, automatically	Nov 2021	-
Enhanced support for full feature lifecycle in Feature management	Users, automatically	Aug 2021	Oct 2021
Improved legal entity support for saved views	Users by admins, makers, or analysts	Aug 2021	Oct 2021
Updates to client feature states with version 10.0.21	Users, automatically	Aug 2021	Oct 2021
WCAG 2.1. accessibility support for the Finance and Operations apps web client	Users, automatically	Aug 2021	Oct 2021
Vertically scrolling workspaces	Users, automatically	Oct 2021	Dec 2021
Enable auto-update for all sandbox environments	Admins, makers, marketers, or analysts, automatically	Feb 2022	To be announced

Data and process integration

Finance and Operations app data and processes are available in Microsoft Dataverse and Azure Data Lake Storage.

Feature	Enabled for	Public preview	General availability
Change feeds in data lakes	Users by admins, makers, or analysts	✔ Apr 30, 2021	Oct 2021
Export to Azure Data Lake feature adds regions, including China	Users by admins, makers, or analysts	-	Mar 2022
Get recommendations on best practices via dual-write table map health check	Users by admins, makers, or analysts	-	Mar 2022

Feature	Enabled for	Public preview	General availability
Increase in Legal Entity limits for dual-write integration	Users by admins, makers, or analysts	-	Mar 2022
Finance and Operations data in Microsoft Dataverse – phase 5	Users by admins, makers, or analysts	Jan 2022	Mar 2022
Mobile offline for Finance and Operations virtual tables	Admins, makers, marketers, or analysts, automatically	Nov 2021	To be announced

Power Platform convergence

This section covers the scenarios and features that will be enabled by converging Finance and Operations apps with Microsoft Power Platform.

Feature	Enabled for	Public preview	General availability
New scenarios enabled with Power Platform convergence	Admins, makers, marketers, or analysts, automatically	✔ Jun 30, 2021	Oct 2021

Description of **Enabled for** column values:

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

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

Cross-app features

Overview

Cross-app features provide ease of use to all users of Finance and Operations apps. These capabilities improve development, administration, and end-user experiences by addressing some of the key shortcomings we've heard from our customers.

For example:

- Developers will benefit from Visual Studio support for X++ development.
- Administrators will benefit from the auto-update capability that is extended to all Microsoft-managed sandbox environments.
- End users will benefit from improved legal entity support for saved views.

Visual Studio 2019 support X++ Development

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

Business value

Visual Studio 2019 is the latest supported release of Visual Studio and offers many new features and improvements.

Feature details

The Visual Studio extension for Finance and Operations apps development in X++ will support Visual Studio 2019, so developers can take full advantage of the latest features and improvements that Visual Studio has to offer.

Enhanced support for full feature lifecycle in Feature management

Enabled for	Public preview	General availability
Users, automatically	Aug 2021	Oct 2021

Business value

This feature makes it easier for customers to stay up to date with the latest features and capabilities provided by Finance and Operations apps and helps to ensure customers are prepared for when features become mandatory.

Feature details

Microsoft product teams will now be able to update the state of optional features to be **On by default**. Previously, the only option for a feature to progress through its lifecycle after being released was to transition it directly to **Mandatory**, which does not permit the feature to be turned off. The ability to change a feature to be **On by default** has been added to provide an intermediate step between features being released and features becoming mandatory.

Features in the **On by default** state are automatically turned on, though organizations will be able to disable these features if more time is needed to validate them. The grid in the Feature management workspace has also been modified to clearly denote feature state (**Preview**, **Released**, **On by default**, **Mandatory**) in the new **Feature state** column.

To help set expectations for when features are expected to transition between states once released, we've made some changes to the documented feature lifecycle and corresponding timelines for features in Feature management. Please read the Feature management overview topic for more details, including some examples of typical timelines for feature progression from **Released** to **On by default** to **Mandatory**.

Important dates

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

Feature stage	Version	Date
Mandatory	10.0.21	October 2021

Improved legal entity support for saved views

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

Feature details

An important capability of the saved views feature, in terms of organizational management of personalizations, is the ability to publish views to specific security roles and to specific legal entities. This feature adjusts legal entity support for saved views in two meaningful ways:

- A view published to specific legal entities is only ever shown in those legal entities. This is a change in behavior from the base saved views feature. This is where a view published to a legal entity is initially available in the view selector only for the selected legal entity, but it is available in any legal entity after the user had first loaded that view.
- Personal views can now be saved as global or belonging to specific legal entities, similar to organization views.

Important dates

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

Feature stage	Version	Date
Generally available	10.0.21	October 2021
On by default	10.0.25	April 2022
Mandatory	10.0.29	October 2022

Updates to client feature states with version 10.0.21

Enabled for	Public preview	General availability
Users, automatically	Aug 2021	Oct 2021

Feature details

Mandatory features with the 10.0.21 release

- Upgrade to React 17
- Show related document attachments
- Edit basic control values in task recordings
- Allow validation of control state in task recordings

Enabled-by-default features with the 10.0.21 release

These features will be turned on by default, but can still be manually disabled. These are all targeted to become mandatory with 2022 release wave 1.

- New grid control
- Grouping in grids
- Freezing columns in grids
- Saved views
- Designate fields as required using personalization
- Enable a drop-down list on multiline controls
- New HTML editor control
- Email throttling

Features transitioning to being generally available with the 10.0.21 release

- Translation support for organization views
- Full page apps

WCAG 2.1. accessibility support for the Finance and Operations apps web client

Enabled for	Public preview	General availability
Users, automatically	Aug 2021	Oct 2021

Feature details

Toward the Microsoft vision of empowering every person and every organization on the planet to achieve more, Finance and Operations apps declare adherence with Web Content Accessibility Guidelines (WCAG) 2.1., the latest accessibility recommendations from the World Wide Web Consortium (W3C), starting with version 10.0.21.

Vertically scrolling workspaces

Enabled for	Public preview	General availability
Users, automatically	Oct 2021	Dec 2021

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 later in 2021, panorama sections will start stacking vertically (instead of laying out horizontally) and will be collapsible. This change will be accompanied by an update to the Workspace form patterns to optimize form metadata for a vertical page orientation.

Enable auto-update for all sandbox environments

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

Business value

The auto-update capability will help customers keep all Microsoft-managed cloud environments current with the latest supported version.

Feature details

The auto-update capability will be extended to all Microsoft-managed sandbox environments in Lifecycle Services implementation projects for the cloud.

For customers with add-on sandbox environments, these environments will be included in the service update per your Update Settings in the implementation project.

Data and process integration

Overview

Data and process integration features provide enhanced data exchange experiences between Finance and Operations apps, Dataverse, and customer engagement apps in Dynamics 365 through dual-write functionality. The data and process integration features also focus on presenting Finance and Operations data in Azure Data Lake Storage.

From a process perspective, the dual-write functionality helps in building a unified end-user experience for Dynamics 365 customers whose business processes span across front office and back office applications. From an analytics perspective, data in Azure Data Lake adds tremendous value for advanced AI features such as predictions through aggregate measurements.

Change feeds in data lakes

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

Business value

Data lakes are changing the way customers store and work with data. Data lakes are ideal for storing large amounts of data at a fraction of the cost of storing them in a relational database. You can bring large amounts of historical data, as well as data from other systems to your data lake. Data can be transformed into summaries, as well as combined with other data on-demand.

When working with large data volumes and by applying changes to the data that changed only since last run, you can save a lot of compute costs as well as time to process.

For example, you can apply changes to financial summary data every few minutes, as opposed to reprocessing the entire financial summary at day's end or on a monthly basis. This way, you not only save on compute costs, but also enable near-real-time financial reporting.

Feature details

A *change feed* is an immutable (never modified) transaction log of all data changes in Finance and Operations apps. Change feed data, available in customers' data lakes, provides a chronological log of all data changes within Finance and Operations apps.

Using the change feed, customers can identify changes to data (inserts, updates, as well as deletes) at a transaction-level detail. They can build data pipelines that react near real-time to changes in Finance and Operations data.

A change feed, once written to a data lake, is never modified or deleted. Customers can use the change feed to audit data changes within Finance and Operations apps as well.

See also

Change data in Azure Data Lake (docs)

Export to Azure Data Lake feature adds regions, including China

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

Business value

Customers can leverage the **Export to Data Lake** feature and retire the use of Bring your own database (BYOD).

Feature details

The **Export to Data Lake** feature is built using a microservice that exports Finance and Operations app data to Azure Data Lake and keeps the data fresh. The **Export to Data Lake** feature is now available in additional geo-regions, including China.

See also

Configure export to Azure Data Lake (docs)

Get recommendations on best practices via dual-write table map health check

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

Business value

The dual-write health check makes sure you meet the minimum system requirements and grants access to the apps that must connect to each other.

Feature details

The dual-write out-of-box table maps have predefined table and field mappings that enable the flow of data between finance and operations apps and Dataverse. Because every business is different, dual-write supports customization so you can change table maps and field mappings. To review your customizations, you can run a table map health check that runs best practices checks against your customizations and provides recommendations.

See also

System requirements and prerequisites (docs)

Increase in Legal Entity limits for dual-write integration

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

Business value

The increased limit supports customers that need to integrate more than 40 legal entities between finance and operations apps and Dataverse.

Feature details

A legal entity is an organization that is identified through registration with a legal authority. Legal entities can enter into contracts and are required to prepare statements that report on their performance. In finance and operations apps, company is a type of legal entity. Currently, when integrating finance and operations apps with Dataverse using dual-write, you are limited to 40 legal entities. To support adoption of dual-write, especially by enterprise customers, the limit is increasing to 250 legal entities.

See also

June 2020 release (docs)

Finance and Operations data in Microsoft Dataverse – phase 5

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

Business value

This feature facilitates seamless data exchange between Finance and Operations apps and Microsoft Dataverse and customer engagement apps. Some of the key converging concepts such as customers, quotations, orders, and address book are harmonized between front-office and back-office apps for a unified experience.

Feature details

We are continuously making dual-write a seamless experience by harmonizing the converging concepts between Finance and Operations apps and customer engagement apps. This allows businesses to exchange near-real-time data in a synchronous, bidirectional fashion beyond application boundaries, giving users a unified experience.

Knowing every business is unique, we have made the dual-write framework extensible. This includes enabling custom entities, as well as extensions to existing entities, to fully use Microsoft Dataverse and surrounding tools for your most important business data. For more information, see Dual-write home page.

The supported scenarios can be further enriched by customers and partners so they extend across Finance and Operations apps, Dataverse, and customer engagement apps.

In 2021 release wave 2, we will improve the operational aspects of the dual-write orchestration package and also improve the demo experience.

See also

Dual-write home page (docs)

Mobile offline for Finance and Operations virtual tables

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Nov 2021	To be announced

Business value

First-party app teams, customers, and partners can take advantage of Power Platform for Finance and Operations data for mobile offline scenarios. This feature enables the deprecation of the Finance and Operations mobile framework.

Feature details

Finance and Operations apps can already be used as a virtual data source in Microsoft Dataverse, and support full create, read, update, and delete operations from Dataverse and Microsoft Power Platform. This also means that they can be used on Power Apps mobile scenarios. This feature further extends these capabilities by adding the option to work seamlessly with Finance and Operations data while in offline mode when there is no connectivity. Once connectivity is restored, any changes made while offline are synchronized.

Power Platform convergence

Overview

Microsoft Power Platform provides a suite of capabilities for Dynamics 365 applications via the Power Platform admin center. Today, Finance and Operations apps are not managed by the Power Platform admin center; however, over time more and more management capabilities will be migrated from Dynamics 365 Lifecycle Services to the admin center.

In the interim, customers will be able to unlock features, such as dual-write, virtual entities, add-ins, create/update/delete events, business events via Dataverse, and more via Microsoft Power Platform integration functionality in Lifecycle Services.

New scenarios enabled with Power Platform convergence

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

Business value

Microsoft Power Platform integration removes the barriers to entry for customers to fully harness the Microsoft Power Platform stack with each of their Finance and Operations environments. Features such as dual-write become a one-click experience to set up. Add-ins are now unlocked for an environment using Microsoft Power Platform integration. Virtual entities are also made available by default in the environment. Business events and create/update/delete (CUD) events in Finance and Operations apps are also integrated with Microsoft Dataverse. Note that CUD events are only going to be available with Microsoft Power Platform integration.

Feature details

Microsoft Power Platform provides a suite of capabilities for Dynamics 365 applications via the Power Platform admin center. Today, Finance and Operations apps are not managed by the admin center; however, over time more and more management capabilities will be migrated from Dynamics 365 Lifecycle Services to the admin center. In the interim, customers will be able to unlock features, such as dual-write, virtual entities, add-ins, CUD events, business events via Dataverse, and more via Microsoft Power Platform integration functionality in Lifecycle Services.

Set up Microsoft Power Platform integration

Using a new experience on each environment in Lifecycle Services, customers can complete the initial setup of the Microsoft Power Platform environment. This will provision an environment of the same type (sandbox or production) in the Power Platform admin center. This environment in the admin center will have the same name as the one from Lifecycle Services, and you will also see the Finance and Operations URL populated on the environment in the admin center. This environment will be powered by Microsoft Dataverse and will have several platform solutions preinstalled for virtual entity support, dual-write orchestration, and more.

Unlock dual-write application setup

Once the setup is completed in Lifecycle Services, the dual-write application setup button will be enabled. From here, customers who want to enable this functionality can do so from

Lifecycle Services in a fast and easy manner. Customers can then choose which entity maps to sync from inside the Finance and Operations app.

Virtual entities

Virtual entities are installed in the environment with the Microsoft Power Platform integration. It will no longer be required to set up manual connections between the environments as the environments are preconnected.

Authentication and authorization

Starting with version 10.0.20, Finance and Operations users who use virtual entities will no longer be required to be manually added or managed in Dataverse. When Microsoft Power Platform integration is enabled, Finance and Operations users will be automatically added to Dataverse just in time when users access virtual entities from Power Apps. This functionality can be used by enabling flight BusinessEventsCDSIntegration in Finance and Operations apps.

Finance and Operations business events in Dataverse

Starting with version 10.0.20, when Microsoft Power Platform integration is enabled, business events in Finance and Operations apps will converge with business events in Dataverse. This will mean that, when a business event happens in a Finance and Operations app, the event will be available in Dataverse. Subscribers to Finance and Operations business events will receive the event from Dataverse. This will also enable execution of C# plug-ins in Dataverse for Finance and Operations scenarios that execute in response to business events.

Finance and Operations CUD events in Dataverse

Starting with version 10.0.20, when Microsoft Power Platform integration is enabled, CUD events will be available for Finance and Operations OData-enabled data entities. It will be possible going forward to subscribe to create, update, and delete events on Finance and Operations OData-enabled entities. CUD events will be exposed via virtual entities in Dataverse. The CUD operation in a Finance and Operations app can happen via the Finance and Operations user interface, Power Apps/Power Portal using virtual entities, or from Finance and Operations OData APIs. The CUD event will consistently trigger the entity regardless. This also enables execution of C# plug-ins in Dataverse for Finance and Operations scenarios that execute in response to CUD events.

Dev tools

The Plugin Registration Tool will enable registering C# plug-ins for the CUD events and business events coming from Finance and Operations apps. With the release of a Visual Studio extension for Microsoft Power Platform, developers can explore Dataverse environments and write, register, deploy, and debug C# plug-ins directly from within Visual Studio. For developer audiences already working in Visual Studio, such as Finance and Operations developers, this will provide one work space (Visual Studio) to author their customizations across the Dynamics 365 apps in Dataverse and Finance and Operations apps.

Unlock additional features

Additionally, once the setup is completed in Lifecycle Services, the add-ins experience will be enabled as one-click installs from the environment details page.

Human Resources

Overview of Dynamics 365 Human Resources 2021 release wave 2

Dynamics 365 Human Resources helps businesses empower and engage their workforce, provide modern benefits packages, and stay compliant. It allows HR professionals to be more strategic, providing the workforce insights they need to build better organization structures, compensation, benefits, leave and absence, compliance, employee and manager self-service, and performance management programs. Human Resources also centralizes people data to build an HR ecosystem, using Microsoft Power Platform to tailor workflows, improve business intelligence, and connect with third-party best-of-breed HR solutions. Human Resources connects people and operations data to help you optimize workforce costs and take better care of employees.

For 2021 release wave 2, we will focus on three key areas:

- **Broaden the human capital management (HCM) ecosystem**: Continue broadening our HCM ecosystem through integration APIs and strategic partnerships.
- **Reimagine the employee experience**: Expand our investments in the employee experience and bringing those experiences into the flow of work.
- **App unification**: Deliver app unification through a simplified platform with better application lifecycle management tooling and extensibility.

The next sections provide details about the specific features we're releasing across these areas.

What's new and planned for Dynamics 365 Human Resources

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Benefits management

Benefits management provides you with a flexible solution that supports a wide variety of benefit options. Human Resources also includes an easy-to-use employee experience that showcases your offerings.

Feature	Enabled for	Public preview	General availability
Redesigned bulk actions inquiry in Benefits management administration	Users by admins, makers, or analysts	Nov 2021	Jan 2022

General

We're enhancing our user experience, and we're providing general improvements to Human Resources that apply to multiple workspaces and forms.

Feature	Enabled for	Public preview	General availability
Consistent environment management and integrations between Human Resources and Finance and Operations apps	Admins, makers, marketers, or analysts, automatically	Dec 2021	Feb 2022
Create one set of human resources capabilities within Dynamics 365	Admins, makers, marketers, or analysts, automatically	Dec 2021	Mar 2022

Integrations and extensibility

A core focus for Dynamics 365 Human Resources is ensuring customers are able to extend and expand application functionality through integrations and customizations. We're making new integrations available and providing new features that streamline custom integrations through Microsoft Dataverse.

Feature	Enabled for	Public preview	General availability
Improved extensibility options	Admins, makers, marketers, or analysts, automatically	Dec 2021	Feb 2022

Leave and absence

The Leave and absence workspace provides a flexible framework for creating new leave plans, workflows for managing requests, and an intuitive self-service page for employees to request time off. Analytics help your organization measure and monitor leave balances and usage for your leave plans.

Feature	Enabled for	Public preview	General availability
Manage employee sick leave	Users by admins, makers, or analysts	Mar 2022	To be announced

Description of **Enabled for** column values:

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

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

Benefits management

Overview

Benefits management provides you with a flexible solution that supports a wide variety of benefit options. Human Resources also includes an easy-to-use employee experience that showcases your offerings.

Redesigned bulk actions inquiry in Benefits management administration

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

Business value

This feature will provide a simplified user experience by adding bulk editing capabilities to Benefits management administration in Human Resources.

Feature details

Often, benefits administrators enroll employees or confirm the selections employees make from Employee self-service. The only way to do that currently is through the **Worker benefits update** form on an employee-by-employee basis, which can be time consuming and repetitive.

With the new inquiry view, benefits administrators will be able to:

- Quickly select and confirm the selection of all employee benefit enrollments.
- Look at different data pivots based on plan types, employee types, and plan bundles, and do bulk selections based on those pivots.
- Look at flex credit allocations for applicable plans and quickly identify anomalies where credits aren't completely allocated.
- Look at enrollment information based on custom criteria (filter based on query) and save those custom views as shortcuts.

General

Overview

We're enhancing our user experience, and we're providing general improvements to Human Resources that apply to multiple workspaces and forms.

Consistent environment management and integrations between Human Resources and Finance and Operations apps

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Dec 2021	Feb 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 Finance and Supply Chain Management. This will bring together disparate Human Resources data into a single solution to create market clarity, improve extensibility, and drive consistency across Finance and Operations apps. These new capabilities will provide a consistent admin experience for managing the application lifecycle for Human Resources.

Feature details

Deploying, updating, and integrating among applications can be a complex process. It becomes even more complex when you need different approaches for different applications. By driving consistency among Human Resources and other Finance and Operations apps, you can better plan and manage how you deploy, update, and integrate Human Resources.

You'll be able to manage environments, updates, and integrations for Human Resources the same way you do for other Finance and Operations applications, such as Finance, Supply Chain Management, and Project Operations.

This feature provides you with consistency when it comes to:

- Management of environments within Dynamics 365 Lifecycle Services, issue search, and Regression Suite Automation Tool (RSAT).
- The experience for how upgrades, updates, and hotfixes are applied to environments.
- Integration options with Microsoft Power Platform using virtual entities and dual-write.
- The experience for how continuous delivery of custom solutions or extensions is applied to environments.
- Regional availability.

Key benefits of the product merge.

Create one set of human resources capabilities within Dynamics 365

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Dec 2021	Mar 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.

The capabilities and investments that have been made in Human Resources will be available within Finance.

Some of these capabilities include:

- Leave and absence management
- Benefits management
- Task management

Integrations and extensibility

Overview

A core focus for Dynamics 365 Human Resources is ensuring customers are able to extend and expand application functionality through integrations and customizations. We're making new integrations available and providing new features that streamline custom integrations through Microsoft Dataverse.

Improved extensibility options

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Dec 2021	Feb 2022

Business value

This new capability will allow the same extensibility options in Human Resources that customers today get from all other Finance and Operations apps.

Feature details

Being able to extend Dynamics 365 Human Resources is key to many organizations to ensure that specific business processes related to industry, region, or company policy are enabled. By improving the options available to extend Human Resources, companies can provide employee-facing experiences to complete forms or update their information, and they can also extend the business logic associated with these actions to complete business process requirements.

Improving extensibility options enables companies to:

- Take advantage of the tooling available as part of Finance and Operations cross-app capabilities.
- Continue using Microsoft Power Platform tools to extend when needed.

Leave and absence

Overview

The Leave and absence workspace provides a flexible framework for creating new leave plans, workflows for managing requests, and an intuitive self-service page for employees to request time off. Analytics help your organization measure and monitor leave balances and usage for your leave plans.

Manage employee sick leave

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

Business value

This feature provides organizations with the ability to manage employee sick leave in more detail to meet company and regulatory policies.

Feature details

This feature provides organizations with the ability to manage employee sick leave in more detail to meet company and regulatory policies. Sick leave management will include the following capabilities:

- Open-ended sick leave requests
- Return-to-work notices
- Sick leave reporting
- Management and approval of sick leave requests

Commerce

Overview of Dynamics 365 Commerce 2021 release wave 2

Dynamics 365 Commerce is an end-to-end solution delivering seamless commerce across all channels, encompassing sales, mobility, intelligence, and productivity, to help customer-facing businesses achieve more in a cloud-first, mobile-first way. The app offers comprehensive support to operate a broad range of business processes including e-commerce, clienteling, point of sale, call center, merchandising, inventory, and channel management capabilities, while providing a unified and immersive customer experience (for B2C and B2B engagements) across physical and digital channels.

Organizations can drive better business outcomes with Commerce through:

- **Engaging customers across channels:** Give your customers or partners the option to purchase when, how, and where they want — on any device — by delivering a frictionless and consistent engagement across physical and digital channels.
- **Getting everything to build and run digital commerce:** Grow your business with a unified digital commerce solution that scales to meet your needs across business and consumer sales.
- **Enabling AI-driven intelligent commerce:** Delight your customers with engaging, personalized, and item-based AI-powered recommendations discovery experiences to increase repeat visits, customer retention and loyalty, while increasing conversions and average order values.
- **Modernizing retail stores and streamlining operations:** Create personalized and friction-free retail commerce experiences through user-friendly applications powered by robust back-office operations.
- **Gaining agility and scalability through a natively headless solution:** Support traditional and emerging channels by using an agile, API-driven headless commerce engine to help adapt to current and emerging needs.

Key investments for this wave include:

- **Customer segmentation and targeting:** Digital commerce organizations will be able to use site builder to target customer segments with specific page layouts and content
- **Integration with Microsoft Clarity:** Organizations can utilize Microsoft Clarity to view how end users interact with pages across their site, including mouse-action recordings, heatmaps, and analytics.
- **Customer specific catalogs:** Organizations can define specific product catalogs by business partner organization, which will restrict the business buyers to see and order products only from the catalog associated with their organization.

- **Enhanced reordering experience:** Business buyers will be able to reorder the entirety of a past order or pick and choose individual products from a past order for re-order.
- **Reassign admin privileges:** Admins of business partner organizations can designate one or multiple other users as admins and will also be able to revoke the admin privileges of another admin user.

What's new and planned for Dynamics 365 Commerce

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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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
Customer segmentation and targeting	Admins, makers, marketers, or analysts, automatically	-	Oct 2021
Commerce localization for Russia	Users by admins, makers, or analysts	Aug 2021	Oct 2021
Enforce custom query change tracking configurations on retail transaction tables due to performance impacts	Admins, makers, marketers, or analysts, automatically	✔ Aug 2, 2021	Oct 2021
Enhanced reordering experience in e-commerce	Users by admins, makers, or analysts	✔ Aug 2, 2021	Oct 2021
Support inventory movement between in-store locations from POS	Users by admins, makers, or analysts	✔ Aug 2, 2021	Oct 2021
Updates to Commerce globalization feature states with version 10.0.21	Users, automatically	Aug 2021	Oct 2021

Feature	Enabled for	Public preview	General availability
Grant and revoke B2B e-commerce business partner user admin privileges	Admins, makers, marketers, or analysts, automatically	-	Oct 2021
Support for catalogs in e-commerce channel	Admins, makers, marketers, or analysts, automatically	-	Oct 2021
Require moderator for ratings and reviews	Users by admins, makers, or analysts	-	Nov 2021
Geo-detection and redirection for e-commerce sites	Users by admins, makers, or analysts	Sep 2021	Nov 2021
GST in e-commerce for India	Users by admins, makers, or analysts	-	Dec 2021
System monitoring and diagnostics for e-commerce	Admins, makers, marketers, or analysts, automatically	Dec 2021	Jan 2022
Digital signing of retail transactions for Norway based on fiscal integration framework	Users by admins, makers, or analysts	-	Feb 2022
Improved stock count operation in POS	Users by admins, makers, or analysts	Dec 2021	Feb 2022
Improved support for batch tracking dimension in store inventory operations	Users by admins, makers, or analysts	Dec 2021	Feb 2022

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
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For a list of the countries or regions where Dynamics 365 business applications are available, go to the International availability guide. For more information about geographic areas and datacenters (regions), go to the Dynamics 365 and Microsoft Power Platform availability page.

Customer segmentation and targeting

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

Business value

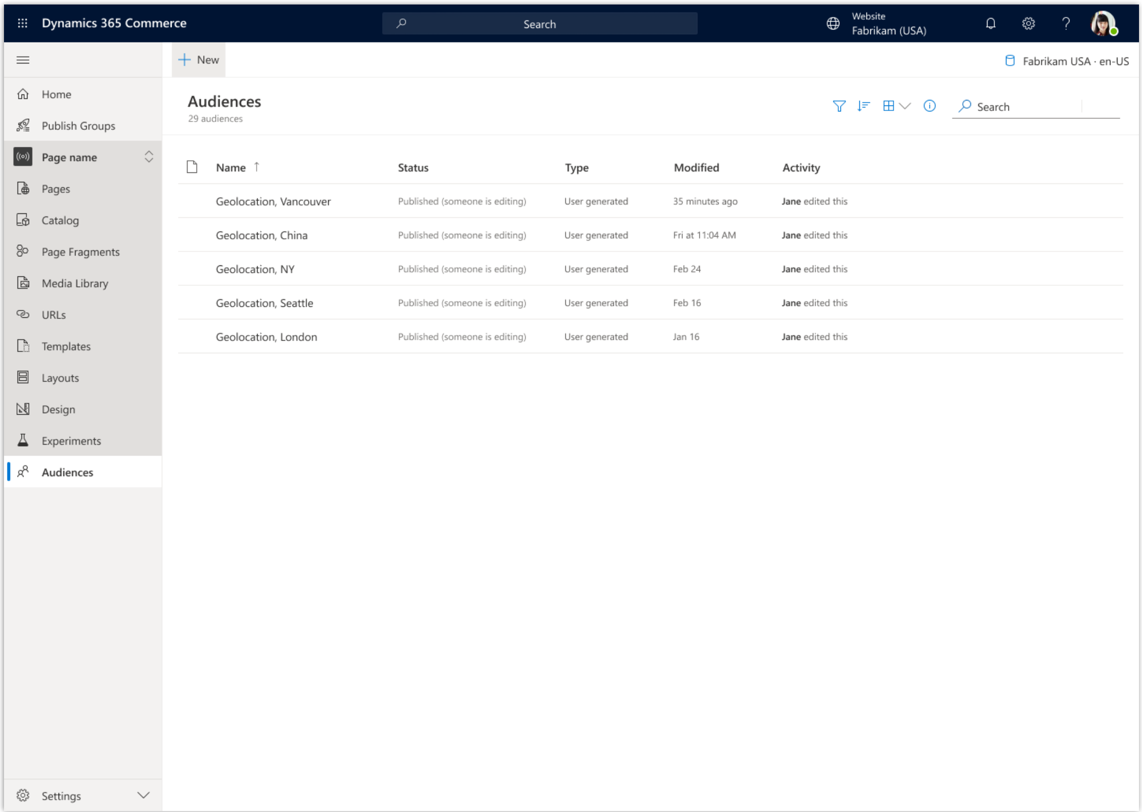
Dynamics 365 Commerce enables organizations to increase customer engagement and satisfaction by using tools in site builder to target specific customer segments with different experiences based on the shopper's device, geo-location, and other dynamically derived attributes from the shopper's browser request.

Feature details

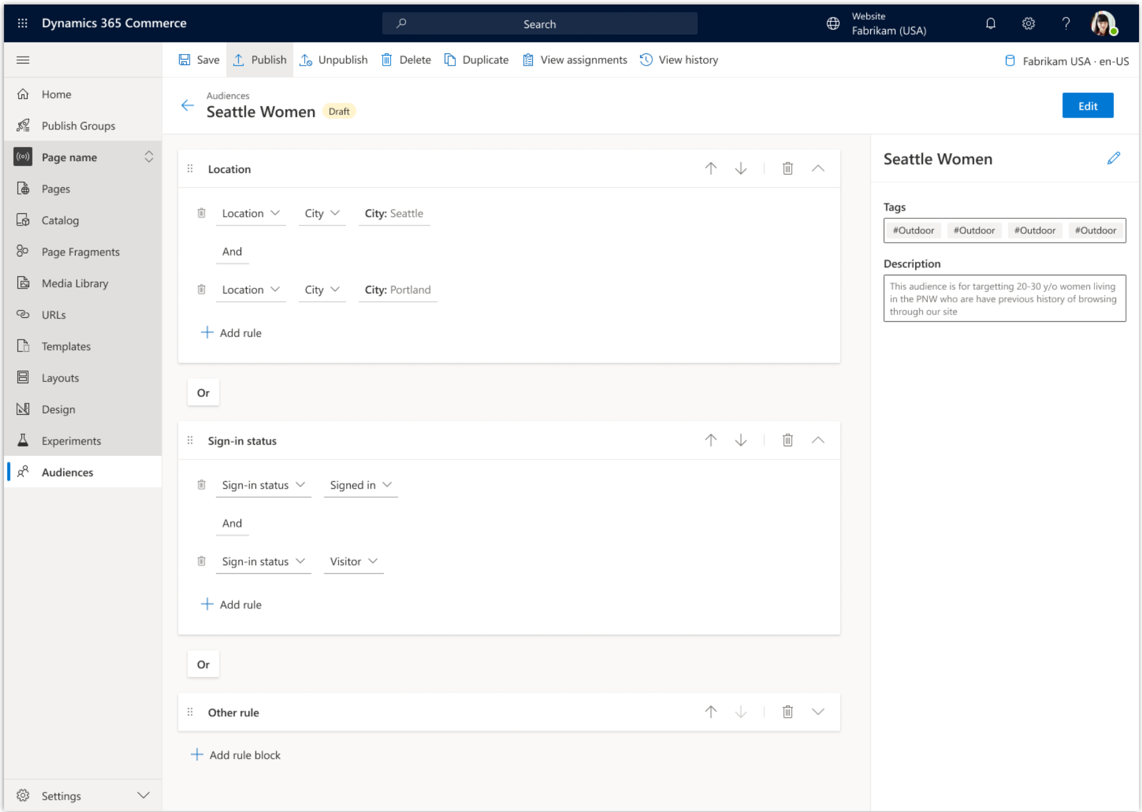
This feature will enable segmentation of customer data such as device type, geo-location, market, or language, gathered from the customer's web browser. Site builder can then be used to generate audience groupings that can be applied to campaigns and experiments across the digital commerce channel.

Content variants can be authored in site builder and associated with targeting rules to ensure easy authoring with powerful results.

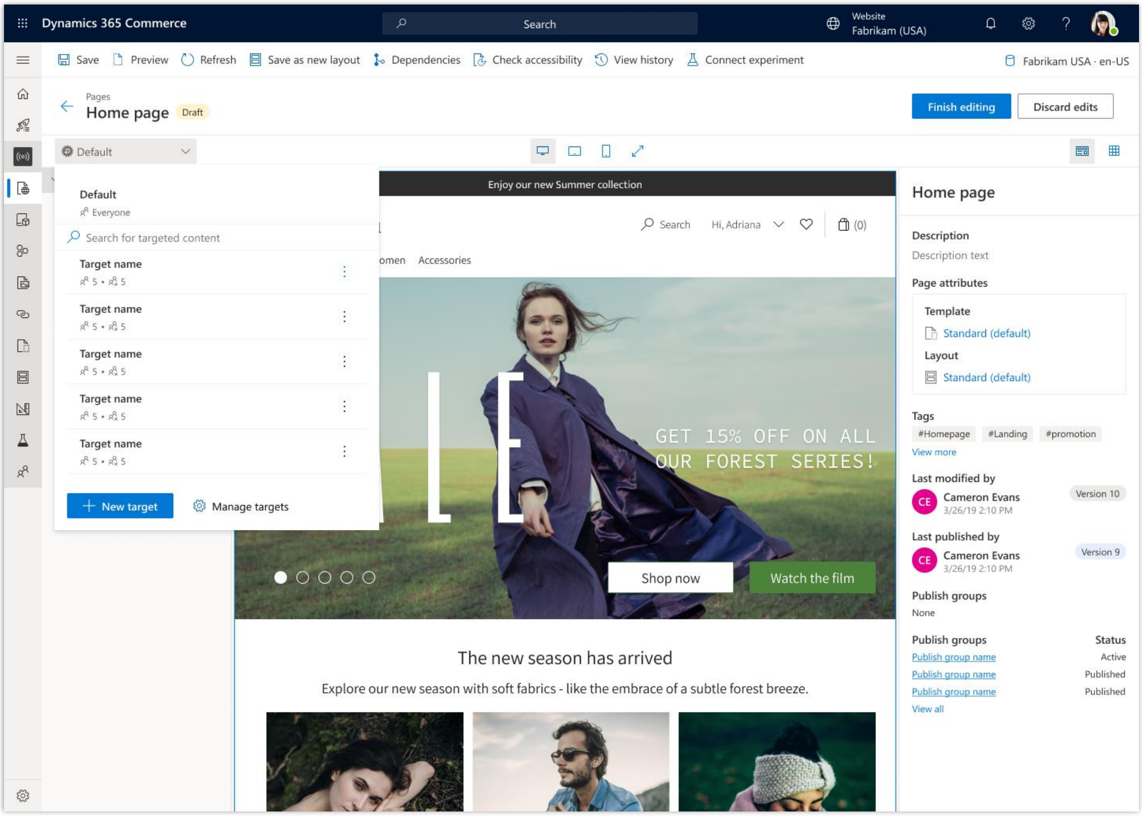
Segmented targeting will support page layouts and content-based scenarios within site builder.



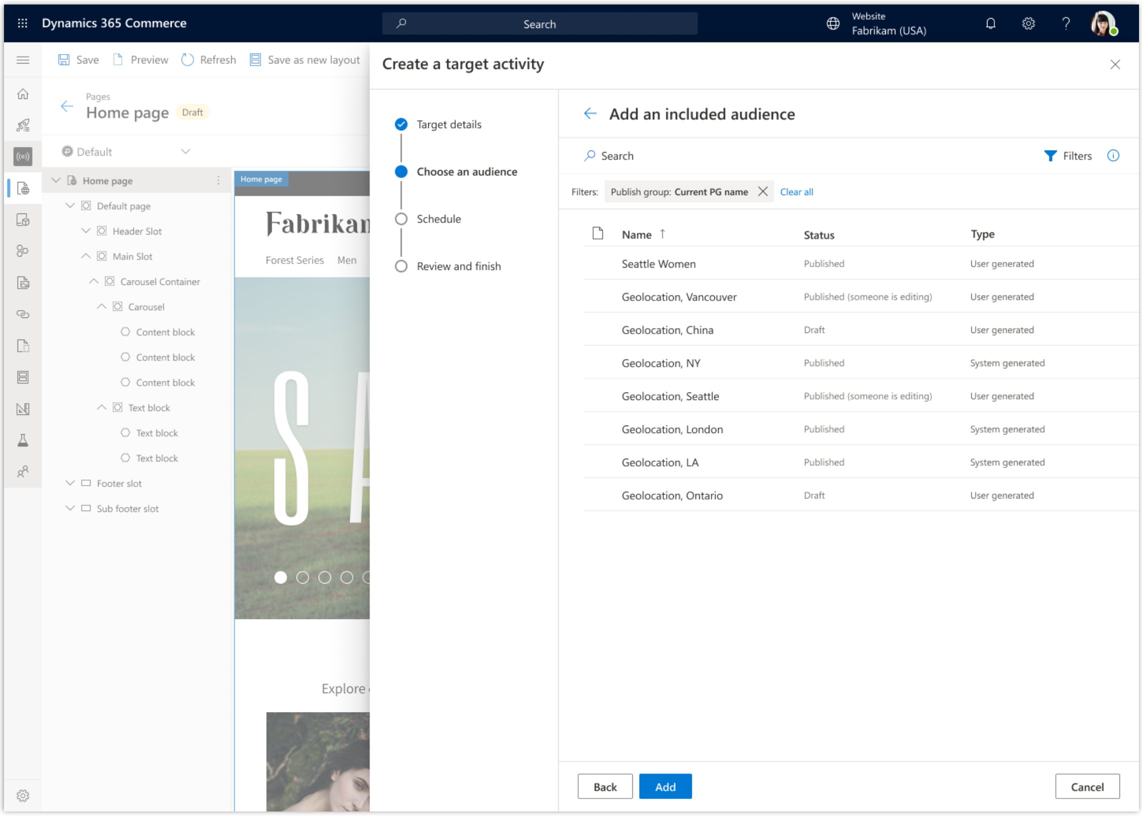
Easily create and manage customer audiences directly in the Dynamics 365 Commerce Site Builder.



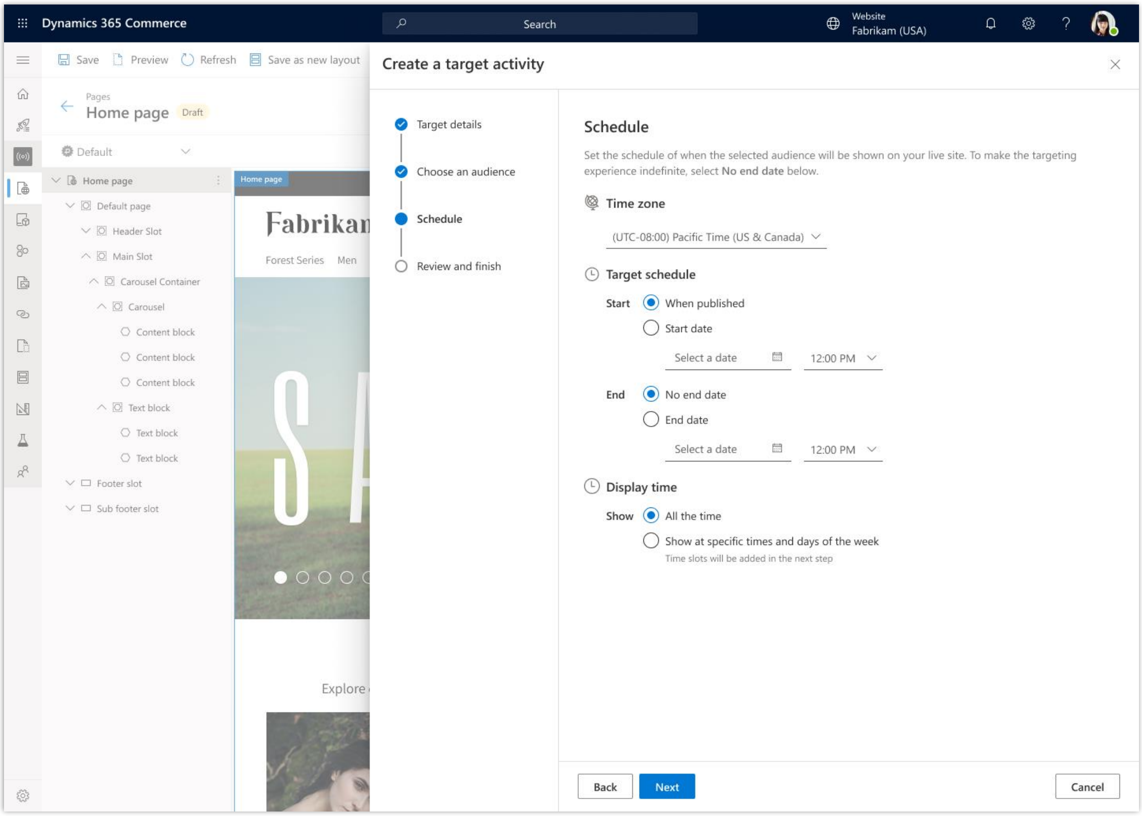
Use rules to tailor customer audiences to meet precise business needs and increase conversion rates.



