Microsoft

Microsoft Dynamics 365

2022 RELEASE WAVE 2 PLAN

Features releasing from October 2022 through March 2023

Contents

Dynamics 365 and industry clouds: 2022 release wave 2 plan

The Dynamics 365 and industry clouds release plan for the 2022 release wave 2 describes new features releasing from **October 2022** through **March 2023**. You can either browse the release plan online or download the document as a PDF file. The PDF file also includes information about Power Apps, Power Automate, Power Virtual Agents, Microsoft Dataverse, Microsoft Power Platform governance and administration, and data integration.

The Microsoft Power Platform features coming in the 2022 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

2022 release wave 2 overview

The 2022 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, Intelligent Order Management, Project Operations, Human Resources, Commerce, Fraud Protection, Business Central, Connected Spaces, Guides, Customer Insights, and Microsoft Cloud for Healthcare, Financial Services, Nonprofit, and Retail.

Marketing

Dynamics 365 Marketing brings real-time customer journey orchestration to enable B2B brands to hyper-personalize experiences across the entire buying journey and confidently grow their marketing and customer experience programs to target up to 100M customers with up to 300M messages or interactions per month. Intuitive lead capture forms, leads nurturing hands-off automation, and a new analytics dashboard enable alignment between sales and marketing teams like never before. Organizations can reach new levels of marketing maturity with AI-powered next best content selection and increased support for business units.

Sales

Dynamics 365 Sales continues to optimize the seller experience using data and AI to help sellers prioritize their work, blending business and productivity tools to meet sellers where they are and driving in-the-moment collaboration experiences so that every seller can engage with their colleagues and customers efficiently, reclaiming their time and being more productive.

Service

Dynamics 365 Customer Service is focused on delivering the capabilities that help run contact centers optimally by providing enhancements in unified routing with features such as percentage-based routing, preferred agent routing, and longest idle routing. Customer support swarming in Microsoft Teams will help agents resolve complex cases through collaboration. Organizations can empower their customers with options to leave voicemail, call back, and dial agents directly in the voice channel. The agent experience is modernized with an enhanced conversation timeline, horizontal multisession navigation, and AI-powered conversation summary. Supervisors can view Power Virtual Agents analytics within their Omnichannel analytics dashboards.

Dynamics 365 Field Service brings new capabilities that enable organizations to better orchestrate service operations for workers. Organizations can now build and maintain location and assets for large facilities, keep their costs at bay by configuring "not to exceed" limits, and group similar incident types under "trade" for ease of management. We're also bringing optimization improvements on booking lock constraints and introducing a myriad of user experience improvements to the mobile app to continue empowering frontline workers.

Finance and operations

Dynamics 365 Finance is launching the general availability of vendor invoice OCR, which automates the reading and recognition of vendor invoices, and will continue adding capabilities for subscription billing use cases. We will integrate Tax Calculation service with Dynamics 365 Project Operations (Public Preview) and extend Electronic Invoicing service to support new upcoming e-invoice legislations for France, Poland, and Saudi Arabia.

Dynamics 365 Supply Chain Management continues to invest in capabilities that drive agility and resilience across the supply chain. New analytics and support for multiple vendors in Planning Optimization help organizations optimize their sourcing strategies. Inventory Visibility lets organizations track real-time consumption within allocated quantities in support of promotions, special events, and new product introductions. Guided warehouse implementation and configuration experiences enable rapid reconfiguration of supply chains, and manufacturers in the process industry can use Planning Optimization for shortening their planning cycles.

Dynamics 365 Intelligent Order Management has continued to expand its ecosystem of providers and build on its continued success. We now have 14 providers that span the Supply Chain Lifecycle from order ingestion to last mile delivery. In the upcoming release we are adding support for various Order Types—back orders, subscription orders, manual orders, and purchase orders. We'll also provide the ability to simulate fulfillment so that our customers can model and understand the impact in choosing various fulfillment strategies. Finally, we have contextual collaboration features where an order can be shared with multiple stakeholders using embedded Teams.

Dynamics 365 Project Operations is continuing to invest in capabilities to empower project managers and project teams in this release wave with Project Budgeting and Time-phased forecasting, Baselines and Snapshots, and in modernizing application experiences on the web and mobile form factors. For project accountants and back-office personas, we are lighting up advanced subcontracting and subscription billing capabilities. In addition, across-the-board investments to ease the complexity of interaction patterns and uptake of modern and fluent controls are also targeted for this release wave.

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. We'll continue to improve the One Dynamics One Platform workstream, which focuses on enabling Finance and Operations applications on Power Platform for administrators, pro-developers, and end-users. It includes enhancements to One Admin, One Developer, and One User experiences.

Human Resources

Dynamics 365 Human Resources will bring improved efficiency by enabling HR business partners to tailor experiences and automatically complete processes where manual decisions and tasks are needed today. Improved efficiency will also be available to managers and employees by providing notifications outside of the application for benefits processes and tasks. We'll also provide better experiences across Dynamics 365 applications by integrating employee skill, compensation, and departure information to resource managers in Project Operations.

Commerce

Dynamics 365 Commerce enables new and updated B2B experiences, including sales agreements across channels and customer-specific catalogs. Omnichannel media management features streamline workflows. Key point-of-sale investments include Store Commerce app availability for iOS and Android devices. Apple Pay and Google Pay digital wallet integration, as well as new customer support options through virtual agent and live agent integration will be available for e-commerce.

Fraud Protection

Dynamics 365 Fraud Protection will have a new TAB (Transaction Acceptance Booster) offering that allows merchants to increase their bank approval rates without having to rip and replace their incumbent fraud provider solution. Having to rip and replace a merchant's incumbent fraud solution is costly and timely. This feature enables the merchant to benefit from Fraud Protection TAB capabilities with minimal disruption to their business.

SMB

Dynamics 365 Business Central continues to improve the reporting capabilities for customers, including new report datasets for Excel and improvements to the Power BI reports that now will support dimensions. The Power Apps and Power Automate integration also continues to offer new capabilities for low-code development. The application will get several improvements like helping users do reverse entries in the payment reconciliation journal and several improvements to the supply chain functionality. We are taking steps forward in scaling productivity of our partners via more efficient and performant tooling for development and administration.

Connected Spaces

Dynamics 365 Connected Spaces now supports alerts and notifications via Teams or Outlook when business AI skills detect actionable patterns within a physical space. Customers can now use Connected Spaces in Germany (besides the US and UK) and connect up to 10 cameras for each Azure Stack Edge device, maximizing their existing investments in expanding Connected Spaces across their physical footprint. Customers can also leverage the Azure Stack Edge Pro 2 device for configuring Connected Spaces at the edge in addition to the existing Pro 1 devices.

Guides

Dynamics 365 Guides will continue investing in capabilities to improve collaboration experiences for authors and operators on HoloLens 2. The application will also be updated to provide more advanced content authoring workflows versioning and publishing of guides in the coming wave.

Customer Insights

Dynamics 365 Customer Insights continues to invest in accelerating customer understanding by enhancing time to value with quicker out-of-the-box insights, predictions, segments, and measures with limitless extensibility across technology ecosystems. New features will allow you to power personalized experiences with real-time insights, analytics, and activations to deliver industry-leading personalization and moments-based marketing. New features also enable ubiquitous insights that allow an integrated data flow across Microsoft Dataverse, Dynamics 365, and Power Platform for seamless workflows.

Microsoft cloud for industry solutions

Microsoft Cloud for Healthcare reflects our commitment to the healthcare industry by bringing together healthcare data to empower care team collaboration and patient engagement solutions. Our investments in this release wave span Azure, Dynamics, and Teams. In this release wave we focus on making interoperability and integration even easier, through new Azure integration templates and Dataverse healthcare APIs. Our experiences are being enhanced with the general availability of our missed appointments model, and making the patient engagement journey more robust and focused on patient outreach, and in tracking care plans within the care management application. Lastly, the integration between the Dynamics 365 and Teams solutions within the Cloud for Healthcare will get better through the integration of the new waiting room and branding experiences.

Microsoft Cloud for Financial Services continues to invest in delivering 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. For this release wave, we are expanding our current retail banking data model and adding new verticals such as wealth management and general insurance. Financial institutions will be able to improve their customer engagement by streamlining consultation appointment scheduling and intelligent customer outreach as well as wealth management and customer onboarding scenarios. We will continue to enable our ecosystem to deeply integrate with Microsoft Cloud for Financial Services.

Microsoft Cloud for Nonprofit is making it easier for fundraisers, marketers, and data analysts to build a comprehensive view of their organization's marketing campaign performance and donations. Improvements to donation import will paint a more comprehensive and up-to-date picture of your donors and supporters. A forthcoming marketing campaign performance report will help marketers assess campaign performance and ROI across Dynamics Marketing and fundraising and engagement.

Microsoft Cloud for Retail will bring together solutions from some of the leading ISVs in shopper analytics and frictionless checkout domain to our cloud in a fully integrated way with our first-party solutions, thereby providing differentiated and higher value proposition to our customers. The investment in this release around retail frontline worker capabilities in terms of business contextual task management, store audits, and clienteling, enriched with powerful communication and collaboration capabilities from Microsoft Teams, would help retailers to maximize the productivity and motivation of their workforce while enabling them to provide good experiences for their shoppers. These solutions are being built on a unified, cohesive, and extensible industry-specific data model with industry-specific AI and machine learning models on top for valuable shopper insights and recommendations.

Key dates for the 2022 release wave 2

These release plans describe functionality that may not have been released yet. Delivery timelines and projected functionality may change or may not ship (see Microsoft policy).

Here are the key dates for the 2022 release wave 2.

Milestone	Date	Description
Release plans available	July 12, 2022	Learn about the new capabilities coming in the 2022 release wave 2 (October 2022-March 2023) across Dynamics 365 and industry clouds, and Microsoft Power Platform.

Milestone	Date	Description
Early access available	August 1, 2022	Test and validate new features and capabilities that will be part of 2022 release wave 2, coming in October, before they are enabled automatically for your users. You can view the Dynamics 365 2022 release wave 2 early access features now.
Release plans available in 11 additional languages	July 29, 2022	The Dynamics 365 and industry clouds and Microsoft Power Platform release plans published in Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	October 1, 2022	Production deployment for the 2022 release wave 2 begins. Regional deployments will start on October 1, 2022.

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

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

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

We've done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We're looking forward to engaging with you as you put these new services and capabilities to work, and we're eager to hear your feedback as you dig in to the 2022 release wave 2 plans.

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

2022 release wave 2 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning **August 1, 2022**.

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

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

The features from these apps update the existing user experiences. You can opt in early to enable these features in your environment. This will allow you to test these features and then adopt them across your environments. For information on how to enable these features, see Opt in to 2022 release wave 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 2022 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
Try enhanced sequence creation experience with new designer	Users, automatically	Aug 1, 2022	Oct 2022

Dynamics 365 Customer Service

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

Feature	Enabled for	Early access	General availability
Auto summarize conversations support for Teams-based collaboration	Users, automatically	Aug 1, 2022	Oct 2022
Auto-enabled AI suggestions for similar cases and knowledge articles	Users, automatically	Aug 1, 2022	Oct 2022
Auto-enabled AI-suggested keywords and brief description for knowledge articles	Users, automatically	Aug 1, 2022	Oct 2022
Compose email with enhanced insert template	Users, automatically	Aug 1, 2022	Oct 2022
Enhancements to rich text editor	Users, automatically	Aug 1, 2022	Oct 2022
Knowledge article search filters are enabled by default	Users, automatically	Aug 1, 2022	Oct 2022
Personalize the out-of-box historical analytics reports	Users, automatically	Aug 1, 2022	Oct 2022
Use dynamic text in signature template	Users, automatically	Aug 1, 2022	Oct 2022
View the Active Duration and the On-hold Duration of a service-level agreement KPI	Users, automatically	Aug 1, 2022	Oct 2022

Dynamics 365 Field Service

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

Feature	Enabled for	Early access	General availability
Build and maintain location and asset hierarchies for large facilities	Users, automatically	Aug 1, 2022	Oct 2022
Enhanced vendor management	Users, automatically	Aug 1, 2022	Oct 2022

Feature	Enabled for	Early access	General availability
Europe deployments ship with Bing Maps disabled to support EU data boundary	Users, automatically	Aug 1, 2022	Oct 2022
Field Service (Dynamics 365) mobile app usability enhancements	Users, automatically	Aug 1, 2022	Oct 2022
The new schedule board becomes the default for all deployments	Users, automatically	Aug 1, 2022	Oct 2022

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
Improve import experience when parent configuration is missing	Users by admins, makers, or analysts	Aug 1, 2022	Oct 2022
Switch a base data model in electronic reporting	Users by admins, makers, or analysts	Aug 1, 2022	Oct 2022

Dynamics 365 Supply Chain Management

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

Feature	Enabled for	Early access	General availability
Display product info in user's language	Users by admins, makers, or analysts	Aug 1, 2022	Oct 2022
Monitor equipment with Sensor Data Intelligence	Users by admins, makers, or analysts	Aug 1, 2022	Oct 2022

Finance and Operations cross-app capabilities

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

Feature	Enabled for	Early access	General availability
Filter events by legal entity	Admins, makers, marketers, or analysts, automatically	Jul 1, 2022	Oct 2022
Updates to client feature states with version 10.0.29	Users, automatically	Aug 1, 2022	Oct 2022

Dynamics 365 Commerce

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

Feature	Enabled for	Early access	General availability
Chat in Dynamics 365 Commerce with Omnichannel for Customer Service	Admins, makers, marketers, or analysts, automatically	Aug 1, 2022	Oct 2022
Enable B2B sales agreement and contract-based pricing	Admins, makers, marketers, or analysts, automatically	Aug 1, 2022	Oct 2022

Marketing

Plan and prepare for Dynamics 365 Marketing in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Marketing**.