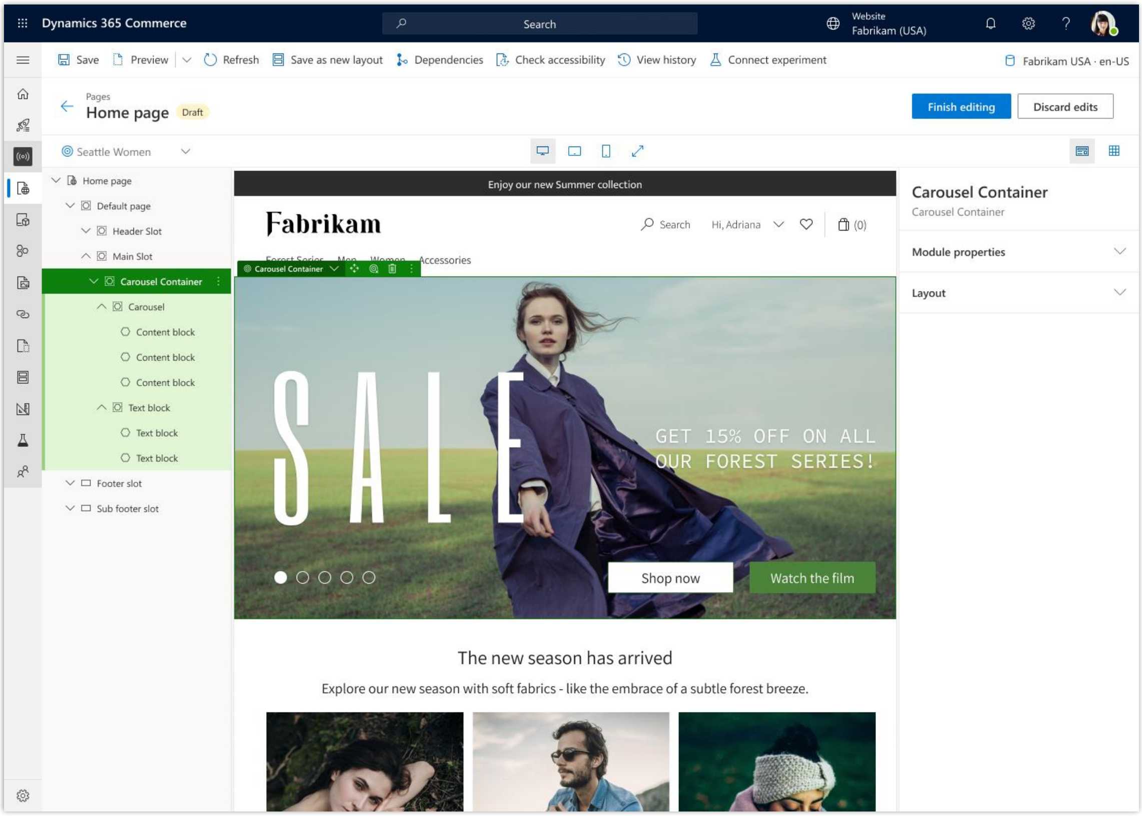
Easily select or create targeted activities in the Dynamics 365 Site Builder's visual page builder.



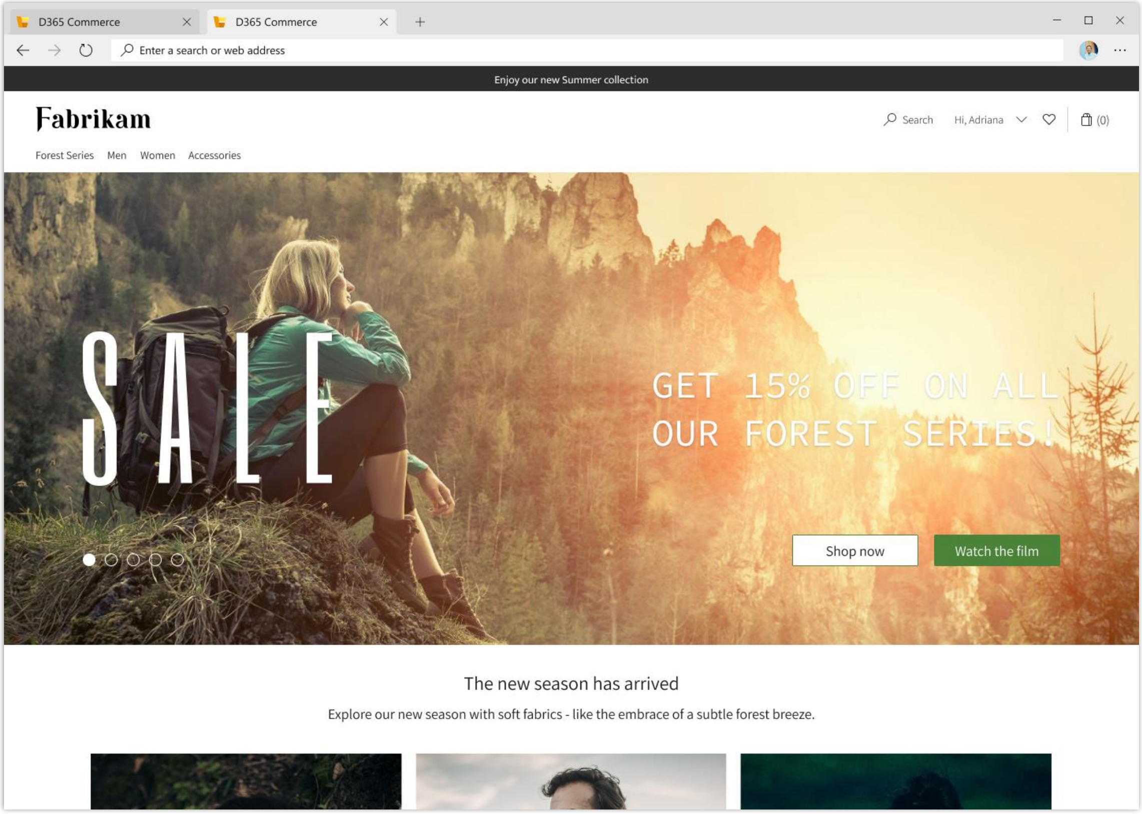
Select which audiences will receive a differentiated marketing experience.



Select a date and time for the targeted activity to go into effect for your customers.



Edit the differentiated marketing experience directly in visual page builder.



Preview and share the differentiated marketing experience with colleagues before it goes live.

Commerce localization for Russia

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

Business value

With this release, Commerce customers with operations in Russia will be able to move to the modern Dynamics 365 Commerce service and ensure their implementation is compliant with local regulatory requirements in Russia.

Feature details

Commerce localization for Russia includes features critical for implementations of Dynamics 365 Commerce in Russia, such as handling of cash payments, prepayments, and customer returns, and processing of gift card operations and loyalty point redemptions according to local requirements. It also includes a sample of integration of point of sale (POS) with fiscal printers.

At the time of general availability, this functionality will provide the following capabilities:

- Processing of cash payments using petty cash journals in Commerce headquarters.
- Processing of prepayments and posting of VAT for prepayments in Commerce headquarters.
- Handling of customer returns according to local requirements.
- A sample of the integration of the POS with a fiscal printer.

The fiscal printer integration sample leverages the fiscal integration framework, supports one of the popular fiscal printer models available on the Russian market, and enables registration of sales in various cash-and-carry and customer order sales scenarios. It also provides options for error handling in basic scenarios such as when retry is possible, as well as more advanced scenarios such as registering a completed transaction that was not previously registered in the fiscal printer. The sample is a part of the Retail SDK and can be built and used as-is. Implementation partners can also extend the integration functionality to cover all required retail scenarios or build integration with other fiscal printers based on the sample.

The following capabilities will not be available at general availability, but may be made available in later updates:

- Support of customer orders in fiscal printer integration.
- Return policies (payment method control and more).
- Processing of issued gift cards as prepayments and a fiscal printer functionality to support this.
- Processing of a loyalty point redemption as a price discount in a retail transaction and a fiscal printer functionality to support this.
- Payment integration.
- Cash collection from retail stores.
- E-commerce capabilities for Russia.
- Gift card policies.
- Pricing enhancements.
- Labeling enhancements.
- N-1 support for upgrade from AX 2012 R3.

Enforce custom query change tracking configurations on retail transaction tables due to performance impacts

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

Business value

This feature will improve the performance of Dynamics 365 Commerce when using the Data Management export framework combined with change tracking capabilities on retail transaction tables.

Feature details

This change will be released in Commerce version 10.0.21.

The retail transaction-related entities impacted by this change are:

- RetailTransactionAdditionalAddressLineEntity
- RetailTransactionAddressLineEntity
- RetailTransactionAffiliationLineEntity
- RetailTransactionAttributeEntity
- RetailTransactionBankedTenderTransEntity
- RetailTransactionCashManagementTransEntity
- RetailTransactionChargeTaxTransEntity
- RetailTransactionDisabledValidationRuleEntity
- RetailTransactionDiscountLineEntity
- RetailTransactionEntity
- RetailTransactionFiscalCustomerEntity
- RetailTransactionFiscalTransEntity
- RetailTransactionFiscalTransExtendedDataEntity
- RetailTransactionGTETaxLineEntity
- RetailTransactionIncomeExpenseLineEntity
- RetailTransactionInfoCodeLineEntity
- RetailTransactionLoyaltyLineEntity
- RetailTransactionLoyaltyRewardPointsLineEntity
- RetailTransactionMarkupLineEntity

- RetailTransactionPaymentLineEntity
- RetailTransactionPaymentLineV2Entity
- RetailTransactionSafeTenderTransEntity
- RetailTransactionSalesLineEntity
- RetailTransactionSalesLineV2Entity
- RetailTransactionServiceProfileEntity
- RetailTransactionSupplementaryInvoiceEntity
- RetailTransactionTaxLineEntity
- RetailTransactionTaxMeasureEntity

In Commerce versions 10.0.20 and earlier, if a user configures **change tracking** in the **Data Management Framework** at the entire entity or primary table level for any of the retail transaction tables listed, massive data export updates are triggered when any record related to the retail transaction is changed. For example, changes to a customer address or a store channel configuration. The data export updates cause a performance impact on the environments, as the core retail transaction entities aren't changed and, in general, retail transactions entities rarely change after their initial creation.

In Commerce versions 10.0.21 and later, if a user enables **change tracking** in the **Data Management Framework** for any of the retail transaction-related entities listed, the user can not select the option to enable change tracking for the entire entity or the primary table. Instead, only the **enable custom query** option configuration is available. The custom query option will ensure that change tracking will only be triggered by changes to core retail transaction tables and not by changes to other tables that have a reference relationship to the retail transaction table.

If an organization already has change tracking enabled for any of the retail transaction entities listed above and they are configured with the **Enable entire entity** or **Enable primary table** configuration, upgrading to Commerce version 10.0.21 will not immediately change the change tracking configuration for these entities. Upgrading to Commerce version 10.0.21 should not cause any regression or negative impact to an existing data export configuration on any of the tables listed.

After upgrading to Commerce version 10.0.21, if a user enables change tracking on a retail transaction-related entity for the first time, or if they disable change tracking on an existing retail transaction entity and then later try to re-enable change tracking for that entity, the user will no longer be able to turn on change tracking at the entire entity or primary table level, and only the **enable custom query** option will be available.

Organizations can modify the **DefaultCTQuery** method to extend the customer query and add additional tables to the query if needed.

Enhanced reordering experience in e-commerce

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

Business value

According to research, sites that support reordering of previously purchased items see a high percentage of customers using this capability. With this release, Dynamics 365 Commerce will help organizations improve customer retention by enhancing the reordering experience.

Feature details

This feature introduces the following enhancements to the existing reordering ("buy it again") function for e-commerce sites:

- The "order details" module has a configurable option for site builders to enable or disable the reordering function.
- Instead of taking customers to the product details page, the enhanced reordering function adds items directly to the shopping bag.
- With the enhanced reordering function, customers can add an individual item, multiple selected items, or all items in an existing order to their shopping bag.

Support inventory movement between in-store locations from POS

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

Business value

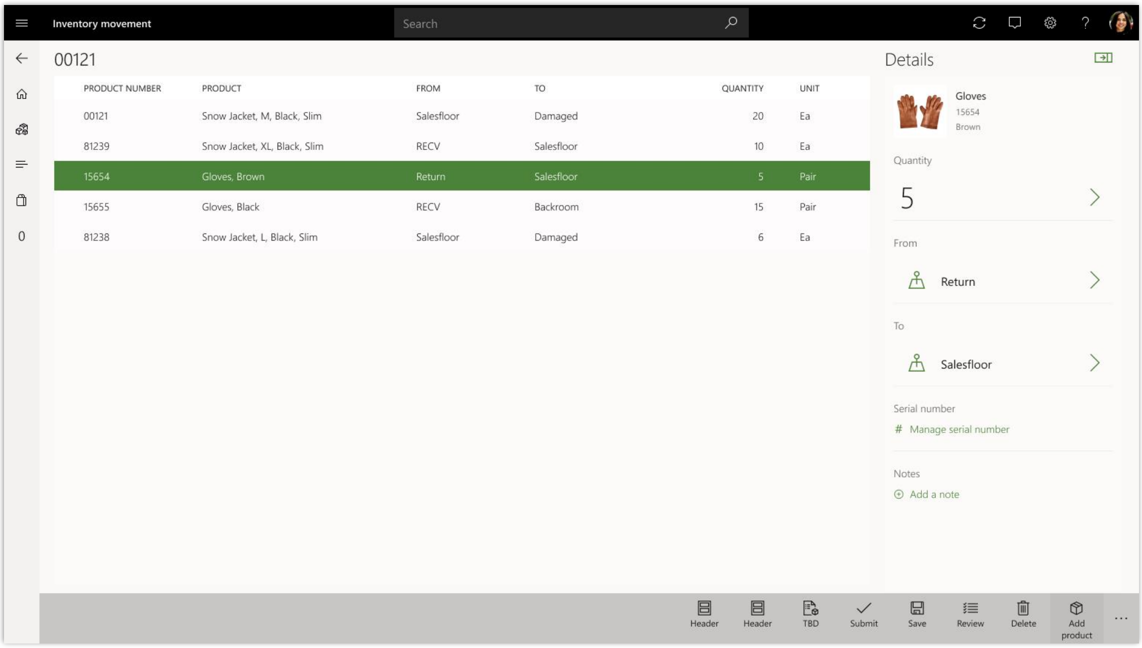
Dynamics 365 Commerce customers can reduce their legacy IT costs by enabling inventory movements between in-store locations directly from their point of sale (POS).

Feature details

This feature enables a new store inventory management operation in Commerce POS that allows users to move inventory of one or more specific products from one inventory location to another within a store warehouse.

- The feature leverages the inventory transfer journal capability from Commerce headquarters to drive the inventory movement processing.
- The new operation supports a barcode scanning experience to add products into the movement request.

- The new operation allows users to enter serial numbers during the movement for serial-controlled products.
- The review function is available in this operation for users to precheck missing or incorrect data prior to submitting the request.



Inventory movement operation in POS.

Updates to Commerce globalization feature states with version 10.0.21

Enabled for	Public preview	General availability
Users, automatically	Aug 2021	Oct 2021

Business value

Several Commerce globalization features are progressing in their feature lifecycle starting with the version 10.0.21. This will streamline the feature configuration process for customers deploying Commerce in various countries or regions.

Feature details

These features will be turned on by default in Commerce version 10.0.21, but they can be manually disabled:

- Support for internal and external connectors in the fiscal integration framework.
- (India) Search customers by tax registration numbers in Commerce point of sale (POS).
- (Italy) Customer information management in Commerce POS.

- (Retail GST for India) Update credit notes with references to original invoices.
- (Poland) Customer information management in Commerce POS.
- User-defined certificate profiles for retail stores.

Grant and revoke B2B e-commerce business partner user admin privileges

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

Business value

This feature enhances the productivity of users of a business partner organization in a B2B scenario by making it possible for admins to grant and revoke admin privileges.

Feature details

As a part of the onboarding process for a business partner organization, the person initiating the request to become a business partner is designated as the admin user for that partner. In the capacity as the admin, this person has some enhanced privileges. Organizations might have a need to designate additional users as admins or revoke the admin privileges of an existing admin. This feature enables an admin user to designate and revoke admin privileges for a different business partner user.

The following capabilities are planned as part of this feature:

- A user with admin privileges can grant admin privileges to one or more non-admin users.
- A user with admin privileges can revoke the admin access of one or more admin users.
- The ability to validate that at least one admin user is associated with a customer hierarchy.

Support for catalogs in e-commerce channel

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

Business value

This new capability in Dynamics 365 Commerce will enable B2B organizations to create stronger business relationships with business partners through the creation of partner-specific catalogs that reflect the products and special pricing that have been negotiated with the partner.

Feature details

In a B2B e-commerce business model, business partner organizations may only contract to purchase a subset of the products from the catalog carried by the retailer. Typically these subsets of products are also negotiated for special prices. Accordingly, business partner organizations want their business buyers to see and buy from only these contracted subsets of products from the B2B e-commerce website. This scenario is achieved by defining one or more business partner-specific catalog with products and prices as negotiated with the business partner. This feature will enable retailers to define business partner-specific catalogs with products and prices as negotiated with them. When logged into the site, business partner users will only see the products and prices as defined in the catalog associated with their organization.

The following capabilities are planned as part of this feature:

- Associate a default catalog to the e-commerce website.
- Associate one or multiple catalogs to the customer hierarchies associated with a business partner organization and set a default catalog.
- Associate a default catalog to the customers in the customer hierarchy.
- Render the e-commerce site with products as per the catalog associated with the customer that's logged in.
- Provide capability for a customer to change the default catalog to another valid catalog on the e-commerce site.

Require moderator for ratings and reviews

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

Business value

With this feature, businesses can opt-in to require manual moderation and manual publish of ratings and reviews, instead of having ratings and reviews automatically published to an e-commerce site. Azure Cognitive Services will continue to filter profanity in titles and content. With this feature, businesses have more control over the content that's published to their sites.

Feature details

This feature enables the following capabilities for businesses:

- Businesses can enforce moderation before ratings and reviews are published to their e-commerce sites.
- Ratings and reviews must be approved before they are published to an e-commerce site.

- Moderators can filter ratings and reviews that have been approved and not approved.
- Moderators can approve ratings and reviews for publishing or take down ratings and reviews if they have a valid business reason.

Geo-detection and redirection for e-commerce sites

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2021	Nov 2021

Business value

Dynamics 365 Commerce will allow you to provide the most relevant and personalized shopping experience for your e-commerce customers based on their geographic location. You can grow customer engagement and retention when you can provide the products, category hierarchies, pricing, payment methods, product storytelling, and delivery options that are tailored to customers in specific countries and regions.

Feature details

Geo-detection and redirection gives you the ability to detect your customers' geographic location, and use that information to suggest or redirect them to the marketized and localized site that's most appropriate for them in their current location. Geo-detection and redirection consists of the following components and capabilities:

- **Enable location-based services for your e-commerce site**: When you enable location-based services site settings, your customers' location (as determined by information from their browser) is used to determine their country or region. That information will be used to offer them the best site URL based on your channel configuration.
- **Declare the countries and regions that your online channels support**: You can now associate one or more countries or regions with an online channel in Commerce headquarters. This list of countries and regions is exposed in site builder to use for configuring the e-commerce experience.
- **Associate countries and regions with channels and languages**: Every unique channel and language combination can be associated with a country or region that you specify for that channel in Commerce headquarters. The mappings you create are used to select the best URL for customers when they arrive at your site.
- **Display a country picker**: When your customers land on a URL that is not intended for the country or region they're in, you can display a site selector experience that lets them select the site for their country or region or continue on to the site they originally requested.
- **Auto-redirect customers**: You can choose to automatically redirect customers to the most appropriate site for the location they're in rather than prompting them to choose.

- **Save customer site preference**: When your customers select a site, their preferences will be persisted for the customer. It will also be used the next time the customer visits the site to automatically redirect him or her to the customer's desired site. Customers can always change their preferred site through the site picker.

GST in e-commerce for India

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

Business value

This features enables Dynamics 365 Commerce customers in India to implement e-commerce capabilities by ensuring the Goods and Services Tax (GST) is calculated on e-commerce orders.

Feature details

This feature includes the following capabilities:

- The GST can be calculated for an e-commerce order based on the delivery and invoice information specified on the order.
- GST can also be calculated for shipping charges included in an e-commerce order on the line level.
- Customer registration numbers (such as GSTIN or PAN) can be specified in a customer profile on an e-commerce site.

System monitoring and diagnostics for e-commerce

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Dec 2021	Jan 2022

Business value

This new capability will improve the productivity and efficiency of IT admins by providing the system diagnostics that reduce the time to detection, mitigation, and resolution for live-site incidents.

Feature details

Access to system diagnostic logs allows much better visibility for IT admins and enables improved time to detection, time to mitigation, and time to resolution of live-site incidents. IT admins are able to determine key contributing factors of incidents, which allows for targeted engagement with Microsoft support teams, or with implementation partners, ISVs, or other stakeholders.

System health visibility also allows IT admins to provide more informed support to their users. For instance, when fielding a support call from a website visitor, an IT admin can easily pinpoint when exactly the issue occurred, whether the issue was caused by an extension, and whether the issue is widespread or limited to specific e-commerce channels. Also, the IT admin can determine issue resolution as soon as the issue is resolved. The IT admin can also configure custom alerts for specific system health conditions for proactive monitoring using Microsoft Azure Monitor.

This feature enables IT admins to access diagnostic logs in Application Insights for e-commerce components. The following event types are included:

- Page views (all page views).
- All dependencies.
- Background calls (modeled as page view dependencies), from browser and NodeJS.
- User displayed error messages (modeled as exceptions), including 404 pages.
- Multistage cart operations (modeled as page view dependencies).

Digital signing of retail transactions for Norway based on fiscal integration framework

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

Business value

This new capability makes the implementation of Dynamics 365 Commerce easier for customers in Norway because the digital signing functionality that is required to be compliant with local cash regulations is now based on the fiscal integration framework.

Feature details

According to local cash register regulations in Norway, any retail sale must be digitally signed, and an excerpt from the signature must be printed in the customer's receipt for the sale. The digital signing of retail transactions for Norway now takes advantage of the fiscal integration framework, which means it supports all of the built-in fiscal integration capabilities. It is included in the out-of-box solution, but must be configured to be used. The functionality enables fiscal registration of sales by means of digital signing in various cash-and-carry sales and customer order scenarios, as well as fiscal registration of audit events of various types. The digital signing capabilities leverage user-defined certificate profiles and allow using certificates stored either in Azure Key Vault or locally.

The fiscal integration framework enables multi-national retailers to build common point of sale solutions that are compliant with different local fiscal regulations in the countries or regions that they operate in.

Improved stock count operation in POS

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

Business value

With this new capability, Dynamics 365 Commerce customers can improve the productivity of in-store personnel by enabling core stock counting activities directly in point of sale (POS) and eliminating the need to use Commerce headquarters or the Warehousing mobile app.

Feature details

This feature introduces several functional and experience enhancements to the stock count operation in the POS app:

- An optimized user experience for scanning barcodes that provides an easier way to add counting lines and update counted quantity.
- Support of in-parallel counting by multiple users. Counted quantities can be entered by users separately with data reconciliation occurring afterward.
- Support of serial-controlled items by entering serial numbers, and location-controlled items by specifying counting location during the counting process.
- New worker permission in Commerce headquarters to control whether the counting results submitted from POS should be directly posted to backend ERP system or should involve review processes.
- The improved operation uses the asynchronous document processing framework to eliminate timeout issues in the current stock count operation when users attempt to post large counting journals to Commerce headquarters.
- The review function is embedded in the operation to facilitate necessary data validations and ensure smooth processing and error handling.

Improved support for batch tracking dimension in store inventory operations

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

Business value

This new capability can enhance the productivity of store employees in industries that typically use inventory batch controlled stock keeping units (SKUs), such as pharmaceuticals and groceries, as employees will be able to perform batch controlled receipt, ship, count, and adjust processes directly on their point of sale (POS).

Feature details

This feature enables a comprehensive support of batch tracking dimension in the following POS inventory operations:

- **Inbound inventory operation**: Users can register or validate batch IDs when receiving batch controlled items into the store from purchase orders.
- **Outbound inventory operation**: Users can indicate which batches are being shipped out of the store to fulfill outbound transfer orders.
- **Inventory adjustment operation**: Users can indicate which batches are being adjusted in or out of store inventory.
- **Inventory movement operation**: Users can indicate which batches are being moved from one location to another in the store.
- **Stock count operation**: Users can register or validate batch IDs when counting batch controlled items.

Additionally, this feature respects the "blank issue allowed" and "blank receipt allowed" configuration of the batch tracking dimension group in Commerce headquarters to drive the data validation.

Fraud Protection

Overview of Dynamics 365 Fraud Protection 2021 release wave 2

Microsoft Dynamics 365 Fraud Protection brings together account protection, payment protection, and loss prevention, providing a 360-degree view of the fraud landscape to merchants to help them discover and combat fraud efficiently and effectively. We are investing in three areas in this release to amplify our customers' ability to fight fraud: Payment Service Provider (PSP) enablement, unhindered Fraud Protection trials, and deeper purchase and account protection fraud analytics.

Payment Service Provider enabled

With the new functionality, PSPs can offer Fraud Protection as a value-added service to their customers. Optimized experiences will enable PSPs to easily integrate Fraud Prevention into their existing infrastructure and enable them to combat fraud on behalf of their merchants or with their merchants. PSPs will be able to observe and manage fraud with their many merchants across multiple verticals and within merchants with deep hierarchies.

Evaluate Fraud Protection unhindered

Any user in your organization can evaluate all Fraud Protection capabilities for free and without the need for Azure AD tenant admin privileges.

Deeper analytics and reporting to amplify fraud observability, investigation, and mitigation

Fraud Protection will provide out-of-the-box curated data sets, metrics, and Power BI reports for purchase protection and account protection. This powerful functionality will help amplify the capacity of your fraud analyst to immediately observe and understand potential suspicious activity. Using the Power BI platform, your analyst can drive deep investigations that will inform a more complete strategy for protecting your business from fraud.

What's new and planned for Dynamics 365 Fraud Protection

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Feature	Enabled for	Public preview	General availability
Deep analytics and reporting to amplify fraud observability, investigations, and mitigations	Users, automatically	Oct 2021	-
Payment Service Provider (PSP) enabled	Users, automatically	Oct 2021	-
Evaluate Dynamics 365 Fraud Protection unhindered	Users, automatically	Feb 2022	-

Description of **Enabled for** column values:

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

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

Deep analytics and reporting to amplify fraud observability, investigations, and mitigations

Enabled for	Public preview	General availability
Users, automatically	Oct 2021	-

Business value

Dynamics 365 Fraud Protection will provide out-of-the-box curated data sets, metrics, and Power BI reports for purchase protection and account protection. This powerful new functionality will help amplify the capacity of your fraud team to immediately observe and understand potential suspicious activity, without needing to consult or hire data scientists. Using the Power BI platform, your team can drive deep investigations that will inform a more complete strategy for protecting your business from fraud.

Feature details

Fraud Protection will provide curated data sets, metrics, and Power BI reports for purchase protection and account protection.

- The score rule optimizer, fraud tracker, rule monitor, and monthly business review reports for purchase protection will enable you to analyze historical transaction data, perform operational tasks, and make informed operational decisions. For example, you'll have access to data to help you make decisions pertaining to the score threshold, rejection of risky transactions, estimating score threshold impact, analyzing fraud trends and performance, and conducting deep dive analysis with a lens on purchase fraud.
- The threat vulnerability analyzer and threat vulnerability trend reports for account protection will enable you to analyze account protection session data, investigate threat and fraud attacks at the session level, and make informed operational decisions. For example, you'll have richer insights pertaining to setting the score threshold, segmenting threat traffic, estimating score threshold impact, analyzing abusive traffic patterns, and validating machine learning score performance. The interactive tool will provide intelligence on various dimensions including geolocation, device configuration, IP, and reason code. The report from the tool will refresh every 24 hours with the latest account protection sessions and will retain account login and account creation sessions from the previous four weeks. The threat vulnerability trend report retains account login and account creation metrics and data from the previous four months.

Payment Service Provider enabled

Enabled for	Public preview	General availability
Users, automatically	Oct 2021	-

Business value

With this new functionality, Payment Service Providers (PSPs) will be able to offer Dynamics 365 Fraud Protection as a value-added service to their customers. Optimized experiences will enable PSPs to easily integrate Fraud Protection into their existing infrastructure and enable them to combat fraud on behalf of their merchants or with their merchants. PSPs will be able to observe and manage fraud with their many merchants across multiple verticals and within merchants with deep hierarchies.

Feature details

Fraud Protection will have multiple new features that enhance Payment Service Providers' ability to offer Fraud Protection as a value-added fraud protection service to all their merchants.

PSPs will be able to integrate Fraud Protection easily into their existing infrastructure to manage PSP taxonomies that encompass many merchants and multiple hierarchies within each merchant entity. PSP-focused experiences will be added to Fraud Protection to manage the creation and addition of multiple merchants and to observe and manage merchant fraud performance across a single merchant, multiple merchants, and across PSP verticals using artificial intelligence and other fraud management features in Fraud Protection such as rules and lists.

Evaluate Dynamics 365 Fraud Protection unhindered

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

Business value

Any user in your organization can evaluate all of the Fraud Protection capabilities for free and without the need for Azure Active Directory (Azure AD) tenant admin privileges, thus streamlining the evaluation process.

Feature details

Microsoft Dynamics 365 Fraud Protection will be available in a free trial version, available directly from the web. This will allow potential users to easily try Fraud Protection without the need for Azure AD tenant admin privileges. Fraud stakeholders and decision makers can more quickly evaluate the capabilities of Fraud Protection with the trial version.

SMB

Overview of Dynamics 365 Business Central 2021 release wave 2

Dynamics 365 Business Central is a comprehensive business application solution that is designed and optimized for small and midsized organizations. For 2021 release wave 2, Business Central investments center on helping users get to productive usage faster, whether they are new or existing customers. We expand the built-in tours to cover more standard entities for better onboarding of additional business roles. We continue our *Better with Microsoft 365* investment by bringing further capabilities to the Business Central and Teams experience. Finally, and not least, we continue our rapid expansion to more countries and regions. In 2021 release wave 1, Business Central added 13 new countries and regions. In release wave 2, we expect to announce availability in more than 10 more countries and regions.

Some examples of our investments in various areas:

Administration: In 2021 release wave 2, Business Central delivers new capabilities to simplify and improve the way our partners administer tenants. Administrators enjoy new experiences for managing licenses and permissions.

Application: You can now get better explanations and guidance on errors that are caused by problems in posting setup and dimensions. Improvements to reporting, bank reconciliation, and supply chain capabilities will also help customers be more productive.

Better with Microsoft 365: Share a record from the browser client in Microsoft Teams.

Country and regional: We continue our rapid expansion in more countries with 10 or more new markets in this release wave.

Development: We continue to deliver new capabilities for developers.

Governance and administration: This wave adds more operations in the *Operation log* section of the Business Central admin center.

Modern clients: We improve the discoverability of reports across departments by applying a filter to the links that are shown in the Role Explorer.

Onboarding: Built-in tours cover more standard entities to support the onboarding of more business roles. A new help pane will help users get unblocked faster when they experience an issue.

Service and platform: We continue our effort in improving the performance of Business Central.

What's new and planned for Dynamics 365 Business Central

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Application

With Business Central 2021 release wave 2, we'll deliver updates in some of the most requested areas for improvement, such as the finance and supply chain areas.

Feature	Enabled for	Public preview	General availability
Add additional columns through personalization in various pages to gain more insight	Users, automatically	Sep 2021	Oct 2021
Add non-inventory items on requisition and planning worksheets	Users, automatically	Sep 2021	Oct 2021
Bank and payment reconciliations	Users, automatically	Sep 2021	Oct 2021
Couple records between Business Central and Dataverse (and apps for Dataverse) in bulk	Users, automatically	Sep 2021	Oct 2021
Default line type in the sales and purchase documents	Users, automatically	Sep 2021	Oct 2021
Delegated admin can create job queue entries and request approval by a licensed user	Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021
Improved user experience to keep posting setup and dimension issues from going wrong	Users, automatically	Sep 2021	Oct 2021

Feature	Enabled for	Public preview	General availability
Integrate Business Central and Microsoft Dataverse with more efficient synchronization of multiple records	Users, automatically	Sep 2021	Oct 2021
Item variant code on demand forecasts	Users, automatically	Sep 2021	Oct 2021
List of trusted partner apps	Users, automatically	Sep 2021	Oct 2021
Locations for non-inventory items	Users, automatically	Sep 2021	Oct 2021
More control over address information data entry	Users by admins, makers, or analysts	Sep 2021	Oct 2021
New automation API to create user groups	Users by admins, makers, or analysts	Sep 2021	Oct 2021
Production BOMs and routes on stockkeeping units in planning scenarios	Users, automatically	Sep 2021	Oct 2021
Remove obsolete reports 204, 205, 206, and 207	Users, automatically	Sep 2021	Oct 2021
Rounding for base unit of measure	Users, automatically	Sep 2021	Oct 2021
Tour of Business Central to help users know the basics	Users, automatically	Sep 2021	Oct 2021
Use multiple units of measure when synchronizing items and resources to Dynamics 365 Sales	Users, automatically	Sep 2021	Oct 2021
More educational app tours for standard roles	Users, automatically	Oct 2021	Nov 2021

Better with Microsoft 365

In Business Central 2021 release wave 2, we invest in better integration with Excel. We also further improve support for collaborative business processes in Teams so you can bring Business Central pages into a Teams channel.

Feature	Enabled for	Public preview	General availability
Enhancements to Microsoft Teams integration	Users, automatically	-	Oct 2021
Centralized Deployment of Office add-ins	Admins, makers, marketers, or analysts, automatically	Aug 2021	Oct 2021
Enhancements to the Outlook add-in	Users, automatically	Aug 2021	Oct 2021
Enhancements to working with Microsoft Excel	Users, automatically	Aug 2021	Oct 2021
Share a record link to Microsoft Teams	Users, automatically	Aug 2021	Oct 2021
AL API for sharing files in Microsoft 365	Users by admins, makers, or analysts	Sep 2021	Oct 2021

Country and regional

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	Enabled for	Public preview	General availability
Country and regional expansion – Argentina	Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021
Country and regional expansion – Bulgaria	Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Feature	Enabled for	Public preview	General availability
Country and regional expansion – Chile	Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021
Country and regional expansion – Myanmar	Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021
Country and regional expansion – Puerto Rico	Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021
Country and regional expansion – Slovakia	Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021
Country and regional expansion – Ukraine	Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Development

We continue to invest in a rich spectrum of extensibility tooling capabilities for developers, including making the AL language even stronger, providing developers with a great experience.

Feature	Enabled for	Public preview	General availability
Generated documentation for AL language	Admins, makers, marketers, or analysts, automatically	-	Oct 2021

Feature	Enabled for	Public preview	General availability
Profiling AL performance with snapshot debugger	Admins, makers, marketers, or analysts, automatically	✔ Aug 1, 2021	Oct 2021
Transactional installation and sync of extensions on-premises	Admins, makers, marketers, or analysts, automatically	✔ Aug 1, 2021	Oct 2021
AL compiler diagnostic messages includes URLs	Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021
Richer access control for extension source in cloud environments	Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021
Force sync of customer-specific extensions in online environments	Admins, makers, marketers, or analysts, automatically	Oct 2021	Oct 2021

Governance and administration

The 2021 release wave 2 delivers a set of admin and governance capabilities designed to help admins and IT pros set up, secure, manage, govern, and monitor customer environments.

Feature	Enabled for	Public preview	General availability
Manage access to environments using Azure Active Directory groups	Admins, makers, marketers, or analysts, automatically	-	Oct 2021

Feature	Enabled for	Public preview	General availability
Admins can handle scheduled tasks after a point-in-time restore	Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021
Copying environments of different types	Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021
Operations log enhancements	Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021
Restarting environments	Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Microsoft Power Platform

With Business Central 2021 release wave 2, we improve the integration with Microsoft Dataverse and Microsoft Power Platform.

Feature	Enabled for	Public preview	General availability
Show reports from named and shared Power BI workspaces in Business Central	Users, automatically	Sep 2021	Oct 2021

Modern clients

In Business Central 2021 release wave 2, we make improvements to our extensive portfolio of clients with the focus on better usability, accessibility, performance, and stability.

Feature	Enabled for	Public preview	General availability
Performance improvements to the Business Central web client	Users, automatically	Aug 2021	Oct 2021

Feature	Enabled for	Public preview	General availability
Usability improvements to the Business Central web client	Users, automatically	Aug 2021	Oct 2021
Unhindered data entry across rows	Users, automatically	✓ Aug 9, 2021	Oct 2021
Discovering reports and administration areas in Role Explorer	Users, automatically	Sep 2021	Oct 2021
Decimal separator on numeric keypad matches region setting	Users, automatically	Oct 2021	Dec 2021

Service and platform

No matter the industry type of a small or medium-sized business (SMB), business users expect a dependable service and platform that they can run their business on.

Feature	Enabled for	Public preview	General availability
OData read-only intent	Admins, makers, marketers, or analysts, automatically	-	Oct 2021
Protect the Business Central Server against excessive background sessions for an environment	Users, automatically	Oct 2021	Oct 2021

Description of **Enabled for** column values:

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

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

Application

Overview

For Business Central 2021 release wave 2, we have reviewed the most popular requests for improvement. We'll invest in better reporting, better management of dimensions, and several improvements to the supply chain area.

Add additional columns through personalization in various pages to gain more insight

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

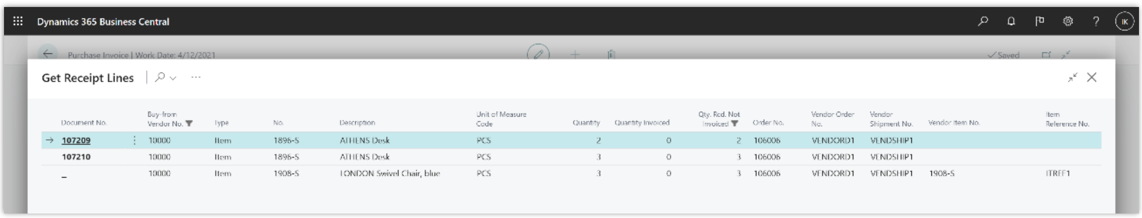
Business value

Different businesses and users need different information to complete business processes. Personalization is a powerful tool that lets people tailor the information that pages contain by dragging fields or columns from a list to the page. Based on feedback from our community, we've added more fields and columns to choose from on several pages.

Feature details

Get Receipt Lines page

You can add the **Order No.**, **Vendor Order No.**, **Vendor Shipment No.**, **Vendor Item No.**, and **Item Reference No.** columns to the **Get Receipt Lines** page.

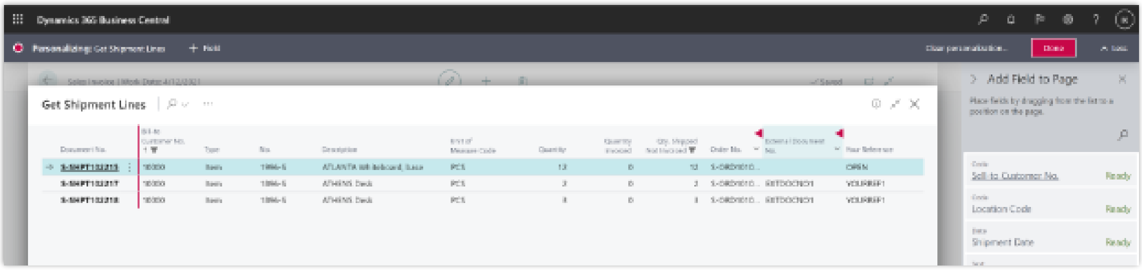


Shows Get Receipt Lines page with new columns.

Thank you for submitting this idea.

Get Shipment Lines page

You can add the **Order No.**, **External Document No.**, and **Your Reference** columns to the **Get Shipment Lines** page.

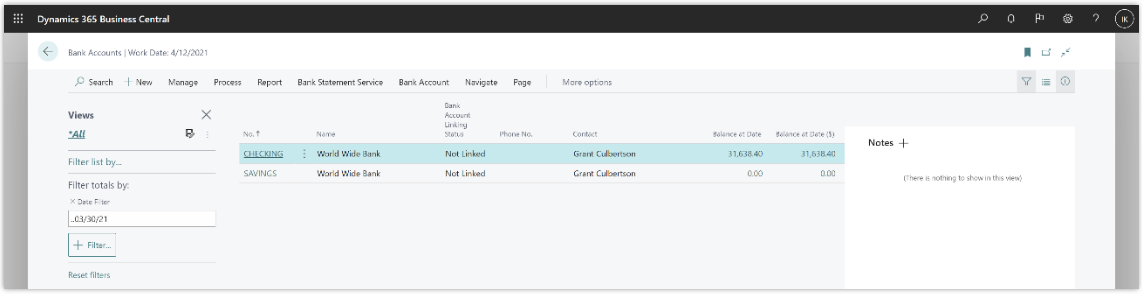


Shows Get Shipment Lines with new columns.

Thank you for submitting [this idea].

Bank Accounts page

The **Bank Accounts** page contains the **Balance at Date** and **Balance at Date (LCY)** columns.

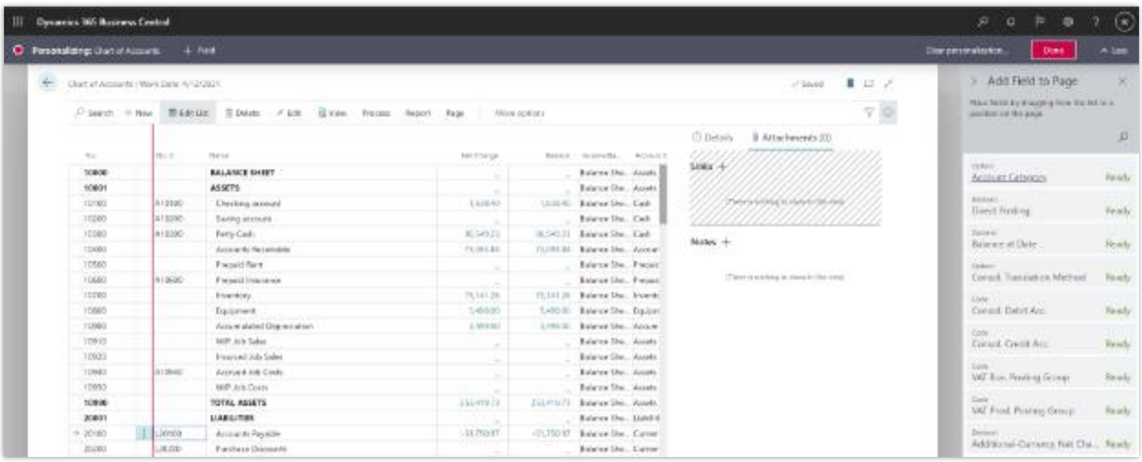


Shows bank accounts list with new columns.

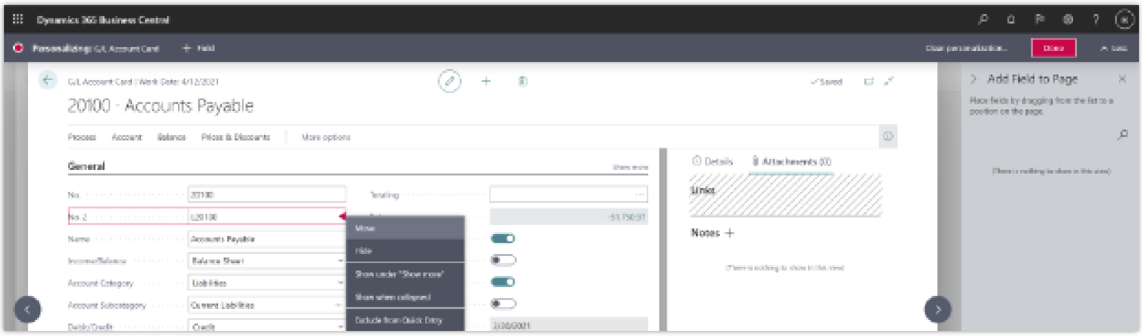
Thank you for submitting [this idea].

Chart of Accounts and G/L Account Card pages

You can add the **No. 2** column for alternative accounts to the **Chart of Accounts** page, and as a field on the **G/L Account Card** page.



Shows chart of accounts list page with new column.

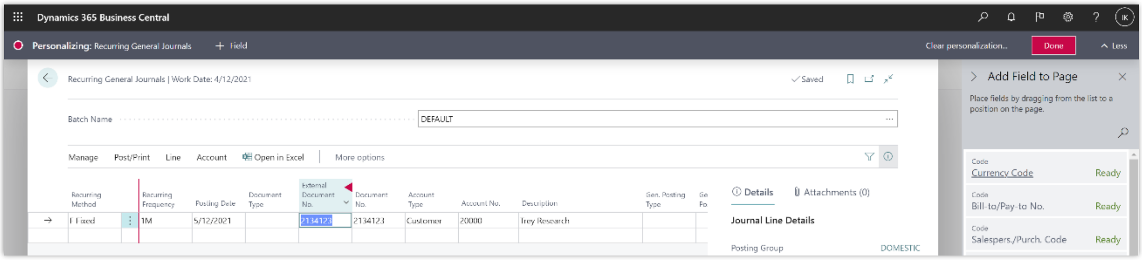


Shows G/L Account Card page with new field.

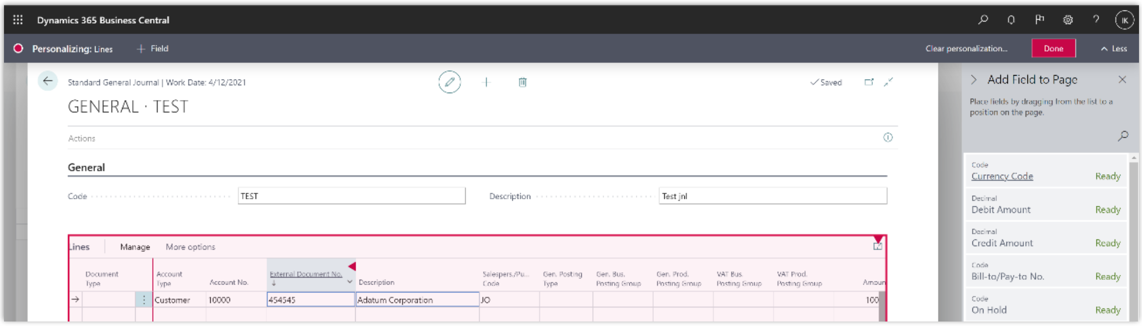
Thank you for submitting [this idea].

General Journals and Recurring General Journal pages

You can add the **External Document No.** column to the **General Journals** and **Recurring General Journals** pages.



Shows Recurring General Journals page with new column.



Shows Standard General Journals page with new column.

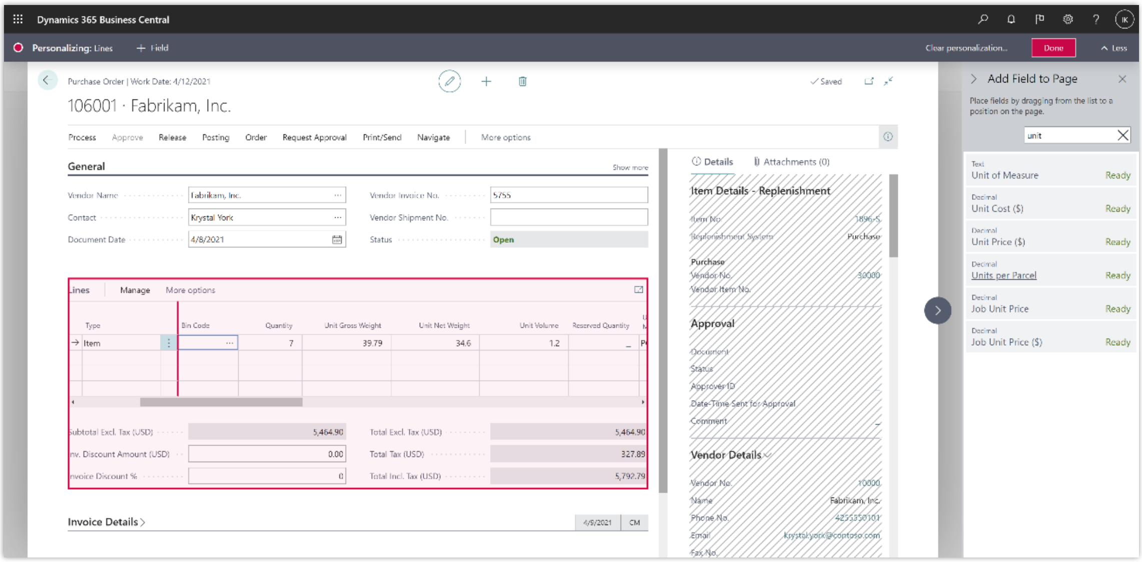
Thank you for submitting [this idea].

Sales, purchase, and archive documents

You can add the **Unit Gross Weight**, **Unit Net Weight**, **Unit Volume**, and **Units per Parcel** columns to pages for the following documents:

- Sales documents and sales archive documents such as blanket orders, quotes, orders, return orders, and more.

- Purchase documents and purchase archive documents such as blanket orders, quotes, orders, return orders, and more.
- Sales shipment report data set.

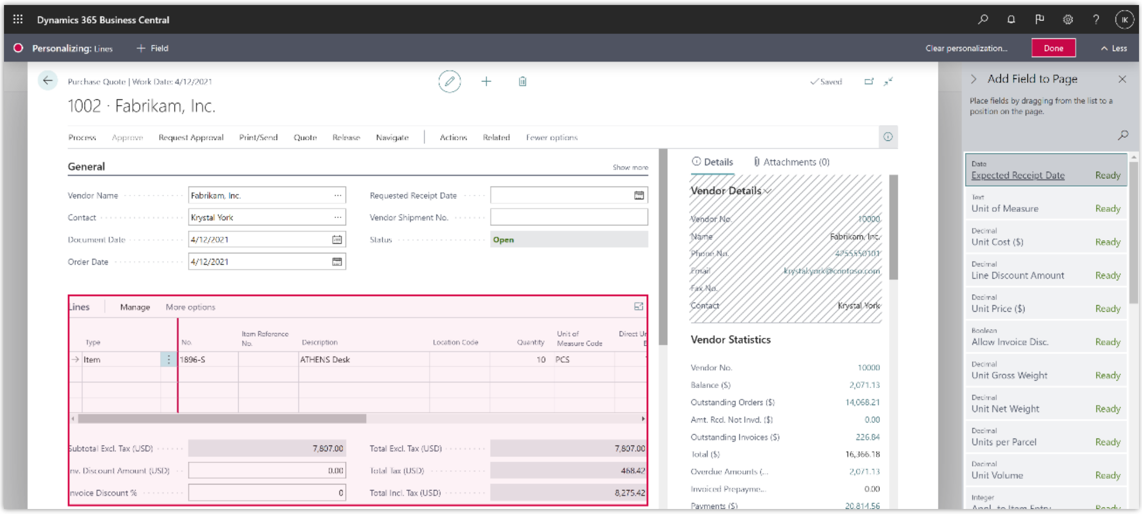


Shows purchase order with new columns.

Thank you for submitting [this idea](#).

Purchase documents

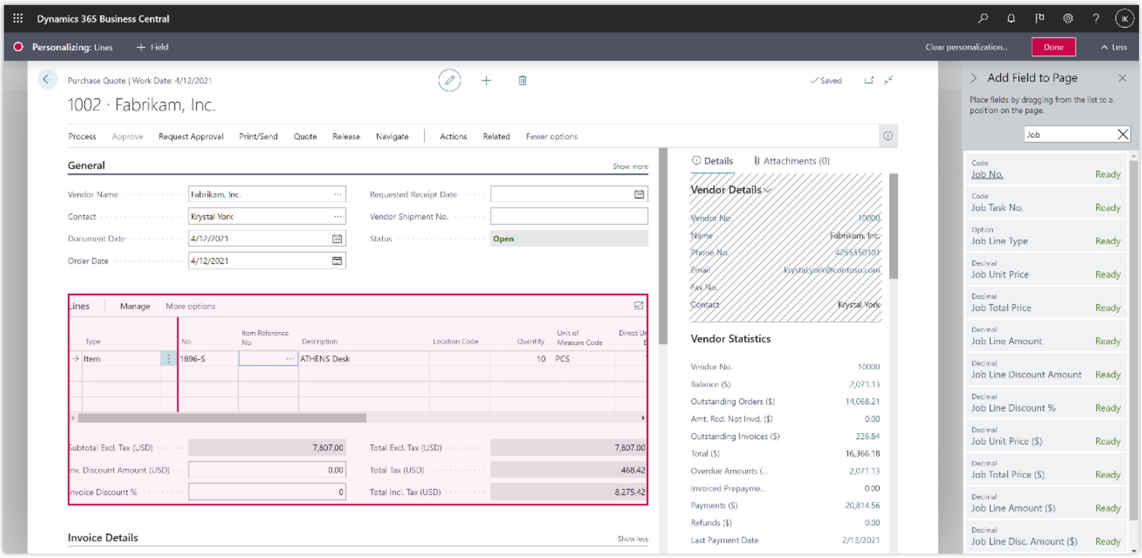
You can add the **Expected Receipt Date** field to the **Purchase Quotes**, **Purchase Quote Archives**, and **Purchase Orders** pages.



Shows Purchase Quotes page with new Expected Receipt Date field.

Thank you for submitting [this idea](#).

Additionally, you can add fields related to jobs, such as **Job No.**, **Job Task No.**, **Job Planning Line No.**, and more.

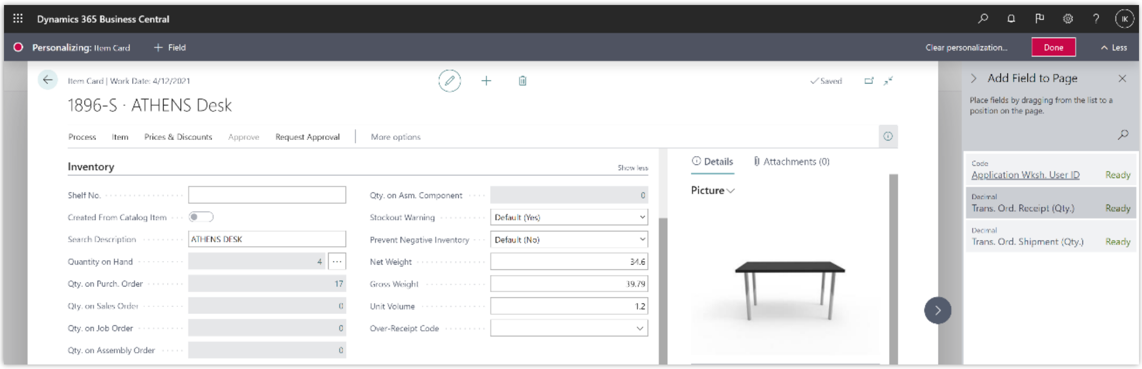


Shows jobs-related columns that can be added to purchase document lines.

Thank you for submitting [this idea](#).

Item Card page

You can add the **Transfer Order Receipt** and **Shipment Quantities** fields to the **Item Card** page.

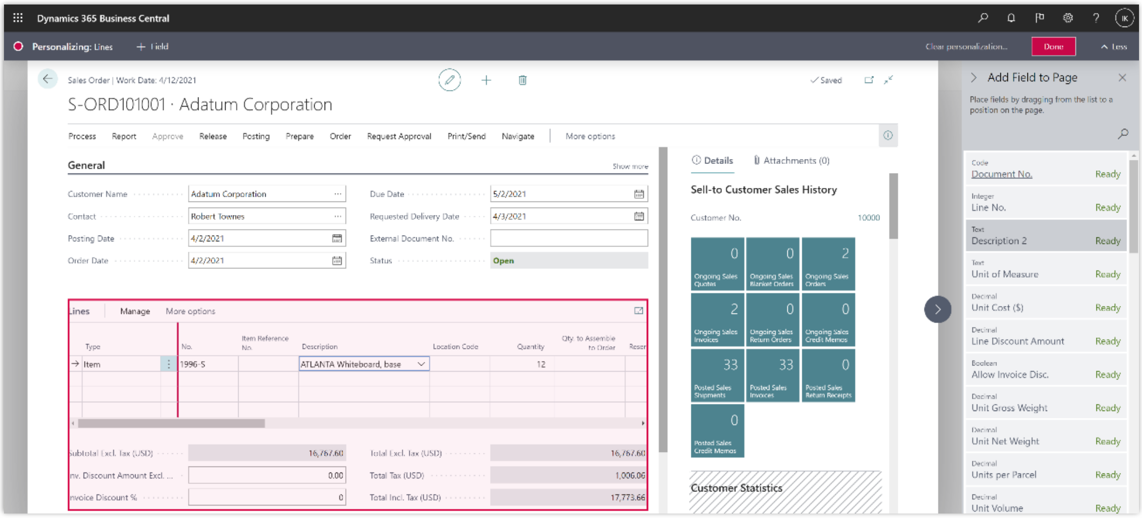


Shows Transfer Order Receipt and Shipment Quantity fields available for personalization on Item Card page.

Thank you for submitting [this idea](#).

Description 2 fields

You can add the **Description 2** field to all sales, service, purchase drafts, and posted and archived document lines.

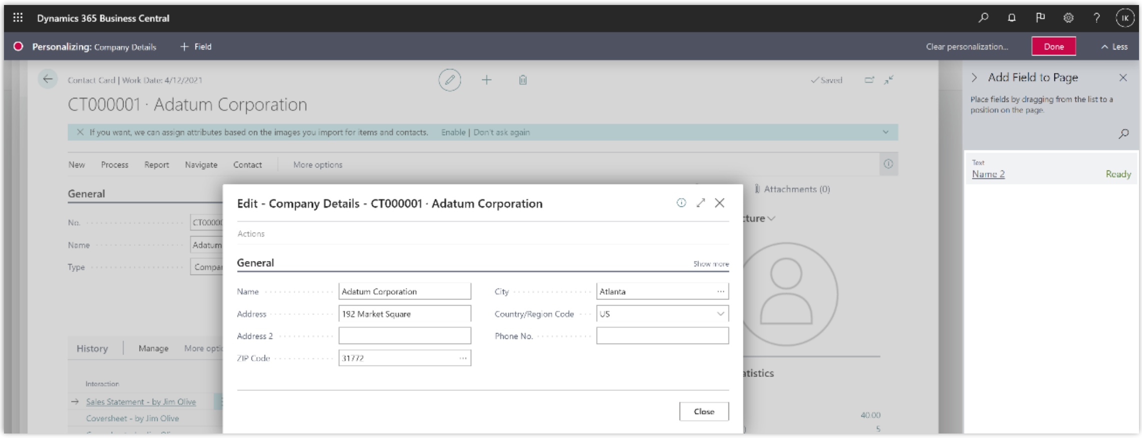


Shows Description 2 field in list of available fields to add to sales order lines.

Thank you for submitting this idea.

Name 2 fields

You can add the **Name 2** field to the Contact Card and list pages, **Contact Company Details** page, and the Resource Card and list pages.



Shows Company Details page with Name 2 in list of available fields to add through personalization.

Thank you for submitting this idea.

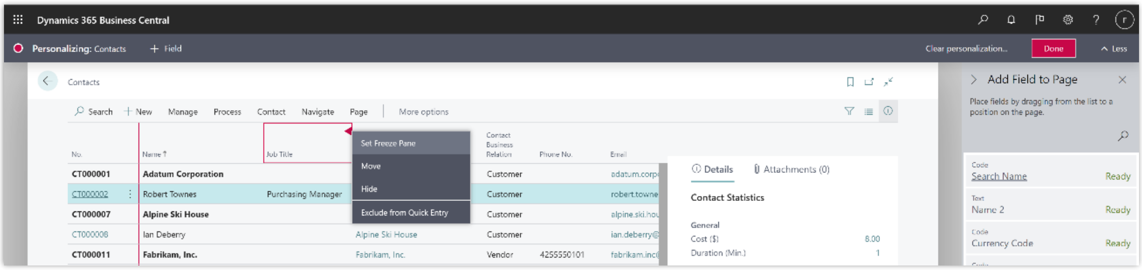
External Document No. field

You can now add **External Document No.** field to the Aged Accounts Receivable report's Word layout.

Thank you for submitting this idea.

Contact Job Title

You can add the **Contact Job Title** field to the Contact Card and list pages, **Contact Company Details** page, and the Resource Card and list pages.

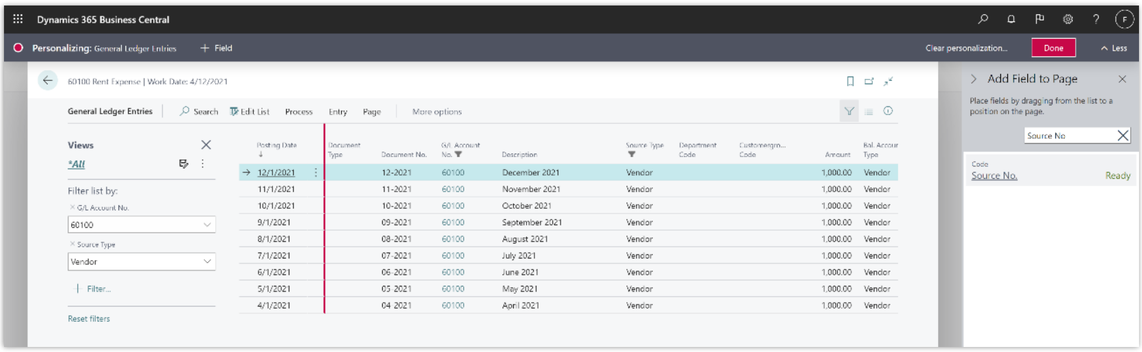


Shows Contact Job Title added to Contacts List page through personalization.

Thank you for submitting this idea.

Source Type and Source No.

You can add the **Source Type** and **Source No.** fields to the **General Ledger Entries** page. Filtering General Ledger Entries by, for example, Source Type Vendor and specific Vendor No. in the Source No. field, gives you a list of entries to be used in expenses by vendor analysis.



Shows Source Type and Source No. fields added through personalization to General Ledger Entries.

Thank you for submitting this idea.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Add non-inventory items on requisition and planning worksheets

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Business value

Some businesses use requisition or planning worksheets to enter information about the items they want to order, and then create orders for the items all in one go. Enabling the worksheets to handle both physical inventory items, such as chairs, and non-inventory items, such as services, gives businesses a unified procurement process.

Feature details

You can process non-inventory lines in much the same way as other types of items. If you use requisition and planning worksheets as the starting point for purchase orders in your procurement process, you can manually enter lines for non-inventory items on the worksheets. Then, when you create your purchase orders, the non-inventory items will be included. This allows you to use same procurement process for inventoriable and non-inventoriable items.

Tell us what you think

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

About Planning Functionality (docs)

Bank and payment reconciliations

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Business value

Bank and payment reconciliations are key processes for all businesses by providing an overview of whether the cash flow is accurate, and that all transactions have been accounted for. In this release wave, we make it more efficient to use those features, assisting the user, and give more information during the process.

Feature details

The **Payment Reconciliation Journal** has been improved with the following capabilities:

- Separate number series.
- Posting preview.
- Ability to reverse the G/L register posted through the Payment Reconciliation Journal.

The **Bank Reconciliation** page has been enhanced with the following capabilities:

- Bank ledger entries are now filtered so only ledger entries after the statement's ending date are displayed, making it simpler to get an overview.
- The layout of the test report has been cleaned up, making it simpler to read. The report will also use the statement date as a filter for the G/L account as well as the bank account, so that the focus is on the period being reconciled.
- When applying auto-matching, the user can decide to not overwrite any of the already matched entries, or to overwrite all.
- Many-to-1 matching is now possible so many bank statement lines can be matched against one bank ledger entry. This will support scenarios such as a bank statement splitting up sales into payment methods for which you only posted one bank ledger entry.
- When you transfer differences to be posted in a general journal, the entries will be auto-matched when you return to the bank reconciliation, reducing the redundant manual step.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Couple records between Business Central and Dataverse (and apps for Dataverse) in bulk

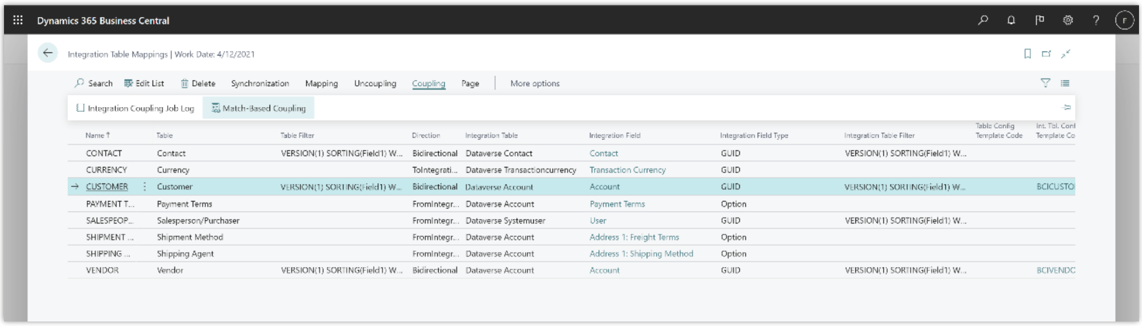
Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Business value

When you integrate your Business Central with Microsoft Dataverse or Dynamics 365 Sales, both systems often already contain data. Because data in Dataverse can come from multiple sources, there might be data that you don't want to transfer to Business Central because it could impact financial reports and other business processes, such as invoicing and tax calculations. Bulk-coupling speeds up the process of coupling multiple records, while letting you define rules to control how the couplings are made.

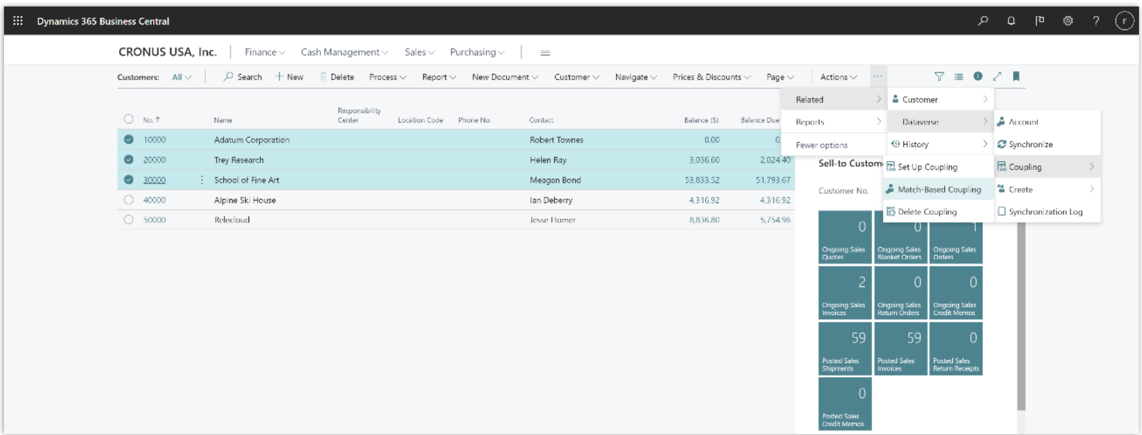
Feature details

When you couple the records that you want to synchronize data for in each application—for example, a customer in Business Central and an account in Dataverse—you can filter and choose the data to synchronize. Rather than write custom business logic in a per-tenant extension to define how to match and couple records between Business Central and Dataverse or Dynamics 365 Sales, you can define the fields to match in the **integration field mapping** page for whole mapping.



Shows new Match-Based Coupling action in Integration Table Mappings page.

To match and couple selected records between Business Central and Dataverse or Dynamics 365 Sales, you can define the fields to match in the **Select Coupling Criteria** page for selected records.



Shows new Match-Based Coupling action on Customer page.

Select Coupling Criteria page allows you to select fields for which matching should be done by choosing the **Match on this Field** column. You can also set matching priority for fields selected for matching and whether Business Central should create new records if no match is found.

Business Central will use those settings to automatically match and couple records. Additionally, this also makes it easier to migrate data from Business Central (on-premises) to Business Central online.

Tell us what you think

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

Coupling Records (docs)

Default line type in the sales and purchase documents

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Business value

Whether your company deals with physical goods or uses Business Central only to book financial transactions, you probably deal with some type of purchase or sales documents. You can now specify a default type for these documents and save a little time when preparing them.

Feature details

Sales and purchase documents can contain different types of lines, such as G/L Account, Item, Resource, or Fixed Asset. In this release you can select the default line type that will be suggested when you create new documents. You can specify the default type for sales on the **Sales & Receivable Setup** page, and for purchases on the **Purchase & Payables Setup** page, in the **Document Default Line Type** field. Afterward, the first line on the document will always use the default type that you specified, and you can start working with lines by selecting values in the **No.** field. Of course, you can change type in line if needed. If you do, the next lines that you create will use type from the previous line. The default value affects only the first line.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Delegated admin can create job queue entries and request approval by a licensed user

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Business value

The delegated admin role enables Microsoft partners to set up and manage certain aspects of Business Central on behalf of their customers. The role is, however, limited in some ways. Among these limitations is the ability to create job queue entries and set them as ready to run for customers. Job queue entries are important tools for setting up and configuring Business Central tenants. Delegated admins can create job queue entries and request approval from a licensed user.

Feature details

Business Central provides the delegated admin role so that people who are not employed by the customer, typically Microsoft partners, can set up and configure business processes for the customers. The delegated admin role is not, however, a licensed user in Business Central, and often is only assigned temporarily, so there are some limitations to what they can do. For example, delegated admins cannot set up tasks that might be run after the delegated admin relationship has been revoked, such as job queue entries.

That has been problematic because job queue entries are useful tools for running setup and configuration processes in Business Central, and delegated admins need to be able to create and run them in their customer's tenant. In this release, delegated admins can create job queue entries and set them as ready to run. Then, a licensed user from the customer can start the job queue entry to complete the process that the delegated admin created.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Delegated Administrator Access to Business Central Online (docs)

Improved user experience to keep posting setup and dimension issues from going wrong

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

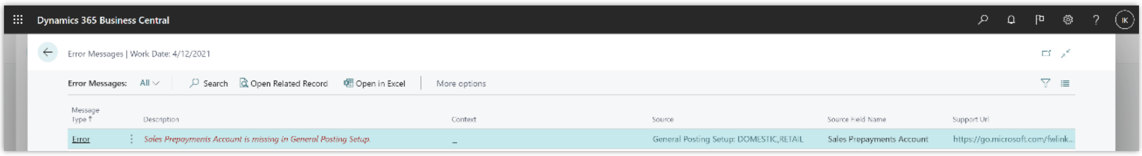
Business value

Posting groups and dimensions can be difficult concepts to understand. It's best to set up posting groups and dimensions up front. However, many companies do that as they go and resolve issues as they arise. We've added tools that support learning by capitalizing on concrete examples—for example, when documents are using posting groups that are not set up correctly or have incorrect dimensions or dimension values. Accountants, controllers, and finance people know how specific transactions need to be posted, and guidance when things go wrong with posting setups and dimensions will make it easier to resolve issues.

Feature details

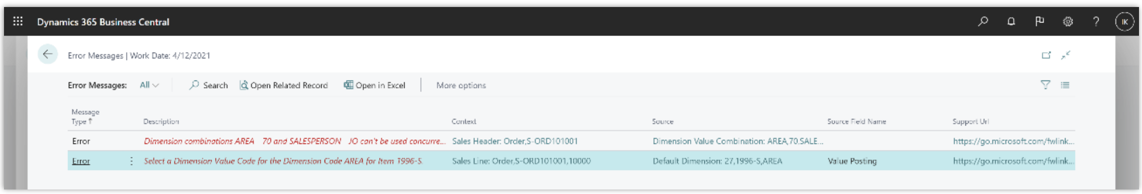
Product telemetry shows that posting groups and dimensions errors are typically caused by incorrect setup. We've made changes to clarify the errors and provide guidance on how to resolve them. You can now investigate issues with posting setups on the **Error Messages** page across the application:

- The **Description** column shows details about the error.
- The **Source** and **Source Field Name** columns point to the posting setup page where the error occurred, and link to a page where you can resolve the issue. This requires the user to have permissions to do so.
- The **Support URL** column provides a link to a troubleshooting guide.



Shows Error Messages page with posting group error example.

Additionally, for dimension issues the **Error Messages** page provides a link in the **Context** column that opens a page where you can fix the issues in the document. This also requires that the user has permissions to do so.



Shows Error Messages page with dimension error example.

NOTE The error handling described here is not available on Item, Resource, Employee and Fixed Asset Journals and for G/L accounts added in local versions of posting groups.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Setting Up Posting Groups (docs)

Integrate Business Central and Microsoft Dataverse with more efficient synchronization of multiple records

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Business value

The data exchanged between Business Central and Microsoft Dataverse is synchronized based on a schedule. Occasionally, there are situations where a business requires multiple records to be created, synchronized, or restored manually on an ad hoc basis. This feature decreases the number of synchronization jobs that are run in such cases, making synchronization of multiple records faster and users more productive.

Feature details

When users select multiple records, such as hundreds of customers or contacts, Business Central creates a single synchronization job per batch of selected records. This greatly reduces the load on the task scheduler that runs the background jobs, and makes it easier for users to stay below the limits for queue entries. This new way of synchronizing batches of selected records also considers Dataverse request limits by ensuring that the batches are processed in smaller sizes.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Item variant code on demand forecasts

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Business value

Accurate demand forecasting gives businesses valuable insight into their position in the market, which helps decision makers shape their strategies for pricing, business growth, and market potential. The ability to include the right level of detail on item variants in demand forecasts unlocks planning capabilities and reduces lead times for companies that don't have an inflow of sales orders and manage many nearly identical items.

Feature details

Item variants are a great way to keep your list of items under control, especially if you have a large number of items that are almost identical and vary, for example, only in color. Rather than setting up each variant as a separate item, you can set up one item and then specify the various colors as variants of the item. In this release, you can register anticipated demand not only with respect to locations and dates, but with item variants as well.

This unlocks planning capabilities for companies that don't have a steady inflow of sales orders, and operate using large lists of almost identical items.

We also plan to enable Edit in Excel for Demand Forecast Entries so that it's easier to create and update demand forecasts.

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

Create a Demand Forecast (docs)

List of trusted partner apps

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Feature details

With a large number of apps available on AppSource, and with business continuity in mind, customers might not want to install an app directly from AppSource until they know the app won't interfere with their business. With this release wave, partners can preload a list of apps into the customer's system to help the customer choose apps that are relevant for their business, industry, and growth. By proxy of the partner, customers can safely install apps that have been preselected for them.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Locations for non-inventory items

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Business value

Now you can track statistics for non-inventory items by location, in the same way as inventoriable items or resources. This gives you better insight into, for example, the location for which a service was purchased.

Feature details

Based on your feedback, we have aligned service items and non-inventory items with other types, such as G/L accounts, item charges, and fixed assets. You can now specify a location for these types of items in supported transactions, and the location will be copied in the item ledger, values, and job ledger entries. This is useful for reporting purposes and cases when there is one document, such as a purchase order, with multiple non-inventory items meant for different locations.

NOTE Warehouse operations are not supported for service and non-inventory items.

Tell us what you think

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

About Item Types (docs)

More control over address information data entry

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2021	Oct 2021

Business value

Typically, businesses use an external service that was built to validate address information in their country or region. When you need to update address information, the structured approach that these services use may not always be what's right for some scenarios. Therefore, Business Central now offers a more flexible means of entering address details.

Feature details

You can set the **Require Country/Region Code in Address** by selecting this field on the **General Ledger Setup** page. When this field is selected, because the address format is related to the selected **Country/Region**, changes to the **Country/Region Code** field on addresses for customers, contacts, or vendors will reset the values in other address fields.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

New automation API to create user groups

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2021	Oct 2021

Feature details

The new API plays a part in the initial deployment of a customer environment together with the other Automation APIs that allow for a scripted creation of the environment, company, application of configuration packages, user permissions, and more.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Production BOMs and routes on stockkeeping units in planning scenarios

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Business value

Many businesses use stockkeeping units (SKUs) in their inventory management processes. Because SKUs often contain important information about the items, they're also valuable in production processes. You can leverage the information from SKUs by assigning them to production bills of material (BOMs) and routes. Additionally, it's easy to update the BOM and route on SKUs. You can simply specify a BOM and route on an item and they will be assigned to the SKU.

Feature details

We have increased the number of business processes that take into account the values in the Production BOM and Production Routing fields defined on SKUs. These include the following processes:

- Capable-to-promise called from sales orders.
- Planning worksheet, including the Calculate Net Change Plan, Calculate Regenerative Plan, and Get Action Messages actions.
- Order planning.

By default, the Production BOM and Production Routing fields are available on SKUs.

NOTE When you create a SKU, the production BOM and route are copied from the item to the SKU. If you have many SKUs, but only one BOM or route, it's easy to update your SKUs. Just remove the production BOM or production route on the SKUs and they'll use the default values from the items.

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

Production planning (docs)

Remove obsolete reports 204, 205, 206, and 207

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Business value

We've removed several reports in favor of newer versions. Enjoy modern report layouts that are easier to customize and faster to generate by using the reports that are based on layouts from Microsoft Word. Your external-facing documents, such as invoices and orders, will benefit from the switch.

Feature details

Before 2021 release wave 1, we announced that we were planning to replace several reports with newer versions, and now it's time for the final cleanup. The 2021 release wave 1 was the last release in which the following reports were available.

Deprecated report	Recommended report
204 Sales - Quote	1304 Sales - Quote
205 Order Confirmation	1305 Sales - Confirmation
206 Sales - Invoice	1306 Sales - Invoice
207 Sales - Credit Memo	1307 Sales - Credit Memo

If you still use one or more of the deprecated reports, now is the time to take the following actions:

1. Start using the recommended reports. These support Word layouts.
2. Clone the deprecated reports to a custom range, and switch to the cloned reports.

How to check if your company uses old reports

Report Selections – Sales

Search for **Report Selection – Sales** and check which reports are configured to be used for *Quote*, *Order*, and *Credit Memo*.

Customer report layouts

Inspect the content of the **Custom Report Selection** table (object ID 9657). For more information, see View a table object directly from the client.

Once you know which customers use these reports, you can replace them on the **Document Layout** page for each affected customer, or you can use configuration packages to update in bulk.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Rounding for base unit of measure

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Business value

You can assign a base unit of measure to items, but sometimes items serve more than one purpose and are sold, received, or consumed in different measures in sales, purchase, and production processes. That means it's important to be able to handle items in alternate units of measure, depending on the process, and accurately convert those measures to the base unit of measure.

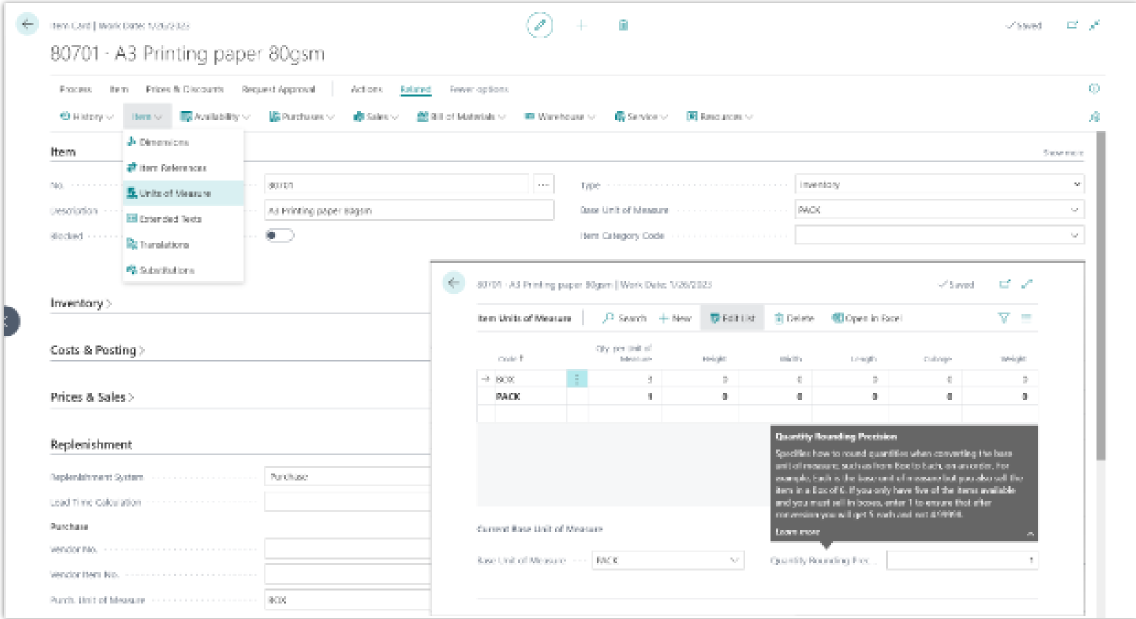
Feature details

You can specify a rounding precision for base units of measure to guide users on what to enter for a given business process, and reduce rounding issues when using alternate units of measure.

When an item serves different purposes, you can set up alternate units of measure for it. The base unit of measure for the item defines how you store it, and the alternate units of measure define how you handle it in purchase, production, or sales documents. For example, you may buy the item on pallets and only use single pieces in production.

When you use alternate units of measure, the value in the **Qty. per Unit of Measure** field helps calculate the quantity in base unit of measure, which can lead to rounding issues.

For example, you're receiving 1 box that contains 6 items from your supplier. When the items arrive at the warehouse, you discover that 1 of the 6 items is missing. You decide not to post the receipt of 1 box, but to change quantity to 5/6 pieces instead. That will be converted to a receipt of 4.99998 pieces. To receive a whole number, the **Quantity Rounding Precision** field lets you specify a value that will, for example, convert the quantity to 5 pieces.



Quantity Rounding Precision.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Set Up Units of Measure (docs)

Tour of Business Central to help users know the basics

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Feature details

Since 2021 release wave 1, you've been able to provide educational tours to guide users through the application. But until now, the tours were limited to pages and controls that are defined by the AL language. With 2021 release wave 2, we expand the use of these tours so they also can include teaching tips that are defined by the platform to call out system controls, such as the top navigation bar and sorting and filtering controls. Additionally, these tours can provide an introduction to and better understanding of the home page as a concept. In all, this will allow the user to learn the basics of the Business Central user interface.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Use multiple units of measure when synchronizing items and resources to Dynamics 365 Sales

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Business value

Get a clearer picture of how you sell items and resources by synchronizing additional units of measure.

Feature details

Items and resources have a base unit of measure, but they're often also sold in other measures, such as bundles and packages. You can now synchronize more units of measure for items and resources with Dynamics 365 Sales.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Synchronization Rules (docs)

More educational app tours for standard roles

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Feature details

With 2021 release wave 1, Business Central started surfacing extensible in-product tours that helped users understand important application concepts and business entities. In 2021 release wave 2 we expand the built-in tours to cover more standard entities to support the onboarding of more business roles. The new tours will reduce friction in the learning and startup phase, and the tours also allow the user to revisit these in-app tours on-demand.

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.

Better with Microsoft 365

Overview

In Business Central 2021 release wave 2, we invest in better integration with Excel. We also further improve support for collaborative business processes in Microsoft Teams so that you can bring Business Central pages into a Teams channel.

Enhancements to Microsoft Teams integration

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2021

Business value

The Business Central app for Microsoft Teams connects Teams to your business data, so you can quickly share details with your team, connect with your business contacts, and respond faster to inquiries.

Feature details

The 2021 release wave 2 includes the following improvements to the Business Central app for Teams:

- New sign-up experience for users who are installing the app but don't have a Business Central subscription. Users will be redirected to a page where they can read about and sign up for a trial subscription.
- Improved search term capabilities, like multiple word search and special characters, for looking up contacts.

An addition, you have two new ways of sharing data between Business Central and Teams. For more information, see the following related features of this release: AL API for sharing files in Microsoft 365 and Share a link to any record directly from Business Central to Microsoft Teams.

Centralized Deployment of Office add-ins

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2021	Oct 2021

Business value

The security of your business data is important to us. Administrators are in control of how Office add-ins for Business Central are deployed to individuals, groups, or the entire organization, by using best-of-breed compliance and policy settings in Microsoft 365.

Feature details

When getting started with Business Central, assisted setup wizards will guide administrators through the process of configuring the Business Central Office add-ins.

Excel add-in

The new Centralized Deployment assisted setup will guide administrators through the manual task of configuring Microsoft 365 to deploy add-ins to select users within the organization when individual acquisition from the Office Store has been turned off.

Outlook add-ins

The Centralized Deployment assisted setup for Outlook add-ins replaces the earlier Business Inbox setup wizard. The new assisted setup will walk administrators through the manual task of configuring Microsoft 365 or Exchange Server to deploy add-ins to select users within the organization.

To support improved security in Exchange and take advantage of custom Exchange policy, the assisted setup no longer automates deployment by using legacy basic authentication.

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.