Overview

As the world adjusts to the new normal with hybrid interactions that are here to stay, customers' expectations are changing. Many companies have raised the bar for the kinds of experiences customers expect, but most companies are not able to deliver. Customers expect companies to understand them, predict their needs, and deliver good experiences to them wherever they are – online or in person. In this landscape, companies need to find new ways to build relationships with their customers, and marketers need to operate at a higher level to attract new customers and build loyalty with the ones they have.

Our focus is to enable you to do just this. We aim to empower you to optimize digital experiences while arming you to elevate in-person interactions. So, no matter where you interact with your customers – through email, at a virtual event, or in person – the experience is congruous. We aim to enable you to reimagine your B2B practices by engaging members of the buying group at the right moments and offering them contextually relevant experiences. Our goal is to enable you to raise the bar on your marketing campaigns – reaching new levels of scale and sophistication. And because relationships are not built based on a single interaction, you will be able to collaborate with other members of your team to design end-to-end experiences that span departments, devices, and channels to make every engagement matter.

Key themes for 2022 release wave 2 include:

- Enable **moments-based marketing** with real-time journey orchestration.
- Leverage the power of **data and AI** to market at scale and achieve higher levels of marketing maturity.
- Embrace **personalized content** to grow your audience interactions.

Investment areas

Collaborative apps
Build collaborative experiences across people, departments, and channels to enable meaningful engagement. Landing a good customer experience is challenging; customers expect brands to follow their lifetime journeys while providing omniscient and harmonious experiences. Enabling deep collaboration between departments unlocks exponential business growth capabilities by placing customer needs at the center of the organization. Boost your ROI by increasing cooperation with sales, use a common dashboard to share an overview of the business pipeline, and trigger a sales sequence to make sure that potential leads are followed up as soon as possible.

Moments-based
Enable moments-based marketing with real-time journey orchestration. Today's expectations demand a new level of customer obsession. Winning and keeping customers is becoming increasingly more competitive. This requires brands to capture the moments they get with customers and use them to serve customers. Grab your consumers' attention by leveraging the relevant touch point, set up capture forms in minutes on your web pages, plug in the channels you control, and include reminders to complete call-to-actions within your customer journey.

Personalization
Embrace personalized content to grow your audience interactions. Personalization is no longer a luxury. It is critical since it increases customers' likelihood to make an initial purchase, to repurchase, and to recommend. Delivering impactful personalization requires leveraging data and AI in an effective way. Drive better customer experience by targeting the right audience, unleash your creativity, deliver impactful hyper-personalized content supported by AI, and acknowledge your customer consent and preferences.

Data and AI
Leverage the power of data and AI to market at scale and achieve higher levels of marketing maturity. Combine and enrich all your data in real time and leverage AI-driven insights to predict customer intent. Capitalize on your data and artificial intelligence to grow your business, increase your monthly customer interactions, and share assets, resources, and results across brands and business units to identify and develop sources of growth.

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

Check out the release plan

For application administrators

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

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

Get the most out of Marketing

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.

Helpful links	Description
Licensing	Improve your understanding of how to license Marketing.
Product documentation	Find documentation for Marketing.
User community	Engage with Marketing experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Marketing.

What's new and planned for Dynamics 365 Marketing

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Collaborative apps

Boost your ROI by increasing cooperation with sales, use a common dashboard to share an overview of the business pipeline, and trigger a sales sequence to make sure that potential leads are followed up as soon as possible.

Feature	Enabled for	Public preview	Early access*	General availability
Close leads fast by automating handoffs with sales	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022
Optimize B2B marketing with a new OOB analytics dashboard	Admins, makers, marketers, or analysts, automatically	Oct 2022	-	Dec 2022

Data and AI

Capitalize on your data and artificial intelligence to grow your business, increase your monthly customer interactions, and share assets, resources, and results across brands and business units to identify and develop sources of growth.

Feature	Enabled for	Public preview	Early access*	General availability
Grow your business with 3X maximum monthly interactions	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022
Scale your multi-brand business effortlessly	Users by admins, makers, or analysts	-	-	Oct 2022

Moments-based

Grab your consumers' attention by leveraging the relevant touch point, set up capture forms in minutes on your web pages, plug in the channels you control, and include reminders to complete call-to-actions within your customer journey.

Feature	Enabled for	Public preview	Early access*	General availability
Create lead capture forms that convert visitors to customers	Admins, makers, marketers, or analysts, automatically	Oct 2022	-	Dec 2022
Extend your outreach with custom channels	Admins, makers, marketers, or analysts, automatically	Oct 2022	-	Dec 2022

Personalization

Drive better customer experience by targeting the right audience, unleash your creativity, deliver impactful hyper-personalized content supported by AI, and acknowledge your customer consent and preferences.

Feature	Enabled for	Public preview	Early access*	General availability
Delight customers with personalized AI-powered next-best content	Admins, makers, marketers, or analysts, automatically	Oct 2022	-	-
Target the right audience using the new segment builder	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022

* You are able to opt into some features as part of early access on August 1, 2022, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Collaborative apps

Overview

Build collaborative experiences across people, departments, and channels to enable meaningful engagement. Landing a good customer experience is challenging. Customers expect brands to follow their lifetime journeys while providing omniscient and harmonious experiences. Enabling deep collaboration between departments unlocks exponential business growth capabilities by placing customer needs at the center of the organization.

Boost your ROI by increasing cooperation with sales, use a common dashboard to share an overview of the business pipeline, and trigger a sales sequence to ensure that potential leads are followed up as soon as possible.

Close leads fast by automating handoffs with sales

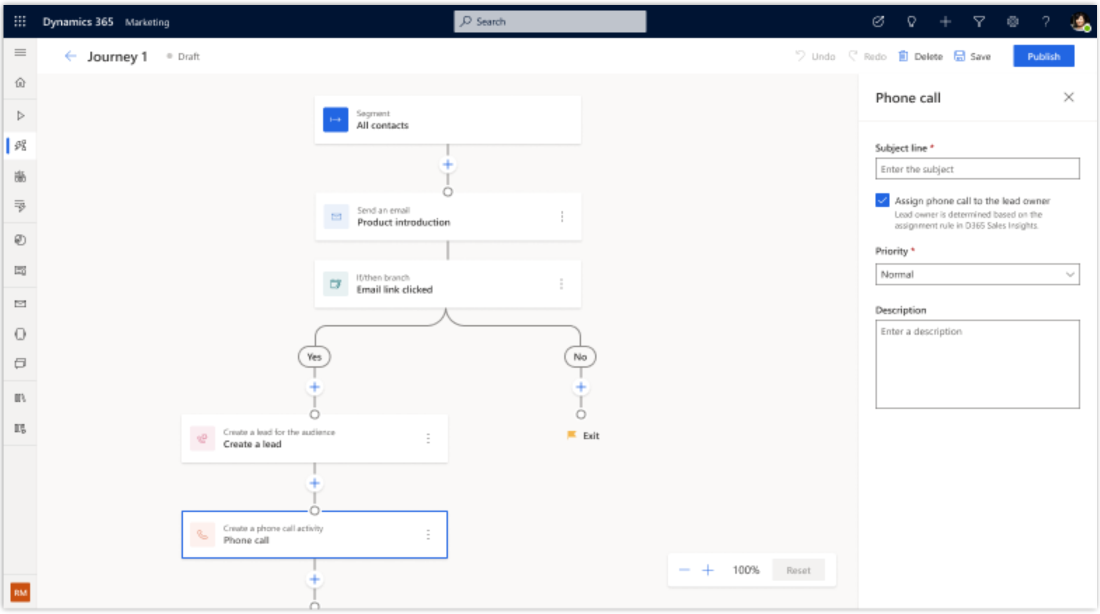
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022

Business value

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

Feature details

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



Close leads faster by automating seamless handoffs between marketing and sales

Optimize B2B marketing with a new OOB analytics dashboard

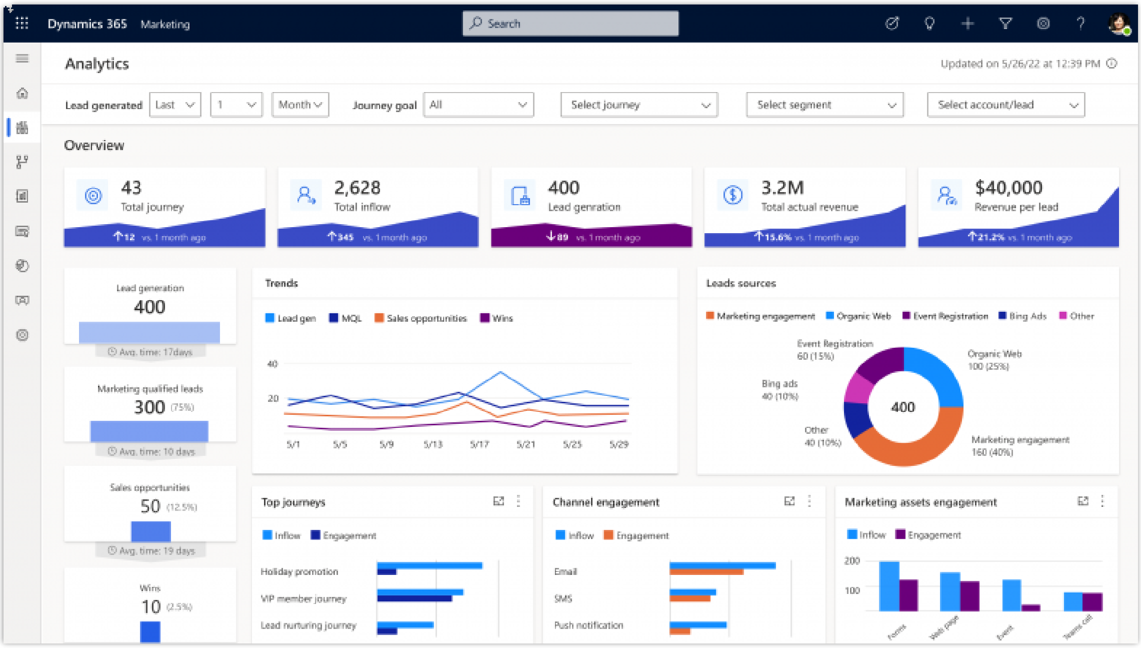
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2022	-	Dec 2022

Business value

Marketers must understand how their marketing mix efforts are contributing to their business pipeline. With new out-of-the-box analytics capabilities, you can track your pipeline development and analyze how different customer journeys, marketing assets, and channels are performing to drive engagement and contribute to different stages of the pipeline. When you use both Dynamics 365 Marketing and Sales, you can further optimize your pipeline velocity by aligning marketing and sales teams on common goals and leveraging a shared pipeline view.

Feature details

- Out-of-the-box funnel to track leads moving through the pipeline (from lead generation to won opportunities).
- Drill down to understand how your marketing efforts are driving key business outcomes across different stages of your pipeline.
- Analyze top-performing journeys, channels, and marketing assets (such as emails or forms) that are contributing to pipeline development and revenue generation.
- Seamless integration with Dynamics 365 Sales for a common view of the business pipeline.