Enhancements to the Outlook add-in

Enabled for	Public preview	General availability
Users, automatically	Aug 2021	Oct 2021

Business value

Set up your business inbox in Outlook to respond faster to inquiries from your customers, vendors, and prospects.

Feature details

The 2021 release wave 2 includes various technical improvements for deploying and using Outlook add-ins:

- You can use the add-ins with companies that have symbols or non-English characters in the company name.

- A simplified wizard distributes the Outlook add-ins to individual users. Automated installation of the add-ins now uses the more secure OAuth 2.0 that replaces legacy basic authentication.
- Administrators can configure Microsoft 365 for centralized deployment of the Outlook add-in to individuals, groups, or everyone within their organization. For more information, see the Centralized Deployment release plan.

Update to minimum requirements

In 2021 release wave 2, version 19 of Business Central, the Outlook add-ins require the Outlook client to be version 2012 or later, and will also require that the WebView2 component is installed to the relevant devices. Users of Outlook clients that don't meet the minimum requirements might not be able to sign in to the add-in from version 19 and later.

For more tips and tricks to help you get an optimal experience with Outlook, see Optimizing Outlook for Your Business Inbox.

About the legacy Outlook synchronization capability

In this release wave, we deprecate the legacy Outlook synchronization feature. The Business Central components for Outlook can no longer be installed from the installer for Business Central (on-premises), and the feature can't be accessed from Business Central.

See also

Optimizing Outlook for Your Business Inbox (docs)

Enhancements to working with Microsoft Excel

Enabled for	Public preview	General availability
Users, automatically	Aug 2021	Oct 2021

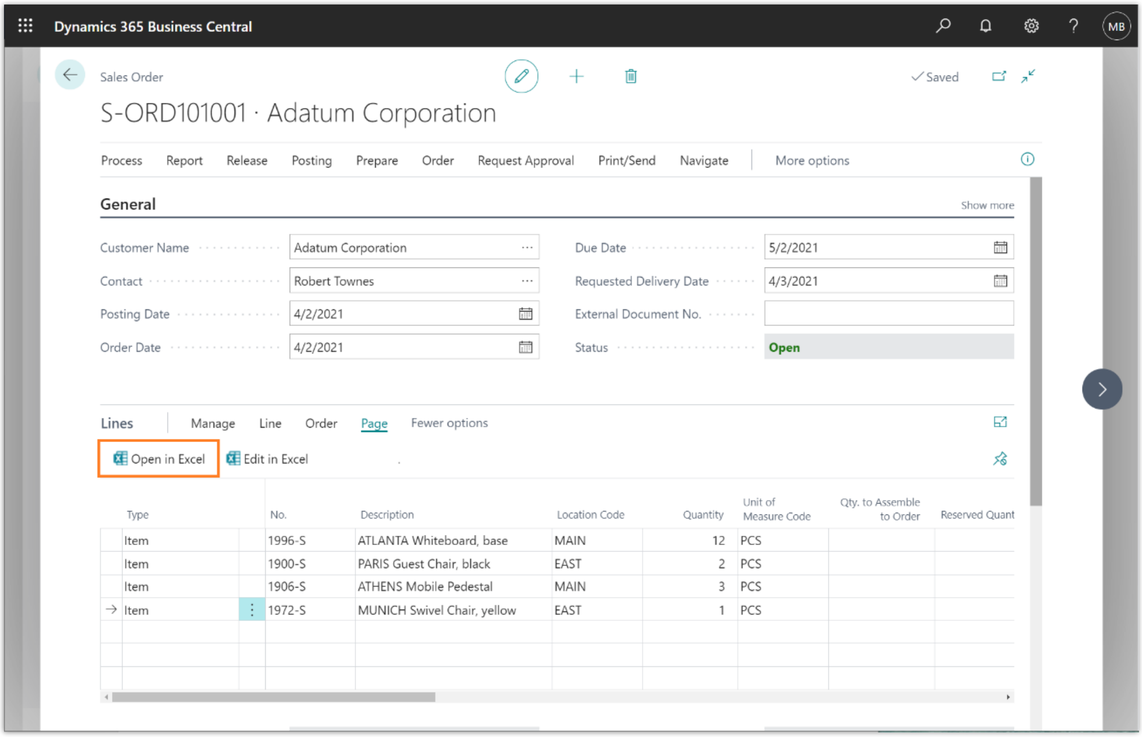
Business value

For many of our customers, Microsoft Excel remains the app of choice for quick data analysis, sharing tabular data, bulk correcting, or entering records. Business Central continues to mature Excel-related features for exporting to Excel and working with the Excel add-in.

Feature details

Downloading embedded lists to Excel (Open in Excel action)

Lists that are embedded in a part on a page can now be exported to Excel. For example, you can export Sales Lines on a Sales Order, list parts on the Role Center, or lists in the FactBox pane. Similar to full-page lists, the **Open in Excel** action downloads a static copy of your list as an Excel file, applying your filters and sort order just as shown on screen.



An illustration of the Sales Order page indicating the new Open in Excel action.

You can enable this feature ahead of time as early as Business Central 2021 release wave 1 (update 18.3). Starting in Business Central 2021 release wave 2 (update 19.0), this is enabled on all environments.

Exporting reports to Excel

From a report request page, users can export report data to Excel. The Excel file will only include the raw data, not the report layout. For more information, see the related release plan: [Save report dataset to Excel from the request page](#).

You can enable this feature ahead of time as early as Business Central 2021 release wave 1 (update 18.3). Starting in Business Central 2021 release wave 2 (update 19.0), this is enabled on all environments.

Enhancements to the Excel add-in (Edit in Excel)

Administrators can now configure Business Central and Microsoft 365 to use Centralized Deployment to deploy the Excel add-in to users or groups of users within their organization. For more information, see the related release plan: [Centralized Deployment of Office add-ins](#).

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.

AL API for sharing files in Microsoft 365

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2021	Oct 2021

Business value

Bring the best of Microsoft's business and productivity suites together to initiate collaborative, review and sharing activities directly from Business Central.

Feature details

AL developers will be able to implement sharing of their reports or other files using standard Microsoft 365 capabilities for cloud-based file sharing. For example, this could be used to build an experience where users share a custom financial report over email.

Share a record link to Microsoft Teams

Enabled for	Public preview	General availability
Users, automatically	Aug 2021	Oct 2021

Business value

Users save time and benefit from reduced app switching when they can initiate collaborative tasks directly from Business Central.

Feature details

The Business Central web client will include a new action to share to Microsoft Teams. This action allows users to type a message, choose recipients such as team members, groups or channels, and send their message with a link to the Business Central record.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Country and regional

Overview

Expansion to more countries and regions is achieved through partner-led localization. Our partners create the relevant localization apps that are published to AppSource. In combination with the built-in language offerings, Dynamics 365 Business Central is then available to serve customers in 50-plus countries and regions worldwide.

Country and regional expansion – Argentina

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Argentina is achieved through partner-led localization. Our partners create the relevant localization apps that are then published to AppSource. In combination with the built-in language offerings, Dynamics 365 Business Central is then available to serve customers in Argentina.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Country and regional expansion – Bulgaria

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Bulgaria is achieved through partner-led localization. Our partners create the relevant localization apps that are then published to AppSource. In combination with the built-in language offerings, Dynamics 365 Business Central is then available to serve customers in Bulgaria.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Country and regional expansion – Chile

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Chile is achieved through partner-led localization. Our partners create the relevant localization apps that are then published to AppSource. In combination with the built-in language offerings, Dynamics 365 Business Central is then available to serve customers in Chile.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Country and regional expansion – Myanmar

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Myanmar 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 Myanmar.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Country and regional expansion – Puerto Rico

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Puerto Rico is achieved through partner-led localization. Our partners create the relevant localization apps that are then published to AppSource. In combination with the built-in language offerings, Dynamics 365 Business Central is then available to serve customers in Puerto Rico.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Country and regional expansion – Slovakia

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Slovakia is achieved through partner-led localization. Our partners create the relevant localization apps that are then published to AppSource. In combination with the built-in language offerings, Dynamics 365 Business Central is then available to serve customers in Slovakia.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Country and regional expansion – Ukraine

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Ukraine is achieved through partner-led localization. Our partners create the relevant localization apps that are then published to AppSource. In combination with the built-in language offerings, Dynamics 365 Business Central is then available to serve customers in Ukraine.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Development

Overview

We continue to invest in a rich spectrum of extensibility tooling capabilities for developers, including making the AL language even stronger, providing developers with a great experience.

Generated documentation for AL language

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

Business value

Reference documentation is an important part of a programming language. In this release we have increased coverage of auto-generated documentation for the AL language, ensuring that this is in sync with the latest changes and additions. Specifically, we are adding properties, triggers, method options, and method attributes.

Feature details

AL reference documentation is used to look up documentation of types, method, and properties in the programming language. For many releases, this documentation has been handcrafted, which can lead to inconsistencies with the actual language. To ensure that the documentation is in sync with the language, entries will be auto-generated, and any additional content will be added manually afterward. This ensures full coverage and that the documentation better reflects the AL language as it evolves.

Profiling AL performance with snapshot debugger

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

Business value

Performance is top of mind for most customers, especially in the world of online business. Until now, apart from selected, reactive telemetry allowing monitoring of customer tenants, there has not been a proactive way to measure execution performance during development nor when troubleshooting specific customer support cases with performance issues. To address this, we are introducing the ability to capture execution timing as part of a snapshot, and investigate this in Visual Studio Code when replaying the snapshot.

Feature details

Snapshot captures now include a performance profile of the executed code that is captured in the snapshot. Using a new performance profiling editor view in the AL Visual Studio Code extension, developers can then investigate the time spent on execution, either using top-down or bottom-up call stack views.

Transactional installation and sync of extensions on-premises

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

Business value

Usually, installing and synchronizing extensions are performed as two distinct operations. To enable force synchronization in online environments, install and sync can now also be performed as one transactional operation per database, available for PowerShell scripts on-premises.

Feature details

As a prerequisite for force sync support of extensions in online environments, the ability to install and sync extensions as one transaction per database has been added. This capability is also available on-premises so that you can choose to only install extensions that can also synchronize, for example.

See also

Administration of Business Central On-Premises (docs)

AL compiler diagnostic messages includes URLs

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Business value

When you compile or run code analyzers, diagnostic messages can appear in the form of error, warning, or informational messages. To help resolve such diagnostic issues, an option of adding a URL for additional documentation on what is causing the issue, and options for how to resolve the issue, will now be available. Note that this feature adds the ability to include a URL; however, not all diagnostic messages will take advantage of this from the beginning.

Feature details

Having links in diagnostic messages from compilation or code analyzers will support linking to additional, relevant documentation about the cause of the issue as well as options for how to resolve it.

Richer access control for extension source in cloud environments

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Business value

Currently it's possible to control access to an extension source in the cloud through the app.json property ShowMyCode. If enabling this, an extension source will be available both for debug, download (PTEs), and in symbols. Because of this, many partners select not to share the source, thereby also prohibiting debug, leading to longer times to mitigate customer issues, and challenges with providing alternatives for debugging a source.

Feature details

For better control of source access, more granular options will be provided. At this time, implementation details are still being worked on. This could be solved by replacing the existing ShowMyCode property in the app.json file and enhancing it with more detailed options—for example, AllowDebugSource, AllowDownloadSource, or AllowSymbolsSource.

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.

Force sync of customer-specific extensions in online environments

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2021	Oct 2021

Business value

Whenever the table schema is changed in a destructive way in an extension, it can have a downstream impact for any depending extension and potentially block updates until the breaking changes have been fully resolved. Until now, the process for handling destructive changes has been to implement them, and then obsolete them in due time to allow a more seamless process.

There can, however, sometimes be a need for making breaking changes. This can occur, for example, in cases where there is no downstream impact of the change, if dependencies are under full control (for example, for per-tenant extensions), or to make changes that are forced by new, clashing object identities introduced upstream.

To help with these scenarios, we are introducing the ability to deploy per-tenant extensions (PTEs) with force schema sync mode, which will allow destructive changes to the table schema in the new extension version.

Feature details

When deploying a new customer-specific (per-tenant) extension to Business Central online, either through the **Extension Management** page or the admin center, it will now be possible to force any destructive table schema changes and circumvent the usual error when such changes are detected. This will allow the removal of specific tables or fields from the database.

NOTE This operation means you will lose any data that is stored in the removed tables and fields. You will still have the option to restore the database. Thus, before a force sync in a production environment, this should be thoroughly tested in a matching sandbox environment, container, or on-premises installation.

Governance and administration

Overview

The 2021 release wave 2 delivers a set of admin and governance capabilities designed to help admins and IT pros set up, secure, manage, govern, and monitor customer environments.

Manage access to environments using Azure Active Directory groups

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

Business value

Use Azure Active Directory groups to manage access to Dynamics 365 Business Central environments.

Feature details

You can use Azure Active Directory (Azure AD) groups to grant access to environments.

In the Business Central admin center, you can associate an Azure AD group with an environment. Members of that Azure AD group will be synchronized to Business Central and granted access to that environment.

Main benefits will be:

- Users can only see the environments that they have access to.
- Only the users in the associated group are imported to the environment.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Admins can handle scheduled tasks after a point-in-time restore

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Business value

After a point-in-time restore, the tenant admin can sign in and decide which restored scheduled tasks to re-enable or cancel if no longer relevant.

Feature details

After a point-in-time restore, or copy to a sandbox, all restored scheduled tasks in the tenant are paused. With this new feature, the internal admin can sign in and see which scheduled tasks are paused and make a decision about re-enabling or canceling them depending on the purpose of each task.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Use Job Queues to Schedule Tasks (docs)

Copying environments of different types

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Feature details

At the different stages of implementation, testing, support, and maintenance of a Business Central instance, Business Central online provides administrators with more flexibility when working with multiple online environments.

In earlier versions, the Business Central admin center would only allow you to copy a production environment into a sandbox environment.

In this release wave, we are adding support for copying the environments within and across different environment types:

- Production to Production
- Sandbox to Sandbox
- Sandbox to Production

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Operations log enhancements

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Feature details

The Operations log in the Business Central admin center provides an overview of the admin operations in the relevant Business Central online environments, such as restoring, renaming, installing, and uninstalling apps, exporting databases, and moving environments between different Azure Active Directory (Azure AD) tenants.

In this release wave, we're adding more operation logs to this view. Administrators will be able to see the following new operations:

- Environment created
- Environment deleted
- Environment copied
- Environment properties updated

The administrators will also be able to truncate the log to remove old operations that are no longer relevant.

Restarting environments

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Oct 2021

Feature details

In some specific circumstances, as a troubleshooting step, administrators might have to restart a particular Business Central environment to resume its normal operation. In this release wave, we're adding the option to restart an environment in the Business Central admin center.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Microsoft Power Platform

Overview

With Business Central 2021 release wave 2, we improve the integration with Microsoft Dataverse. We also enhance the integration with Microsoft Power Platform with support for workspaces in Power BI.

Show reports from named and shared Power BI workspaces in Business Central

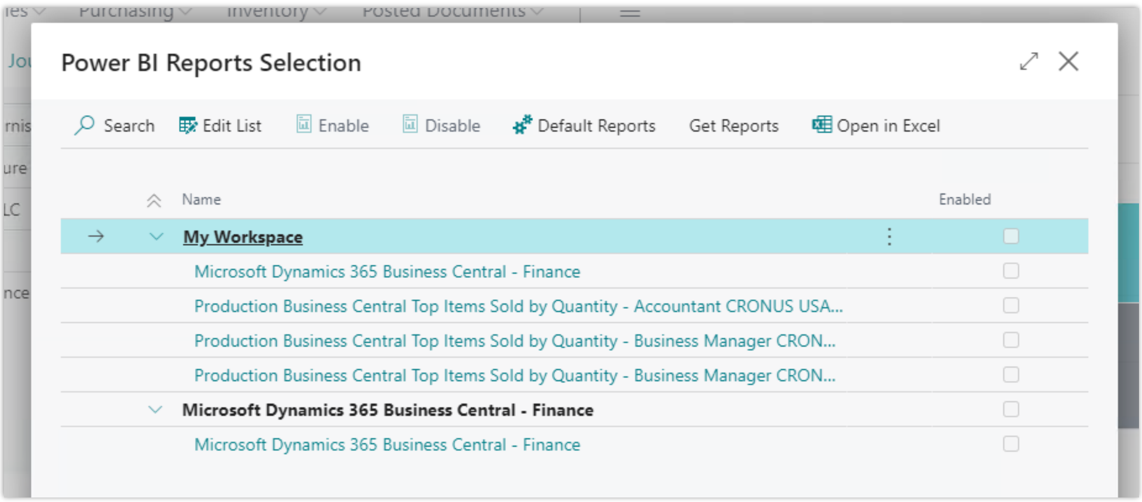
Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Business value

Flexibility in your work and your workspace is essential and this also applies to data analysis and business intelligence. With that in mind, Power BI had introduced named and shared workspaces, but in Business Central, you were only able to use the default workspace and the ones provided by Business Central. Now you can embed reports from any of your personal or shared Power BI workspaces into Business Central.

Feature details

With this feature, when selecting which Power BI reports to show in Business Central, Power BI returns the list of workspaces you have access to and the reports in the workspaces. (The permissions you have in Business Central still apply.) You can then choose one of the reports and have it embedded in Business Central.



Business Central and Power BI workspaces.

If you have a report in a shared team or organization-wide workspace, it can now also be embedded in Business Central.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Modern clients

Overview

Business Central offers an extensive portfolio of clients so that users can achieve more at their desks, at home, or on the go. With users across a diverse range of business roles and proficiency levels, and with local and accessibility needs, we are committed to make sure that the user interface is both intuitive to start with and powerful when needed.

Your voice matters: We assess feedback across numerous community channels at a regular cadence, and we run user studies. Based on this research, we have identified client enhancements for 2021 release wave 2.

Performance improvements to the Business Central web client

Enabled for	Public preview	General availability
Users, automatically	Aug 2021	Oct 2021

Business value

Users benefit from improved responsiveness when interacting with the user interface of the web client.

Feature details

The 2021 release wave 2 includes various performance optimizations that benefit not only the Business Central web client, but other clients as well. These optimizations result in faster-opening pages, more efficient resource usage on client devices, and more.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Unhindered data entry across rows

Enabled for	Public preview	General availability
Users, automatically	Oct 2021	-

Business value

Accelerate repetitive data entry through a reliable and predictable editing experience. Never lose a keystroke when correcting data across cells or when filling out data column by column, but still benefit from business rules that validate your input.

Feature details

When you type data in any editable list, the Business Central web client no longer pauses while it processes the previously modified row.

While this feature already provides a more responsive experience in itself, data entry becomes even more efficient when combined with the F8 key to copy the value of the cell above and other keyboard shortcuts for actions, like the F9 key to post a journal.

As a partner, you can start previewing this feature through Microsoft Collaborate as soon as October 2021.

Usability improvements to the Business Central web client

Enabled for	Public preview	General availability
Users, automatically	Aug 2021	Oct 2021

Business value

With a growing and diverse workforce learning to use the web client (and using it to complete business tasks quickly and reliably), we are continuing to optimize the client for improved usability.

Feature details

When vertical screen space is reduced, the header along the top of the client automatically resizes to a compact, 8 pixel height, freeing up more space for data on the screen. This improvement is available only for Business Central online.

Data entry and navigation improvements

After October 2021, we'll be addressing user feedback that covers various aspects of the user interface, such as:

- Better indication of noneditable cells in lists.
- More reliable multiple-row selection on lists.

- Consistent user interaction for navigating submenus in the action and navigation bars.
- Consistent lookup and dropdown behavior on fields.

Discovering reports and administration areas in Role Explorer

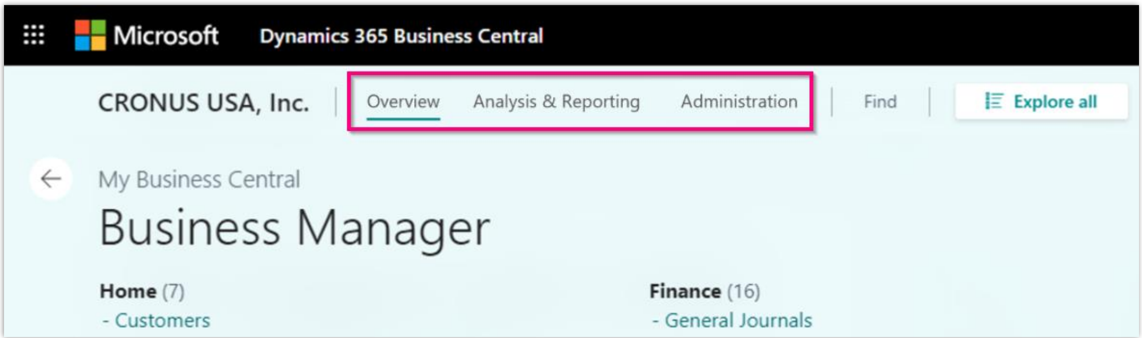
Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Oct 2021

Business value

With the addition of Role Explorer in a previous Business Central release wave, we made it extremely easy to browse, search, and simply explore pages within or outside of your role. Now, you can narrow the exploration to reports and data analysis areas only, which can help you discover information crucial for your business decisions. In the same way, you can narrow the exploration to just administrative tasks, which can help when you're setting up or configuring the system.

Feature details

The Role Explorer window features new, easy-to-discover actions that let you filter Role Explorer to show only reports or only administration areas. You can always switch back to get an overview of all pages again.



Shows the Analysis & Reporting and Administration actions in the Role Explorer for filtering.

This feature works seamlessly, whether you are exploring your role or all roles, using the Find option, or expanding and collapsing content in the window. In short, it's smooth, easy, and ready to use.

Decimal separator on numeric keypad matches region setting

Enabled for	Public preview	General availability
Users, automatically	Oct 2021	Dec 2021

Business value

Business Central empowers users to work efficiently and save time when entering data in the web client. With support for different decimal separators on numeric keypads, a favorite among business accountants, currency amounts and other decimals can be typed quicker and more reliably.

Feature details

The 2021 release wave 2 adds support for the localization of the decimal and thousands separator key (typically a period or comma character) when entering numeric values in fields. Previously, on most non-US keyboards, using the "." or "," as a thousandths or decimal separator from the keyboard's numeric keypad didn't result in the correct separator in the Business Central web client. For example, a value of 123,456 got entered as 123.456. With this release, this is no longer a problem.

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.

Service and platform

Overview

No matter the industry type of a small or medium-sized business (SMB), business users expect a dependable service and platform that they can run their business on.

OData read-only intent

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

Business value

Integrations that query data using OData can indicate a read-only intent to read data from a secondary database replica.

Feature details

Integrations that consume data from Business Central can indicate a read-only intent to use the read-only database replica. This will offload read-only queries from the primary database.

Replicas are always in the transactionally consistent state, but at different points in time there may be some small latency between different replicas.

Protect the Business Central Server against excessive background sessions for an environment

Enabled for	Public preview	General availability
Users, automatically	Oct 2021	Oct 2021

Business value

Having a system protection limit on the creation of sessions started from AL code will make the Business Central Server and service more stable. Cases where one environment starts a lot of sessions won't affect the stability of other environments running on the same server (or even the environment that started the sessions).

Feature details

The Business Central Server can process multiple background sessions simultaneously. Similar to child sessions, the Business Central Server is protected against an excessive number of background sessions for an environment. Excess background sessions can be sent to a queue for processing when a time slot becomes available. To control the background sessions, the Business Central Server now includes the following configuration settings, which are set on a per-environment basis:

- The maximum number of background sessions that the server instance can actively process at the same time.
- The maximum number of background sessions that can be waiting in the queue for processing.
- The maximum amount of time that background sessions will wait in the queue for processing.

Connected Store

Overview of Dynamics 365 Connected Store 2021 release wave 2

Dynamics 365 Connected Store is a turnkey software as a service (SaaS) solution that gathers and analyzes observational signals and line-of-business data to create insights and to automate actions for retailers in their stores. Connected Store brings together computer vision and AI to help transform the retail store experience. By utilizing data from video cameras, Connected Store delivers real-time actionable recommendations that can make retail store operations more efficient, improve customer experiences, and bridge the physical and digital divide by offering benefits to retailers that are traditionally available only to online retailers.

Dynamics 365 Connected Store enables you to:

- **React to environmental triggers**: Ensure that customer needs are met effectively and quickly by equipping store managers and employees with actionable alerts triggered by store activity, such as long checkout lines. Access to automated, sensor-driven reporting is standardized and available in-the-moment 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 shoppers visiting a store on any given day and time. Reports are accessible to employees, managers, and even stakeholders outside of the immediate environment, such as a regional store 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 Store achieves this by using the following hybrid approach:

- **Intelligent edge**: A managed gateway in the store 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 for the retailer.
- **Prebuilt AI models**: Out-of-the-box and ready to use retail-industry-specific AI models that apply computer vision and AI to a physical space.

What's new and planned for Dynamics 365 Connected Store

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may**

change and projected functionality may not be released. For more information, go to Microsoft policy.

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

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

Store analytics

Provide insights and trend information about store analytics.

Feature	Enabled for	Public preview	General availability
Display effectiveness analytics	Users, automatically	Sep 2021	Dec 2021
Queue management analytics	Users, automatically	Sep 2021	Dec 2021
Shopper analytics	Users, automatically	Sep 2021	Dec 2021

Description of **Enabled for** column values:

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

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Store analytics

Overview

Connected Store provides analytics and trend information about shopper analytics, display effectiveness, and queue management.

- **Shopper analytics** (previously named "store traffic"): Business decision makers and store supervisors can understand foot traffic patterns for a particular store.

- **Display effectiveness**: Business decision makers and store supervisors can understand display effectiveness and engagement across all of the store displays.
- **Queue management**: Business decision makers and store supervisors can understand cashier queue lengths and dwell times for better real-time staffing decisions.

Display effectiveness analytics

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Dec 2021

Business value

Enables business decision makers to:

- Determine and measure the effectiveness of displays/promotions within the store.
- Do A/B testing to find the best location to place products by measuring engagement.

Feature details

The display effectiveness analytics feature provides insights around the display/promotion effectiveness of various display zones (configured by the store manager) and their performance relative to each other.

This feature helps the store manager determine the effectiveness of displays by answering questions such as:

- How many people visited the display?
- How long, on average, did visitors dwell?
- From what direction (side of display zone) did visitors enter/exit the display zone?
- Which are the most and least busy displays?
- Which are the most and least engaging displays?
- Display engagement trends

Queue management analytics

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Dec 2021

Business value

Enables business decision makers to:

- Determine cashier queue lengths and wait times

- Make informed decisions on employee shift management
- Help improve customer experience by reducing wait times
- Improve revenues by minimizing queue abandonment

Feature details

The queue management analytics feature includes insights around queue lengths and wait times (configured by the store manager) and their performance relative to each other.

Queue management includes insights that help you do the following:

- Identify the longest and shortest queue length.
- Identify the slowest and fastest queue times with respect to the average queue time for all queues.
- Visualize queue length and queue time trends for the longest and slowest queues.
- Sort through a list of all store queues configured for insights according to queue name, longest and shortest queue values, and fastest and slowest queue times for the selected time range.

Shopper analytics

Enabled for	Public preview	General availability
Users, automatically	Sep 2021	Dec 2021

Business value

Enables business decision makers to plan for shift management and inventory based on foot traffic patterns.

Feature details

Shopper analytics (previously called "store traffic analytics") includes out-of-the box AI models and insights related to entry trends, patterns, changes, anomalies at store entries/exits, and over capacity determined by configurable thresholds. The easy-to-use dashboards also enable you to explore how many people visited the store during a given timeframe, categorized by entrance with drill-down capabilities. Using these features, business decision makers will be able to plan for shift management and inventory based on foot traffic patterns at various locations in a store.

The following are some of the key insights provided by this feature:

- Store entries
- Busiest day
- Least-busy day

- Busiest entrance
- Least-busy entrance
- Over-capacity indicators
- Foot traffic trends

Guides

Overview of Dynamics 365 Guides 2021 release wave 2

Microsoft Dynamics 365 Guides is a mixed-reality application that displays step-by-step holographic instructions right where the work happens, enabling employees to quickly learn and execute complex tasks.

Dynamics 365 Guides:

- Helps reduce errors and increase safety.
- Closes knowledge gaps and strengthens skills.
- Adapts to your work in real time.
- Improves training and processes.

Dynamics 365 Guides addresses the needs of three key personas: content authors, operators, and managers/analysts.

Authors can easily create guides without 3D or programming skills by using a simple PC app and a HoloLens app. Operators use guides on HoloLens in training and on the job to get guidance while they work in a heads-up, hands-free style. Trainers and managers can analyze usage data to optimize their workflows.

What's new and planned for Dynamics 365 Guides

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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Feature	Enabled for	Public preview	General availability
Updated user experience leveraging HoloLens 2 instinctual interactions	Admins, makers, marketers, or analysts, automatically	-	Nov 2021

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
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Updated user experience leveraging HoloLens 2 instinctual interactions

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

Business value

This enables an easier to use and more intuitive application, for example, reducing the time needed to open files.

Feature details

Users can now leverage instinctual touch interactions throughout the Guides application. Although users can still operate a Guide with hands-free interactions, core app functionality such as sign-in or starting a guide will have an updated touch interface.

When a user raises their hand at any time, a small launcher menu will appear. After pressing one of the buttons on the launcher, a touch panel appears in front of the user where they can use touch to start a guide.

Remote Assist

Overview of Dynamics 365 Remote Assist 2021 release wave 2

Microsoft Dynamics 365 Remote Assist is a mixed-reality application that empowers technicians to solve problems faster the first time. Whether in a heads-up, hands-free environment on Microsoft HoloLens or using an iOS or Android device, technicians can collaborate with remote experts to troubleshoot issues in context. This modernizes field service operations so technicians can make the most of their time.

Dynamics 365 Remote Assist is focused on these three key scenarios for 2021 release wave 2:

- **Service and repairs**: Enable companies to service assets faster by doing the right remote collaboration fast and capturing the right fix to perform further analysis.
- **Surveys and walkthroughs**: Perform tasks such as inspections, quality assurance, project reviews, and other field service and operations activities by capturing asset information with augmented reality.
- **Knowledge and service insights**: Empower your technicians to capture the right information and make it available for your broader organization. Use repair data from your technician operations to improve your business processes.

What's new and planned for Dynamics 365 Remote Assist

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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Feature	Enabled for	Public preview	General availability
Support for a subset of Teams policies	Admins, makers, marketers, or analysts, automatically	-	Oct 2021

Feature	Enabled for	Public preview	General availability
Support for Spotlight and Pinning for Remote Assist video feed on Teams desktop	Users, automatically	-	Oct 2021

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
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Support for a subset of Teams policies

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

Business value

Remote Assist users participating in a Teams meeting or call are now subject to the same policies as any other Teams user, easing configuration and ensuring compliance for customers' meetings.

Feature details

When Teams admins have set up policies about the following features, these policies will automatically cascade to Remote Assist:

- Ability to start a meeting recording
- Ability to send text chats
- Ability to enable video camera
- Ability to share files

For example, if the ability to start a meeting recording has been disabled through the associated policy for a user, that feature will be disabled for that user in Teams as well as in Remote Assist.

Support for Spotlight and Pinning for Remote Assist video feed on Teams desktop

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2021

Business value

Customers can use these features to ensure that the Remote Assist video feed is on the biggest part of the screen during meetings or calls. This enables the ability to properly view, and eventually record the details for the remote collaboration session.

Feature details

When a Remote Assist user is part of a meeting or a call, Teams desktop users can now leverage the Spotlight or Pinning feature to keep the Remote Assist user video feed on the main stage. These features are accessible through a right click on the video feed of the meeting or call participant.

Customer Insights

Overview of audience insights 2021 release wave 2

Audience insights in Dynamics 365 Customer Insights enables every organization to unify and understand their B2C & B2B customer data to harness it for intelligent insights and actions.

Eliminate data silos and unify customer data

- Use connectors to ingest and unify data, bringing in transactional, observational, and behavioral data from various data sources.
- Transform customer data to build a unified customer profile conforming to the Common Data Model.

Enrich customer profiles

- Create richer customer profiles by incorporating aggregated audience intelligence from first-party and third-party enrichments.

Enable powerful AI and insights

- Derive insights about your business using capabilities like segments and measures that are built on top of unified profiles.
- Accelerate business processes with out-of-the-box AI models or custom algorithms using Azure Machine Learning.

Extend business processes and personalize customer experiences

- Enable marketing, sales, and service professionals to drive personalized engagements across channels.
- Work with contextual customer insights and tailored customer profile cards that integrate with Microsoft and non-Microsoft business applications.
- Build on existing connectors, a variety of APIs, and Microsoft Power Platform to enable and extend line-of-business experiences.

What's new and planned for audience insights

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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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B2B

This section covers capabilities around account records and organization profiles.

Feature	Enabled for	Public preview	General availability
Activities for accounts and contacts	Users by admins, makers, or analysts	Oct 2021	-
Company name normalization	Users by admins, makers, or analysts	Oct 2021	-
Insights and unified profiles for accounts and contacts	Users by admins, makers, or analysts	Oct 2021	-
Measures in B2B scenarios	Users by admins, makers, or analysts	Oct 2021	-
Predict churn in B2B scenarios	Users by admins, makers, or analysts	Oct 2021	-
Relationships between account and contact entities	Users by admins, makers, or analysts	Oct 2021	-
Segments in B2B scenarios	Users by admins, makers, or analysts	Oct 2021	-
Shared environment for B2B and B2C customer profiles	Users by admins, makers, or analysts	Oct 2021	-
Support existing accounts hierarchies	Users by admins, makers, or analysts	Oct 2021	-

Data ingestion

This section lists updates to the data ingestion capabilities in audience insights.

Feature	Enabled for	Public preview	General availability
Additional Power Query connectors	Users by admins, makers, or analysts	Jan 2022	-

Feature	Enabled for	Public preview	General availability
Support in-lake transforms on attached entities	Users by admins, makers, or analysts	Jan 2022	-

Data unification

This section lists updates to the data unification scenarios in audience insights.

Feature	Enabled for	Public preview	General availability
Custom normalizations	Users by admins, makers, or analysts	Jan 2022	-

Enrichment

This section lists updates to the data enrichment enhancements in audience insights.

Feature	Enabled for	Public preview	General availability
B2B scenarios for enrichments and exports	Users by admins, makers, or analysts	Oct 2021	-
Share of voice for brands and interests	Users by admins, makers, or analysts	Nov 2021	-

Extensibility

This section lists updates to the extensibility scenarios in audience insights.

Feature	Enabled for	Public preview	General availability
More activation options with Microsoft services	Users by admins, makers, or analysts	Mar 2022	-
More integrations with third-party services	Users by admins, makers, or analysts	Mar 2022	-

Intelligence

This section lists updates to the intelligence scenarios in audience insights.

Feature	Enabled for	Public preview	General availability
Improvements to prediction models	Users by admins, makers, or analysts	Feb 2022	-

Description of **Enabled for** column values:

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B2B

Overview

Get more actionable insights for organizations and accounts from Dynamics 365 model-driven apps.

Activities for accounts and contacts

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

Feature details

Users now have the ability to display activities from different profile types in the same timeline simultaneously. For example, activities that are related to accounts and activities that are related to contacts of those accounts can be viewed in the timeline widget of a Customer card.

Company name normalization

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

Feature details

Audience insights lets you use algorithms to normalize company names. The normalization uses models based on machine learning and artificial intelligence to improve qualitative data unification capabilities. Normalized company names are also used by other system processes in B2B scenarios.

Insights and unified profiles for accounts and contacts

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

Feature details

Create unified profiles and insights for both organizations and individuals and switch between them to get a holistic view of accounts and contacts. The combined view shows segments, measures, activities, and more.

Measures in B2B scenarios

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

Feature details

This new feature enables B2B customers to create new measures with the help of data mapping by selecting desired accounts and sub-accounts in their managed hierarchies. Specifically, B2B customers can choose hierarchies to apply and roll up the sub-accounts into the main account to calculate measures with aggregated results.

Predict churn in B2B scenarios

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

Feature details

In B2B scenarios, customers are business organizations and organized as accounts with individual organization reps as related contacts. In addition to churn predictions for individual customer records, audience insights predicts the likelihood of churn for accounts and provides the same straightforward guided experience.

Relationships between account and contact entities

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

Feature details

If your organization has already configured existing relationships between fields in account data to related contacts, in a Dynamics 365 model-driven app like Sales or Customer Service, this information is persisted when the data get ingested to audience insights.

Segments in B2B scenarios

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

Feature details

As part of enabling B2B customers, the segmentation capability in audience insights supports the B2B scenarios of accounts and contacts for these business accounts. It also respects any existing hierarchical relationships between accounts and contacts. This feature includes changes to the segment builder and the general workflows to create, manage, and schedule segments in audience insights.

Shared environment for B2B and B2C customer profiles

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

Feature details

Ingest and work with B2B profiles (accounts and contacts) and B2C profiles (individual customers) in the same environment of audience insights instead of creating two individual environments and keeping the data separated.

Support existing accounts hierarchies

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

Feature details

Leverage an existing account hierarchy in an existing organization to generate additional insights (for example, through segments and measures based of unified account profiles). This feature enables users to consolidate insights based on their existing account hierarchy.

Data Ingestion

Overview

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

Additional Power Query connectors

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

Feature details

Ingested data is the foundation for data unification and subsequent data processing. More Power Query connectors provide additional options for ingesting data in audience insights in a variety of formats.

Newly added Power Query connectors include:

- Azure Synapse Analytics
- Dataverse Data Lake
- Adobe Analytics v2 APIs
- Google Analytics v4 APIs

Support in-lake transforms on attached entities

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

Feature details

Initiate, author, and refresh data transformation settings using technology similar to Power Query for data connected from a Common Data Model folder in your Azure Data Lake Storage account before ingesting the data to audience insights.

Data unification

Overview

Updates and improvements in this area include advanced configuration options for the data unification process, including:

- Improved match rules
- Improved normalization

Custom normalizations

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

Feature details

This feature provides the ability to normalize anonymous values and name aliases before matching them. Users can specify their own list of name variations and anonymous values to be normalized before matching to improve the matching process configuration and adapt it to the user's need.

Enrichment

Overview

Data enrichment capabilities in Customer Insights for this release include:

- Brand share of voice

B2B scenarios for enrichments and exports

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

Feature details

Audience insights extends integrations with Microsoft services to support B2B scenarios. These capabilities create a seamless experience when working with Dynamics 365 Customer Insights and other first-party services. The integrations with third-party systems and services also support the B2B scenarios and provide you with the required flexibility to activate and export accounts and their related contacts.

Existing enrichments from Microsoft adapt to enable B2B scenarios for our customers. Integrations of third-party data enrichment providers enable B2B enrichment scenarios, too.

Share of voice for brands and interests

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

Feature details

Audience insights extends brand and interest enrichments with the addition of a new comparative share of voice (SoV) score.

You can use this new score to understand how a specific brand or interest compares to other brands and interests for a given customer's demographic. For example, you can find out if a customer's demographic segment (35-49 year-old females from Seattle, USA) has a higher SoV for brand X as compared to the brands Y or Z.

Extensibility

Overview

Updates to the extensibility scenarios in Dynamics 365 Customer Insights audience insights capabilities include additional integrations with first-party and third-party services.

More activation options with Microsoft services

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

Feature details

Improve existing integrations with other Microsoft services to provide a more seamless experience when using Dynamics 365 Customer Insights and other first-party services. Additionally, we're extending the number of available integrations to more Microsoft services to enable further activation scenarios.

More integrations with third-party services

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

Feature details

Audience insights provides additional integrations with third-party systems and services to enable additional usage scenarios and provide you with increased flexibility on how to use your customer data. Also, we're extending functionality and providing improvements to various existing activation scenarios.

Intelligence

Overview

Let the system generate predictions based on unified profiles and other data ingested to Dynamics 365 Customer Insights to get a better understanding of customer patterns.

Improvements to prediction models

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

Feature details

Out-of-the-box prediction models, including **subscription churn**, **transactional churn**, and **customer lifetime value (CLV)** become generally available as a part of Customer Insights. The planned improvements include more data flexibility, more detailed explanations in the product, and additional model management capabilities.

Overview of engagement insights 2021 release wave 2

Engagement insights (preview) in Dynamics 365 Customer Insights enables individual and holistic interactive analytics over web, mobile, connected products, and customer journey touchpoints. Engagement insights expands to multichannel analytics over data from other channels for richer customer analytics, downstream actions, and optimizations.

Eliminate data silos and unify customer data

Engagement insights enables connecting multiple data sources from a variety of applications. Data processed and stored in audience insights and behavioral signals collected in engagement insights are unified for analytics with built-in support for identity resolution to unlock a 360-degree view with key analytics on customers.

Enable interactive analytics

Out-of-the-box analytics offers access to data interactively, providing rich insights into customer actions as they happen to help drive better business insights.

Connect analysis to systems of action

Embed the insights and activations based on your data right into your systems of action including advertising channels, marketing channels, and other business applications.

Advanced analytics and customer journey analytics

Use digital analytics to understand customer journeys through funnel reports, journey maps, flows, and more to drive the next best actions.

Built-in capabilities provide advanced analytics with custom reports, behavioral and advanced segments, custom metrics, and predictive analytics based on real-time signals to enable business critical personalization scenarios.

What's new and planned for engagement insights

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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Customer journey analytics

This section lists enhancements to the area of customer journey analytics.

Feature	Enabled for	Public preview	General availability
Journey maps	Users by admins, makers, or analysts	Oct 2021	Feb 2022

Fundamentals

This section covers continued efforts in the area of fundamentals for the engagement insights capabilities.

Feature	Enabled for	Public preview	General availability
Availability in additional geographies	Users by admins, makers, or analysts	Jan 2022	To be announced

Integrations with other Microsoft services

This section lists all integration scenarios across Microsoft services.

Feature	Enabled for	Public preview	General availability
Integration with Microsoft Clarity	Users by admins, makers, or analysts	Mar 2022	To be announced
Integration with Microsoft Advertising	Users by admins, makers, or analysts	Mar 2022	To be announced

Marketing automation integration

Continued efforts to integrate with Dynamics 365 Marketing.

Feature	Enabled for	Public preview	General availability
Integrate with customer journey orchestration	Users by admins, makers, or analysts	Mar 2022	To be announced

Multi-channel analytics

This product area contains enhancements to multi-channel analytics.

Feature	Enabled for	Public preview	General availability
Multi-channel funnels	Users by admins, makers, or analysts	Jan 2022	To be announced
Multi-channel reports	Users by admins, makers, or analysts	Jan 2022	To be announced
Export cohorts generated from multi-channel segments	Users by admins, makers, or analysts	Feb 2022	To be announced
Customer profiles and activities in reports	Users by admins, makers, or analysts	Mar 2022	To be announced

Description of **Enabled for** column values:

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

Overview

Journey maps will release as a public preview when engagement insights becomes generally available. This area includes improvements to journey maps.

Journey maps

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

Feature details

Journey maps allow you to understand the path that visitors take through websites or mobile apps. They let you better understand your visitors' behavior and validate your assumptions on the usage of your channels.

Journey maps help you to find out more about how customers interact through different touchpoints and channels, and they see how these interactions relate to each other.

Fundamentals

Overview

This product area includes the availability in additional geographies and improvements to performance and scalability.

Availability in additional geographies

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

Feature details

Engagement insights continues to expand the availability of the service to additional geographies and Azure regions. This expansion aligns with other capabilities that are closely connected, such as audience insights or customer journey orchestration.

Integrations with other Microsoft services

Overview

First-party integrations with partnering services include Power Apps portal, Azure Static Web Apps, Microsoft Clarity, and Microsoft Advertising.

Integration with Microsoft Clarity

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

Feature details

Clarity is a user behavior analytics tool that helps you understand how users are interacting with your website through features, such as session replays and heatmaps. Engagement insights integrates with Microsoft Clarity to use these capabilities seamlessly.

Integration with Microsoft Advertising

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

Feature details

This feature enables the integration between Microsoft Advertising and the engagement insights capability of Dynamics 365 Customer Insights. We introduce a basic integration that includes engagement insights web tracking capabilities as a usage analytics solution.

Marketing automation integration

Overview

Adding capabilities like tag rationalization, additional SDK features, and alignment on the segmentation engine for a smoother integration with Dynamics 365 Marketing.

Integrate with customer journey orchestration

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

Feature details

The engagement insights SDK serves as the single SDK for event tracking. After implementing the SDK, users can use different offerings without any changes to the tracking snippet on the webpage or mobile app. Engagement insights addresses requirements from the current customer journey SDK features in Dynamics 365 Marketing to close gaps in web tracking.

Journey orchestration will use the engagement insights platform to create journey triggers from external events. Customer journey orchestration will also be able to trigger orchestrations based on engagement insights events. Engagement insights is required for analytics on customer behaviors.

Multi-channel analytics

Overview

The scenarios covered include multi-channel (web, mobile, and connected products) reports and funnels. You can also export cohorts from multi-channel data and use customer profiles and activities from audience insights in custom reports.

Multi-channel funnels

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

Feature details

Use funnel reports to understand how the website audience progresses through the various steps of their journey across all touchpoints (web, mobile, connected products, and customer activities). Identify the drop-off points and use these insights for optimization and process improvements. Multiple enhancements of the existing capabilities are planned based on the feedback that was provided during the preview of engagement insights.

Multi-channel reports

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

Feature details

Use the multi-channel report capabilities to view reports data across web, mobile, and connected products. Additionally, reports can include transactional and demographic data with customer activities and profiles.

Export cohorts generated from multi-channel segments

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

Feature details

Export cohorts generated from segments that span multiple channels like web, mobile, connected products, customer profiles, and more.

Customer profiles and activities in reports

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

Feature details

See reports showing customer profiles and activities from audience insights. Interactively analyze the current composition of customer profiles and activities. Review how the composition changes over time to get insights into customers and their behavioral data in a single place.

Customer Voice

Overview of Dynamics 365 Customer Voice 2021 release wave 2

Dynamics 365 Customer Voice is an enterprise feedback management solution, powering simple-yet-robust feedback capture, an integrated customer data platform, and built-in insights tools to identify and act upon market opportunities.

Making it easy for survey owners to get insights and act on the insight is the primary investment as part of 2021 release wave 2. Survey owners would be able to get feedback insights quickly and use Power Automate to define custom workflow to engage the right person at the right time.

For more information about Dynamics 365 Customer Voice, please check out product documentation at https://aka.ms/CustomerVoiceDoc and tech community forum at https://aka.ms/CustomerVoiceForum.

What's new and planned for Dynamics 365 Customer Voice

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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Insights and follow-up

Redesigned survey report to enable more robust filtering capabilities to make it easy to get the required insights.

Feature	Enabled for	Public preview	General availability
Dynamic close loop follow-up notification	Admins, makers, marketers, or analysts, automatically	-	Jan 2022
Period-to-period comparison analysis	Admins, makers, marketers, or analysts, automatically	-	Jan 2022

Feature	Enabled for	Public preview	General availability
Survey key driver analysis	Admins, makers, marketers, or analysts, automatically	-	Jan 2022

Survey administration

Enable administrators to manage survey usage in the organization.

Feature	Enabled for	Public preview	General availability
Departmental capacity management	Admins, makers, marketers, or analysts, automatically	Oct 2021	-

Description of **Enabled for** column values:

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Insights and follow-up

Overview

The survey report summary now includes robust filtering capabilities to enable survey owners to slice-and-dice the survey results to get the insights they need from the survey.

In addition to summarizing the feedback results, Dynamics 365 Customer Voice now has the capability to compare results over time so you can identify trends and analyze performance. The satisfaction metrics dashboard is now improved with key driver analysis so you can get not only the insights of your performance but also understand why and what drives the performance.

Lastly, the new Power Automate response trigger enables you to create custom workflows to engage the right person at the right time.

Dynamic close loop follow-up notification

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

Feature details

This feature enables a survey owner to use survey variables to dynamically assign an owner to the alert that is generated when receiving low satisfaction responses. The alert owner receives a notification to enable the right employee to engage with the customer in timely manner.

Period-to-period comparison analysis

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

Feature details

This feature enables business owners to compare feedback over a period of time, including monthly and quarterly reports. The period-to-period comparison identifies your performance over time and what drives the score to go up or down.

Survey key driver analysis

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

Feature details

This feature provides insights into the relative importance of other questions in your survey compared to the overall feedback metrics. This enables a business owner to identify what drives the metrics (such as NPS) score and how to improve the score.

Survey administration

Overview

Administrators can manage survey usage in the organization.

Departmental capacity management

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

Feature details

The departmental capacity management feature enables a tenant administrator to distribute Dynamics 365 Customer Voice licenses into allotments and assign a security group to each allotment. Members of the security group can then use the assigned allotment to create and distribute Dynamics 365 Customer Voice surveys for their department.

Microsoft Cloud for Industry

Overview of Microsoft Cloud for Healthcare 2021 release wave 2

Microsoft Cloud for Healthcare provides capabilities to manage health data at scale and makes it easier for healthcare organizations to improve the patient experience, coordinate care, and drive operational efficiency.

By bringing together capabilities from Microsoft Dynamics 365, Microsoft 365, and Microsoft Azure, Microsoft Cloud for Healthcare expedites a healthcare organization's ability to roll out solutions. Patients, providers, and care coordinators can perform daily duties in a modern yet familiar user interface.

What's new and planned for Microsoft Cloud for Healthcare

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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Connected patient experiences

Healthcare solutions to help with connected patient experiences

Feature	Enabled for	Public preview	General availability
Easier access for patients	Users by admins, makers, or analysts	Jan 2022	-
View the full context of the patient	Users by admins, makers, or analysts	Jan 2022	-

Data interoperability

Healthcare data model and data ingestion provide the foundation for healthcare customers to be successful on Dynamics 365 and Power Platform.

Feature	Enabled for	Public preview	General availability
Improved modeling of healthcare data in dataverse	Users by admins, makers, or analysts	✔ Jun 30, 2021	Oct 2021

Health team productivity

Provider solutions by Dynamics 365 and Power Platform enable healthcare providers to coordinate safe and effective care.

Feature	Enabled for	Public preview	General availability
Enable device management	Users by admins, makers, or analysts	Jan 2022	-
Faster care with care management	Users by admins, makers, or analysts	Jan 2022	-

Security, compliance, privacy, and availability

Microsoft Cloud for Healthcare helps healthcare customers with safer solutions broadly.

Feature	Enabled for	Public preview	General availability
Expansion to more regions	Users by admins, makers, or analysts	-	Oct 2021

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Connected patient experiences

Overview

As part of Microsoft Cloud for Healthcare, Dynamics 365 and Power Platform support the following healthcare solutions for healthcare providers to help with connected patient experiences:

- **Patient 360**: Get a full picture of a patient (powered by PowerApps)
- **Patient access**: Provide access to personalized care (powered by Power Apps portals)
- **Patient outreach**: Reach out to patients for personalized care (powered by Dynamics 365 Marketing)
- **Patient service center**: Support patients with patient insights (powered by Dynamics 365 Customer Service)
- **Health assistant**: Surface next best actions in context of a patient (powered by Dynamics 365 Sales)

2021 release wave 2 updates improve these solutions through engaging and improved usability of all solutions, enabling customers to focus on providing care.

Easier access for patients

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

Feature details

Patients leverage the patient access portal to schedule appointments and interact with their provider. This release enables patients to make it easier to finish their tasks, as well as access relevant information.

View the full context of the patient

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

Feature details

To provide good care, a provider needs to understand the full patient view.

With this release we provide a solution where the provider can see:

- Unified patient profiles.

- Unified patient activity timelines with an opportunity to enrich it through Customer Insights.

Data interoperability

Overview

To help customers for Microsoft Cloud for Healthcare accelerate using Dynamics 365 and Microsoft Power Platform, we provide a starter healthcare data model. The data model aligns with HL7 FHIR standards to support data interoperability with other services. In addition, we provide tools to help with data ingestion.

For 2021 release wave 2, we're extending the data model and improving the data ingestion pipeline.

Improved modeling of healthcare data in dataverse

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

Business value

Provide a healthcare data model as a downloadable component to start initial creation of solutions.

Feature details

This release improves the data interoperability and ingestion of data into Dynamics 365 and Microsoft Power Platform solutions. Customers and partners will receive access to a generally available solution focused on the underlying data model of Microsoft Cloud for Healthcare to build their own solutions faster.

Health team productivity

Overview

As part of Microsoft Cloud for Healthcare, Dynamics 365 and Microsoft Power Platform will support the following healthcare solutions for healthcare providers:

- **Care management**: Coordinate care plans and care teams standalone and in Teams (powered by Power Apps)
- **Home health**: Schedule and coordinate home visits (powered by Dynamics 365 Field Service)

2021 Release wave 2 updates improve these solutions through engaging and improved usability of all solutions, enabling customers to focus on providing care.

Enable device management

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

Feature details

To help patients get better faster, providers might supply them with devices to track their health. With these solutions, providers are able to manage their inventory of devices and associate them with the correct patients.

Faster care with care management

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

Feature details

Within care management, exploit easy-to-use and intuitive tools to provide care more effectively. This release focuses on giving healthcare providers support in quickly finding the tasks that they need to accomplish first, such as easy access to their patient information and creating supportive care plans.

Security, compliance, privacy, and availability

Overview

Microsoft Cloud for Healthcare solutions powered by Dynamics helps customers provide care faster and safer and build on top of the trusted Microsoft cloud platforms.

Expansion to more regions

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

Feature details

Customers in more regions gain access to Cloud for Healthcare solutions powered by Dynamics 365. Focus in this release is to release the Dynamics- and Power Platform-based solutions in select European and Asian countries.

Overview of Microsoft Cloud for Financial Services 2021 release wave 2

Microsoft Cloud for Financial Services provides capabilities to manage financial services data at scale and makes it easier for financial services organizations to improve their customer experience, coordinate engagement, and drive operational efficiency.

By bringing together capabilities from Microsoft Dynamics 365, Microsoft 365, and Microsoft Azure, Microsoft Cloud for Financial Services expedites a financial services organization's ability to achieve its digital transformation.

What's new and planned for Microsoft Cloud for Financial Services

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

Customer intelligence

Customer intelligence unifies important, relevant, and accurate customer information across multiple sources through Dynamics 365 Customer Insights.

Feature	Enabled for	Public preview	General availability
Segment customers by engagement and relationship strength	Users by admins, makers, or analysts	Oct 2021	-
View customer churn risk	Users by admins, makers, or analysts	Oct 2021	-

Customer onboarding

Support for applicant onboarding, ensuring the application details are available in CRM for easy follow-up and validation.

Feature	Enabled for	Public preview	General availability
Track loan applications	Users by admins, makers, or analysts	Oct 2021	-

Retail banking data model

Dedicated banking data model hosted in Dataverse.

Feature	Enabled for	Public preview	General availability
Branch schema in retail banking data model	Users by admins, makers, or analysts	Oct 2021	-
Customer schema in retail banking data model	Users by admins, makers, or analysts	Oct 2021	-
Financial holdings schema in retail banking data model	Users by admins, makers, or analysts	Oct 2021	-
Groups and relationships schema in retail banking data model	Users by admins, makers, or analysts	Oct 2021	-
Life events schema in retail banking data model	Users by admins, makers, or analysts	Oct 2021	-
Loan application schema in retail banking data model	Users by admins, makers, or analysts	Oct 2021	-

Unified customer profile

The unified customer profile helps tailor customer experiences through a 360-degree view of the customer, bringing together financial, behavioral, and demographic data from inside and outside the walls of the bank.

Feature	Enabled for	Public preview	General availability
See a customer's groups and relationships with other customers	Users by admins, makers, or analysts	Oct 2021	-
Track a customer's life events	Users by admins, makers, or analysts	Oct 2021	-
View a customer's financial holdings	Users by admins, makers, or analysts	Oct 2021	-
View a snapshot of customer information	Users by admins, makers, or analysts	Oct 2021	-

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Customer intelligence

Overview

In the current banking world, bank agents provide services to many customers. They're required to communicate, advise, and provide information based on a deep understanding of the customer's financial strength via holdings, assets, and liabilities, including the customer's actions, life moments, and an overview of their personal and business relationships with other people connected to the bank. This information about the customer is stored in the bank across multiple separate modules: sales, services, marketing, and operational systems. To access all this information, the bank agent must search several systems that often contain data that is incomplete, inaccurate, and isolated.

Customer intelligence unifies important, relevant, and accurate customer information across multiple sources via Dynamics 365 Customer Insights. This empowers the agent to engage with customers with relevant insights that combine demographic information, financial measures, and attitudes to form financial segments and AI models. Combined, these insights help agents to quickly understand the customer.

Segment customers by engagement and relationship strength

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

Business value

In the current banking world, bank agents provide services to many customers. They must communicate, advise, and provide information based on a deep understanding of the customer's financial strength through holdings, assets and liabilities, including the customer's actions, life moments and an overview of their personal and business relationships with other people connected to the bank.

This information about the customer is stored in the bank across multiple separate modules: sales, services, marketing, and operational systems. To access all this information, the bank agent must search several systems, with data that is oftentimes incomplete, inaccurate, and isolated.

Customer intelligence unifies important, relevant, and accurate customer information across multiple sources through Dynamics 365 Customer Insights. This empowers the agent to engage with customers by using relevant insights that combine demographic information, financial measures, and attitudes to form financial segments and AI models, altogether helping to quickly understand the customer.

In addition, customer intelligence offers the agent a view of important indicators regarding the relationship between the bank and the customer while also informing any proactive outreach from the bank. Insights can help to anticipate certain behaviors based on customers who are similar in engagement or financial situation. Deeper understanding can reduce unnecessary friction and replicate best practices through data-driven insights that help to optimize the customer journey with the bank.

Feature details

Be proactive with customers and customize services for them by segmenting them into groups that share similar values, such as share-of-wallet and engagement habits. Identify customers who are most valuable or critical to the bank so you know to give them exceptional care with a high-touch relationship.

Customer segmentation is based on engagement and strength of relationship with the bank.

View customer churn risk

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

Business value

In the current banking world, bank agents provide services to many customers. They must communicate, advise, and provide information based on a deep understanding of the customer’s financial strength through holdings, assets, and liabilities, including the customer’s actions, life moments, and an overview of their personal and business relationships with other people connected to the bank.

This information about the customer is stored in the bank across multiple separate modules: sales, services, marketing, and operational systems, so for the bank agent to access all this information, the bank agent must search several systems, with data that is often incomplete, inaccurate, and isolated.

Customer intelligence provides a quick and easy view of customer's churn risk level.

Feature details

Customer intelligence unifies important, relevant, and accurate customer information across multiple sources through Dynamics 365 Customer Insights. This empowers the agent to engage with customers with relevant insights that combine demographic information, financial measures, and attitudes to form financial segments and AI models, altogether helping to quickly understand the customer.

In addition, customer intelligence offers the agent a view of important indicators regarding the relationship between the bank and the customer while also informing any proactive outreach from the bank. Insights can help to anticipate certain behaviors based on customers who are similar in engagement or financial situation. Deeper understanding can reduce unnecessary friction and replicate best practices through data-driven insights that help to optimize the customer journey with the bank.

Customer onboarding

Overview

In today’s digitized world, banks are offering their applicants the use of online channels to receive information on their accounts and keep track of their finances.

When applying for a loan, applicants usually reach out to the bank via the official website or mobile application as a first step to explore available options and evaluate their fit. Tailoring the right loan quickly and easily can make the difference between an engaged customer and one who turns to another lender. Allowing the applicant to start the loan application journey online, providing initial information to the bank, creates an opportunity to offer relevant information and capture the applicant interest in real time. However, in some cases this process is abandoned midway, leaving the application information incomplete. To ensure such opportunities aren't left unaddressed, banks need to connect the online experience with CRM to ensure follow through.

Track loan applications

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

Business value

Loan managers engage with multiple applicants who are interested in loans. The current engagement process requires manual data collection during customer interactions, such as in calls, chats, and meetings. In addition, when reviewing new loan applications and looking up the application status, the loan manager needs to understand the full picture of the loan process, which currently requires gathering information from various tools and resources.

Loan application management and tracking offers loan managers a quick view of the loan application details and status. This information helps them to engage with customers more meaningfully and to provide relevant information in these interactions.

Feature details

The application queue allows loan managers to get a quick view of the pipeline, across new applications, in-process applications and an archive of applications that were completed.

Detail sections provide information related to personal, collateral, and financial information relevant to the loan application. A dedicated documents section enables loan managers to review and manage the documents uploaded by the applicant during the loan application process.

Loan application tracking helps you:

- Keep track of applications.
- Validate information provided by applicants.
- Ask for additional information as needed.
- Capture where the applicant is in the flow.

Retail banking data model

Overview

A dedicated banking data model hosted in Dataverse captures new dimensions, such as financial information, groups and relationships, and life moments.

To help banks take advantage of the benefits of CRM quickly, with their business model supported out of the box, we're introducing extensions to Common Data Model that are customized for retail banking scenarios.

These changes will accelerate adoption of Dynamics 365 solutions, while also ensuring that processes and measures available out of the box are consistent and relevant for their business processes.

Branch schema in retail banking data model

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

Business value

To help banks take advantage of the benefits of CRM quickly, with their business model supported out of the box, we are introducing extensions to Common Data Model that are custom made for retail banking scenarios. These changes will accelerate adoption of Dynamics 365 solutions, while also ensuring that processes and measures available out of the box are consistent and relevant for their business processes.

Feature details

The new branch schema in the retail banking data model will support branches in the bank, including:

- Branch number
- Name
- Manager
- Address
- Connection to the customer table to capture customer's primary branch

Customer schema in retail banking data model

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

Business value

To help banks take advantage of the benefits of CRM quickly, with their business model supported out of the box, we are introducing extensions to Common Data Model that are custom made for retail banking scenarios. These changes will accelerate adoption of Dynamics 365 solutions, while also ensuring that processes and measures available out of the box are consistent and relevant for their business processes.

Feature details

The new customer schema in the retail banking data model will support people and small or medium companies as customers of the bank. The schema includes:

- Contact and Account tables that include financial details related to know your customer (KYC) and know your business (KYB)
- Flags indicating whether data is controlled by an external system
- Tables locked for updates from external systems only

Financial holdings schema in retail banking data model

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

Business value

To help banks take advantage of the benefits of CRM quickly, with their business model supported out of the box, we are introducing extensions to Common Data Model that are custom made for retail banking scenarios. These changes will accelerate adoption of Dynamics 365 solutions, while also ensuring that processes and measures available out of the box are consistent and relevant for their business processes.

Feature details

The new financial holdings schema in the retail banking data model supports the financial holdings of bank customers.

Financial holdings are categorized as one of the following:

- Account: Either checking or savings accounts
- Credit line: Credit limit that was approved by the bank
- Loan: Secured, unsecured, or mortgage loans
- Investment: Investment accounts including portfolios of funds, stocks, bonds, and other assets
- Long-term saving: Deposits that are often locked for an extended period of time, like provident funds

Each category defines the details associated with the financial holding, as well as possible financial instruments that can be connected to it, including:

- Credit and debit cards, which can be associated with an account or a credit line
- Standing order or direct debit/deposit, which can be associated with an account
- Overdraft, which can be associated with an account

Relevant alerts for financial holdings are predetermined based on the category and instruments defined in the data model.

Customers have a many-to-many relationship with financial holdings, with each connection further classified by the role of the customer toward the holding, such as owner or co-signer.

Groups and relationships schema in retail banking data model

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

Business value

To help banks take advantage of the benefits of CRM quickly, with their business model supported out of the box, we're introducing extensions to Common Data Model that are tailor made for retail banking scenarios. These changes will accelerate adoption of Dynamics 365 solutions, while also ensuring that processes and measures available out of the box are consistent and relevant for their business processes.

Feature details

The new groups and relationships schema in the retail banking data model supports groups, such as households and partnerships. Features and capabilities include:

- A new table that represents groups, including types (for households and partnerships).
- Groups can be associated with all/some/none of the financial holdings owned by its members, which then defines the financial strength of the group, through total income, assets, and liabilities.
- Each group can have a primary member. For any member a main group of household type can be set.

Life events schema in retail banking data model

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

Business value

To help banks take advantage of the benefits of CRM quickly, with their business model supported out of the box, we are introducing extensions to Common Data Model that are custom made for retail banking scenarios. These changes will accelerate adoption of Dynamics 365 solutions, while also ensuring that processes and measures available out of the box are consistent and relevant for their business processes.

Feature details

To help keep track of key moments of the customer, the retail banking data model will include a life moment table. Moments will capture a wide range of life event types:

- Birthday: Date of birth, which is managed via the Contact table
- Personal status: The Contact's marital status
- Family: Represents the birth or adoption of children in the family
- Education: Any education events including graduation from high school or college
- Home: Purchase or sale of a home
- Car: Purchase or sale of a car
- Health: Significant medical event, such as surgery, which may require lending or sale of investment

Relevant alerts for life moments are predetermined based on the event type and are defined in the data model.

Loan application schema in retail banking data model

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

Business value

To help banks take advantage of the benefits of CRM quickly, with their business model supported out of the box, we are introducing extensions to Common Data Model that are custom made for retail banking scenarios. These changes will accelerate adoption of Dynamics 365 solutions, while also ensuring that processes and measures available out of the box are consistent and relevant for their business processes.

Feature details

The new loan application schema in the retail banking data model supports loan applications. The schema provides the following capabilities:

- Enable bank to manage the application more seamlessly
- Reflect latest status in CRM

Unified customer profile

Overview

With changing customer expectations, retail banks are constantly required to enhance their customer experience and to meet the customers where they are while maintaining a personalized experience and efficient, professional service.

Because of data silos in the bank, relationship managers lack consolidated visibility into customer information, characteristics, financial history, and intelligent insights. This limits their ability to provide personalized experiences, and they're likely to miss growth opportunities.

With a unified customer profile, relationship managers can gain a complete view of the customer to reach better outcomes through personalized experience, facilitate cross-sell and upsell, and increase customer retention and loyalty.

See a customer’s groups and relationships with other customers

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

Business value

With changing customer expectations, retail banks are constantly required to enhance their customer experience and to meet the customers where they are while maintaining a personalized experience and efficient, professional service.

Because of data silos in the bank, relationship managers lack consolidated visibility into customer information, characteristics, financial history, and intelligent insights, hence are limited in their ability to provide personalized experiences and are likely to miss growth opportunities. With Unified Customer Profile, relationship managers can gain a complete view of the customer to reach better outcomes through personalized experience, facilitate cross-sell and upsell and increase customer retention and loyalty.

Feature details

Context about connections can help you:

- Develop targeted, data-driven marketing campaigns
- Surface next best actions and next best product recommendations based on the relationship between customers’ accounts
- Power more personalized messaging to enhance the customer experience

Many customers have their entire household or family at the same bank. This understanding can help prevent customers within the same group from receiving multiple offers that are the same, repeatable communications, and most importantly the spread of lack of satisfaction, when one member has an unsuccessful interaction with the bank.

The groups and relationship view provides:

- Main snapshot: Shows the customer's primary group that represents a household in the summary tab, providing a high-level understanding of the customer's financial support and value.
- Group and relationship details: Provides an elaborate view of the customer's groups and relationships. Shows their primary group and role within their group, plus other groups and relationships the customer is a part of and their role there. For each group, there's a detailed view of all members, along with the aggregated financial holdings that derive the group's value to the bank.

Track a customer's life events

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

Business value

With changing customer expectations, retail banks are constantly required to enhance their customer experience and to meet the customers where they are while maintaining a personalized experience and efficient, professional service.

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Feature details

Life event journey offers the bank agent an at-a-glance view of the customer and his or her personal life milestones. Life events allows bank agents to add new life moments, as well as edit or remove existing life moments as they learn new information about the customer. This helps agents benefit from each other, as information gained is easily shared across the team.

View a customer's financial holdings

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

Business value

With changing customer expectations, retail banks are constantly required to enhance their customer experience and to meet the customers where they are while maintaining a personalized experience and efficient, professional service.

Because of data silos in the bank, relationship managers lack consolidated visibility into customer information, characteristics, financial history, and intelligent insights, and hence are limited in their ability to provide personalized experiences and are likely to miss growth opportunities. With Unified Customer Profile, relationship managers can gain a complete view of the customer to reach better outcomes through personalized experience, facilitate cross-sell and upsell and increase customer retention and loyalty.

Feature details

Help bank agents quickly understand customer wallet share, total assets, and liabilities, and key flags related to holdings. In addition, provide a whitespace view to quickly surface opportunities to deepen the relationship.

The summary view offers an at-a-glance perspective as part of the summary tab.

- Financial summary: Provides an at-a-glance perspective, including:
  - Customer wallet share
  - Total assets and liabilities
  - Key flags related to holdings
  - Whitespace view
- Financial details: Allows the bank agent to drill into the granular details of the customer's financial situation, showing detailed information of accounts, loans, investments, credit lines and long-term savings. Details include owned financial holdings and customers at the bank related to them, as well as holdings where the featured customer plays a role but is not the owner. Key flags related to the holdings are also highlighted to ensure follow up as needed.
- Cards: Displays the bank agent customer's card information, providing an at-a-glance view on the summary tab, revealing credit or debit cards used by the customer, including key flags when those are about to expire, not activated, lost, or reported stolen. The agent can get a drilldown view on the financial details tab (see previous point), showing cards within the associated holding (account, credit line), whether within the owned list of holdings or the other tab that features holdings held by other customers at the bank.

View a snapshot of customer information

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

Business value

With changing customer expectations, retail banks are constantly required to enhance their customer experience and to meet the customers where they are, while maintaining a personalized experience and efficient, professional service.

Because of data silos in the bank, relationship managers lack consolidated visibility into customer information, characteristics, financial history, and intelligent insights. This limits their ability to provide personalized experiences, so they're likely to miss growth opportunities.

With Unified Customer Profile, relationship managers can gain a complete view of the customer to reach better outcomes through personalized experience, facilitate cross-sell and upsell and increase customer retention and loyalty.

Feature details

The customer snapshot provides the bank agent with a quick, at-a-glance view of who the customer is, from name through personal information such as demographics, regular income, and their preferred channel of communication. The profile can be enriched with additional Customer Intelligence-driven information such as banking segments, and churn risk (built on Customer Insights).

The at-a-glance customer view includes:

- Name
- Demographics
- Regular income
- Preferred channel of communication

Customer view can be enriched with the following Customer Intelligence-driven information:

- Banking segments
- Churn risk

Overview of Microsoft Cloud for Nonprofit 2021 release wave 2

Microsoft Cloud for Nonprofit empowers scalable and transformative mission impact by helping nonprofits to engage with their donors and supporters, deliver effective programs, and accelerate mission outcomes.

By combining the power of Fundraising and Engagement with Dynamics 365 Marketing, nonprofit organizations and UN agencies can cultivate valuable donor relationships through a guided journey to campaign segmentation and analysis. Our Volunteer Management app combined with a Power Apps portal app enables nonprofits to perform all their key functions in one seamless experience, including program execution, project management, program design, and volunteer management. Finally, Microsoft Cloud for Nonprofit helps organizations to bring data into view from disparate systems and applications, including CRM data.

What's new and planned for Microsoft Cloud for Nonprofit

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Deliver effective programming

Empower staff and volunteers to deliver measurable and responsive programs based on community needs.

Feature	Enabled for	Public preview	General availability
Volunteer Engagement	Users, automatically	-	Nov 2021
Volunteer Management	Users, automatically	-	Nov 2021

Know your donors and supporters

Increase funding and support of your mission by aligning program needs with personalized supporter engagements.

Feature	Enabled for	Public preview	General availability
Security and compliance enhancements	Users, automatically	-	Nov 2021

Description of **Enabled for** column values:

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

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

Deliver effective programming

Overview

Nonprofit and UN program staff wear many hats - program execution, project management, program design, and volunteer management, for example. In release wave 2, we'll launch two volunteering applications:

- A volunteer management model-driven Power App for nonprofit staff to manage engagement opportunities. Volunteer management enables volunteer coordinators and volunteers to collaborate and match skills with needs.
- A Microsoft Power Apps portal app that integrates with nonprofit websites to ensure that volunteer recruitment efforts span far and wide, and that the most diverse and committed audience members possible commit their time and talents. Volunteer management staff who leverage Teams will be able to manage engagement opportunities and streamline volunteer onboarding without ever leaving Teams.

Volunteer Engagement

Enabled for	Public preview	General availability
Users, automatically	-	Nov 2021

Business value

Empower volunteers to discover, register for, and participate in nonprofit engagement opportunities.

Feature details

Built on the Microsoft Power Platform, the Volunteer Engagement Power Apps portal application enables volunteers to easily engage and support your organization’s mission.

- Discover opportunities: prospective volunteers learn about opportunities that match their interest, qualifications, and schedule.
- Create a profile: prospective volunteers create and update profiles to highlight their experience, skills, and interests.
- Communicate seamlessly: Volunteers and nonprofit staff exchange messages and communicate with ease.
- Promote engagement opportunities: Volunteer staff publish opportunities to their website to cast the widest net possible to attract engaged constituents.

Volunteer Management

Enabled for	Public preview	General availability
Users, automatically	-	Nov 2021

Business value

We’re equipping volunteer managers with the tools they need to simplify volunteer recruiting, onboarding, retention, and reporting.

Feature details

Volunteer Management is a Power App that enables the management of day-to-day processes to recruit, onboard, and retain volunteers.

- **Publish engagement opportunities:** Design the opportunity and define qualifications, skills, and shifts needed.
- **Approve volunteers:** Review volunteer profiles and qualifications and approve individuals to participate in engagement opportunities.

- **Track volunteer onboarding:** Quickly and easily understand what stage of the onboarding process the volunteer is in.
- **Manage day-of activities:** Track attendance and balance shift volumes.
- **Communicate with ease:** Define automated messaging to ensure your volunteers receive timely logistics, training, and gratitude for their time.
- **Gain volunteer insights:** Understand who is registering for, failing to show up to, and repeatedly contributing time to your organization.

Know your donors and supporters

Overview

Nonprofit development operations and database administrators will benefit from faster and more secure donation processing. As we continue to invest in leveraging Microsoft platform capabilities, we have further redesigned the architecture of Fundraising and Engagement to ensure Azure is delivering real-time processing and market-leading transaction security.

Nonprofit organizations and UN agencies that leverage Dynamics 365 Marketing and Cloud for Nonprofit will benefit from a nonprofit marketing template that will provide a guided journey to campaign segmentation and analysis.

Microsoft Cloud for Nonprofit provides:

- **Constituent management**: Attract, retain, and grow donor and supporter bases.
- **Personalized engagement**: Connect through compelling content by using the most proven channels.
- **Donation and award management**: Payment processing, fund accounting, and designation management to support fundraising efficiency for simple to complex funding types.

Security and compliance enhancements

Enabled for	Public preview	General availability
Users, automatically	-	Nov 2021

Business value

We’re delivering the highest standard of security, privacy, accessibility, and global readiness to our nonprofit customers.

Feature details

Microsoft Cloud for Nonprofit products powered by Dynamics 365, Microsoft Power Platform, Azure, and Modern Work are designed and engineered with the highest security, privacy, accessibility, localization, and global readiness standards in mind to help nonprofit organizations deliver more effective mission impact more safely and securely on top of the trusted Microsoft cloud platforms.

Change history

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

2021 release wave 2 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning **August 2, 2021**. Features from the following apps are available as part of early access:

- Power Apps

The features from these apps update the existing user experiences. You can opt in early to enable these features in your environment. This will allow you to test these features and then adopt them across your environments. For information on how to enable these features, see Opt in to 2021 release wave 2 updates.

IMPORTANT If you are using Dynamics 365 apps, such as Sales, Service, Marketing, Finance, Supply Chain Management, Business Central, and Commerce, there are early access features that could impact your users. For Dynamics 365 early access features, see 2021 release wave 2 features available for early access.

Power Apps

For a complete list of the Power Apps features, see What's new and planned for Power Apps.

Feature	Enabled for	Early access	General availability
Advanced lookup capabilities for all users in model-driven Power Apps	Users, automatically	✔ Jun 30, 2021	Oct 2021
Easily share a record in the new model-driven app experience	Users, automatically	✔ Jun 30, 2021	Oct 2021
Model driven apps support multiple app side panes	Users, automatically	Aug 2, 2021	Oct 2021
Model-driven app improvements	Users, automatically	Aug 2, 2021	Oct 2021
Model-driven app removes the web client related Dynamics 365 - custom app	Users, automatically	Aug 2, 2021	Oct 2021
Modern search for all users in model-driven Power Apps	Users, automatically	Aug 2, 2021	Oct 2021
New column options in grid view page	Users, automatically	Aug 9, 2021	Oct 2021

Feature	Enabled for	Early access	General availability
New model-driven app experience for editing multiple records	Users, automatically	✔ Jun 30, 2021	Oct 2021
New Power Apps grid (read-only)	Users, automatically	Aug 9, 2021	Oct 2021
Unified Interface browser support changes	Users, automatically	Aug 2, 2021	Oct 2021

Power Apps

Overview of Power Apps 2021 release wave 2

Microsoft Power Apps is the industry-leading low-code application development platform that underpins Dynamics 365 extensibility, Microsoft 365 customization, and a standalone custom line of business applications for customers around the world. Power Apps dramatically lowers the cost, complexity, and time of software development through a range of powerful low-code development tools, a deep data platform in Microsoft Dataverse, and hundreds of connectors to common business data sources.

The 2021 release wave 2 plan provides significant improvements for Power Apps developers of all skill levels, improving the sophistication and usability of apps that can be created across the web and mobile devices.

What's new and planned for Power Apps

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

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.

Build advanced apps on a modern, unified platform

Building apps keeps getting easier.

Feature	Enabled for	Public preview	Early access*	General availability
Unified and modern Power Apps designer	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2021
Improved site map in model-driven apps	Users by admins, makers, or analysts	Aug 2021	-	Oct 2021

Feature	Enabled for	Public preview	Early access*	General availability
Intelligent authoring experience with Power Apps Studio	Admins, makers, marketers, or analysts, automatically	Aug 2021	-	Oct 2021
Simplified Dataverse search configuration for admins and model-driven app makers	Admins, makers, marketers, or analysts, automatically	Sep 2021	-	Oct 2021
Support for themes across Power Apps	Admins, makers, marketers, or analysts, automatically	Sep 2021	-	Oct 2021
Reinvented maker experience for configuring model-driven apps for offline use	Admins, makers, marketers, or analysts, automatically	Oct 2021	-	Dec 2021

Collaborate with fusion teams

Fusion teams have choices on how they want to interact with Power Apps.

Feature	Enabled for	Public preview	Early access*	General availability
Manage everything about solutions and tables in a modern way	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2021
Canvas component and component libraries	Admins, makers, marketers, or analysts, automatically	Aug 2021	-	Oct 2021
Code component improvements	Admins, makers, marketers, or analysts, automatically	Sep 2021	-	Oct 2021

Roll out world-class experiences for users

User experiences keep getting better with Power Apps.

Feature	Enabled for	Public preview	Early access*	General availability
Advanced lookup capabilities for all users in model-driven Power Apps	Users, automatically	-	✔Jun 30, 2021	Oct 2021
Modern search for all users in model-driven Power Apps	Users, automatically	-	Aug 2021	Oct 2021
New column options in grid view page	Users, automatically	-	Aug 2021	Oct 2021
New Power Apps grid (read-only)	Users, automatically	-	Aug 2021	Oct 2021
Easily share a record in the new model-driven app experience	Users, automatically	-	✔Jun 30, 2021	Oct 2021
New model-driven app experience for editing multiple records	Users, automatically	-	✔Jun 30, 2021	Oct 2021
Model driven apps support multiple app side panes	Users, automatically	-	Aug 2021	Oct 2021
Model-driven app improvements	Users, automatically	-	Aug 2021	Oct 2021
Model-driven app removes the web client related Dynamics 365 - custom app	Users, automatically	-	Aug 2021	Oct 2021
Unified Interface browser support changes	Users, automatically	-	Aug 2021	Oct 2021

* You are able to opt-in to some features as part of early access on August 2, 2021, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
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Build advanced apps on a modern, unified platform

Overview

Power Apps maker experiences enable you to create the applications you need to solve your business challenges. Modern intelligent designers and controls enable you to quickly build modern apps your users will want to use.

Unified and modern Power Apps designer

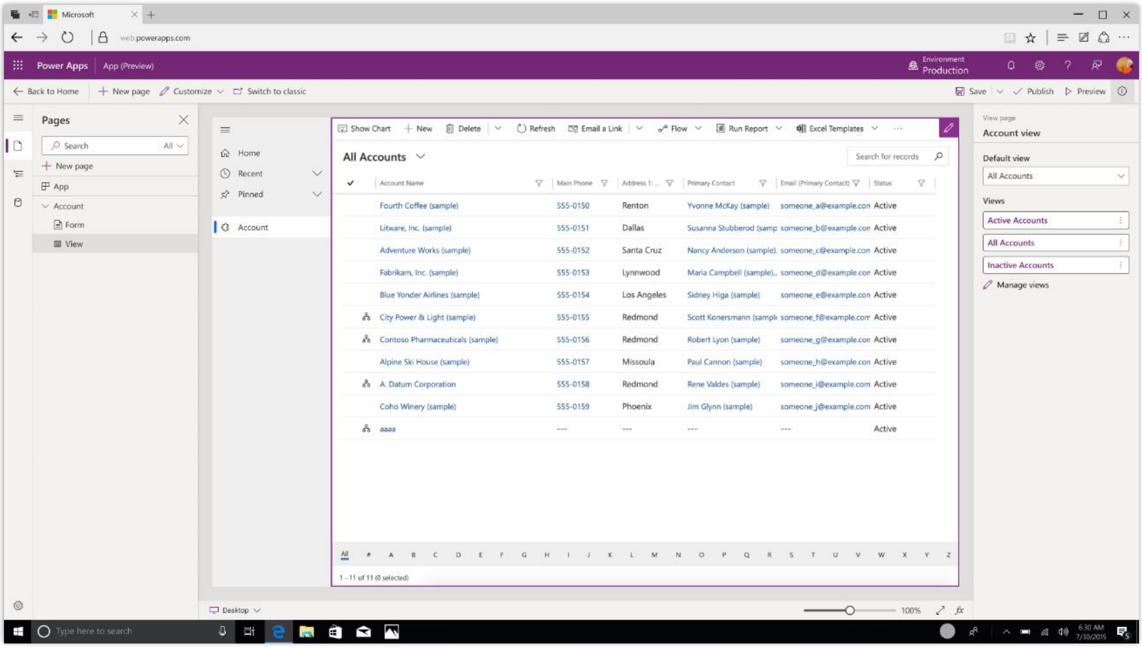
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Oct 2021

Business value

The modern app designer will allow makers and admins to build apps faster, in a more intuitive way. Getting started has never been easier.

Feature details

In the new Power Apps app designer, you can easily build an app with forms, views, and dashboards, and take advantage of the capabilities of canvas apps. The app designer will be your hub for productive app creation in Power Apps. The capabilities provided have reached parity with the classic model-driven app designer. The new app designer has surpassed them with features like a live preview and better integration with the other authoring experiences in Power Apps.



App authoring experience showing a centered live preview with configuration.