Business-to-business marketing analytics dashboard

Data and AI

Overview

Leverage the power of data and AI to market at scale and achieve higher levels of marketing maturity. Combine and enrich all your data in real time and leverage AI-driven insights to predict customer intent. Capitalize on your data and artificial intelligence to grow your business, increase your monthly customer interactions, and share assets, resources, and results across brands and business units to identify and develop sources of growth.

Grow your business with 3X maximum monthly interactions

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

Business value

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

Feature details

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

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

Scale your multi-brand business effortlessly

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

Business value

Businesses need the ability to implement a customer engagement strategy that spans multiple brands, regions, or product lines without the daunting overhead of processes that typically accompany it. Now in real-time marketing, you can effortlessly organize your digital assets, content, and journeys to match your organizational structures by separating business and customer data across different organizational boundaries. This also enables you to gain comprehensive insights into a specific brand's marketing performance without losing a view of the bigger picture.

Feature details

- Define reusable marketing assets at the enterprise level; allow individual brands or lines of businesses to leverage, extend, or customize them.
- Organize your marketing journeys, digital assets, content, and customer preferences to support your multi-brand strategy needs.
- Reduce compliance risk by using out-of-the-box campaign and data segregation capabilities across organizational boundaries instead of relying on processes and people.
- Review marketing analytics at individual brand, region, and organization levels.

- Built on top of modernized business units (Microsoft Dataverse) to ensure a no-cliff experience across your Dynamics 365 applications.

Moments-based

Overview

Enable moments-based marketing with real-time journey orchestration. Today's expectations demand a new level of customer obsession. Winning and keeping customers is becoming increasingly more competitive. This requires brands to capture the moments they get with customers and use them to serve customers. Grab your consumers' attention by leveraging the relevant touch point, set up capture forms in minutes on your web pages, plug in the channels you control, and include reminders to complete call-to-actions within your customer journey.

Create lead capture forms that convert visitors to customers

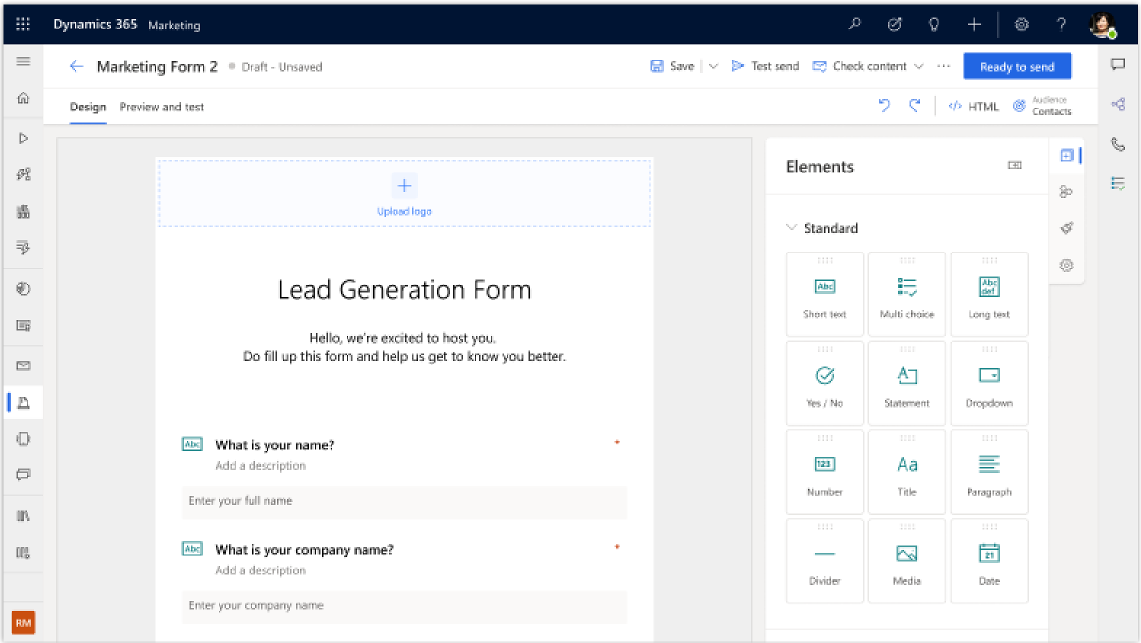
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2022	-	Dec 2022

Business value

Lead capture forms are crucial for gathering marketing information, turning visitors into leads, and turning leads into valuable customers. With the new intuitive forms experience in real-time marketing, you can easily create modern forms with advanced capabilities that validate form data and dynamically display form fields.

Feature details

- Effortlessly create engaging user experiences and increase your campaigns' conversion rate.
- A modern editor guides you through the entire form creation process.
- Get started straight away with beautiful templates or start from scratch.
- Smart forms can show or hide fields based on the previous user interactions.
- Increase usability for your customers with advanced form validation.
- Leverage new interactions with customer journeys to, for example, send a thank you email.



Form editor with canvas and tool panel.

Extend your outreach with custom channels

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

Business value

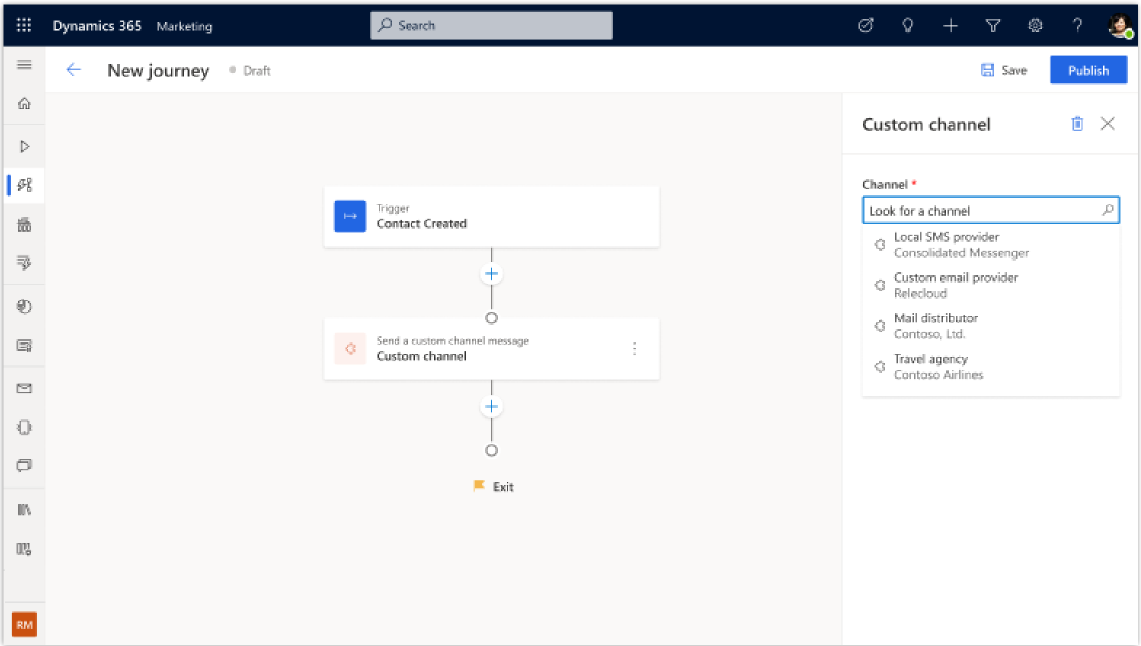
Extend real-time marketing with the communication channels you are familiar with to engage your customers in moments that matter. Use real-time marketing personalization, consent and analytics tools to create compelling content and deliver it via your preferred communication channels, such as a local SMS provider or WhatsApp. Capitalize on proven channels, plug any of them into your new or existing journeys, and unfold their true potential with Dynamics 365 Marketing to maximize your customer engagement.

Feature details

In addition to real-time marketing's built-in channels (email, SMS, and push notifications), you can now create custom channels to use in customer journeys. Custom communication channels provide additional extensibility and personalized targeting when reaching out to your customers.

- Install and configure a new custom channel of your choice.
- Create templates for your custom channels using Dynamics 365 Marketing editors.

- Use your custom channel template in a customer journey through a new tile.
- Review deliverability analytics for your custom channel.



Extend your outreach with custom channels

Personalization

Overview

Embrace personalized content to grow your audience interactions. Personalization is no longer a luxury. It is critical as it increases customers' likelihood to make an initial purchase, to repurchase, and to recommend. Delivering impactful personalization requires leveraging data and AI in an effective way. Drive better customer experience by targeting the right audience, unleash your creativity, deliver impactful hyper-personalized content supported by AI, and acknowledge your customer consent and preferences.

Delight customers with personalized AI-powered next-best content

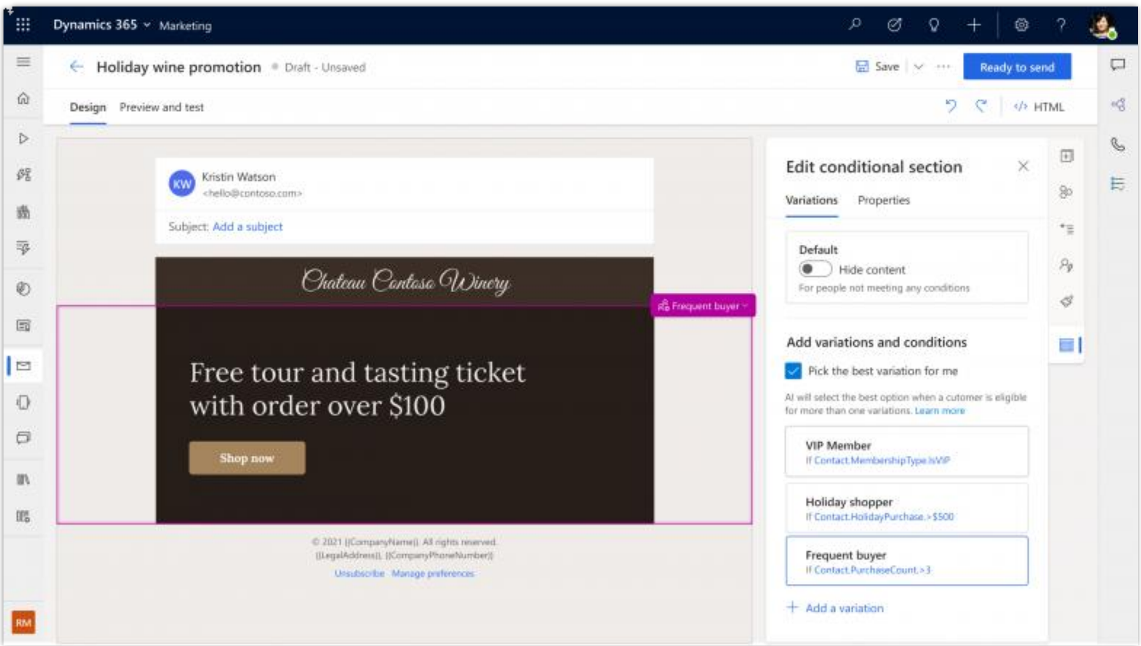
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2022	-	-

Business value

Your customers are unique and are driven by different incentives. Compelling content and offers are a marketer's most powerful tool in nurturing leads, engaging customers, or preventing them from churning. In addition to specifying manual rules for offer or content selection in a message, you can leverage AI-powered optimization to tailor the best content for each of your customers. The AI model achieves this by analyzing your customers' preferences, interests, and motivations based on rich customer data from all your customer data sources through Dynamics 365 Customer Insights and past interactions with your brand. You know your business best. The built-in AI will work with the rules you define and further optimize by selecting and delivering the best content or offer to each customer, improving your journey goal attainment and return on investment.

Feature details

- Simply add a few options of different content variations (containing different offers, images, and calls to action) when composing messages using codeless conditional content and define rules on the type of customers to target with each variation.
- Use the message with content variations at any step in the journey to tailor the message for every customer going through the journey.
- Optionally, optimize the content selection logic for every customer with AI. Delight every customer with the best content variation, selected by AI based on their profile attributes and past interaction data.
- Guide the AI model to make the best decisions by specifying optimization criteria for the model (for example, maximize email clicks or journey goal attainment).
- Compare the AI's performance against an automatically-generated control group.
- Improve the effectiveness of the AI when using 360 customer profiles from Dynamics 365 Customer Insights.



AI-powered next best content or offer selection

Target the right audience using the new segment builder

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

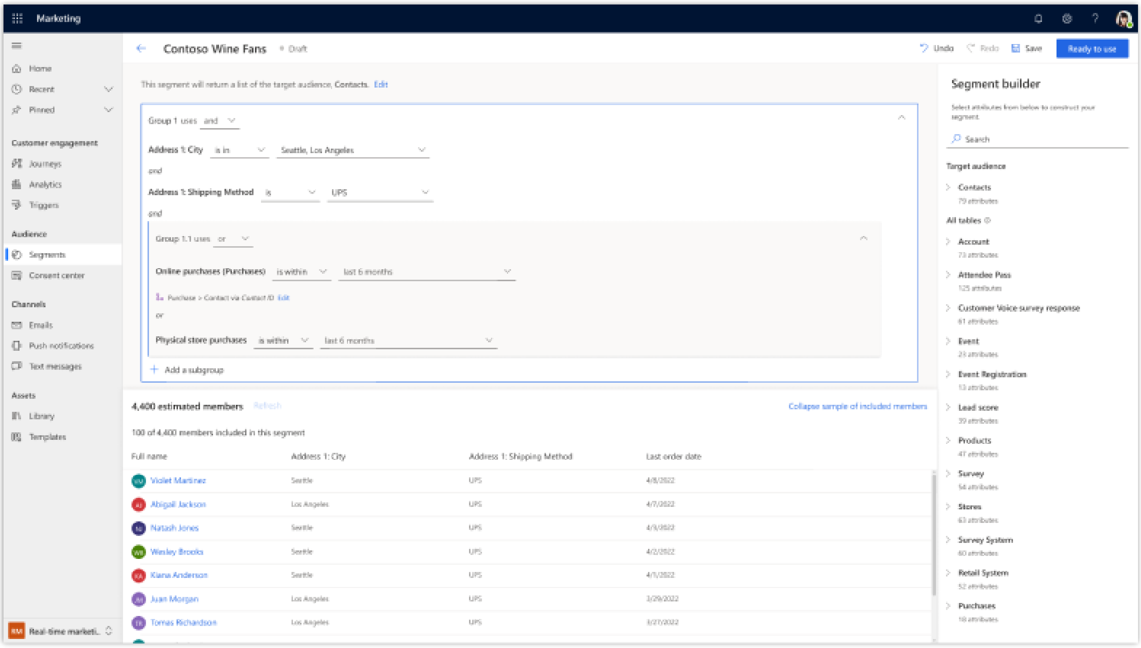
Business value

To improve marketing return on investment, it is important that your segments target the right audience. You can now build segments effortlessly by describing them in natural language or by using an easy drag-and-drop logic builder that doesn't require specialized knowledge of complex data structures and logical operators. To further ensure your confidence in building segments, you can preview the members and estimate the size of draft segments as part of the creation process. In addition, the segment builder enables you to build segments using leads. You can then target the leads directly using customer journeys for your demand generation programs.

Feature details

Marketers need to target the right audience to make the most of their campaigns. Segments are one of the best tools to make sure you're targeting the right audience. With the new Dynamics 365 Marketing segment builder, you can build segments by describing them in natural language or by using the easy drag-and-drop logic builder that doesn't require specialized knowledge of complex data structures and logical operators.

- Directly create segments based on attribute data for both contacts and leads.
- Discover and search across all attributes in the right pane and add them to your queries to enrich your segments with more complex logic.
- Preview and estimate the number of segment members as part of your segment creation process.
- Use natural language to intelligently assist and ease your segment creation experience.



Segmentation builder

Sales

Plan and prepare for Dynamics 365 Sales in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Sales**.

Overview

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

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

For 2022 release wave 2, we continue to optimize the seller experience—using data and AI to help sellers prioritize their work and blending business and productivity tools to meet sellers where they are and surface in-context collaboration experiences so that sellers can engage efficiently and reclaim their time to focus on customer connections.

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

Investment areas

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

To learn more, go to Overview of Microsoft Teams integration.

Sales accelerator and process automation
Sales accelerator is a sales engagement platform that enables sellers to efficiently engage with prospects and customers across multiple channels. Also, prioritized worklist guides sellers to connect with the right customers and help them streamline workflow through automation and integration.

To learn more, go to the Sales accelerator overview.

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

Conversation intelligence
Conversation intelligence uses analytics and data science to gather data from sellers' call recordings and Dynamics 365 Sales, and provides you with the information and insights to intelligently manage your sales team and proactively coach sellers.

The focus areas for this wave are:

- Capture every customer interaction to provide real-time business insights on top - Organizations using Microsoft communication channels, such as Teams, Outlook, and Azure Communication Services, to interact with their customers will enjoy a seamless connectivity of these interactions to the relevant business data records with zero context switching and critical business insights provided on top.
- Get conversation intelligence as an integral part of your daily workflows within Dynamics 365 Sales

- Get business insights and productivity tools--such as real-time tips during calls, question detection and analysis, and many more--to boost performance and win more deals

To learn more about conversation intelligence, go to Improve seller coaching and sales potential with conversation intelligence.

Reporting
Dynamics 365 Sales offers standardized reports that would allow sales managers and admin users to understand the usage of the sales application. The reports would also help them in gauging the performance of teams and individuals using the application. The filtering parameters would help them with different perspectives about the performance and usage of a sales record. To learn more, go to view and understand sales usage reports

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

Check out the release plan

For application administrators

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

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

Get the most out of Sales

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

What's new and planned for Dynamics 365 Sales

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Conversation intelligence

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

Feature	Enabled for	Public preview	Early access*	General availability
Get tips and suggestions while on a call with customer	Users by admins, makers, or analysts	Jan 2023	-	Mar 2023

Reporting

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

Feature	Enabled for	Public preview	Early access*	General availability
Track your progress using seller dashboard	Users by admins, makers, or analysts	Oct 2022	-	Dec 2022

Sales accelerator and process automation

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

Feature	Enabled for	Public preview	Early access*	General availability
Try enhanced sequence creation experience with new designer	Users, automatically	-	Aug 2022	Oct 2022
Guide sellers to work simultaneously	Admins, makers, marketers, or analysts, automatically	-	-	Nov 2022

Feature	Enabled for	Public preview	Early access*	General availability
Streamline sequence creation with looping of repeated steps	Admins, makers, marketers, or analysts, automatically	-	-	Nov 2022
Sellers can create sequences, customer engagement plans	Users by admins, makers, or analysts	-	-	Jan 2023
Improve assignment accuracy using segment priority	Admins, makers, marketers, or analysts, automatically	-	-	Jan 2023

Teams and Outlook collaboration

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

Feature	Enabled for	Public preview	Early access*	General availability
Track linked Microsoft Teams chat as activity in timeline	Users by admins, makers, or analysts	-	-	Oct 2022
Use mention to find, share Dynamics 365 records in emails, chats	Users by admins, makers, or analysts	Nov 2022	-	Feb 2023
Sellers can create collab spaces around sales processes	Users by admins, makers, or analysts	Nov 2022	-	Mar 2023
Enable sellers to orchestrate activities in Teams	Users by admins, makers, or analysts	Nov 2022	-	Mar 2023
Share records in email in Dynamics 365 app for Outlook	Users by admins, makers, or analysts	Oct 2022	-	To be announced
Collaborate securely on live business data in email, chat	Users by admins, makers, or analysts	Nov 2022	-	To be announced
Display preview of shared records when pasting URLs	Users by admins, makers, or analysts	Nov 2022	-	To be announced

* You are able to opt into some features as part of early access on August 1, 2022, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Conversation intelligence

Overview

Conversation intelligence uses analytics and data science to gather data from sellers' call recordings and Dynamics 365 Sales and provides you with the information and insights to intelligently manage your sales team and proactively coach sellers.

The focus areas for this wave are:

- Capture every customer interaction to provide real-time business insights on top. Organizations using Microsoft communication channels, such as Teams, Outlook, and Azure Communication Services, to interact with their customers will enjoy seamless connectivity between these interactions and the relevant business data records with zero context switching and critical business insights provided on top.
- Get conversation intelligence as an integral part of your daily workflows within Dynamics 365 Sales.
- Get business insights and productivity tools--such as real-time tips during calls, question detection and analysis, and many more--to boost performance and win more deals.

To learn more about conversation intelligence, go to Improve seller coaching and sales potential with conversation intelligence.

Get tips and suggestions while on a call with customer

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

Business value

Sellers get AI-driven insights that enable them to easily access information on what to say when a sales call gets tough.

Feature details

To make remote selling more powerful than face-to-face selling, conversation intelligence automatically surfaces real-time suggestions and tips while sellers are on a phone call or Teams meeting with a customer. Suggestions include information and talking points on product and service details, competitive battle cards, pricing, and more.

Reporting

Overview

Dynamics 365 Sales offers standardized reports that would allow sales managers and admin users to understand the usage of the sales application. The reports would also help them gauge the performance of teams and individuals using the application. The filtering parameters would help them with different perspectives about the performance and usage of a sales record. To learn more, go to view and understand sales usage reports

Track your progress using seller dashboard

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

Business value

As a seller, your efforts are focused on managing relationships and executing sales activities that translate into revenue opportunities. To increase your throughput, you may need to constantly have a pulse on everything that you are involved in. You will need to be able to review and recalibrate any execution efforts as needed.

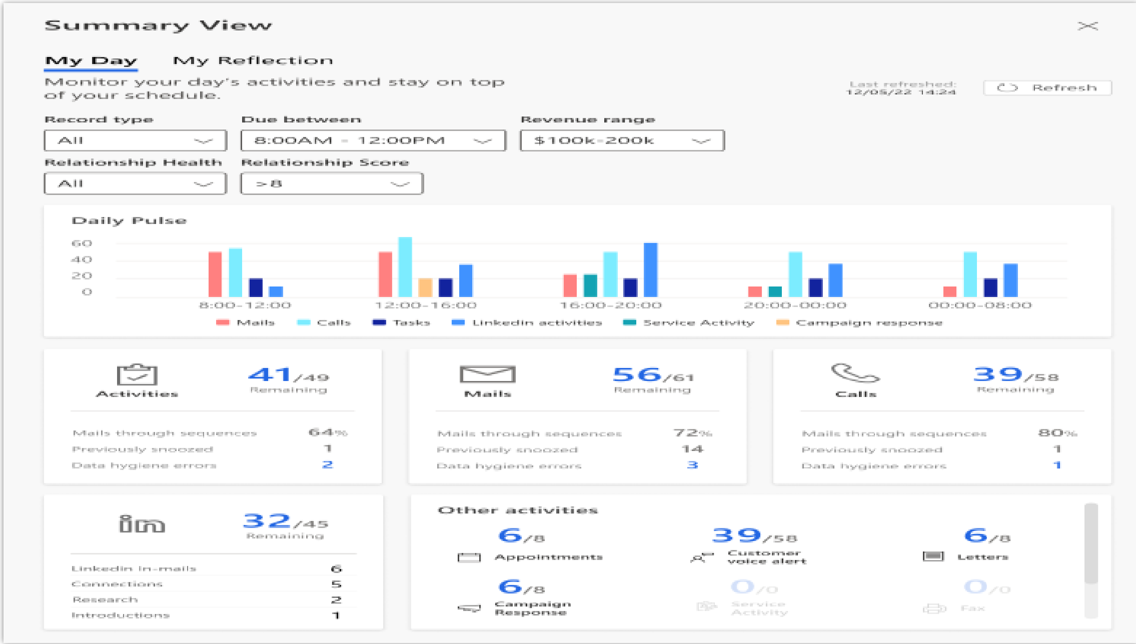
With this feature, you will have a dashboard that summarizes progress highlights and insights. You can visit the dashboard at the start of your day to get organized and throughout the day to view your activities.

Feature details

As a seller, you will be able to:

- View your dashboard to monitor your progress.
- Get a summarized view of your activities progress across contacts, accounts, leads and opportunities you are involved in.
- View key insights across activities, relationships, and conversations you have engaged in.

As an administrator, you can manage the permissions required to access the seller dashboard.



Summarized view of my day head.

Sales accelerator and process automation

Overview

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

To learn more, go to the [What is the Sales accelerator?](#).