Improved site map in model-driven apps

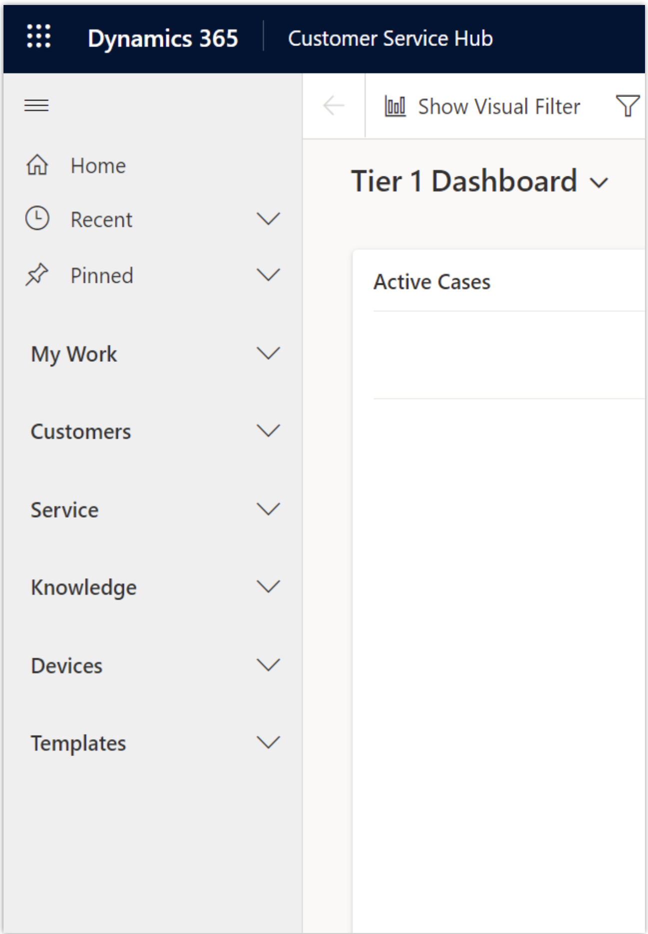
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Aug 2021	-	Oct 2021

Business value

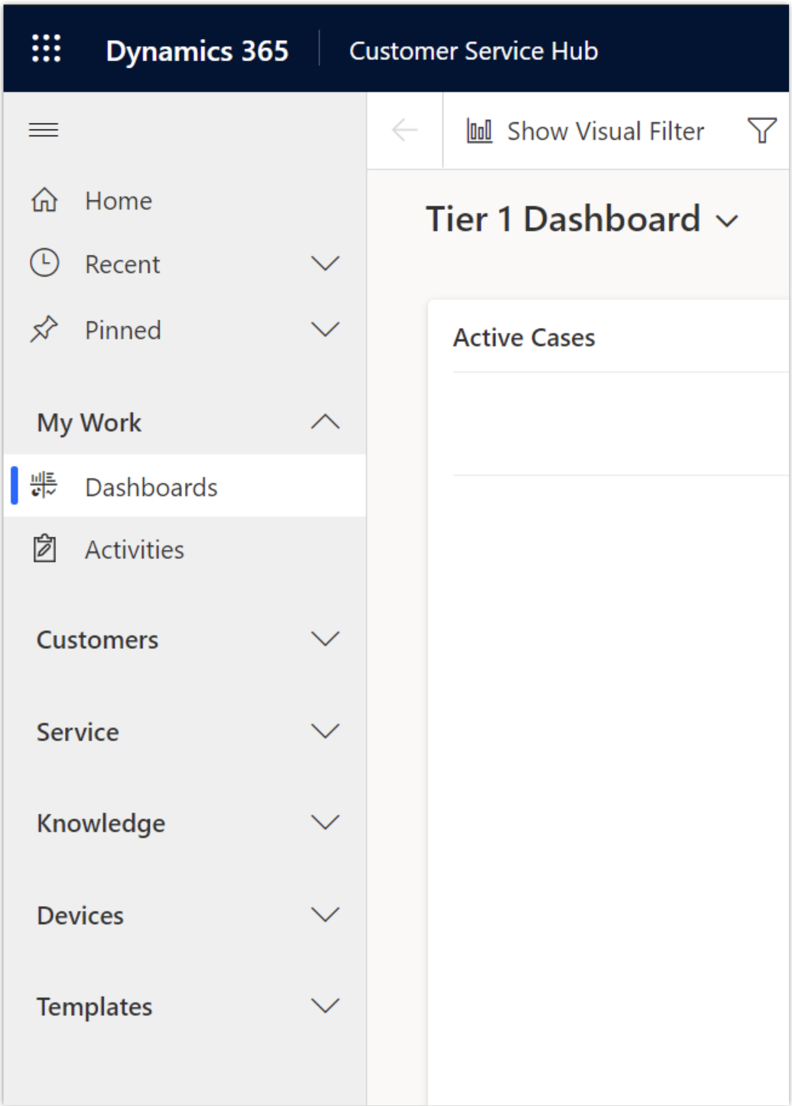
Makers can create a more streamlined app by using the improved model-driven app site map through collapsing groups and the option to hide **Home**, **Recent**, and **Pinned** items.

Feature details

Now users can more quickly get to items further down in the site map with less scrolling through collapsible groups. The user choice to collapse or expand per group is kept local in the browser.

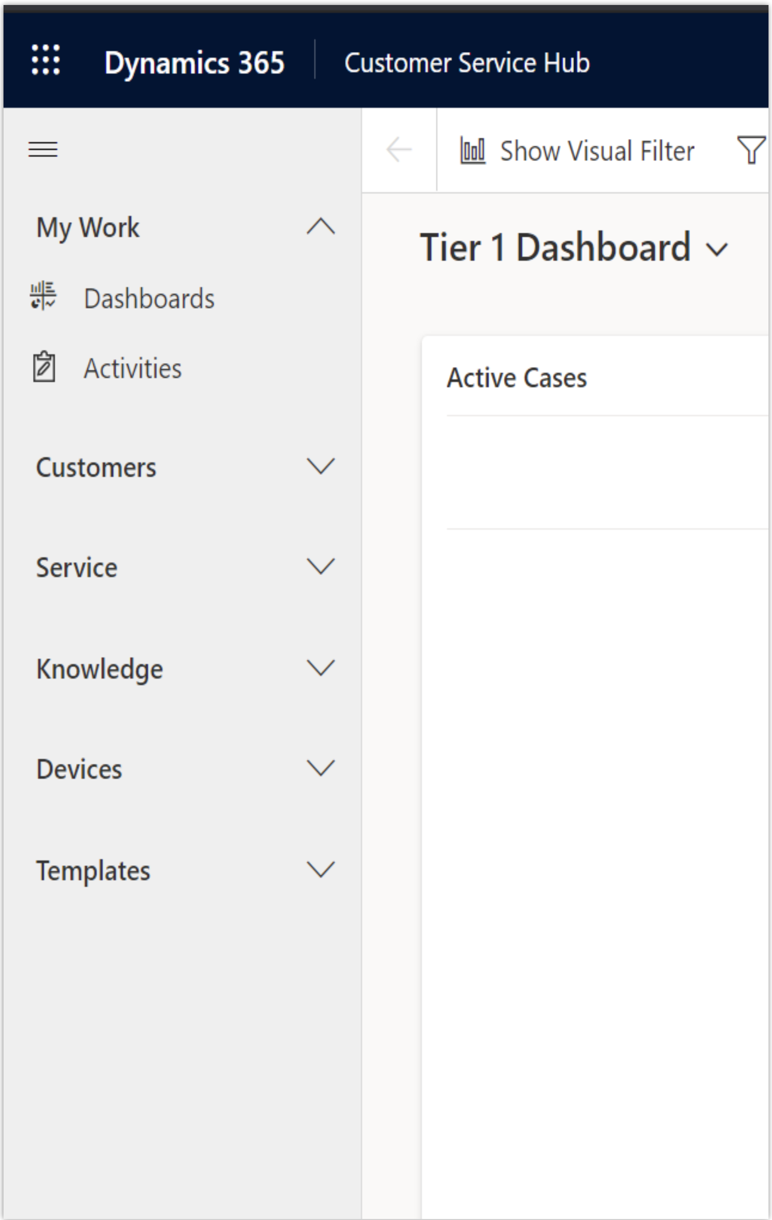


All groups collapsed



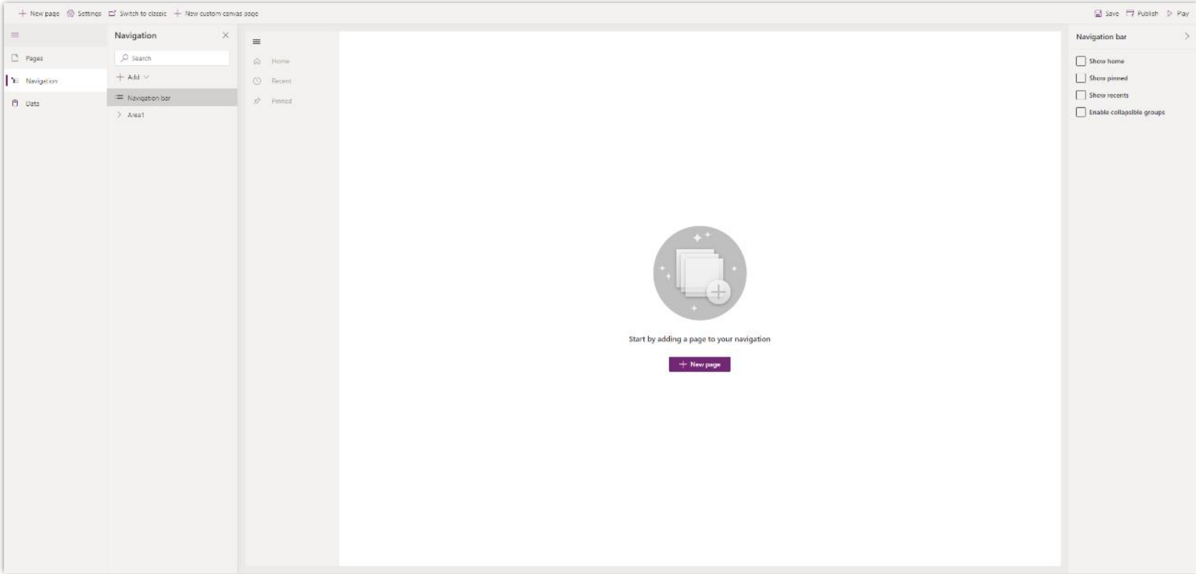
First group expanded.

In addition, makers can toggle the visibility of the **Home**, **Pin**, and **Recent** items to have them hidden to remove the fixed items at the top of the site map.



Home, Pinned, and Recent buttons hidden from the site map.

Makers can enable this behavior through the new modern app designer.



Configuring the site map in Power Apps Studio.

The improved site map is also supported on mobile devices.

Intelligent authoring experience with Power Apps Studio

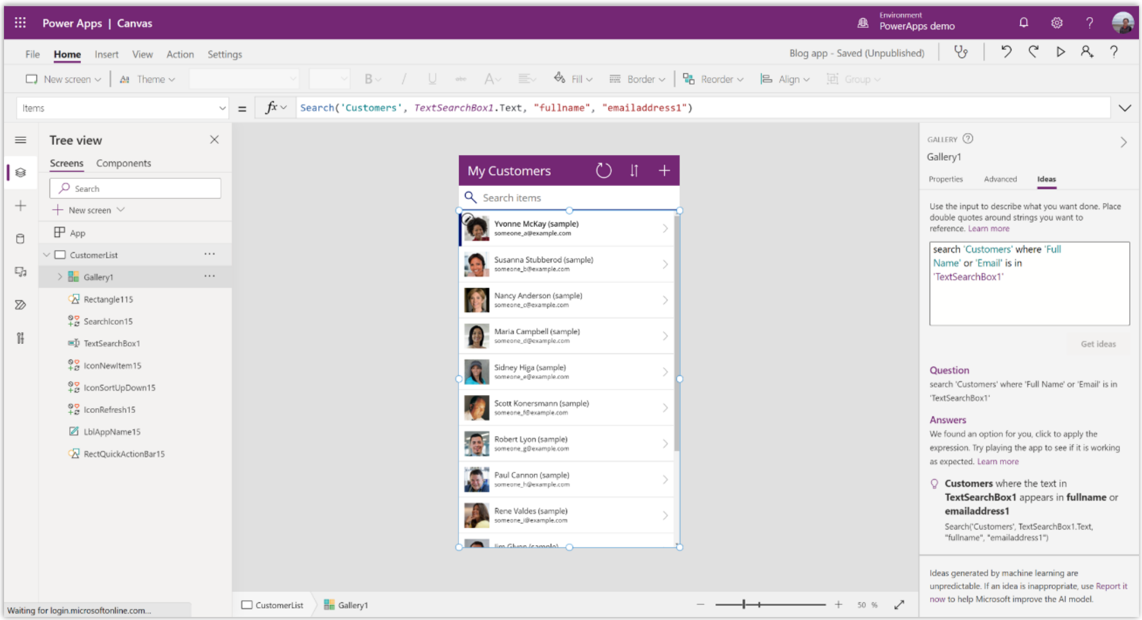
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2021	-	Oct 2021

Business value

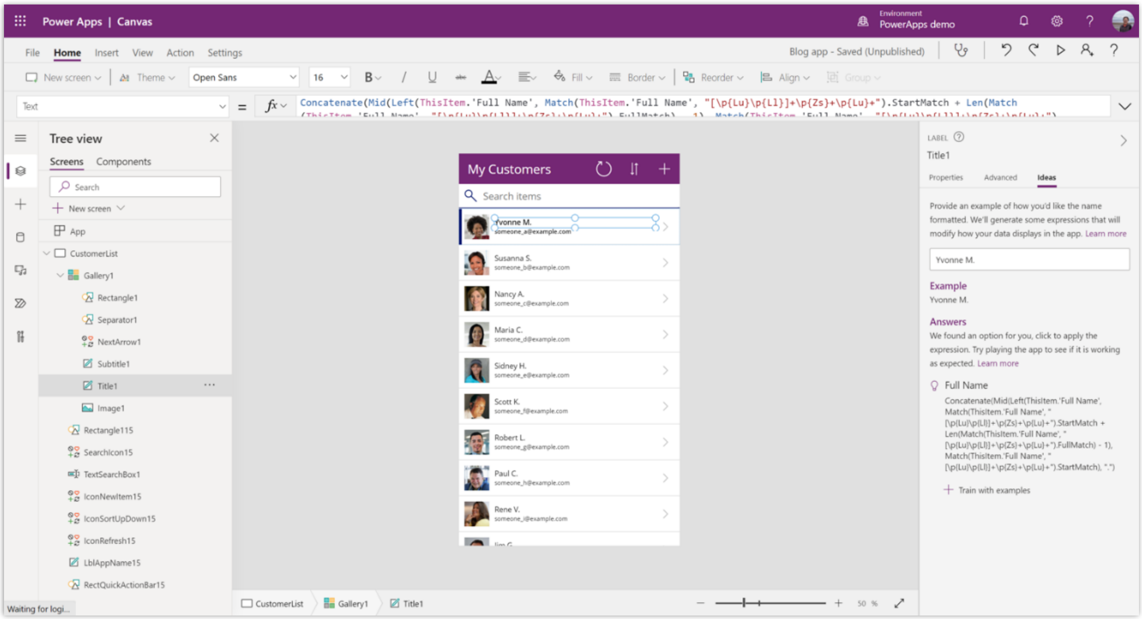
Use AI to help simplify the app authoring experience.

Feature details

[Microsoft Power Fx] is a powerful capability for makers to connect app components, make the app respond to button clicks or data changes, and more; however, it will take some time for a citizen maker persona to learn to use the formula language and write the formulas correctly. To remove the hurdle for rapid app development, we're bringing in the power of AI to help. This feature will enable makers to use natural language to type in expected behavior or input a desired format, and Power Apps will automatically generate formulas for makers to apply.



Transforming natural language to Power Fx formula.



Use examples to generate Power Fx formula - programming by example using PROSE.

Simplified Dataverse search configuration for admins and model-driven app makers

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

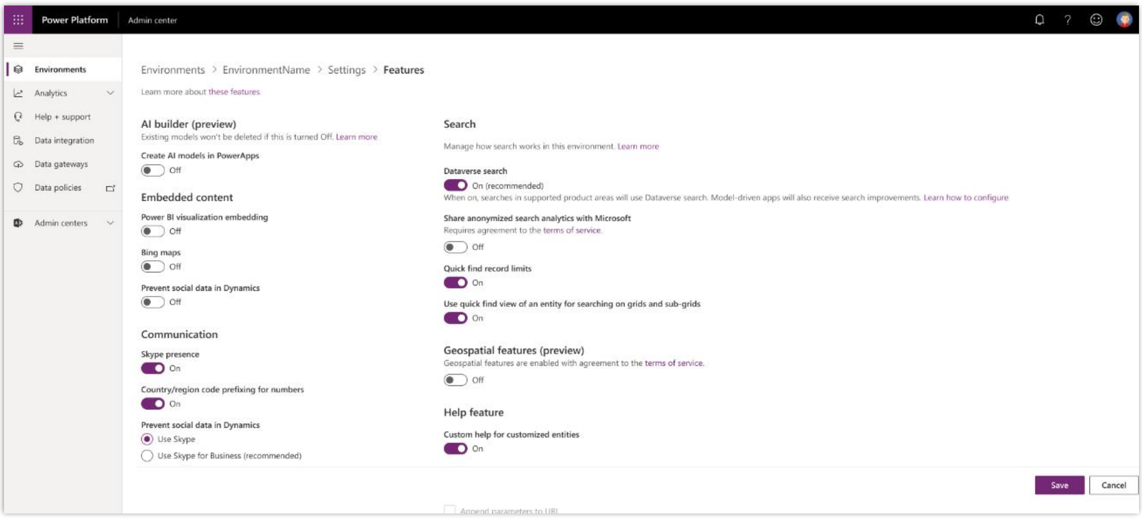
Business value

Administrators can enable Microsoft Dataverse search easily for their environments through the Power Platform admin center. Model-driven app makers can configure the global search experience within their apps.

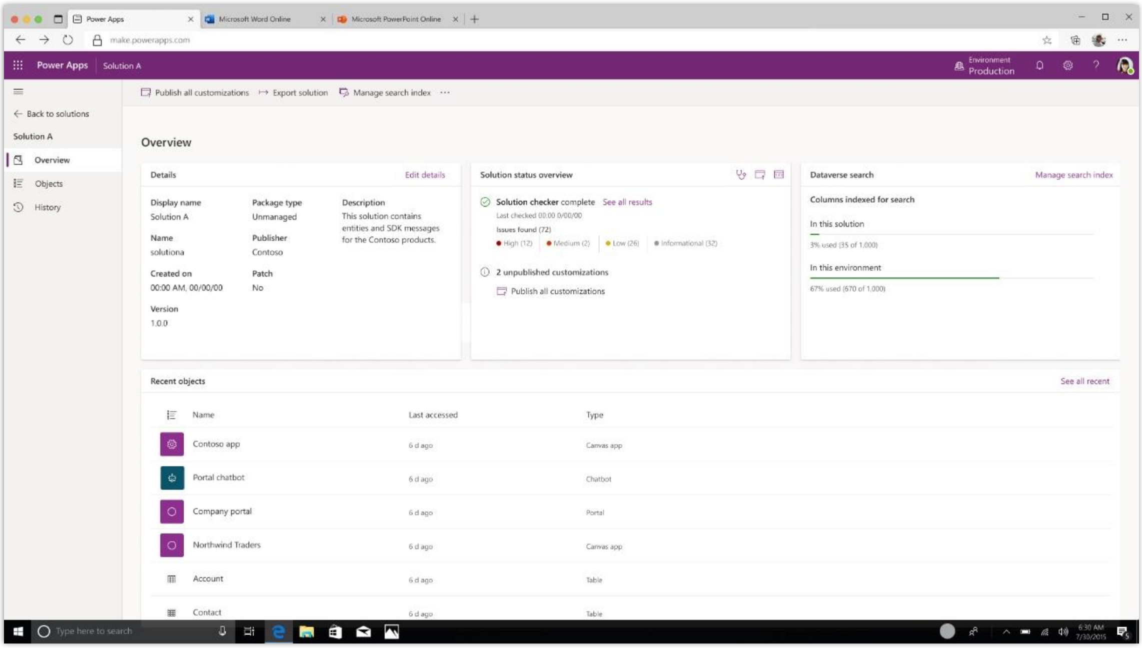
Feature details

Relevance search is now Dataverse search, enabled for the environment and used by global search in model-driven apps. Model-driven app makers can manage their users' global search experience by choosing the right tables to be a part of the search index.

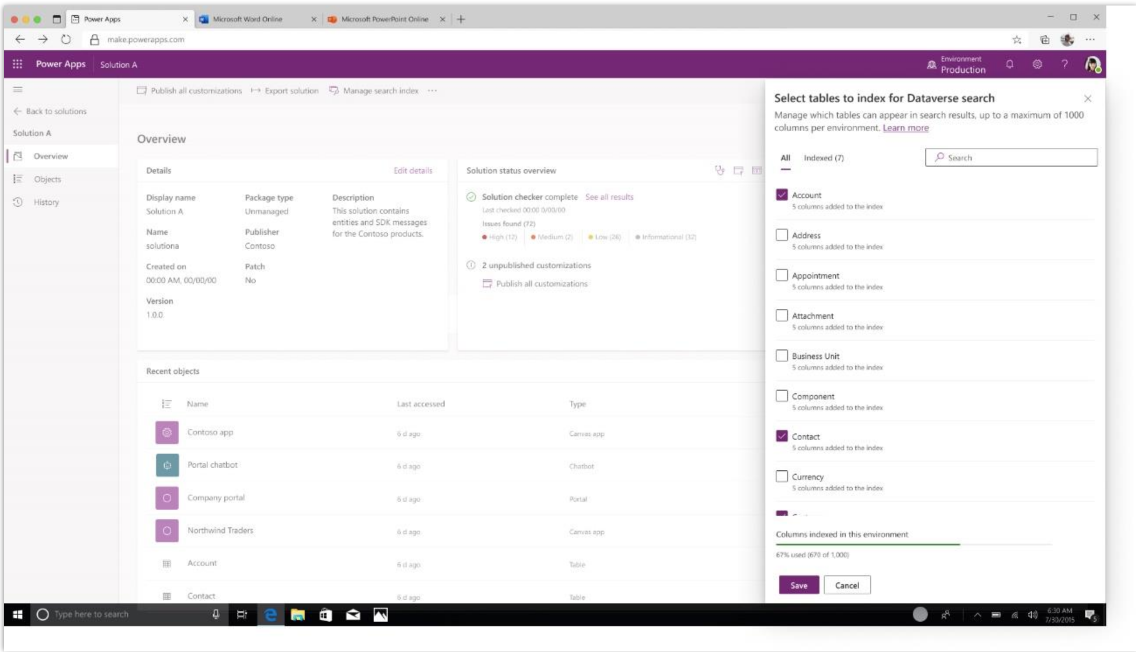
Configuring Dataverse search is an integral part of the modern solution explorer. Model-driven app makers can see what's in the search index in the context of a solution and add or remove tables to build the index so that users find their Dataverse information easily.



Enabling search for admins.



Configuring search for makers.



Configuring Dataverse search for makers.

Support for themes across Power Apps

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

Business value

Theming standardization across model-driven and canvas apps is very critical as apps converge and begin to surface inside other platforms like Microsoft Teams and SharePoint. Applications must have the ability to adapt and provide necessary tools for makers and professional developers to build theme-aware components. We'll take a staged approach to build the theming capabilities, starting with the "happy path" cases enablement by using Fluent concepts, and then incrementally enhancing to have powerful custom theme editors that can generate solution-aware themes.

Feature details

In 2021 release wave 2, we'll have a unified infrastructure for themes across model-driven apps and canvas apps. This feature will enable context and host-aware themes for browsers and embedded mode in Microsoft Teams.

Power Apps functions will have theme-specific objects available, and this will be used for a component's default and dynamic theme-switching. Developers will have a supported way to build and deploy code components that can be themed and integrated more seamlessly within Power Apps.

Code components in canvas apps will also extend support to the new infrastructure for themes, enabling component libraries to have theme-enabled components. Solution awareness and the ability to package themes will also be added.

Reinvented maker experience for configuring model-driven apps for offline use

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

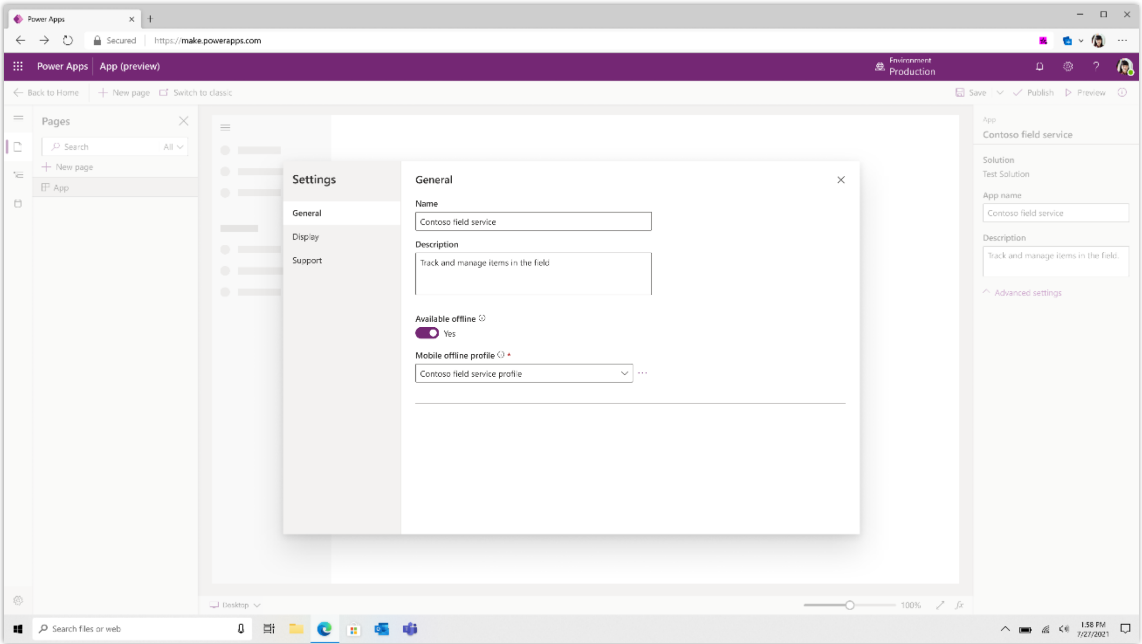
Business value

Setting up a model-driven app to use in offline mode is much easier, more intuitive, and accessible to all app makers.

Feature details

Through the modern app designer, makers can seamlessly configure their model-driven applications for offline use.

You don't need to figure out which tables to add and which filters to apply in your offline profile. Now, it's just one toggle switch to enable an app for offline and automatically generate a default offline profile. There's also no need to set users to offline profiles; if your user has access to the app (through security roles), they can also use the app in offline mode.



Offline configuration in the modern app designer.

Collaborate with fusion teams

Overview

Fusion teams can take advantage of more ways to use Power Apps for their user experiences, in addition to opportunities to package their code for reuse.

Manage everything about solutions and tables in a modern way

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

Business value

Provide an accessible and complete modern maker experience.

Feature details

Power Apps, also known as the maker portal, will include all the features present today in the classic experiences, allowing makers to stay in the portal to manage everything about their solutions and tables. This improves productivity because makers don't need to "switch to classic" to access some features. With this milestone, the classic solution list and solution explorer are deprecated because all features can be used from the portal.

Canvas component and component libraries

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

Business value

App makers don't have to rely on code components for simple UX components to get the benefits of custom extensibility, application lifecycle management (ALM), and reuse. Components and component libraries feature in canvas apps provide a much faster and simpler way not only to build custom UX, but also to have centralized control on upgrade, update, and solution support with ALM capabilities.

Feature details

Components and component libraries feature in canvas apps can be used to build reusable and centrally managed low-code UX components. Besides investments in reliability and fundamentals, this release will add component ALM support. Users will have the ability to package and ship component libraries and applications using standard Microsoft Dataverse solutions. Component libraries will also add support for new Fluent controls and Power Apps component framework code components for custom pages.

Code component improvements

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

Business value

With Power Apps component framework already in general availability, we'll be adding more features that enable professional developers to build and extend Power Apps in a scalable manner with strong performance. Features being enabled for the next wave are geared toward enterprises that use some of the best practices and capabilities developed for the internal first-party components.

Feature details

In this release, code components for canvas apps will have the following improvements and new features:

- Virtual components and shared libraries support will enable code components to use system React and Fluent libraries. Developers can also create their own shared libraries that can be used across code components.
- Code components will have support for events in line with the canvas apps native components. This will enable developers to define custom events that can be raised by code components.
- For model-driven apps, code components can be created for the simple lookup and Multi-select option set (Choices) type, and properties of these new types can also be added. These are top community requests. Additional framework APIs on the canvas apps will be added, which approaches model-driven app parity.

Roll out world-class experiences for users

Overview

This release brings more modern experiences to users of apps created with Power Apps.

Advanced lookup capabilities for all users in model-driven Power Apps

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jun 30, 2021	Oct 2021

Business value

Lookups are a core component of model-driven apps because they help you access underlying data relationships in Microsoft Dataverse. Advanced lookup capabilities help users be more productive with data-entry tasks by providing a better way to search and look up records within a context, as an intuitive extension of the simple lookup control in model-driven apps.

Feature details

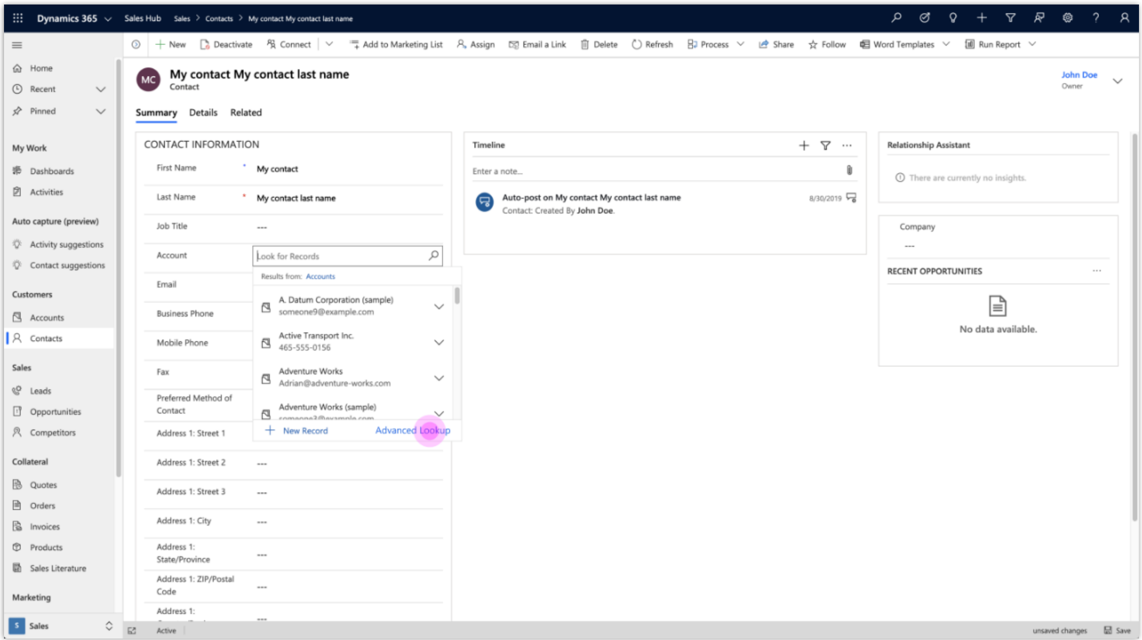
Searching for and looking up rows in model-driven apps on the web is easier with advanced lookup. Use the advanced lookup capabilities to drill into a form and easily sort rows, and switch between tables or views in a lookup column.

In addition to seeing results as you type, you can do the following:

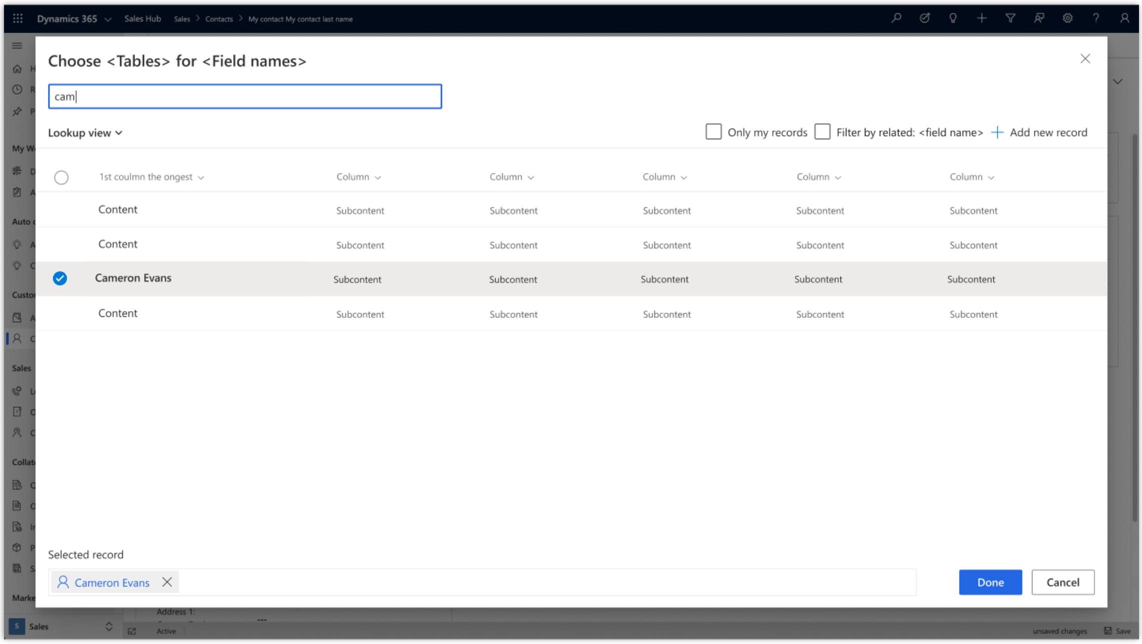
- View more information per row to select the correct row easily.

- Switch views and sort on data to look up the correct row.
- Easily select multiple rows to a lookup field from the advanced lookup grid.
- Filter the rows to show only rows that you own.
- Explore data from advanced lookup without losing context.

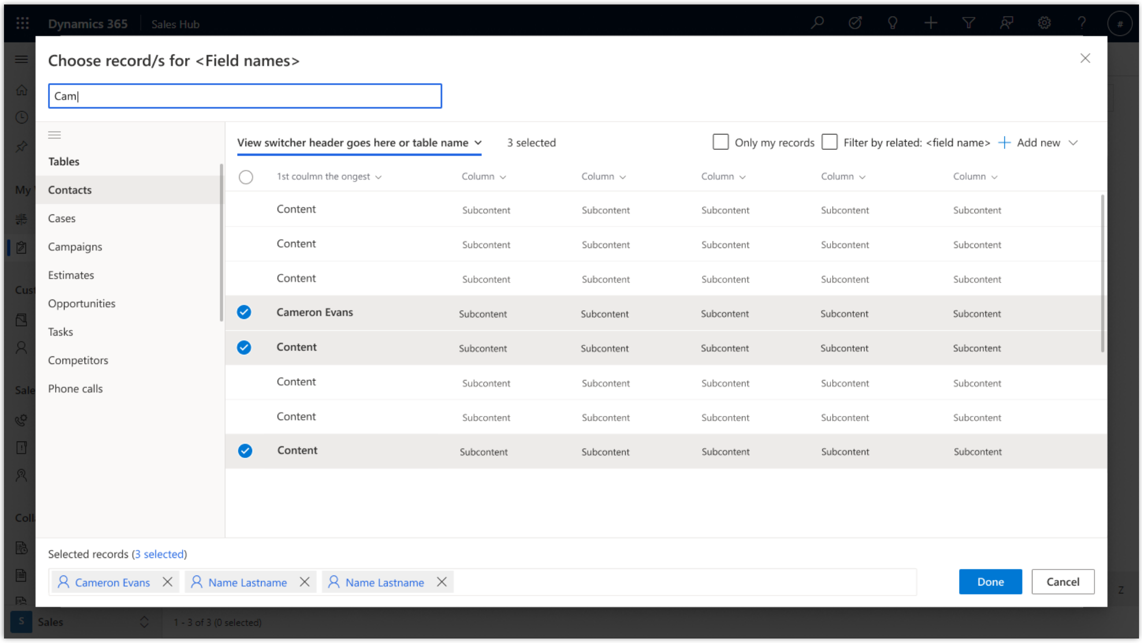
All these capabilities are available for an admin to opt-in under the **Advanced lookup** toggle in Power Platform admin center. In 2021 release wave 2, this will be enabled by default for all users.



Advanced Lookup entry point.



Advanced lookup single table single select.



Advanced lookup multi-table multi-select.

See also

[Manage behavior settings](#) (docs)

Modern search for all end users in model-driven Power Apps

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

Business value

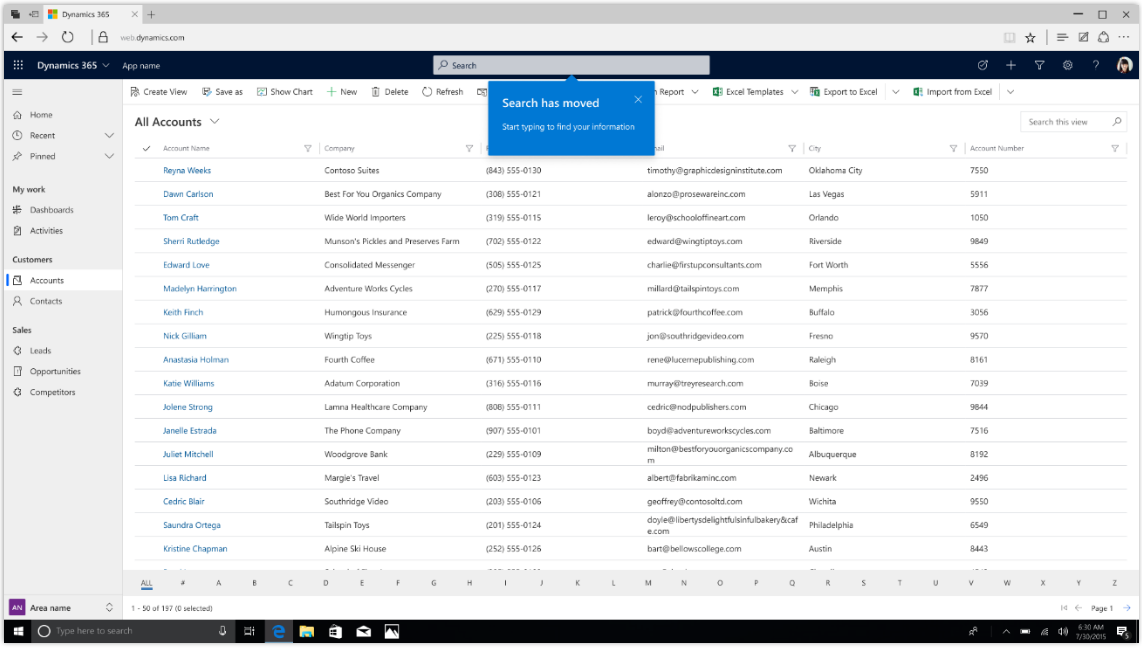
This capability introduces a modern global search experience, backed by Microsoft Dataverse search, for all model-driven Power Apps on all devices as the default, helping users find their information and navigate easily.

Feature details

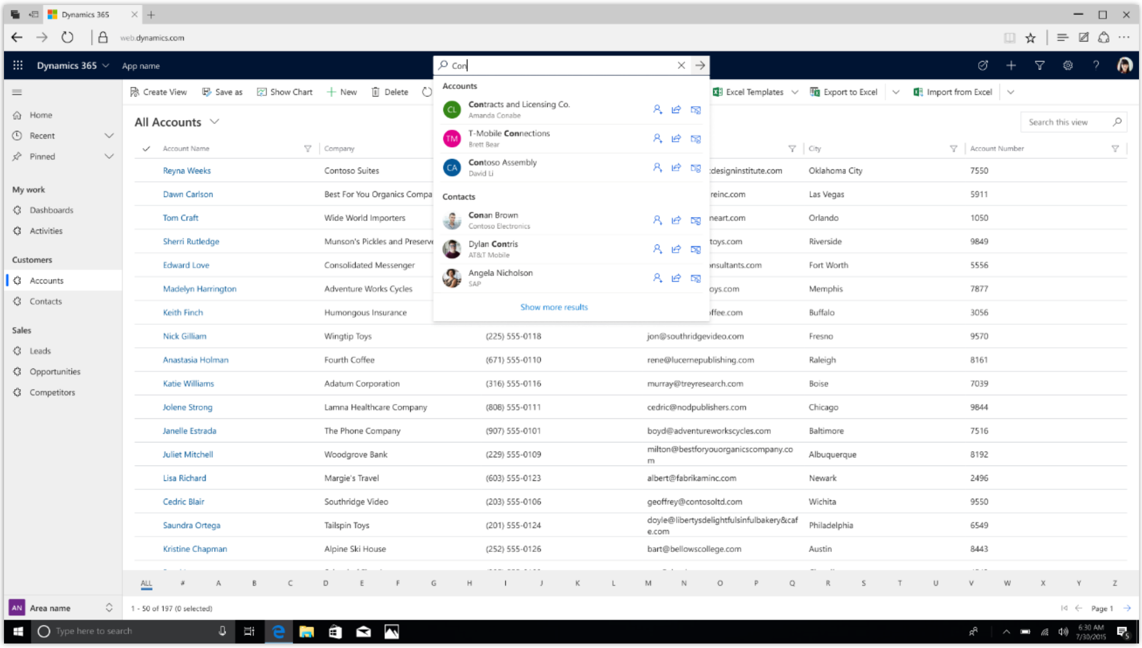
Relevance search is now Dataverse search and is the only global search option for all users in model-driven apps in a production environment on any device. Global search is easy to use, fast, and intelligent. Relevance search delivers the following benefits:

- The search box is always available at the top of every page in your app. You can start a new search and quickly find the information that you're looking for.
- Personalized zero query experience of recent searches and rows, which helps you complete a search without a keystroke.
- Seeing suggested results as you type puts Microsoft Dataverse information at your fingertips.
- High-quality results let you search and act on your information easily and quickly.
- Quick action commands that appear next to search results help you complete a task without losing context.