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

Try enhanced sequence creation experience with new designer

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

Business value

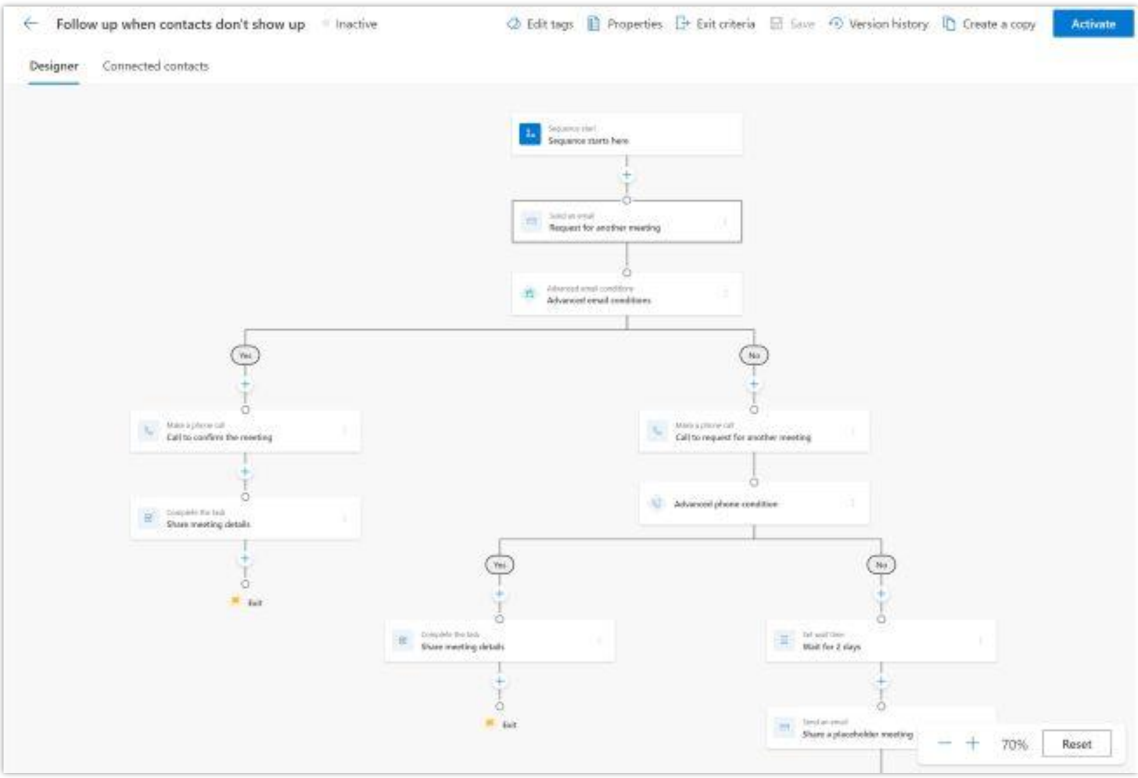
Sequences help to propagate and ensure winning selling strategies. Sales engagement managers will benefit from the enhanced user experience and features of the sequence designer while configuring sequences.

Feature details

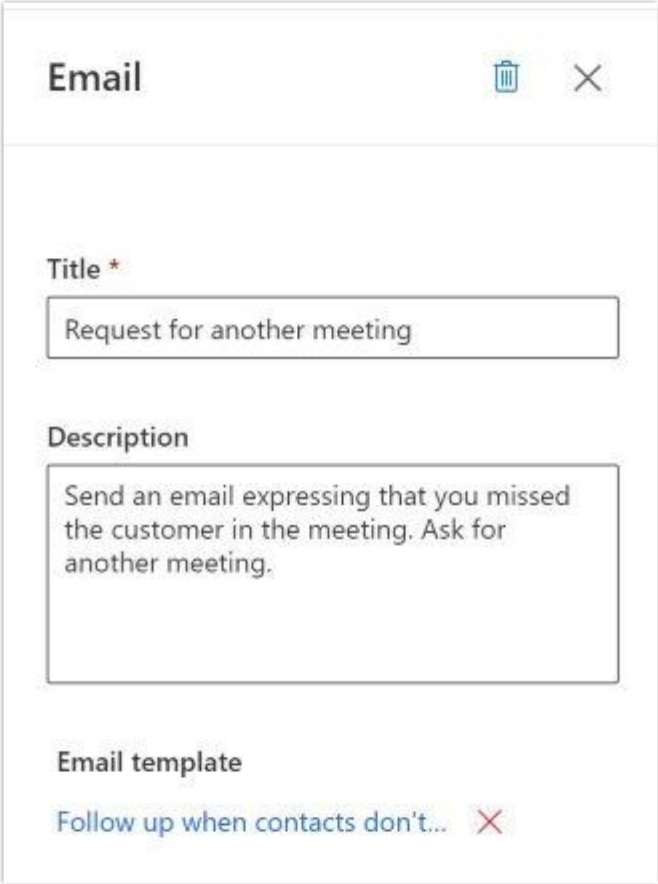
With this change, you will now have a consistent automation experience across Dynamics 365 Marketing customer journey orchestration and Dynamics 365 Sales sequences, making it convenient for you to use both systems.

Using the new sequence designer, the sales manager and operation team can:

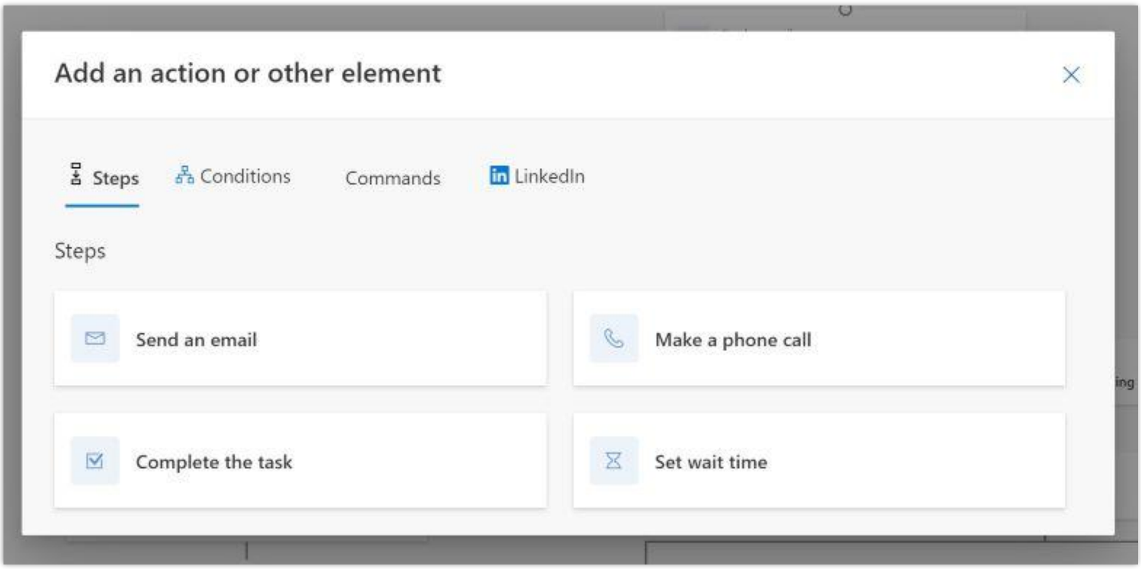
- Edit a sequence step using a side panel that provides more space with an improved experience.
- Discover and provide an exit criterion for a sequence.
- Understand the end of any sequence branch with an exit icon.
- Save all the changes of sequence steps with a single click.



New designer



Side panel to edit and view steps



New pop-up to add steps, conditions, and commands

Guide sellers to work simultaneously

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

Business value

Digital selling is a team activity wherein multiple sales team members work together to win a deal. With sequences, you offer guidance at the moment toward the next best step for sellers to take. To facilitate this, now assign different sequences to different sellers for a particular record at the same time. You can guide multiple sellers to work together and win a deal. For example, assign one sequence to an account executive and another sequence to a solution architect while they both work on a target account simultaneously.

Feature details

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

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

This will enable sellers to:

- View all activities across sellers for a record in a unified timeline.
- Assign an activity from your sequence to your team member and track progress.
- Each seller would see their respective upcoming activity in the worklist and up next widget.

Streamline sequence creation with looping of repeated steps

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

Business value

Digital selling is not a linear process. Sellers do multiple follow-ups with prospects to get a response and to move the conversation forward. Sequences are streamlined to easily repeat steps and create child branches. You can take advantage of repeated evaluations of sequence steps until the exit criteria are met. For example, follow up with a prospect on a proposal every three days until the closure. You can create a child branch, perform additional tasks in the child branch, and merge it back into the main branch.

Feature details

With improved sequence creation:

- Easily create a loop of repeated steps and specify criteria to exit the loop.
- Loop through repeated steps until exit criteria are met or for a specific number of times.
- Spawn a sub-branch from a step to guide additional tasks, and then merge it back to the main branch.

Sellers can create sequences, customer engagement plans

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

Business value

Sellers are in the best place to understand the needs of their customers. They need to keep prospects engaged and need the ability to choose the right engagement channel (email, phone call, LinkedIn, and others), sequence steps, and content that resonate with their prospects. Now, sellers can create and customize sequences. This removes the dependency on sales managers to create sequences. Also, empowers sellers to automate their work and personalize communication while reaching out to prospects.

Feature details

Currently, only sequence managers and admins can create sequences that create a dependency though sellers are in the best position to decide how to plan an engagement with customers. With this change:

- You can control which security roles can create or modify sequences.
- Sellers can create new sequences and modify existing sequences.
- Sellers can personalize outreach plans by customizing sequences with their preferred communication medium (email, phone call, LinkedIn, and others), language, wait time, follow-up technique, and other steps.

Improve assignment accuracy using segment priority

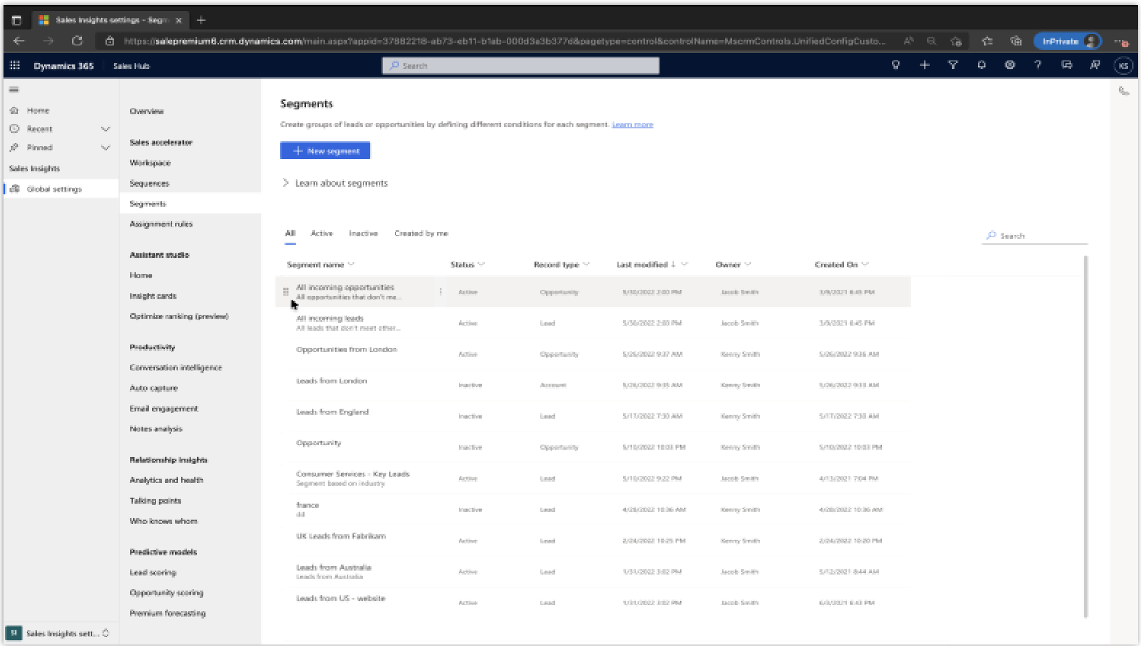
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Jan 2023

Business value

To respond to the business needs, you may want to control how records are attached to the sequence and assigned to relevant sellers. As an administrator, you can now assign priority to each segment. This leads to the precise and accurate assignment of records to the respective sellers and sequences, resulting in favorable sales outcomes.

Feature details

Currently, the sales manager or administrator creates multiple segments. When a record is created, it passes through these segments in a random order, leading to inaccurate assignments. This feature enables you to define the sequence of segment determination. It leads to the precise and accurate assignment of records to the respective sellers and sequences, resulting in favorable sales outcomes.



Prioritize segments to route effectively.

Teams and Outlook collaboration

Overview

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

To learn more, go to [Overview of Microsoft Teams integration](#).