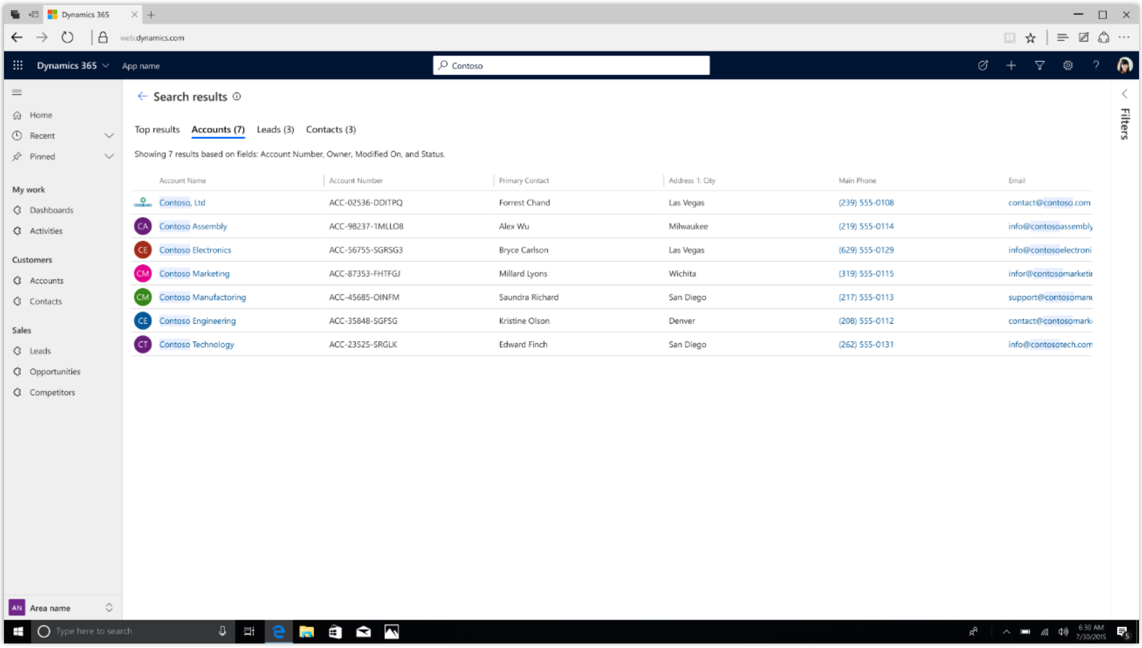
All these capabilities are available as an admin opt-in under the Dataverse search toggle in Power Platform admin center. With 2021 release wave 2, this will be enabled by default for all **production** environments. With this capability enabled by default, individual users won't have the ability to switch to categorized search.



Search bar



Suggestions



Results page

New column options in grid view page

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

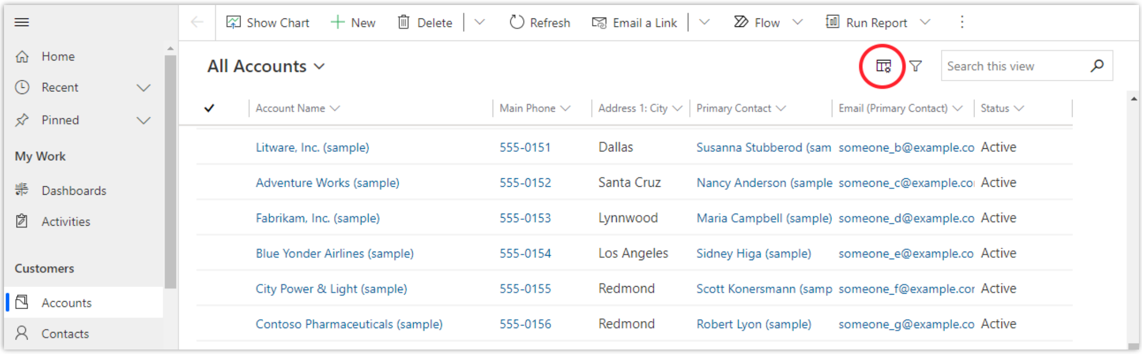
Business value

App makers can customize grid columns and their order right from the grid view page.

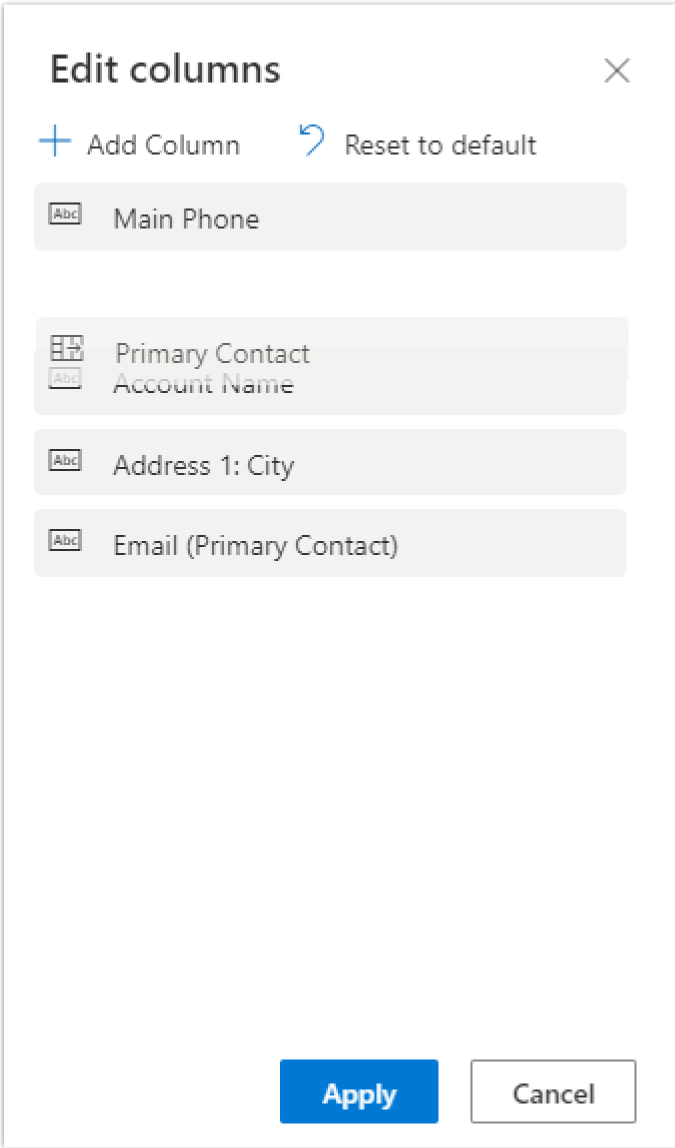
Feature details

The grid view page in model-driven apps now features column options settings that let app users customize which columns are shown in the grid. With this feature, users can:

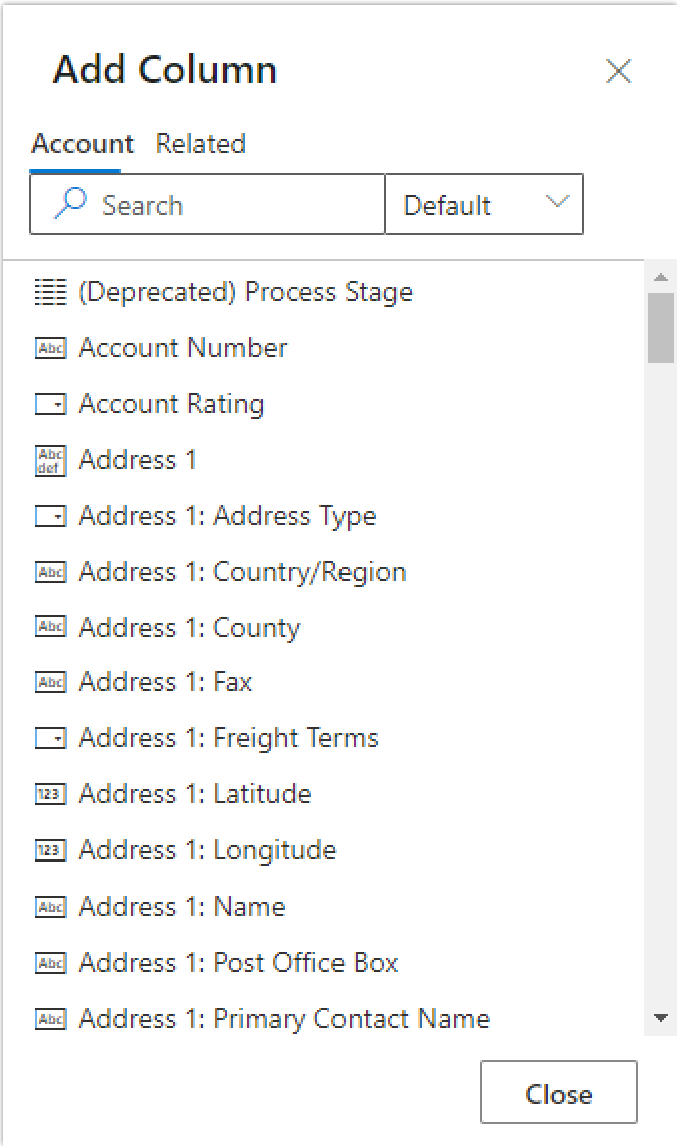
- Add new columns, from current or related tables.
- Remove columns.
- Change the order of columns in the grid.



Column options button inside the grid view page.



Dragging columns to change their order.



Adding new columns.

New Power Apps grid (read-only)

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

Business value

With grids serving as the data display and navigational cornerstone of views, a new grid control brings compliance with Microsoft Accessibility Standards, as well as improved productivity with performance improvements and a modern UI. It will serve as the foundation for numerous upcoming improvements in this area.

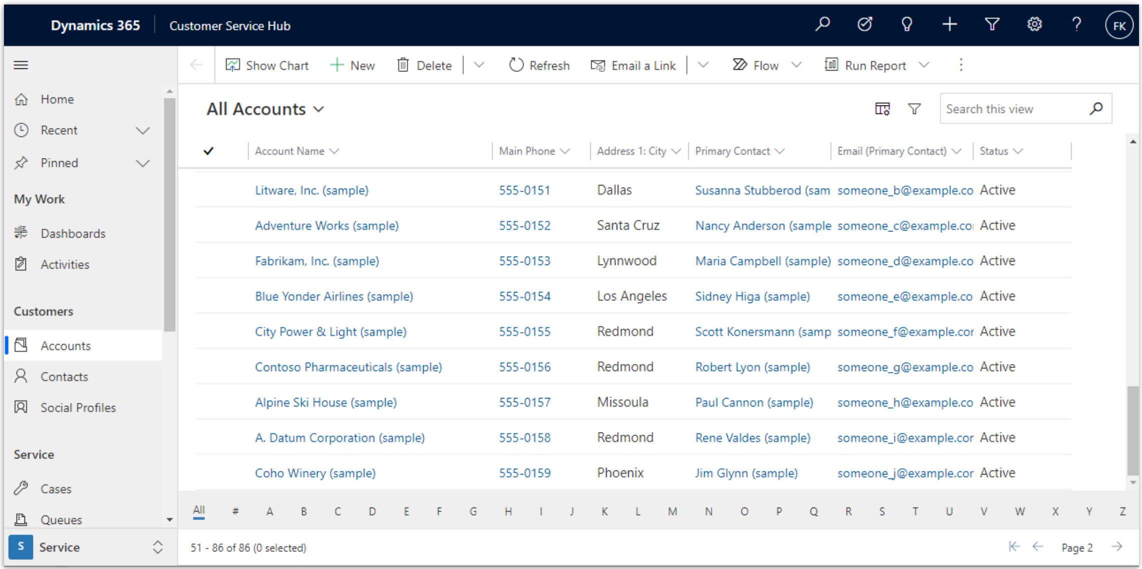
Feature details

Model-driven apps now feature a new read-only grid control, both inside the view page and inside forms (sub-grids). The new grid control is in compliance with Microsoft Accessibility Standard and is the basis for numerous upcoming features.

In addition to improved performance the new control supports:

- Remembering grid view settings across the session
- Ability to resize columns
- Ability to reorder columns (through column options UI)

An editable version of the control will be coming soon.



New read-only grid control in a view page.

Easily share a record in the new model-driven app experience

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jun 30, 2021	Oct 2021

Business value

Removes the dependency on the previous web client hybrid experiences. Provides a Web Content Accessibility Guidelines (WCAG) 2.1 accessible experience by using modern dialogs and controls.

Feature details

User will be able to share a row quickly and easily with another user or team by using the Unified Interface dialog experience, which meets all WCAG 2.1 requirements and supports reflow across all viewport sizes. This capability is also fully supported in the mobile experience.

See also

Share rows with a user or team (docs)

New model-driven app experience for editing multiple records

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jun 30, 2021	Oct 2021

Business value

Removes the dependency on web client hybrid experiences. Provides a Web Content Accessibility Guidelines (WCAG) 2.1 accessible experience by using modern dialogs and controls.

Feature details

Users will be able to edit multiple rows quickly by using the Unified Interface dialog experience, which meets all WCAG 2.1 requirements and supports reflow across all viewport sizes. It's also fully supported on the mobile experience.

See also

Edit multiple rows (docs)

Model driven apps support multiple app side panes

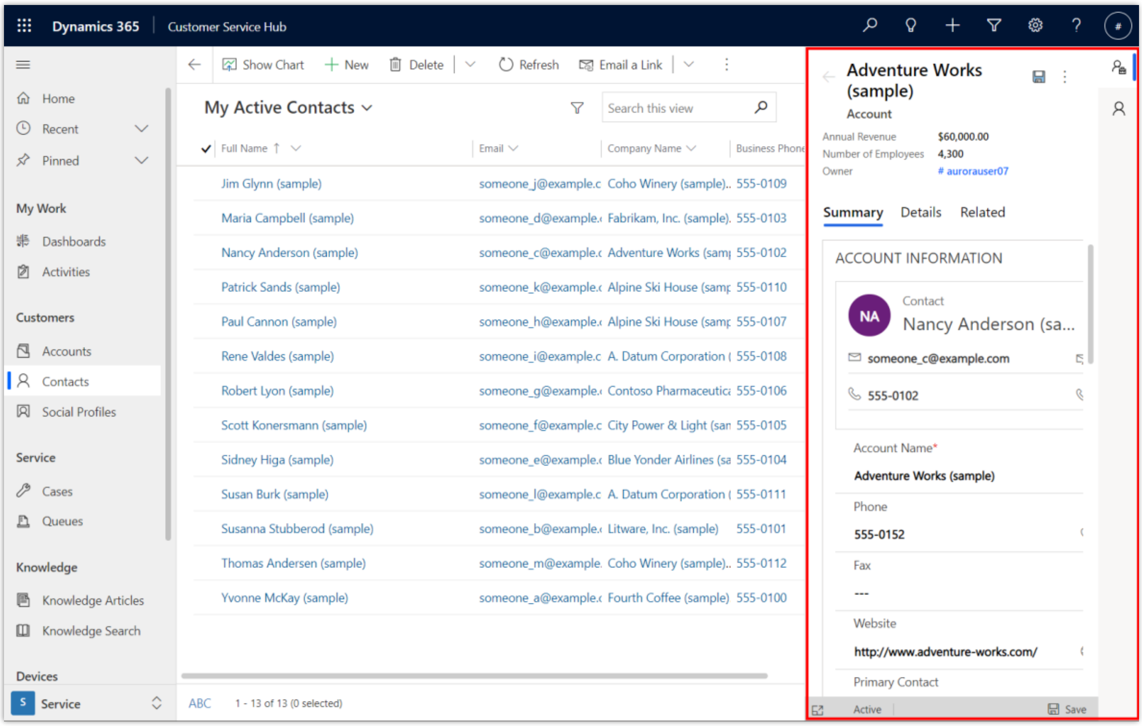
Enabled for	Public preview	Early access	General availability
Users, automatically	-	Aug 2021	Oct 2021

Business value

Enable one or more productivity-enhancing panes to be opened to the side of the main content.

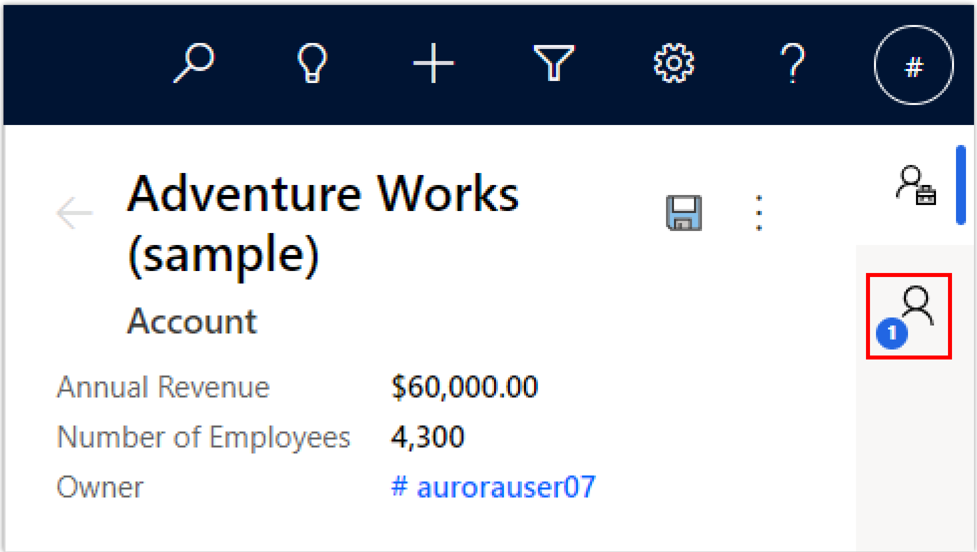
Feature details

Model-driven apps now support the ability to have multiple app-level side panes. The app side pane feature builds on the legacy `loadPanel` API, which was limited to a single side pane. This new feature creates a collection of tabs, each with a different pane. Omnichannel for Customer Service and Dynamics 365 Customer Service products have a similar experience of multiple tabs within the single pane. That experience is moving into the app side pane and allowing additional panes to be added.



Model-driven app with two panes in the app side pane.

A set of new client APIs is used to create and manage multiple side panes. The pane can open pages in a way similar to how the `navigateTo` API works, and it allows either in-place navigation or opening in another part of the app. It's easy to open a view or form in the pane. The new custom page with out-of-the-box or custom components can create a more targeted experience. Each pane can have a badge over the tab icon to draw the user's attention.



App side pane tab has badge count overlay.

To support the legacy `loadPanel` API along with the new multiple side panes, the `loadPanel` API will be placed in a tab in the side pane collection when 2021 release wave 2 is enabled. Before 2021 release wave 2, `loadPanel` will continue to work as it does now, but calls to the new API will replace the pane. For earlier opt-in to the combined behavior, a new app setting can be enabled for the model-driven app. In the future, the `loadPanel` API will be deprecated, with the exception that existing usage is moved to the app side pane. No changes are being made to the left side pane, which is used by Omnichannel for Customer Service and Dynamics 365 Customer Service products.

Model-driven app improvements

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

Business value

Model-driven apps are more accessible, responsive, and keyboard-friendly. Some components have styling updates to align with other Microsoft products.

Feature details

Model-driven apps have a number of improvements in 2021 release wave 2.

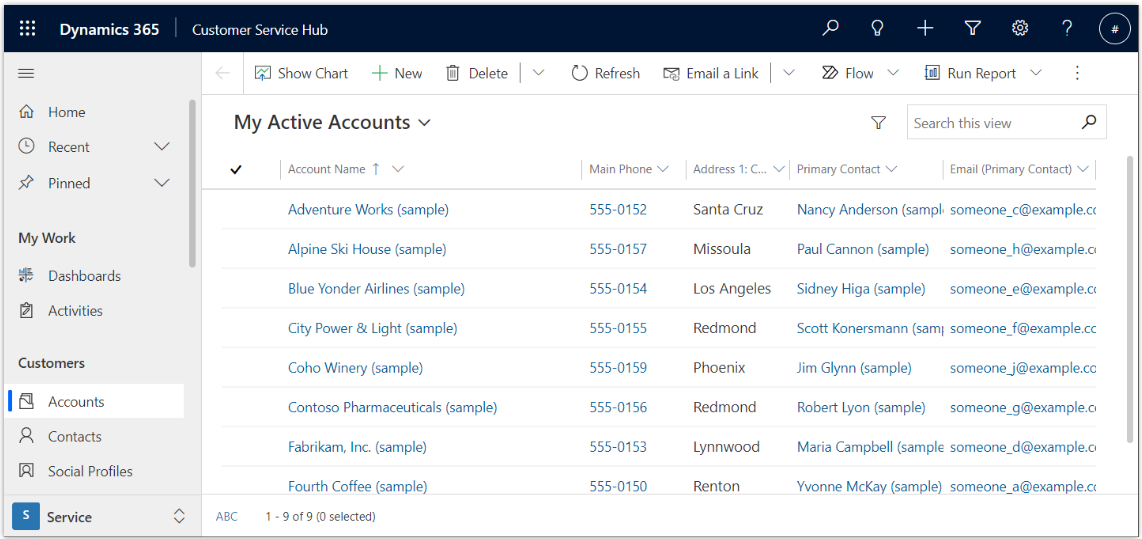
With this release, several accessibility compliance updates have been done for Web Content Accessibility Guidelines (WCAG) 2.1, including core shell and page support for zoom up to 400%, improved progressive collapse, and keyboard support access.

To be more effective in short viewports, forms will enable a high-density header and large center dialogs will use the full screen. To be more effective with narrow viewports, the site map and side panes will move into a collapsed mode initially, and then move into an app menu in the header.

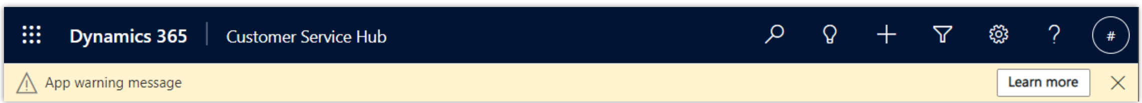
The improved app menu maintains the existing site map or session list, and it now has the app panes in addition to the current session app tabs.

To improve keyboard access, this release adds landmark regions for five main regions: Header, Navigation, Main, Left Side Pane (when used), and Right Side Pane (when used). Within a region, tabbing will cycle through and, at the last element, move focus to the first element in the region. A user can move to the first or last element by using **Ctrl+Home** or **Ctrl+End**, respectively. To switch to the next region, use **Ctrl+F6**. Use **Shift+Ctrl+F6** to switch to the previous region. To support keyboarding to pop-up and toast notifications, **F2** will set focus to the visible notification.

As part of improving visual consistency with other Microsoft products, we're updating the styling for scroll bars and the message bar. Scroll bars use a thin, rounded styling that's consistent with Microsoft 365 and Microsoft Teams. This works with browsers supporting scroll bar styling, such as Microsoft Edge (Chromium) and Chrome. The app and form message bars have an updated coloring for information and warnings background, in addition to the call to action button. These message bar changes are done to align with Microsoft Fluent styling.



Scroll bars have updated styling such as site map and grid.



App message bar warning updated styling.

App message bar information updated styling.

Model-driven app removes the web client related Dynamics 365 - custom app

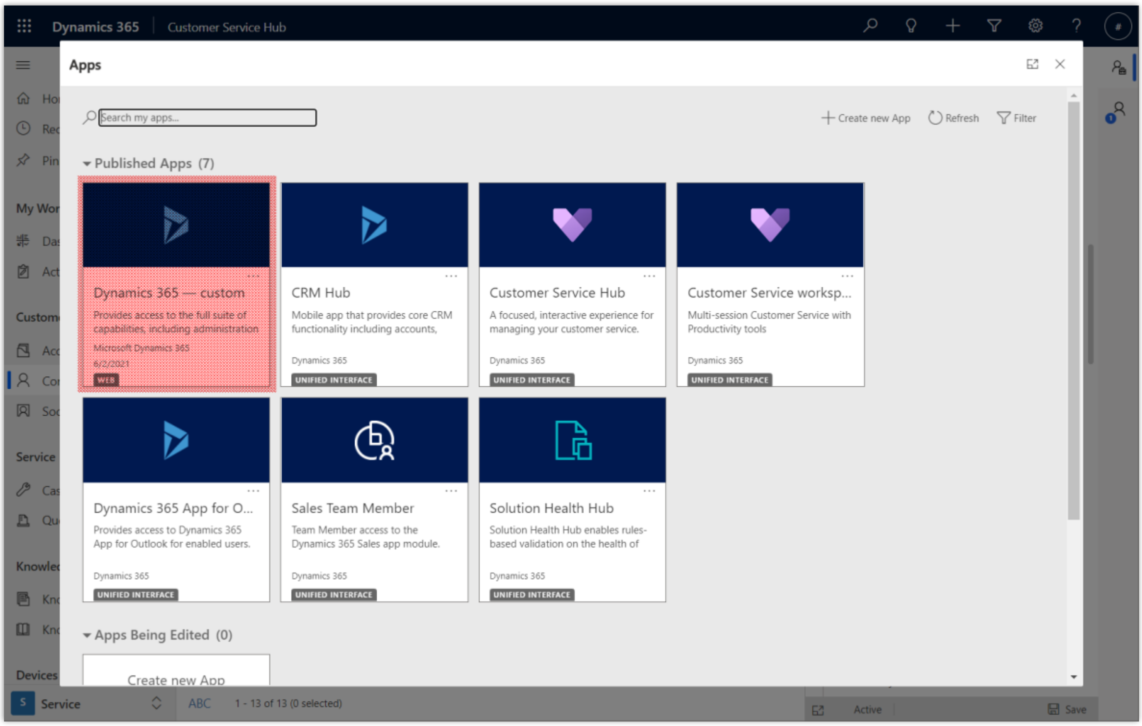
Enabled for	Public preview	Early access	General availability
Users, automatically	-	Aug 2021	Oct 2021

Business value

This change is related to the removal of the web client following the move to Unified Interface.

Feature details

As part of the move from the web client to Unified Interface, the compatibility custom app aligned to the web client is removed. The Dynamics 365 - custom app will no longer be shown in the app switcher.



Model-driven app switcher removes the Dynamics 365 - custom app.

Unified Interface browser support changes

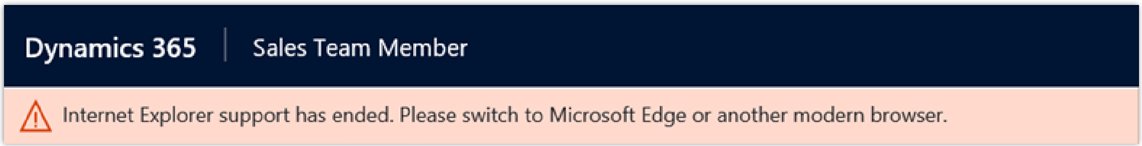
Enabled for	Public preview	Early access	General availability
Users, automatically	-	Aug 2021	Oct 2021

Business value

Improve user experience and performance by supporting only modern browsers.

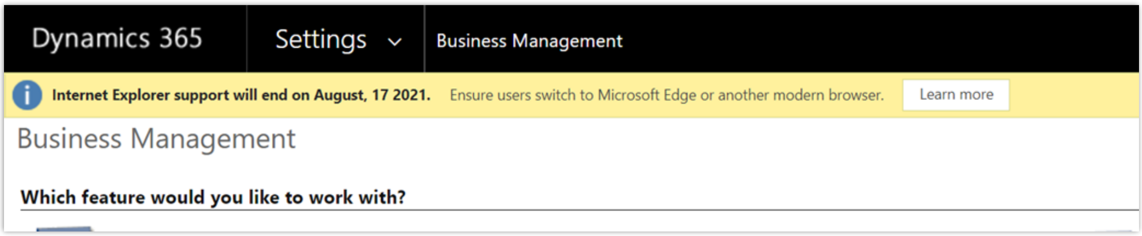
Feature details

With Internet Explorer support ending August 17, 2021, the Unified Interface web browser will start warning users who are running Internet Explorer by using the app message bar. The message will be shown each time the session starts and can be dismissed. Users who move to Microsoft Edge (Chromium) or another modern browser will see their performance improve as much as doubled compared to Internet Explorer, and they'll have a more consistent experience.



App message bar warning about the end of Internet Explorer support.

Administrators who open either the Power Platform admin center or the classic **Advanced Settings** and have users within the organization using Internet Explorer will see a warning message. After all users have stopped using Internet Explorer, we'll remove the message for those organizations.



Advanced Settings app message about the end of Internet Explorer support.

NOTE Starting in 2022 release wave 1, Internet Explorer and classic Microsoft Edge browsers will be blocked from opening Unified Interface. This will let us further improve the experience by adding browser enhancements that aren't possible on these deprecated browsers. Leading up to the blocked experience, an app error message will be shown to users of Internet Explorer.

To further improve user experience, 2021 release wave 2 will include user warnings for older browsers. Based on performance investigations, we see that use of older, unsupported browsers have performance issues not seen in the latest version of the same browser. For this release, we'll show users a warning message when they're using browser versions older than Microsoft Edge (Chromium) 83, Chrome 83, and Firefox 76. These browsers were all released in May 2020. Future twice-a-year releases will move up the version that shows warnings.

Warning app message shown when browser version is older than recommended.

Power Automate

Overview of Power Automate 2021 release wave 2

Microsoft Power Automate provides the tools that you can use to improve your business' productivity by automating repetitive, time-consuming tasks. Power Automate provides a better way to get things done across your organization through digital and robotic process automation (RPA).

Power Automate is investing in several areas as a part of Microsoft Power Platform 2021 release wave 2, including the following.

- **Microsoft Teams**: With more than 100 million daily active users, is central to Microsoft's remote work strategy, and Power Automate is key to the Microsoft Teams extensibility strategy for providing automation for your collaboration scenarios. We will build more and easier entry points across the Microsoft Teams experience, such as in meetings/calendars and other types of conversations. It will also be possible for administrators to push solutions that contain flows across the teams in their organization.
- **Dynamics 365**, **Power Apps**, **Power BI**, and **Microsoft Dataverse**: With deeper integrations, we're making it easier for professional developers and users to collaborate and deploy solutions on Microsoft Power Platform.
- **Power Automate Desktop**: This component was released to general availability in 2020, and it enables makers to automate the diversity of applications on their desktops. Going forward, we'll provide migration for existing Softomotive and UI flows customers, secure credential management, and much more. We're building enterprise trust for desktop flows by providing what centers of excellence need in the cloud: centralized management, monitoring, and reporting that allows users to scale beyond the per-flow experience in the portal. These experiences will provide security, governance, and administration so that administrators can extend their control over desktop flow artifacts in the Power Platform admin center and Center of Excellence toolkit.
- **AI builder**: Effective automation in any organization relies heavily on AI to be reliable and scalable, so we are further investing in content intelligence – specifically, in document automation where we'll be adding better support for multiple layouts, extracting content from tables, working with checkboxes and radio buttons on forms, and support for more languages.
- **Process advisor**: Process advisor is the newest component in Power Automate. This component provides organizations with insights into their tasks via a process map that shows variations across different instances and analytics. With this knowledge, organizations can use the recommendations that process advisor provides to make more informed decisions on which areas to automate to optimize their processes.

What's new and planned for Power Automate

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Cloud flows

Cloud flows is automation that runs in the cloud.

Feature	Enabled for	Public preview	Early access*	General availability
Templates for your organization in Microsoft Teams	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2021
Comments on cloud flows and actions	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2021
Undo edits in cloud flows	Admins, makers, marketers, or analysts, automatically	-	-	Nov 2021
Integrations with team management in Microsoft Teams	Admins, makers, marketers, or analysts, automatically	-	-	Dec 2021
Updates for instant flows in canvas apps	Admins, makers, marketers, or analysts, automatically	-	-	Jan 2022
Power Automate mobile app improvements	Admins, makers, marketers, or analysts, automatically	-	-	Mar 2022

Feature	Enabled for	Public preview	Early access*	General availability
Real-time presence in cloud flows	Admins, makers, marketers, or analysts, automatically	Aug 2021	-	Mar 2022

Document automation

The document automation solution is a standard end-to-end solution allowing users to receive documents in emails, use AI Builder form processing to extract data from them, and to then review and approve the collected data.

Feature	Enabled for	Public preview	Early access*	General availability
Document automation solution	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2021

Power Automate Desktop

Power Automate Desktop and desktop flows enable you to automate repetitive processes in desktop or web applications.

Feature	Enabled for	Public preview	Early access*	General availability
More resilient UI automation in Citrix environments	Admins, makers, marketers, or analysts, automatically	-	-	Nov 2021
The log message action is available in desktop flows	Admins, makers, marketers, or analysts, automatically	-	-	Dec 2021
Use Microsoft Dataverse from desktop flows	Admins, makers, marketers, or analysts, automatically	-	-	Dec 2021
Enhanced Power Automate Desktop recorder	Admins, makers, marketers, or analysts, automatically	-	-	Mar 2022

Feature	Enabled for	Public preview	Early access*	General availability
Use connectors in desktop flows	Admins, makers, marketers, or analysts, automatically	-	-	Mar 2022
Data loss prevention policies for desktop flows	Admins, makers, marketers, or analysts, automatically	Feb 2022	-	Mar 2022

Process advisor

Process advisor quickly captures detailed steps for each process in your organization to help you better understand places to streamline workflows.

Feature	Enabled for	Public preview	Early access*	General availability
Customize filters in process advisor	Admins, makers, marketers, or analysts, automatically	Nov 2021	-	-
Innovation backlog for managing ideas and projects with process advisor	Admins, makers, marketers, or analysts, automatically	Mar 2022	-	-

* You are able to opt-in to some features as part of early access on August 2, 2021, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Cloud flows

Overview

Cloud flows are automation that runs in the cloud using our 475+ connectors and can be triggered either automatically, instantly, or with a schedule.

Templates for your organization in Microsoft Teams

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

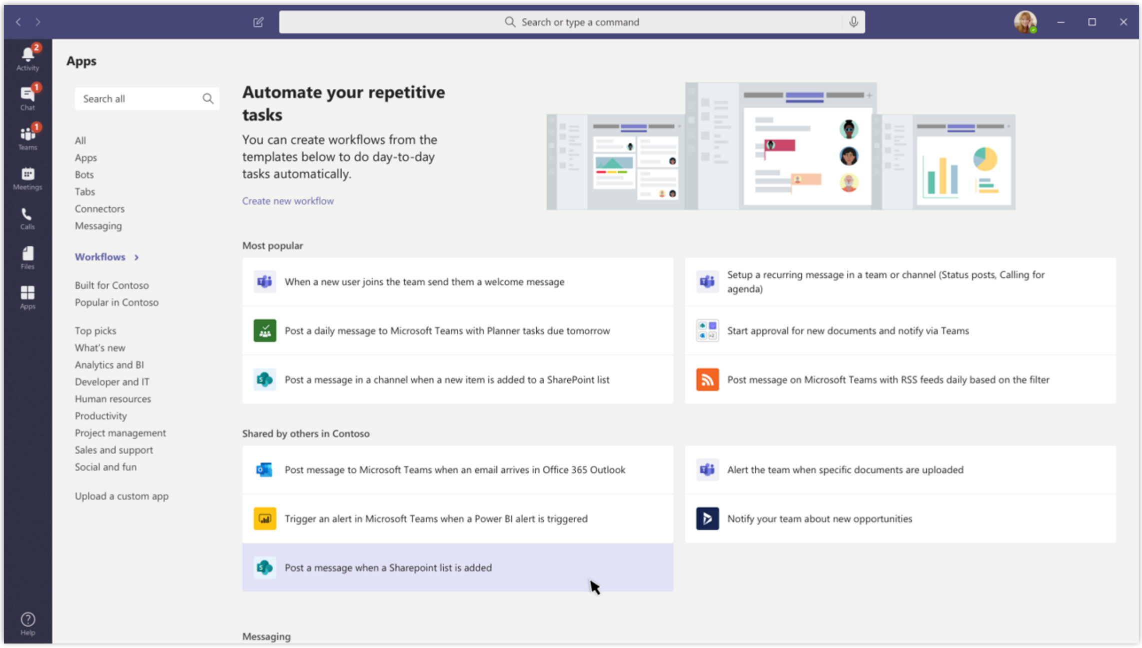
Business value

This feature allows users in Microsoft Teams to directly acquire flow templates from the Microsoft Teams store using a new dedicated workflows section. This allows users to browse and acquire flows directly from within Microsoft Teams without the need to switch contexts to a browser or another app.

Feature details

There will be a new **workflows** section in the Microsoft Teams app store that all Microsoft Teams users can access, even if they don't have the Microsoft Teams app installed. This feature organizes cloud flow templates that are related to Microsoft Teams in the following two categories:

- Templates provided by Microsoft or Microsoft partners
- Templates published by a person in the user's organization



Catalog of templates in Microsoft Teams.

Comments on cloud flows and actions

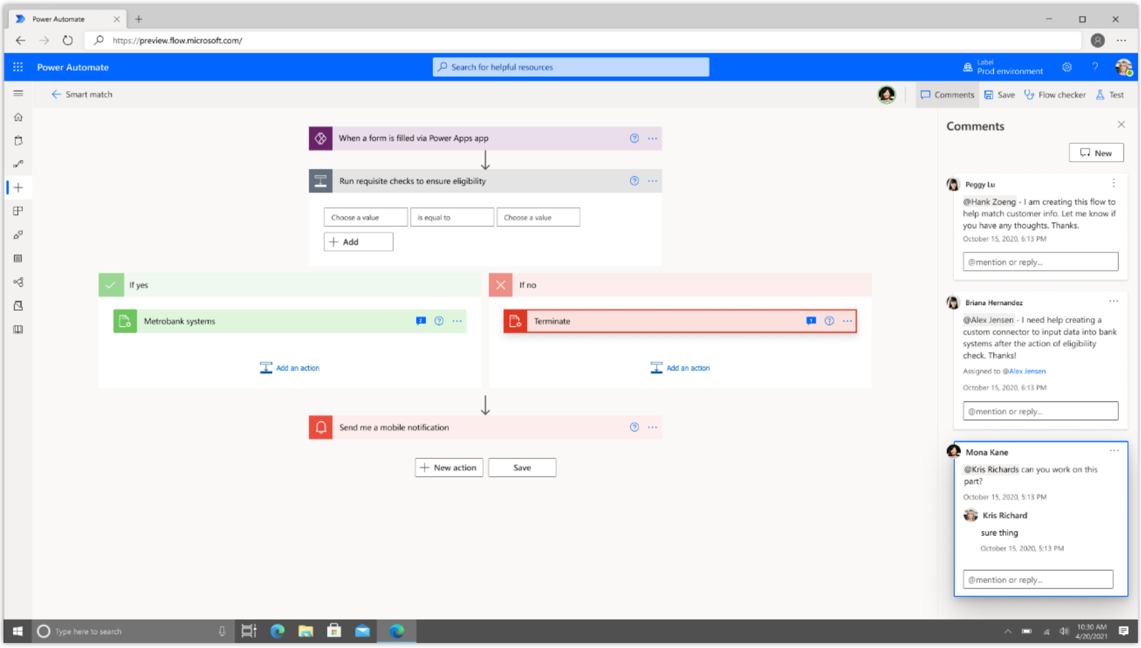
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Oct 2021

Business value

With this feature, Power Automate users can collaborate by inserting interactive comments on flows and their elements, similar to the way customers can add comments in Microsoft Office products like Word.

Feature details

There will be a new **Comments** button in the command bar for cloud flows, enabling makers to comment on the entire flow or on specific actions. Makers will also be able to reply to, resolve, or delete existing comments.



Comments pane for Power Automate.

Undo edits in cloud flows

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

Business value

People are building more and more advanced cloud flows in Power Automate. Previously, we added copy and paste, and in 2021 release wave 2, we'll add the ability to undo edits. This means that if you accidentally delete an action, or you don't like your content changes in a particular parameter, you can undo the changes and return to the previous state of the cloud flow with a single click.

Feature details

Makers are building more advanced cloud flows with Power Automate. We added the copy and paste feature, making it easier to duplicate actions. In 2021 release wave 2, we'll add an **undo** feature, allowing you to undo edits that you made during your session. So, if you accidentally delete an action, or you don't like your changes, you can undo the changes and return to the previous state of the cloud flow with a single click.

Integrations with team management in Microsoft Teams

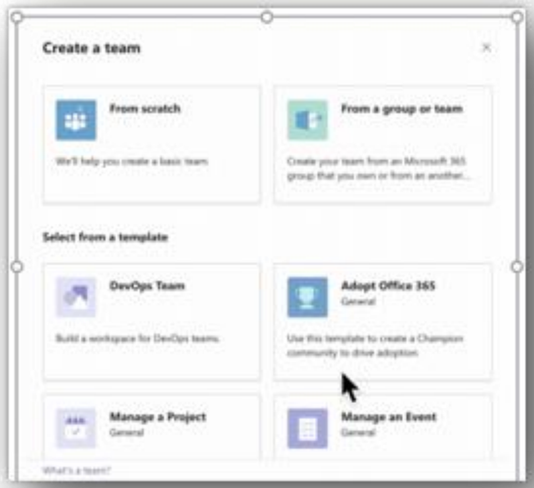
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Dec 2021

Business value

This feature adds Power Automate flow templates in Microsoft Teams templates. Team owners can now more easily add flows into new teams when they create a team from a Microsoft Teams template.

Feature details

Users who create and manage teams in Microsoft Teams can use Power Automate for several scenarios. For example, we'll pair Power Automate templates with Microsoft Teams templates to enable scenarios like posting a welcome message, automated channel notifications, and more.



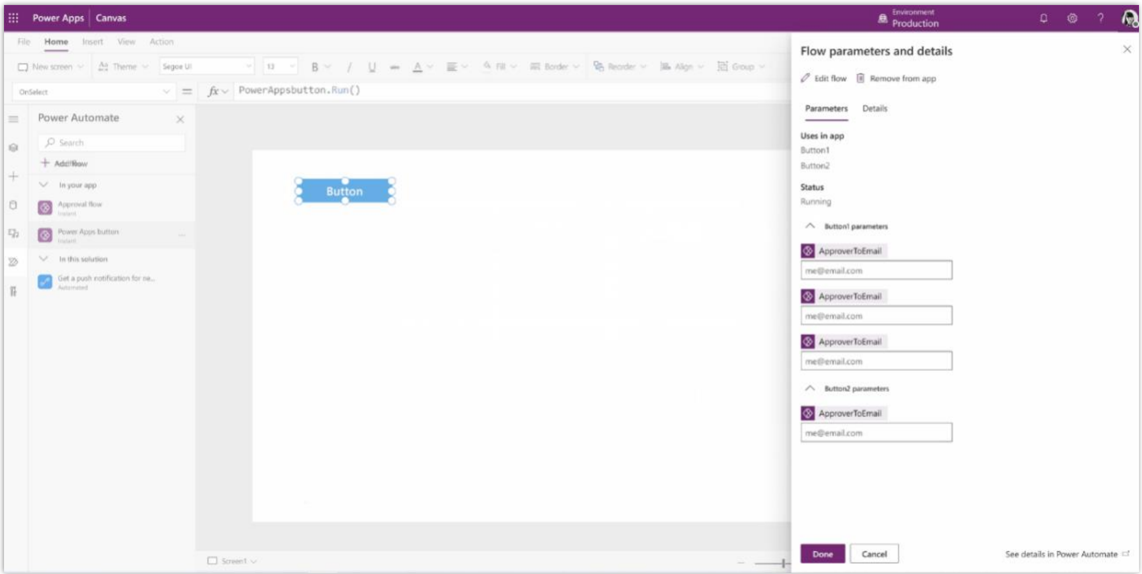
Microsoft Teams templates.