Track linked Microsoft Teams chat as activity in timeline

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

Business value

Collaboration across different sales teams happens primarily on Teams chat. This feature helps business users keep track of the latest in their conversations associated with a record. Providing an entry into the timeline for key chat events, like starting a linked chat, attaching documents, or restarting an existing linked chat conversation, helps business users to remain updated and notify them of important updates to the linked conversations.

Feature details

Business users can easily discover recent activity on the chats via the direct entry into the record's timeline. Business users can:

- Track a linked chat as an activity in the timeline.
- See important activities in the chat on the associated record's timeline.
- Get notified when a conversation gets updated, a document gets shared, or when a conversation gets linked or unlinked.
- Search the timeline for specific chat activities.
- Go directly to the conversation of interest from the record's timeline.

Use mention to find, share Dynamics 365 records in emails, chats

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Nov 2022	-	Feb 2023

Business value

Use the @mention to insert Dynamics 365 data in emails and chats just like you insert people references today. In the previous release wave, we enabled business users to search and share business data using the Dynamics 365 app for Teams or Outlook and by pasting a Dynamics 365 record URL. In this release wave, we make it even easier to find and insert business data contextually in communications by enabling users to @mention relevant sales data.

Feature details

- **Use @mention to quickly find and share relevant sales information**: Sellers can already @mention contacts in emails and chats. With this feature, they can @mention to search and insert key sales information like customer or prospect details in Outlook emails and Teams conversations.

- **Easily collaborate on Dynamics 365 records you are currently focusing on**: Find as suggestions, recently used Dynamics 365 data to add to communications when you draft Outlook emails and Teams chats.

Sellers can create collab spaces around sales processes

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Nov 2022	-	Mar 2023

Business value

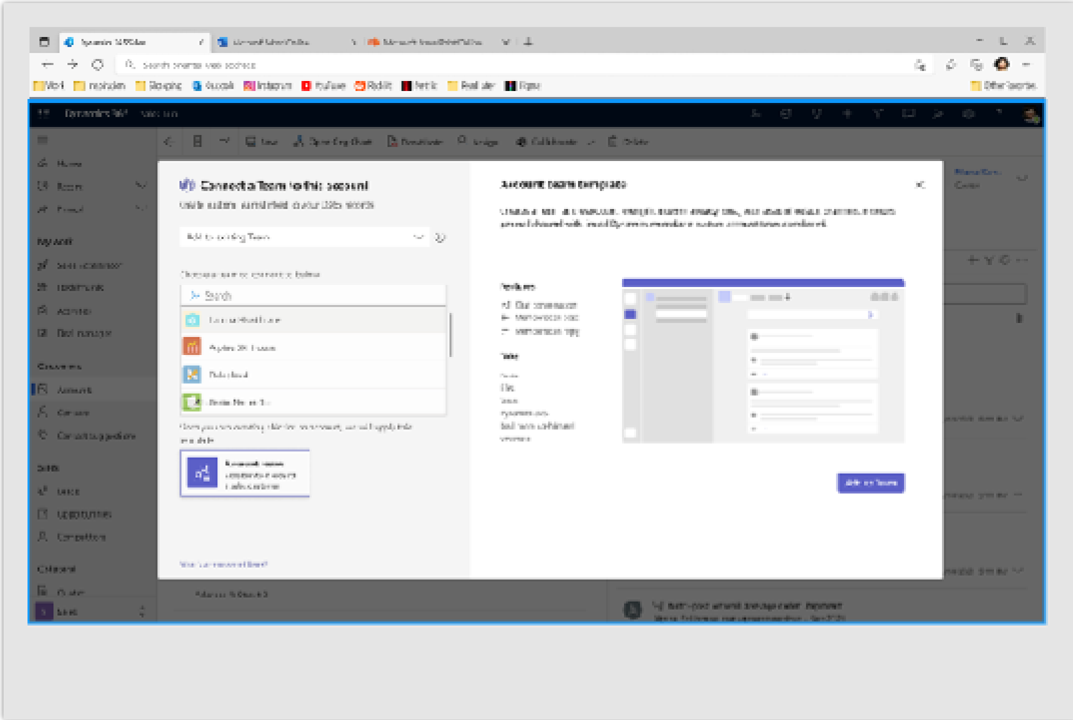
Effective collaboration within a team requires an organized workspace that brings together relevant members, tools, and contextual information. Ease of setup, consistency across accounts, and quick access to information are enabled via Dynamics 365 templates for Teams.

Feature details

Collab spaces in Teams is a tailored workspace created using Dynamics 365 templates for Teams. With this release, we are enabling sellers to easily collaborate on Dynamics 365 records with their colleagues in Microsoft Teams.

The key functionalities of this capability include:

- Scenario-based Dynamics 365 templates for Teams automate the setup with the correct channels, apps, and members, reducing team/user setup time.
- Teams created using templates come with standard channel structure and starter folders for document management that help with the consistent organization of information across Teams.
- Dynamics 365 app for Teams is installed as part of a team creation with the relevant record pre-pinned as a channel tab enabling sellers to have easy access to CRM information from within Teams.
- Users are guided via a first-run experience to help them understand Teams, Channels, and Apps setup.
- Dynamics 365 admin controls provide customization capabilities to manage triggers for the setup of Teams (for example: Create a Teams workspace when a new account is created), define channel structure, and customize folders for organizing documents in a predictable fashion.



Dynamics 365 templates

Enable sellers to orchestrate activities in Teams

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Nov 2022	-	Mar 2023

Business value

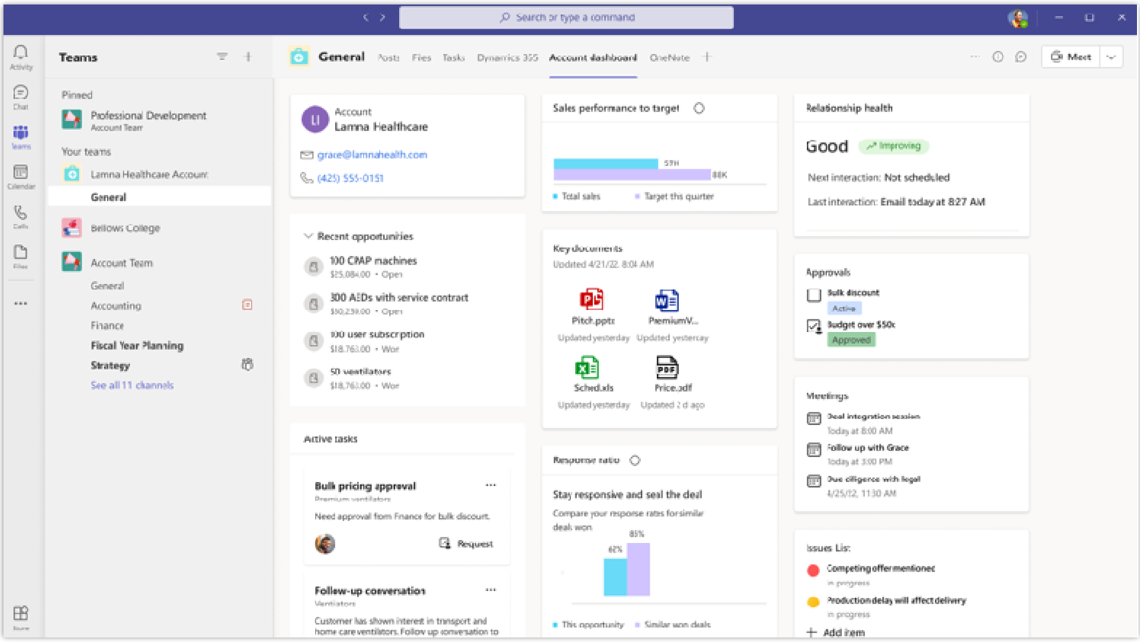
Selling can sometimes involve multiple roles and coordinating the activities can often be a challenge. Sales teams need the ability to enable the orchestration of activities when collaborating on accounts and deals, thus improving sales outcomes. The intelligent deal room dashboard provides a single pane for customer insights, activity coordination, and intelligent activity recommendations.

Feature details

Collab space dashboards enable the entire team to see team member activity with their key deals. The key functionalities of this capability include:

- Deal room dashboard provides the latest account/opportunity information that is relevant for collaborating with others.
- Customer information and sales progress are visible to all stakeholders working on an account.

- Tasks can be easily assigned and managed.
- Key documents associated with the account are centrally managed.
- Easily collaborate with other stakeholders via meetings; centrally access information and action items from the meetings.
- Intelligent recommendations on the next best actions based on account/opportunity updates.



Dashboard

Share records in email in Dynamics 365 app for Outlook

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

Business value

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

Feature details

Business users can:

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

Collaborate securely on live business data in email, chat

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

Business value

Business conversations happen across multiple channels and are effective only when CRM data is inserted in the context of the communication. With this feature, we enable sales representatives, service agents, and all business users to securely share and take action on Dynamics 365 data in emails and chats. Conversation velocity and user productivity increase by reducing users' time switching between collaboration apps and customer engagement apps.

Feature details

This feature ensures data consistency and accelerates collaboration by enabling business users to insert Dynamics 365 records as loops—live and portable information cards with inline actions across emails and chats. All participants in the conversation can view the same live information, update the information, and view changes made by others—across email and chat. The feature was released as preview in the previous release wave. It is made generally available in this release wave.

Business users can:

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

Display preview of shared records when pasting URLs

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

Business value

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

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

Feature details

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

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

Service

Plan and prepare for Dynamics 365 Customer Service in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Service**.

Overview

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

In 2022 release wave 2, our focus is on delivering the following capabilities:

- Enhanced omnichannel voice capabilities with support for voicemail, callback, and direct agent dialing.
- Enhanced unified routing with support for longest idle routing, percentage-based routing, and preferred agent routing, with simplified skill management.
- Improved Microsoft Teams collaboration capabilities with customer support swarming to help agents resolve complex cases, and improvements to the embedded Teams chat and Teams meeting integration capabilities.
- Modernized agent experience with a new continuous view of previous conversations, enhanced multisession navigation, and AI-powered conversation summary.
- Improved extensibility of the out-of-the-box reports and ability for supervisors to view Power Virtual Agents analytics within their Omnichannel analytics dashboards.

Investment areas

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

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

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

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

In 2022 release wave 2, we are enabling the knowledge article search filters and AI-suggested keywords and description for knowledge articles.

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

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

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

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

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

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

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

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

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

Check out the release plan

For application administrators

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

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

Get the most out of Customer Service

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.

Helpful links	Description
Licensing	Improve your understanding of how to license Customer Service.
Product documentation	Find documentation for Customer Service.
User community	Engage with Customer Service experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Customer Service.

What's new and planned for Dynamics 365 Customer Service

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Administrator experiences

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

Feature	Enabled for	Public preview	Early access*	General availability
Try enhanced settings in AI suggestions for knowledge articles	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022
Improve administration productivity with guided quick setup	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022
Link signature templates to a queue	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022

Agent experiences

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

Feature	Enabled for	Public preview	Early access*	General availability
Monitor support operations near real-time	Admins, makers, marketers, or analysts, automatically	Oct 2022	-	-
Try enhanced layout for Customer Service workspace	Users by admins, makers, or analysts	Aug 2022	-	Oct 2022
Try enhancements to rich text editor	Users, automatically	-	Aug 2022	Oct 2022
Try enhancements to timeline maker experience	Admins, makers, marketers, or analysts, automatically	Aug 2022	-	Oct 2022
Try auto AI suggestions for similar cases, knowledge articles	Users, automatically	-	Aug 2022	Oct 2022
Compose email with new insert template	Users, automatically	-	Aug 2022	Oct 2022
Personalize the out-of-box historical analytics reports	Users, automatically	-	Aug 2022	Oct 2022
Use dynamic text in signature template	Users, automatically	-	Aug 2022	Oct 2022

Knowledge management

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

Feature	Enabled for	Public preview	Early access*	General availability
Try auto AI-suggested keywords, descriptions for knowledge articles	Users, automatically	-	Aug 2022	Oct 2022

Feature	Enabled for	Public preview	Early access*	General availability
Knowledge article search filters are enabled by default	Users, automatically	-	Aug 2022	Oct 2022

Omnichannel

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

Feature	Enabled for	Public preview	Early access*	General availability
Offer single sign-on in chat, Power Virtual Agents bots	Users by admins, makers, or analysts	-	-	Oct 2022
Use voice support in more Dynamics 365 regions	Users by admins, makers, or analysts	-	-	Oct 2022
Enable customers to leave voicemails for agents	Users by admins, makers, or analysts	-	-	Jan 2023
Enable customers to keep queue spot, get callbacks	Users by admins, makers, or analysts	-	-	Jan 2023

Service-level agreements

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

Feature	Enabled for	Public preview	Early access*	General availability
View active duration, on-hold duration of an SLA KPI	Users, automatically	-	Aug 2022	Oct 2022

Teams integration

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

Feature	Enabled for	Public preview	Early access*	General availability
Use customer support swarming for complex cases	Users by admins, makers, or analysts	Oct 2022	-	
Use Teams chat for contextual collaboration	Users by admins, makers, or analysts	-	-	Oct 2022
Auto summarize conversations in Teams-based collaboration	Users, automatically	-	Aug 2022	Oct 2022
Insert records as loops in chats, emails	Users by admins, makers, or analysts	Nov 2022	-	To be announced
Use mention in emails and chats	Users by admins, makers, or analysts	Nov 2022	-	To be announced

Unified routing

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

Feature	Enabled for	Public preview	Early access*	General availability
Try enhancements in user experience to manage skills	Admins, makers, marketers, or analysts, automatically	Oct 2022	-	-
Route calls to agents who are idle for longest duration	Admins, makers, marketers, or analysts, automatically	Oct 2022	-	-
Try enhancements to overflow management	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022
Allocate work items to queues based on percentage	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022

Feature	Enabled for	Public preview	Early access*	General availability
Route work items to preferred agents	Admins, makers, marketers, or analysts, automatically	Jul 2022	-	Oct 2022

* You are able to opt into some features as part of early access on August 1, 2022, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Administrator experiences

Overview

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

Try enhanced settings in AI suggestions for knowledge articles

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

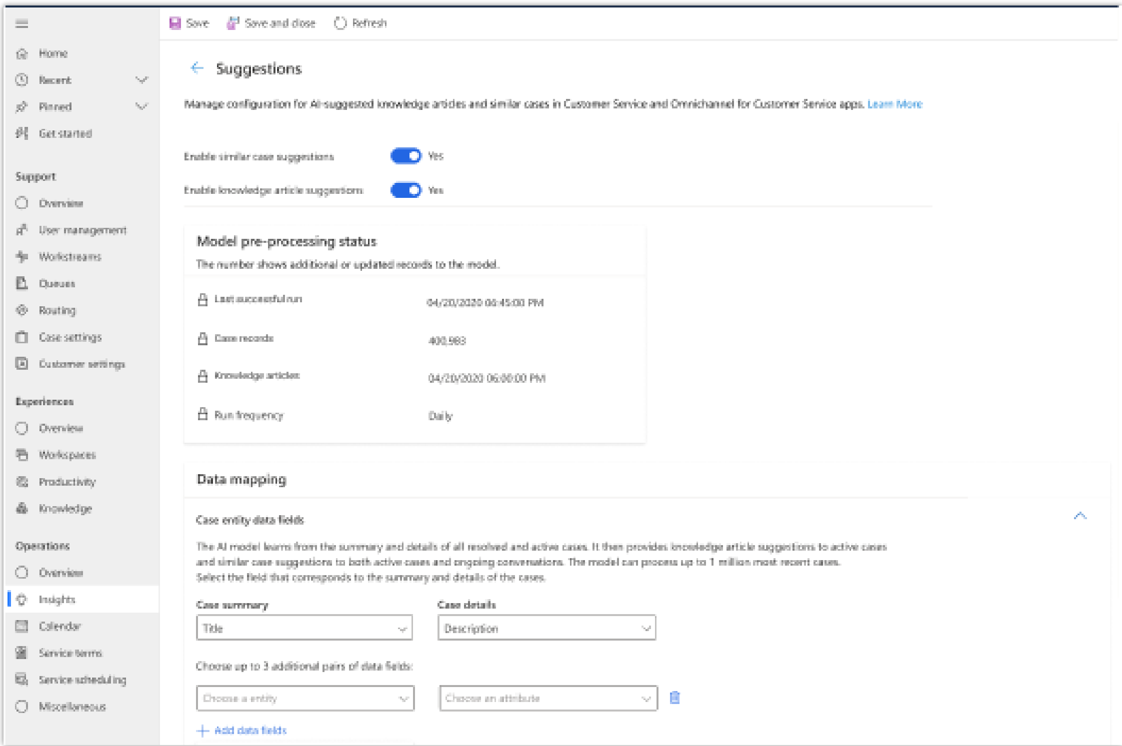
Business value

Smart assist supports AI-based suggestions that can proactively suggest related knowledge articles and similar cases based on the text context from an active case or an ongoing support conversation. Today, administrators can select two text data fields from case and knowledge article record types that are used by the model to understand the context. Customers may want to select more fields with different data types from those record types or from the related record types that carry additional meaningful information for the AI model to better interpret the context of cases and knowledge articles. In addition, to ensure that the right suggestions are surfaced to agents, customers may also want to filter the suggestions by defining additional rules. This feature allows administrators to configure data fields with more options and create custom rules, so that agents can get more related suggestions for knowledge articles and similar cases.

Feature details

The enhancement in the settings to configure AI suggestions includes the following options:

- Select up to five data fields.
- Select data fields from the case and knowledge article record types and their related record types.
- Create custom rules, including model preprocessing rules to define the set of historical cases and or knowledge articles to be included in the daily refresh for suggestion candidates.



Map additional data fields for case & KB suggestions

Improve administration productivity with guided quick setup

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

Business value

The Customer Service admin center application unifies and simplifies the setup tasks with a step-by-step guided experience, which helps admins easily onboard to different channels.

Feature details

Enhancements to the Customer Service admin center include:

- Get started wizard to easily set up email, case, chat, and voice channels, and the creation of routing rules to get you started with handling customer issues with minimal steps.
- The setup is dynamic to what product you provision.

Link signature templates to a queue

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

Business value

Customer service agents use the email address of a queue as the sender in email. The default signature template of the queue's owner is inserted into the email whenever the queue is marked as a sender. With signature templates for a queue, the template defined for the queue instead of the signature of the queue owner is applied to the email. Administrators can define different templates for different queues having the same owner.

Feature details

Administrators can define a signature template for a queue. When a queue is used to send an email, the signature template defined for that queue is inserted into the composed email instead of the queue owner's default template.

If the signature template for the queue is not defined, then the default signature template of the owner of the queue will be applied to the composed email.

With this, administrators can define multiple templates for different queues with the same owner.

Agent experiences

Overview

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

Monitor support operations near real-time

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

Business value

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

Feature details

Key capabilities that will be available include the following:

- Real-time workload monitoring dashboard: Provides information about the incoming workload, key performance indicators such as average handle time, queue lengths, and so forth, for the contact center across chat, digital messaging, and voice channels, near real time.
- Real-time agent insights dashboard: Provides visibility into agent metrics such as capacity, presence status, items they're working on, and so forth, near real time.

Try enhanced layout for Customer Service workspace

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

Business value

Customer Service workspace enables agents to multitask on several cases and conversations simultaneously with the ability to switch among issues seamlessly, without losing the context of the work that's in progress. The modern design of the Customer Service workspace app has a new layout for the site map, sessions, and tabs.

Feature details

Some of the key layout changes of the Customer Service workspace app are:

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

Try enhancements to rich text editor

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

Business value

The rich text control provides a standard way to enable text formatting and embedded media support with minimal effort. This control gives makers and administrators a consistent way across their organization to enhance the user experience and encourage greater efficiency and productivity.

Feature details

Enhancements to the rich text editor control in Dynamics 365 include the following capabilities:

- Embed any supported/allowed file and preview the supported file types.
- Set a default font name and size.

Try enhancements to timeline maker experience

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

Business value

The timeline configuration experience enables the timeline to show a customer's history across interactions. This experience gives administrators the ability to configure the information displayed in each timeline to help agents have the best understanding of the customer's history so they can deliver more personalized service.

Feature details

Enhancements to the Dynamics 365 timeline maker experience include the following capabilities:

- Configure which actions are shown for each type of record
- Configure and show more than one timeline on a form
- Create and view each type of activity with main form dialog, main form, or when applicable, quick view
- Create and view fax and letter records on the timeline are disabled by default

Try auto AI suggestions for similar cases, knowledge articles

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

Business value

When solving a customer problem, agents often spend time searching for knowledge articles and or similar cases and scan them to determine if they are relevant to the active case they are working on. This delays customer service and resolution time. With AI suggestions for similar cases and knowledge articles, the best knowledge articles and the appropriate similar cases are proactively surfaced to agents, taking the context of cases or conversations into account.

Feature details

The AI-suggested keywords and description feature was made generally available in the 2021 release wave 2. It requires an administrator to turn it on. As part of this wave, the following enhancements are available:

- AI suggestions for similar cases and knowledge articles is turned on automatically. The suggestions appear in the app side pane in the Customer Service workspace and Omnichannel for Customer Service apps.
- Administrators can configure the feature or manually turn it off from the administrator settings.

For more info about feature configuration, see Enable AI suggestions for similar cases and knowledge articles.

Compose email with new insert template

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

Business value

Email templates enable customer service agents to create consistent, professional, preformatted email messages that can be used to communicate with customers. With this feature, agents can insert an existing email template to their email in a fast and easy way and helps save their time.

Feature details

The enhanced insert template experience enables you to perform the following actions:

- Select any view from the list, grid and tile view in the template gallery. As an administrator, you can default a particular view for all the users. For more information, see Configure the default email template selection view.
- Search for a template based on the title, subject, description, and content of the email template.
- Filter the list of templates using a standard set of filters. You can also enhance the filter by adding custom attributes.

For more information about this feature, go to Insert an email template.

See also

Insert an email template (docs)

Personalize the out-of-box historical analytics reports

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

Business value

Contact center supervisors need to slice and dice the operational metrics across dimensions like queues they manage, agents who report to them, and so forth to understand and improve their team's performance and improve the customer support experience. Currently, the out-of-box historical analytics report does not persist with the applied filters, which means that users must reapply them every time they open the dashboards. Providing the ability to save applied filters on reports as bookmarks improves usability by avoiding rework.

Feature details

Key feature capabilities include the following:

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

Use dynamic text in signature template

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

Business value

Email signatures are like electronic business cards users can include in their emails. Having a signature template enables users to be consistent in their responses to customers. The dynamic text in the template enables users to reuse the same signature template and have consistent content and format in their response, similar to that of other users.

Feature details

With dynamic text in signature templates, you can use the dynamic slugs instead of using the static text like typing out your first name and last name. If you insert a signature template in your email and are logged in, the dynamic text slugs will be updated with your first name, last name, and other details based on your organization's configuration.

For more information about this feature, see: [Create a signature for emails](#).

Knowledge management

Overview

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

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

In 2022 release wave 2, we are enabling the knowledge article search filters and AI-suggested keywords and description for knowledge articles.

Try auto AI-suggested keywords, descriptions for knowledge articles

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

Business value

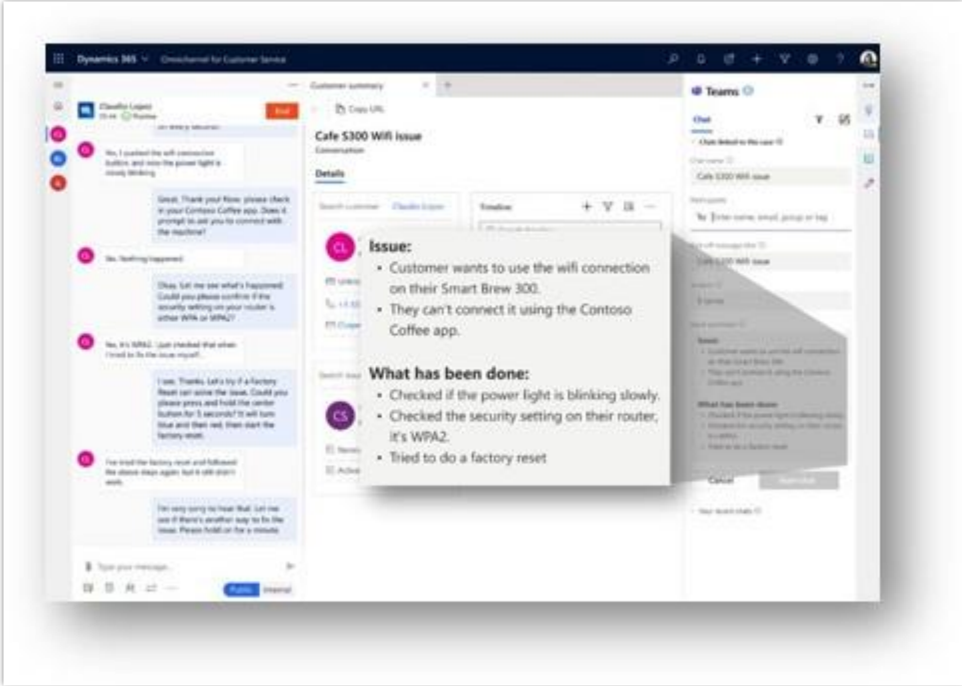
Keywords and the description are important metadata elements of a knowledge article that can help improve the searchability and surfacing of relevant articles. It's essential to have a variety of keywords to align with the various ways customers talk about their issues. Adding high-quality, diverse keywords and descriptions is time-consuming and often challenging, especially for new authors. With AI-suggested keywords and brief descriptions for knowledge articles, authors can be more productive while following the authoring best practices, thereby improving the searchability of knowledge articles.