Updates for instant flows in canvas apps

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

Feature details

We're making it easier to work with instant flows inside of canvas apps. A common challenge is that you need to modify the data that you send to the flow. Previously, you needed to work with the formula bar, which can be challenging when there is a complex set of data to pass to the flow. To make this easier, we're adding a new **Flow parameters and details** pane that you can access while you're working on your canvas app.



New pane in canvas apps.

This new pane shows:

- Each place where an instant flow is called in the canvas app
- A way to remove the flow from the canvas app entirely so, for example, users won't need to provide connections
- A view of the data that's passed to each flow input so you can quickly change the data passed to your flow

Power Automate mobile app improvements

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

Feature details

There will be a new version of the Power Automate mobile app for Android and iOS. This new version of the mobile app provides an updated, modern experience for Power Automate users on their mobile devices. These users can receive notifications and trigger button flows on the go. This new version will also have improved support for sovereign clouds.

Real-time presence in cloud flows

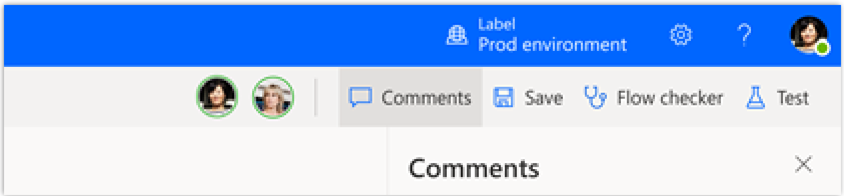
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2021	-	Mar 2022

Business value

Enable makers to collaborate more effectively by providing real-time visibility.

Feature details

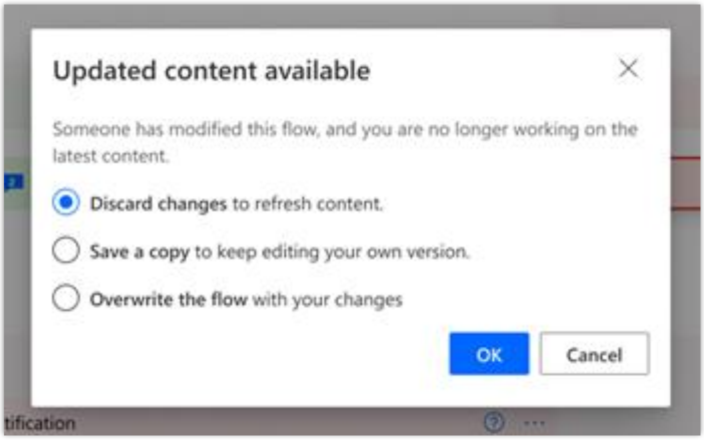
There's frequent collaboration between developers and business users on software projects, making development a team sport. Gartner has coined the term **fusion teams** to describe this pattern. To help fusion teams, this feature provides better collaboration across code-first and no-code artifacts. As a first step, when multiple people open a cloud flow, this feature will provide them with real-time presence about who is editing the flow with them.



Presence indicators

Since multiple people can now edit a cloud flow simultaneously, we're also introducing different options for handling this scenario. You'll have the option to perform the following:

- Discard your own changes.
- Save a copy of the flow. (With this option, you preserve changes that you and your colleagues made.)
- Overwrite changes that your colleagues make.



Overwrite changes.

Document automation

Overview

Document automation is a solution that allows you automate processing of your documents in an end-to-end process. It includes the following capabilities:

- Process documents received in emails orchestrated by Power Automate
- Extract data from documents using AI Builder models
- Process the data extracted and allow users to review and approve data through central manual validation Power Apps
- Export the processed data to external systems using Power Automate connectors
- Statistics on number of documents processed

Document automation solution

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

Business value

Document automation is reference implementation for automating documents like invoices. It can be used out-of-the-box to save days of implementation or can be used as inspiration to accelerate your implementation.

Feature details

Document automation is an end-to-end solution for processing documents at scale. It includes:

- A document queue
- A Power Apps validation station to allow for manual user validation of processed documents
- AI Builder preconfigured models to extract data from documents
- Many flows for importing documents and exporting data to external systems

Document automation offers a generic solution that is customizable for a broad range of document types and specialized solutions for specific document types, such as invoices.

Here's a list of the new capabilities that are in the general availability of the toolkit:

- Automatic data validation
- Confidence scores in the Power Apps validation application
- Export extracted data to Dynamics 365 Finance and Operations
- Richer interactions with the manual validation application
- Prebuilt models like receipt processing and invoice processing

Power Automate Desktop

Overview

Getting started with Power Automate Desktop continues to get quicker, get simpler to use, easier to deploy, more scalable, and easier to govern. In 2021 release wave 2, we'll make substantial improvements across the board on these capabilities.

More resilient UI automation in Citrix environments

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

Feature details

Today, customers can automate Citrix systems using image recognition with desktop flows. Although image recognition is flexible and can work for any system, it's not as reliable as UI automation, which leverages the UI elements using accessibility APIs.

In this release, we'll improve our support for UI automation on Citrix environments by having a lightweight runtime inside the target Citrix environment. This runtime will be able to communicate with the Citrix session and thus directly access UI elements, bringing direct addressability to controls that bypasses the need for image-based lookup where possible. Customers will have a choice to use either this lightweight runtime approach or existing image processing for performing their automation.

The log message action is available in desktop flows

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

Business value

Users will be able to provide customized messages in the logs of their desktop flows in order to write down information, which may be important to be kept as part of the flow logs for history purposes.

Feature details

Log message is available in desktop flows, enabling users to log custom messages. They can use this feature for error handling purposes and for logging progress and values for variables when their desktop flows run. This new action is like the **Log message** action that was available in WinAutomation.

Use Microsoft Dataverse from desktop flows

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

Feature details

There will be a new module in Power Automate Desktop that lets you work directly with data that's stored in Microsoft Dataverse. Like the cloud flows and Microsoft Dataverse integration, this new integration automatically respects the relationship between the desktop flow and the environment it's in, ensuring that dependencies are properly tracked for healthy solutions and application lifecycle management (ALM).

Enhanced Power Automate Desktop recorder

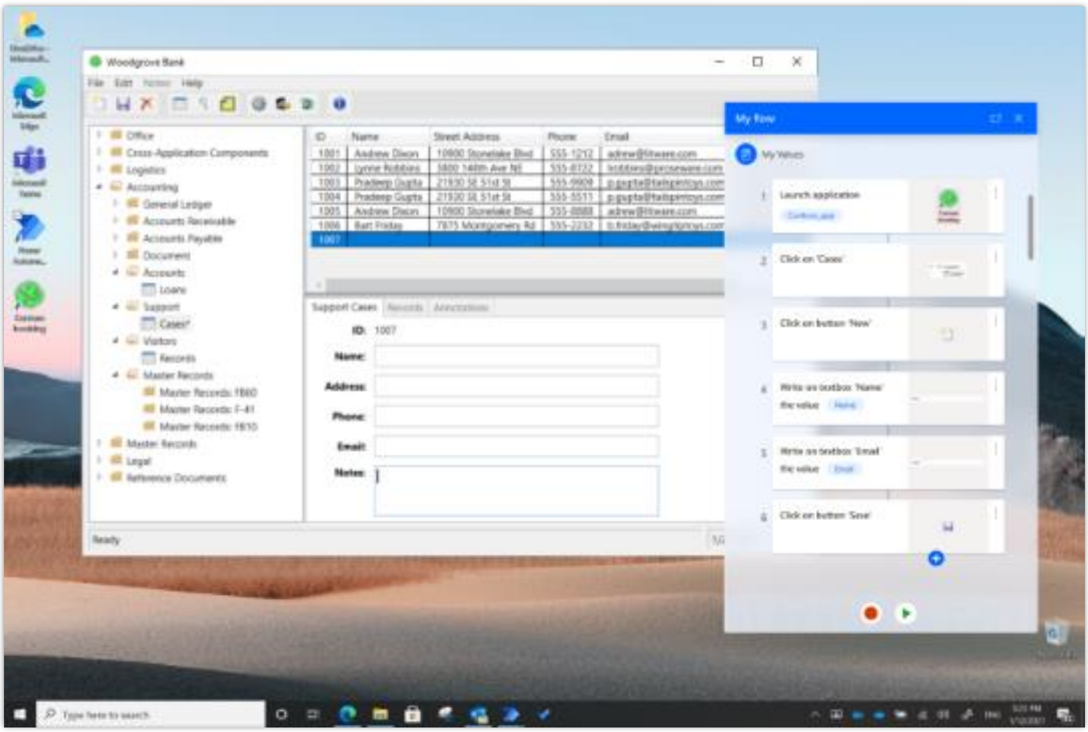
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Mar 2022

Business value

Today, Power Automate Desktop includes a recording experience that captures user interactions. This helps users quickly create automations that they can customize subsequently, for running at a later time. This feature will further simplify the recording experience so more users can automate more types of interactions with greater ease.

Feature details

This feature improves the user onboarding and authoring experiences, mostly through a more capable recorder that replaces the desktop and web recorders that currently exist. This enhanced recorder will be more reliable with many applications, simpler to get started, and easier to use.



Future of the recorder in Power Automate Desktop.

Use connectors in desktop flows

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

Business value

Users will take advantage of the 475+ API connectors while building desktop flows, which are already available in cloud flows expanding the capabilities and functionalities for Power Automate Desktop.

Feature details

Today, there are more than 475 connectors that are available for use in cloud flows. With this feature, all connectors will be available as actions for desktop flows as well. So, if a maker wants to quickly send an email or update a file in OneDrive from their desktop flow, instead of having to call a cloud flow, they can drag-and-drop those actions directly into the desktop flow.

Data loss prevention policies for desktop flows

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

Business value

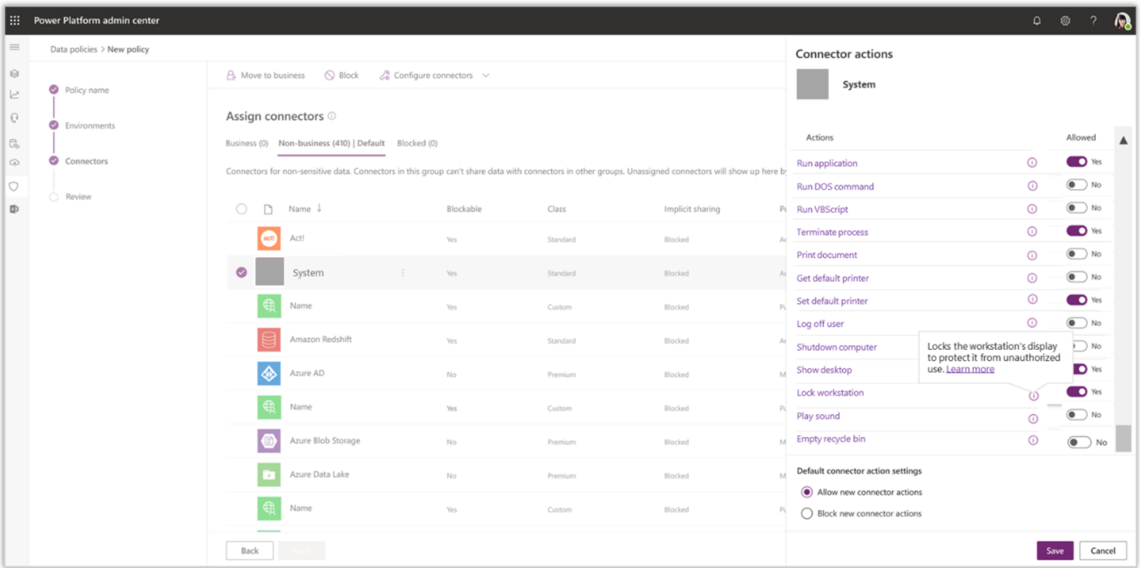
Data loss prevention policies in Microsoft Power Platform give additional control to administrators who wish to limit their users beyond the standard policies that govern access to their data.

Feature details

In 2021 release wave 2, admins will be able to create new policies to govern desktop flows. These policies will allow environment administrators to perform the following actions.

- Classify Power Automate Desktop modules in either business, non-business, or blocked categories.
- Identify certain actions in modules that should be blocked entirely.
- Set the default rules for new actions and new modules.

As with cloud flows, there will be some built-in actions that cannot be blocked by administrators. If a desktop flow is in violation of one or more policies, it will not run.



Pane for configuring options for a module in data loss prevention for desktop flows.

Process advisor

Overview

Process advisor quickly captures detailed steps for each process in your organization to help you better understand places to streamline workflows.

Customize filters in process advisor

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

Business value

With the ability to choose your specific custom attributes (such as Location, Vendor, Department, and more), you could filter and drill down into your process data to understand your processes accordingly.

Feature details

Every organization has unique needs when it comes to analyzing their tasks. Users now have the ability to see custom attributes as filters in their process advisor reports, so they can customize their reports according to what is important to their business.

Innovation backlog for managing ideas and projects with process advisor

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

Feature details

Process mining customers often start with ideas submitted from business users who want to understand more about a process that they want to optimize or make more efficient. The innovation backlog provides the ability to submit ideas and information like ROI, time, resources, and assignments.

Power Virtual Agents

Overview of Power Virtual Agents 2021 release wave 2

Power Virtual Agents enables anyone in your organization to create AI-powered bots that can chat with users about specific topics. They can answer routine questions, resolve common issues, or automate tasks that take up valuable customer or employee time.

The 2021 release wave 2 brings improvements in the authoring experience with variable passing between topics, list variables, inline images and videos, regular expressions in custom entities, and commenting. We are also facilitating initial bot setup with bot creation from templates, sharing bots with security groups, and new AI capabilities to build your bots automatically from website content.

Creating a bot is typically a complex and time-intensive process, requiring long content update cycles and a team of experts. Power Virtual Agents gives anyone in your organization the ability to create powerful custom bots using an easy, code-free graphical interface without the need for AI experts, data scientists, or teams of developers. A bot can interact with users, ask for clarifying information, and ultimately answer a user's questions.

With deep integration with Power Automate and the Microsoft Bot Framework, authors can extend their bots to integrate with API back ends, which will enable the bots to handle additional topics, limited only by the author's imagination. You can deploy bots to many channels including websites, Microsoft Teams, and Facebook.

Use Power Virtual Agents documentation to get detailed information and answers to address your needs, from basic authoring tips all the way to complex bot configuration topics.

For official product documentation and training for Power Virtual Agents, go to:

- Power Virtual Agents documentation
- Power Virtual Agents training on Microsoft Learn
- Power Virtual Agents videos on YouTube

What's new and planned for Power Virtual Agents

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Bot configuration

Configure bots to suit business needs.

Feature	Enabled for	Public preview	General availability
Export and import topics using Microsoft Power Platform solutions	Admins, makers, marketers, or analysts, automatically	-	Oct 2021
Share bots with a security group	Users by admins, makers, or analysts	-	Oct 2021

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
Insert Adaptive Cards	Admins, makers, marketers, or analysts, automatically	-	Oct 2021
Pass and return variables to subtopics	Admins, makers, marketers, or analysts, automatically	-	Oct 2021
Automatically start a bot conversation with a welcome topic	Users by admins, makers, or analysts	-	Oct 2021
Use and see different versions of a topic	Admins, makers, marketers, or analysts, automatically	-	Jan 2022
Use Microsoft Power Platform connectors directly in topics	Admins, makers, marketers, or analysts, automatically	-	Jan 2022
Use the list variable to get content from Power Automate and Bot Framework skills	Admins, makers, marketers, or analysts, automatically	-	Jan 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.

Export and import topics using Microsoft Power Platform solutions

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

Business value

Significantly speed up the development time when creating multiple bots across environments by importing and exporting topics with Microsoft Power Platform solutions. Your developers can now create a standard set of topics that they can easily copy to other bots.

Feature details

Bot owners will be able to export and import topics using Microsoft Power Platform solutions.

Currently, bot makers can export and import entire bots between solutions. With this addition, they'll be able to do the same but with topics, allowing them to create template topics that can be used in multiple bots without having to manually copy and paste or redo entire conversation flows.

For example, independent software vendors (ISVs) can create bot content, such as a set of topics that is specific to an industry or scenario, that their customers can import to help "seed" their bot with content to get up and running quickly.

Share bots with a security group

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

Business value

By using security groups to share a bot, you can easily manage who should or shouldn't have access to your bot within your organization. This makes it easier for your business to target specific internal groups.

Feature details

In addition to only allowing teammates or the whole tenant to chat with the bot, you can share your bot with security groups. This means you can set a dynamic group of users to chat with the bot, which is helpful when creating bots that only apply to specific groups of types of users. For example, you might create a bot for HR employees that is specific to their role.

Core authoring

Overview

Creating a bot with Power Virtual Agents is easy to do with the no-code authoring canvas, and there are a number of ways you can manage how topics interact, how you want the conversation to flow, and what it should feel like.

It's also 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.

Insert Adaptive Cards

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

Business value

Make your bots pop and stand out from the crowd by employing Microsoft Adaptive Cards. Delight your customers with customized rich content formatting.

Feature details

Easily author rich content without needing to write code by using Microsoft Adaptive Cards directly from within the authoring experience. Adaptive Cards will be displayed consistently wherever your customers are and tailored to their screen size and device capability, including images and videos.

Pass and return variables to subtopics

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

Business value

This feature enables authors to pass variables from the parent topic to subtopics, facilitating the creation and maintenance of large topics.

Feature details

Subtopics operate just like normal topics except that they run within the context of that parent topic. With the addition of variable passing, variables from the parent topic can be referenced in the subtopics as well, making them even more powerful.

For example, say you had a topic that is provided as a response when users ask for the best places to eat in a city. Within that topic, you might want to ask follow-up questions to determine the type of food they want, in which area of the city, or the price range. You could design a conversation path that included all of these follow-up questions in one topic, but it could become long, convoluted, and hard to follow from an admin perspective.

Instead, you can have each follow-up question call a subtopic. Any variables you assign within the subtopic will be available within the parent topic, so you could branch off into a subtopic to determine what type of food they want, fill that as a variable, and then return to the original topic to continue asking the other follow-up questions. You could then call the type of food variable either in the parent topic or use it in the subtopic that asks where they want to eat. That way, you'll only return restaurants that serve the type of food that they user wants.

Automatically start a bot conversation with a welcome topic

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

Business value

Having the bot start the conversation creates a more engaging experience and helps to orient your bot users as to what to ask or how to use the bot. For example, you could create a welcome message that expresses your company's voice and suggests some initial questions that users can ask the bot.

Feature details

Configure your bot to automatically show a message at the start of a conversation without needing to write any code, directly from within the Power Virtual Agents portal.

This capability exists in the Power Virtual Agents app in Microsoft Teams and will now be available in the Power Virtual Agents web app. For more information, go to Configure how the bot starts the conversation

Use and see different versions of a topic

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

Business value

Save time by rectifying mistakes or returning to the previous state of a topic with topic version history.

Feature details

Review earlier versions of a bot's topic so you can compare it with the current version, test that version of the topic, and publish it.

Use Microsoft Power Platform connectors directly in topics

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

Business value

Increase the speed by which you can call connectors and perform advanced operations by using Microsoft Power Platform connectors directly within a bot topic. Using connectors directly in a topic means bot authors can easily call data connectors without the need to create and manage a Power Automate flow, making their workflow quicker and more efficient.

Feature details

Bot authors can use Microsoft Power Platform connectors directly within Power Virtual Agent topics instead of having to call a Power Automate flow. This will allow authors to easily call data connectors without having to create or manage a flow and with lower latency for each call.

Use the list variable to get content from Power Automate and Bot Framework skills

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

Business value

Use existing list content from Power Automate and Bot Framework skills to speed up development of your bots and make your bots more powerful with your users.

Feature details

Bot authors can use a list variable to take array outputs from Power Automate and Bot Framework skills and present them as a list of choices in a bot question.

Microsoft Dataverse

Overview of Microsoft Dataverse 2021 release wave 2

Microsoft Dataverse is a low-code data platform that allows you to easily build scalable and interconnected applications, automations, and agents using common data, security, and business logic.

Deliver services with agility

Quickly add business value with an extensible data platform that uses out-of-the-box common tables, extended attributes, semantic meanings, and an open ecosystem enabled by Common Data Model.

Increase scale and efficiency

Boost productivity and reduce costs by quickly developing applications, processes, and reusable data schemes. Repeatably build, validate, and deploy your applications using GitHub and Azure DevOps.

Make your data work smarter

Get accurate insights by adding low-code AI tools to your process automation. Identify and resolve duplicated and conflicting data with a managed data platform that includes built-in business logic and rules.

Rely on the security of a trusted platform

Protect your data with a robust security management infrastructure that provides critical security and compliance capabilities—advanced encryption, rich access control, and deep integration with Azure Active Directory.

What's new and planned for Microsoft Dataverse

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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Microsoft Dataverse API

APIs are web services that apps use to interact with Microsoft Dataverse.

Feature	Enabled for	Public preview	General availability
Microsoft Dataverse search API v2.0	Admins, makers, marketers, or analysts, automatically	-	Oct 2021

Microsoft Dataverse data

Ability to store structured and unstructured data.

Feature	Enabled for	Public preview	General availability
Lookup validation for solutions	Users, automatically	-	Oct 2021
Microsoft Dataverse search can search through file data type	Admins, makers, marketers, or analysts, automatically	-	Oct 2021
Microsoft Dataverse search enabled by default for production environments	Admins, makers, marketers, or analysts, automatically	-	Oct 2021
Publishers can update non-customizable table settings through solutions	Users, automatically	-	Oct 2021
Security role update with layering support for third-party solutions	Users by admins, makers, or analysts	-	Oct 2021
Support Azure Active Directory group with dynamic membership type	Users by admins, makers, or analysts	-	Oct 2021
Microsoft Dataverse data archival	Admins, makers, marketers, or analysts, automatically	Mar 2022	To be announced
Delete and remove users with disabled status	Users by admins, makers, or analysts	Sep 2022	Oct 2021

Description of **Enabled for** column values:

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

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

Microsoft Dataverse API

Overview

Microsoft Dataverse APIs are the glue that binds Microsoft Power Platform together.

- The data APIs provide capabilities to work with data in your Microsoft Dataverse tables and perform specialized operations.
- The relevance search API makes it possible to easily find relevant information that can span multiple tables.

Microsoft Power Platform depends on APIs exposed by Microsoft Dataverse APIs. Canvas apps, model-driven apps, and Microsoft Power Automate depend on Dataverse APIs. ISVs and customers use our APIs to create integrations and custom applications.

Microsoft Dataverse search API v2.0

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

Business value

This capability makes searching over data in Microsoft Dataverse more flexible to meet the diverse requirements makers may have while building search experiences.

Feature details

Microsoft Dataverse search API enables programmatic access to search capabilities over your data in Dataverse. With the new API v2.0, we're adding the following two capabilities:

- Define a more granular search scope. This includes the ability to specify which tables and columns to search, which filters to apply at a column level, and which columns to include in the search response.
- Use Microsoft Dataverse search from plug-ins.

Microsoft Dataverse data

Overview

Microsoft Dataverse is the default data store for Microsoft Power Platform. Microsoft Dataverse allows the storage of many types of data in customizable tables. Depending on your data needs, it's possible to store structured and unstructured data in one or many environments. Microsoft Dataverse provides extensive security, filtering, and search capabilities within environment bounds. Microsoft Dataverse API and logic capabilities are used to build and maintain workflows for your application needs.

Lookup validation for solutions

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2021

Business value

Performing a validation for all required relationships reduces problems post publishing and helps customers be more successful when distributing solutions.

Feature details

With this new feature, solutions will automatically check for all required lookup relationships prior to export.

Before this feature, it was possible to create a solution, select your solution components, and then export even if you didn't include the lookup relationships necessary for your solution to successfully be imported.

Now, at the time of export, a check will automatically be made on every table of a solution to find lookup fields. Once found, the check will validate that the relationship necessary for the lookup to work properly was included in the solution. If it's not present, an error message will provide details of what table is involved and which relationship is missing.

For more information about this feature, go to Important New Feature: Relationship Validation for Solutions.

Microsoft Dataverse search can search through file data type

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

Business value

Searching the file data type makes it easier for users to search through their textual information stored in files in Microsoft Dataverse.

Feature details

Microsoft Dataverse search can now search through the file data type, enabling search over text in files like Word docs and PDFs. Microsoft Dataverse search is easy to use, fast, and intelligent, and it helps users find their information easily in experiences like global search in model-driven apps in Power Apps. It also enables makers to build apps, bots, and flows that intelligently search over data in Microsoft Dataverse.

Microsoft Dataverse search enabled by default for production environments

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

Business value

Microsoft Dataverse search enabled by default for production environments makes it easier for users to find information and makers to build intelligent apps, bots, and flows over data in Microsoft Dataverse.

Feature details

Microsoft Dataverse search is now enabled by default for production environments. It is easy to use, fast, and intelligent, and it helps users find their information easily in experiences like global search in model-driven apps in Power Apps. It also enables makers to build apps, bots, and flows that intelligently search over data in Microsoft Dataverse.

Publishers can update non-customizable table settings through solutions

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2021

Business value

This feature reduces the steps needed for publishers to manage their solutions and make updates that are critical to their users.

Feature details

Today, publishing a new version of a solution to **Enable Auditing = On** on the account table would be ignored because **Allow Customizations = Off**. There are workarounds that would need to be done involving multiple steps to allow customizations on the table, make the changes, and then reinstate the customization lock afterwards.

For example, a customer has their account table set to **Enable Auditing = Off** and **Allow Customizations = Off**.

This new feature will allow a publisher to update **Account to Enable Auditing = On** in a new version of their solution without having to change the customization setting. Because the change is submitted by the publisher, the table setting change is enforced. If a table change was submitted through a different publisher, the **Allow Customization = Off ** would be honored, and the change will not be allowed.

For more information about this feature, go to [Publishers can modify table properties for non-customizable solutions].

Security role update with layering support for third-party solutions

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

Business value

To support third-party solutions, security role updates won't break existing functionality.

Feature details

When the third-party updates their solution with security role updates, the solution's security role privileges are merged with the privileges of the existing security role.

Support Azure Active Directory group with dynamic membership type

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

Business value

Large enterprises heavily use the dynamic membership type in Azure Active Directory groups to simplify the group membership management. Supporting the dynamic membership type in Microsoft Dataverse will unblock these enterprises.

Feature details

Dataverse supports Azure Active Directory (Azure AD) security and office groups including the ability to differentiate Owners, Members, and Guests. To complete the full Azure AD group functionality, we're extending the support of the dynamic membership type. The dynamic membership type leverages business rules to manage the group membership dynamically. Microsoft Dataverse authentication and authorization will be extended to support this membership type.

Microsoft Dataverse data archival

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2022	To be announced

Business value

Providing customers with the ability to move data to a long term storage enables support for regulatory requirements, internal and external audit requirements, and reducing non-active data from the transactional store. In addition, it will provide customers with flexibility to gain business insights and drive actions, based on combining the historical data archived, with the active transactional data already available, through the Azure Synapse Link for Dataverse feature.

Feature details

Customers will be able to define criteria by selecting a root table and schedule archival of the same. The system will automatically pick the related child tables. At the scheduled time, the process will then copy data to a new storage and delete the copied data from the primary Microsoft Dataverse storage.

The first release will support BYOL - bring your own Azure Data Lake. A dashboard will provide the capability to manage the lifecycle of the archival operations.

This Microsoft Dataverse platform feature will also provide Dynamics 365 apps the ability to extend the base Dataverse capability, and support archival of complete functional blocks. This will enable Dynamics 365 customers to archive data blocks relevant to specific business processes like ledger transactions, inventory transactions, incidents, and so on.

Delete and remove users with disabled status

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2021	Oct 2021

Business value

Remove users who are no longer active in the system to free up storage space and allow for historical records to be purged.

Feature details

When users have been disabled or deleted from Azure Active Directory or Microsoft 365 admin, they are set to **disabled** status in Microsoft Dataverse. Disabled users residing in the system not only take up storage space but also inhibit the ability to purge historical records. This feature provides the capability to delete and remove users who have a disabled status while maintaining data integrity.

Governance and administration

Overview of Microsoft Power Platform governance and administration 2021 release wave 2

Microsoft Power Platform offers a range of governance and administration capabilities that span Power Apps, Power Automate, Power Virtual Agents, and Microsoft Dataverse. These capabilities are designed to help administrators and IT professionals setup, secure, manage, govern, and monitor the use and adoption of Microsoft Power Platform and its components across the enterprise. In addition to the Power Platform admin center, which is the unified user experience we aim to provide for Microsoft Power Platform administrators, a unified API surface and rich tooling like PowerShell cmdlets are also available to provide fully automatable management capabilities beyond the out-of-box portal experience.

What's new and planned for Microsoft Power Platform governance and administration

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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An enhanced, unified Power Platform admin center

Enhancements to the unified admin experience for Microsoft Power Platform and Dynamics 365.

Feature	Enabled for	Public preview	General availability
Assign storage capacity to specific environments	Admins, makers, marketers, or analysts, automatically	Nov 2021	
Granular admin privilege management	Admins, makers, marketers, or analysts, automatically	Mar 2022	

Feature	Enabled for	Public preview	General availability
Intuitive, modern UI experiences for user, teams, and role management	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Project Operations based trials (with ERP) in the Power Platform admin center	Admins, makers, marketers, or analysts, automatically	Sep 2021	Dec 2021

Automation and tooling for administrators

Rich tooling experiences are available for administrators and IT professionals managing Microsoft Power Platform.

Feature	Enabled for	Public preview	General availability
Modernized user interface for advanced settings	Admins, makers, marketers, or analysts, automatically	-	Oct 2021
Unified Microsoft Power Platform API	Admins, makers, marketers, or analysts, automatically	Oct 2021	Mar 2022

Description of **Enabled for** column values:

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An enhanced, unified Power Platform admin center

Overview

The unification of the Power Platform admin center continues towards delivering a single admin experience, not only for Microsoft Power Platform, but also for Dynamics 365. The admin center is offering a unified experience to manage environments, deployments, users, capacity, and usage. Powerful analytics empowers admins to gain visibility into creation and usage and to investigate and diagnose issues with their deployments. The integrated help and support experience is enhanced with live chat and virtual agent experiences, which optimizes the self-service experience and reduces the time spent contacting Microsoft Support.

Assign storage capacity to specific environments

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

Business value

Provide customers the ability to manage storage at a granular level to give customers more control of their storage resources.

Feature details

We'll provide the ability to assign capacity from the tenant pool to different environments and provide customers the ability to manage these pools at a more granular level than what is being offered today. This will allow customers to have a greater degree of control of the storage resources for their respective tenants.

Granular admin privilege management

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

Business value

Empower organizations to define a variety of security roles at the tenant and environment levels, supporting the ability to assign different fine grained admin privileges.

Feature details

Currently, Microsoft Power Platform supports centralized admin roles at the tenant and environment levels. In large enterprises where an admin team is comprised of specialized roles, there's a need to enable fine grained custom admin role definition at the tenant and environment levels, allowing different admin personas to perform distinct privileged operations in the enterprise.

With this feature, admin roles can be managed in a decentralized manner, attributing different admin privileges to different security roles/personas. For example, dedicated roles can be defined to enable security admins to manage data loss prevention policies, business owners to view analytics reports, and operations admins to perform environment lifecycle actions.

Intuitive, modern UI experiences for user, teams, and role management

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

Business value

Modern, intuitive portal experiences will be available in the Power Platform admin center replacing the legacy web client UI. Not only does this feature ensure a consistent user experience for the administrator, but it also streamlines the navigation patterns, allowing for better discovery and faster job completion.

Feature details

We'll provide a modern, intuitive UI experience within the Power Platform admin center instead of the legacy web client UI for user, group teams, and role management. This will enable admins to seamlessly manage users and permissions by leveraging the modern admin center interface without going back and forth between the modern and legacy Dynamics 365 UI.

Admins will be able to use the modern UI to perform tasks like edit user details, create or edit security roles, and add/remove users to/from security roles. Admins will also be able to manage all aspects of Microsoft Dataverse for Teams from the modern UI as a means to leverage Microsoft Azure Active Directory groups to manage security role assignment in Microsoft Power Platform environments.

Automation and tooling for administrators

Overview

Rich tooling experiences like PowerShell cmdlets are available for administrators and IT professionals to provide additional management capabilities for use outside the out-of-the-box portal experiences. A unified API surface for administrating all services across Microsoft Power Platform will help optimize a fully automatable management experience.

Unified Microsoft Power Platform API

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

Business value

The Microsoft Power Platform API will provide customers with a single unified API for all admin management scenarios across environments, tenant settings, capacity, licensing, and resources.

Feature details

Today, customers have a myriad of programmability options from PowerShell to Management Connectors to REST APIs. The REST APIs are disparate across different endpoints depending on the resource in question, and they provide a challenging experience. This delays documentation and reduces parity between PowerShell and the APIs.

Unification of the various APIs into a single Microsoft Power Platform API will be done in phases. First, we'll start by enabling tenant settings, capacity, and licensing APIs on a single endpoint. Then, we'll enable environment management capabilities like environment creation, adding Microsoft Dataverse to an existing environment, backup, copy, restore, and so forth. Next, we'll start to enable the endpoints for various resources that an environment can contain like Power Apps, Power Automate flows, Power Virtual Agents, and more.

Most notably, this will have no impact to the Dataverse APIs which remain separate. This Microsoft Power Platform API will be a unified API surface for all other admin management actions.

Project Operations based trials (with ERP) in the Power Platform admin center

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	Dec 2021

Business value

Today, customers who want to do a trial of Project Operations apps need to do so in either the Lifecycle Services (LCS) portal when enterprise resource planning (ERP) functionality is required or the Power Platform admin center when CRM functionality is required. In some cases, customers need to use both admin portals to manage their trial. This is very time consuming and has a disconnected experience. The new single admin portal approach resolves these issues.

Feature details

Project Operations, inclusive of scenarios that require the deployment of Dynamics 365 Finance and Operations apps, will now be fully managed in the Power Platform admin center. Historically, Finance and Operations apps have only been deployable through the Lifecycle Services (LCS) admin portal. This has now been reimagined to better align with the rest of the Dynamics 365 apps, and now Finance and Operations will appear as another app installed on top of Microsoft Dataverse.

Behind the scenes, all of the infrastructure and databases that today's Finance and Operations customers are used to provisioning will still get deployed, but those technical details will be hidden away in the Power Platform admin center. New customers with a trial of the Project Operations suite will get a Microsoft Dataverse and an X++ ERP runtime simultaneously.

For trial scenarios, this now means that customers who need ERP and CRM combined functionality can get a single environment that contains the full stack of capabilities, and it'll all be in a single admin center experience.

Modernized user interface for advanced settings

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

Business value

This feature provides a modern user experience when configuring advanced settings using the web client.

Feature details

As part of the web client removal, some admin settings in the web client have been moved to a modern experience. Organization admins will have new settings options in the Microsoft Power Platform environment settings to configure:

- Redirected to the modern user interface from the web client.
- Enable **Switch to classic** from Power Apps.

Data integration

Overview of data integration 2021 release wave 2

The data integration team's vision is to democratize data for business users so it's seamless to extract, transform, and load data into Microsoft Dataverse and Azure Data Lake Storage from any data source and to allow other Microsoft products to leverage this data.

We are investing in a few key pillars:

- Microsoft Power Platform dataflows. Power Query is the industry leading smart data prep tool and evolves by infusing artificial intelligence and machine learning (AI/ML) into data transformations and by extending dataflows to all of Microsoft Power Platform. In 2021 release wave 1, we're enabling the dataflows experience in Dataverse in Teams so that customers can easily populate data and build better applications.
- Enhance data integration by enabling analytics on Dataverse data through Export to Data Lake in Common Data Model form, new and enhanced connectors, and improvements in the connectivity platform. Other enhancements include Office data integration to enable new insights, extending dual-write for more entities, improving Data Export Service, and enhancing Gateway for enterprises and Robotics Process Automation (RPA).
- End-to-end diagnostics so that customers can better diagnose and fix issues in queries or Gateway.
- Common Data Model establishes industry-wide structure and semantics of underlying data so that customers can then reason about that data through various business application solutions, analytics, and machine learning (ML) algorithms.

What's new and planned for data integration

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Microsoft Power Platform dataflows

Microsoft Power Platform dataflows provide a no-code experience based on Power Query Online for non-technical users.

Feature	Enabled for	Public preview	General availability
Export output data to multiple formats and destinations	Admins, makers, marketers, or analysts, automatically	Mar 2022	-
Improved refresh history and diagnostics for dataflows	Admins, makers, marketers, or analysts, automatically	Mar 2022	

Power Query Online

Power Query is the data connectivity and data preparation experience for users across a wide variety of Microsoft products and services.

Feature	Enabled for	Public preview	General availability
Support for multi-value parameters	Admins, makers, marketers, or analysts, automatically	Mar 2022	
Visual data prep with multiple outputs for transforms	Admins, makers, marketers, or analysts, automatically	Mar 2022	

Description of **Enabled for** column values:

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

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

Microsoft Power Platform dataflows

Overview

Microsoft Power Platform dataflows provide a no-code experience based on Power Query Online for non-technical users to connect, transform, and enrich data from a wide variety of data sources into Microsoft Dataverse and Azure Data Lake Storage in Common Data Model format.

Dataflows provide the building blocks that allow Microsoft to enable out-of-box analytics and AI insights, such as the analytics and insights provided by AI Builder or Dynamics 365 Customer Insights, making them a huge differentiator for Dynamics 365 offerings.

Export output data to multiple formats and destinations

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

Feature details

Today, we provide the ability for citizen data analysts to push prepared data to Microsoft Dataverse or Azure Data Lake Storage. This feature will let customers export the prepared output data from their queries and dataflows into multiple formats (for example, Excel and CSV) and destinations beyond Microsoft Dataverse and Azure Data Lake Storage so that they can be easily consumed to make business decisions.

Improved refresh history and diagnostics for dataflows

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

Feature details

We're improving inline refresh history and error messaging with enhanced diagnostics so users can easily analyze and troubleshoot dataflows.

Power Query Online

Overview

Power Query is the data connectivity and data preparation experience for users across a wide variety of Microsoft products and services, including Power BI, Excel, Dynamics 365 Customer Insights, and several more. For more information, go to Power Query.

Support for multi-value parameters

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

Feature details

Query parameters allow Power Query users to easily parameterize parts of their queries like filter values and easily update those parameter values in a centralized way (for example, when used across multiple queries).

Query parameters provide capabilities to restrict allowed parameter values that can be picked from a list of values, either static or dynamic (for instance, the result of another query); however, a current limitation is that users can only pick a single value (for example, *shoes*) for the parameter. An area of recurring customer feedback is the need to support the selection of more than one value. For example, a **Product Category** parameter could have *Shoes*, *Shirts*, and *Accessories* as allowed values. This improvement would allow selecting both *Shoes* and *Shirts* through the Query Parameters UX and downstream binding of those parameters (for example, "Column1 in/not-in ProductCategory" instead of the current "Column1 = ProductCategory").

Visual data prep with multiple outputs for transforms

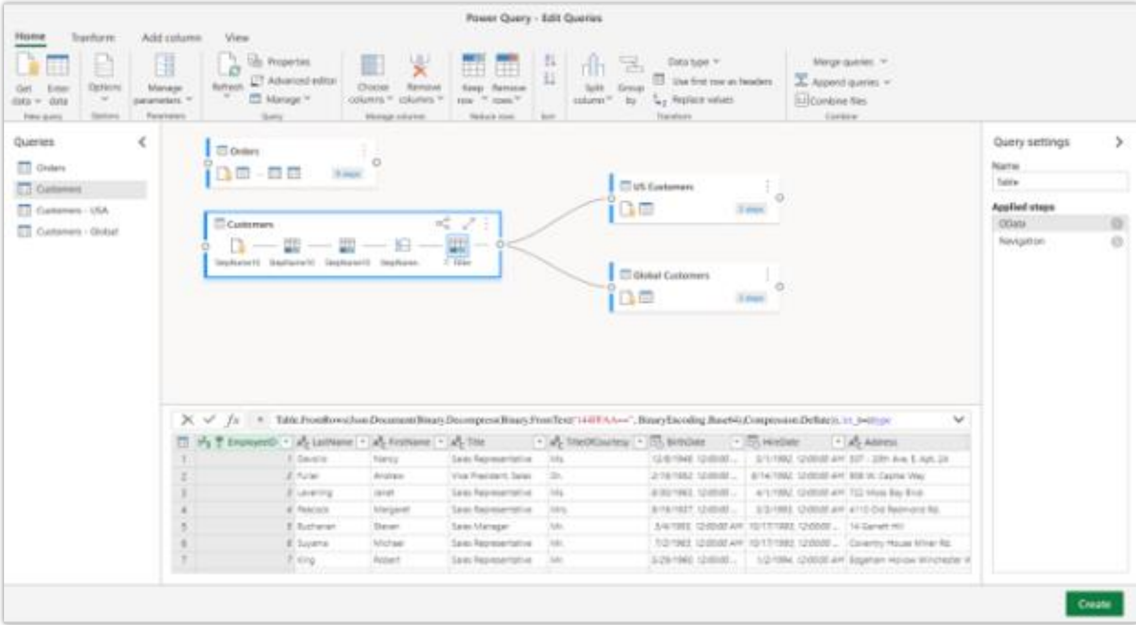
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2022	-

Feature details

When customers apply a filter today, there's only a single output that filters the data based on the condition that was applied. For example, if the filter applied was **ProductCategory = Shoes**, the remaining data is filtered. If customers want to use the inverse of the filter, which includes data from the other product categories, it can be time consuming to create another query with the same steps and a filter with **ProductCategory <> Shoes**. By providing multiple output row-sets for transforms, such as **Filter**, customers will be able to get both:

- A query where the filter was applied
- A query with the remaining data or where the inverse of the filter was applied

Likewise, this feature will provide an easy option for users to consume the "rows that weren't matched" in the **Merge** operation.



Transforms with multiple outputs.

Got feedback?

Share your feedback on a community forum for Dynamics 365 or Power Platform. We'll use your feedback to make improvements. To find out about updates to these release notes, follow us on Twitter @MSFTDynamics365.

Microsoft