Feature details

AI-suggested keywords and description was made generally available in the 2021 release wave 2. It requires an administrator to turn it on. As part of this wave, the following enhancements are available:

- AI-suggested keywords and brief description for knowledge articles is turned on by default and no longer requires an administrator to enable it.
- When the feature is turned on, access to the suggested keywords and description is available in the default knowledge article form automatically.
- Admins can configure the feature or manually turn it off in the administrator settings.

For more info about feature configuration, see [Configure AI suggestions for article keywords and description](#).



Conversation Summary - Teams Collaboration

Knowledge article search filters are enabled by default

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

Business value

Agents can filter knowledge article search results based on custom fields in addition to the standard fields.

Feature details

The knowledge article filters feature was made generally available in the 2021 Release wave 1. The feature had to be enabled by an administrator. As part of the Release wave 2, you will see the following enhancements:

- The knowledge article filters feature is turned on by default and doesn't require an administrator to enable it.
- Administrators can configure the feature or manually turn Off the feature from the **Filters** section of the Customer Service admin center app.

- When the feature is turned on, administrators can configure standard and custom fields as filters.
- When the feature is turned on, Dynamics 365 Web Client or Power Apps maker filter configuration gets deactivated. You can disable it at any time by setting it to no.

For more info about feature configuration, see Enable knowledge article search filters.

Omnichannel

Overview

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

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

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

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

Offer single sign-on in chat, Power Virtual Agents bots

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

Business value

Enable business to offer a seamless single sign-on experience for live chat and Power Virtual Agents bot integration.

Feature details

Single sign-on for live chat in Omnichannel for Customer Service and Power Virtual Agents creates a seamless sign-in experience for users who are interacting with a chatbot through the live chat widget. This feature will enable the following capabilities:

- Power Virtual Agents bots can authenticate users while engaged over a live chat conversation, allowing for a more secure and robust experience with a chatbot.

- Authentication context is shared between Power Virtual Agents and Omnichannel live chat. If your user is authenticated by one system, they are authenticated in both.
- An unauthenticated live chat conversation can be started and continue as authenticated after the user logs in.

Use voice support in more Dynamics 365 regions

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

Business value

There's a large demand for the voice channel in Omnichannel for Customer Service. We are increasing the global availability to cover more countries and regions so that our customers across the world can use the voice services.

Feature details

We are increasing the global availability of the voice channel in Omnichannel for Customer Service to cover more countries and regions so that our customers across the world can use the voice offering. Based on customer demand, we are expanding the voice coverage to United Kingdom, Canada, India, and Switzerland.

Enable customers to leave voicemails for agents

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

Business value

Companies often need voicemail support at the group or individual level to ensure that their customers can leave voicemails if they happen to reach out during peak or after hours.

Feature details

Administrators can configure a voicemail box at the queue or agent level so overflow calls can be directed to the voicemail box. Agents and administrators can set up their voicemail box with welcome messages and playback and manage voicemails that their customers have recorded.

Enable customers to keep queue spot, get callbacks

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

Business value

Companies want to enable active callbacks by leveraging automation for their customers, so that they don't have to wait in the queue for the next agent during busy periods.

Feature details

Administrators can configure and manage rules to handle voice callback to customers. The system will automatically offer the customers the ability to retain their position in the queue and arrange for voice callbacks when their turn arrives.

Service-level agreements

Overview

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

View active duration, on-hold duration of an SLA KPI

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

Business value

Service-level agreements (SLAs) help businesses define the level of service or support that they agree to offer to a customer. The enhancements in SLA KPIs will enable supervisors and customer service agents to understand the amount of business hours spent to meet an SLA KPI.

Feature details

- SLA KPIs now have active duration and on-hold duration attributes.
- Active duration will show the business hours taken by the SLA KPI to reach its terminal state of success or failure from its start time.

- On-hold duration will show the business hours for which the SLA KPI's timer was put on hold.

Teams integration

Overview

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

Use customer support swarming for complex cases

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

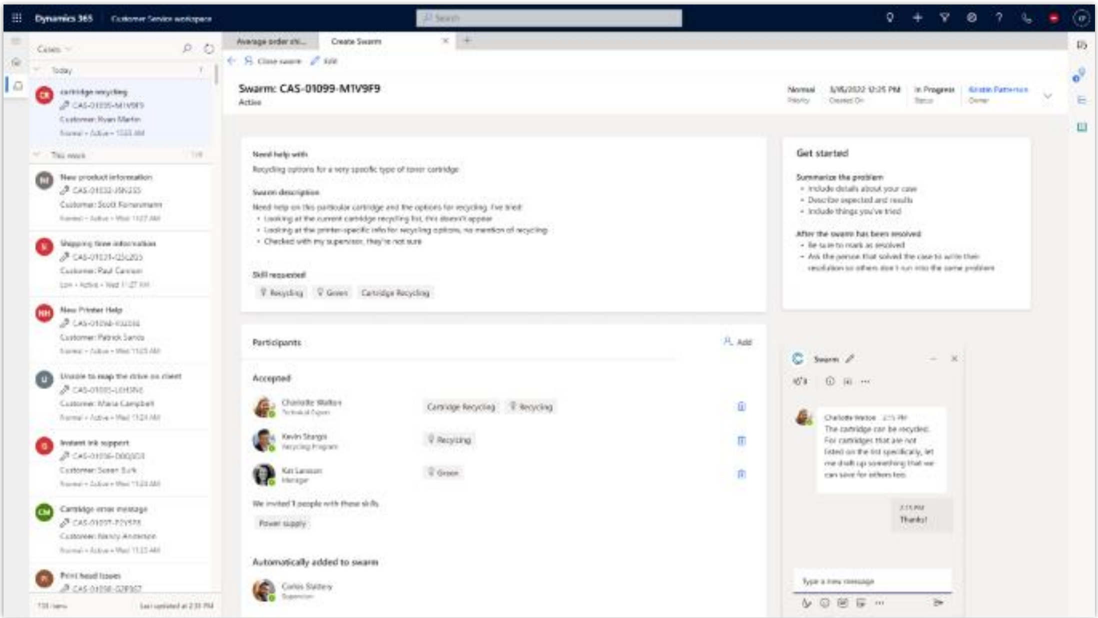
Business value

Agents can easily find and work with co-workers from various departments and have the right skills to quickly resolve complex customer issues. Agents and subject matter experts can swarm cases in the applications they are accustomed to using, including Customer Service workspace and Microsoft Teams.

Feature details

Enhancements to customer support swarming are:

- Richer agent experience with improved swarm creation flow, ability to create notes and tasks to manage swarm progress, and enhanced wrap-up activities.
- Streamlined admin experience for a faster setup. Admins also have increased flexibility to define which CRM users can automatically be added as participants to specific swarms.
- Organizations can have additional CRM users beyond the existing default users. Roles such as the agent’s manager, account owner, and Team admin are available in the current release.



Customer Support Swarming

Use Teams chat for contextual collaboration

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

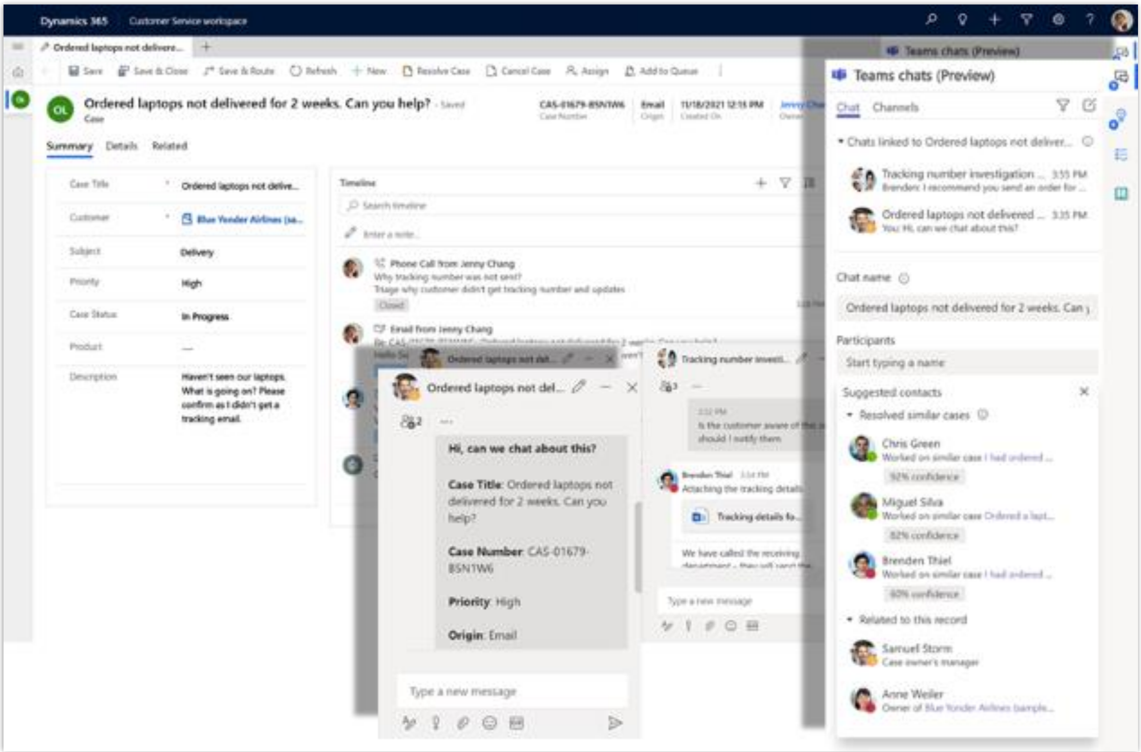
Business value

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. Agents can link Teams chats directly to Customer Service records, enabling a contextual experience.

Feature details

Enhancements to the embedded Teams chat include:

- The ability to track key chat events on the associated record timeline. On the timeline, users can now view chat-related events such as linking a chat to a record or if chat participants have updated the linked chats with new messages.
- Administrators can now use custom rules to define the suggested CRM contacts agents see when starting linked chats. The existing out-of-the-box rules for suggested contacts are enhanced, providing organizations the flexibility to adapt these suggestions to their business process.



Embed chat

Auto summarize conversations in Teams-based collaboration

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

Business value

Reading through a long conversation transcript to understand the context or writing a summary of the conversation is time-consuming. AI automatically provides a summary of the conversation for agents to share with other collaborators. An AI-generated conversation summary enables an agent to easily collaborate with other agents, supervisors, sales engagement managers, and so on using embedded Microsoft Teams.

Feature details

This feature was available for public preview in 2022 release wave 1, and will be generally available in this release wave with the following key capabilities:

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

- The ability for agents to edit or hide the auto-generated summary if they don't want to include it in the Teams chat.

Insert records as loops in chats, emails

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

Business value

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

Feature details

Business users can:

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

Use mention in emails and chats

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

Business value

Use @mention Dynamics 365 data in emails and chats just like you do today when referencing people. Prior to this enhancement, business users were able to search for and share business data using the Dynamics 365 app for Teams or Outlook and by pasting a Dynamics 365 record URL. With this release, we make it even easier to find and insert business data contextually in communications by enabling users to @mention relevant CRM data.

Feature details

- **Use @mention to quickly find and share relevant customer service information**: Customer Service users can already use @ to mention contacts in emails and chats. With this feature, they can use @mention to search for and insert key case or account information in Outlook emails and Teams conversations, such as case resolution details.
- **Easily collaborate on Dynamics 365 records you are currently working on**: Recently used Dynamics 365 data are displayed as suggestions. Users can add this data to communications when drafting Outlook emails and Teams chats.

NOTE This feature requires a Customer Service Enterprise license.

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, 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.

Try enhancements in user experience to manage skills

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

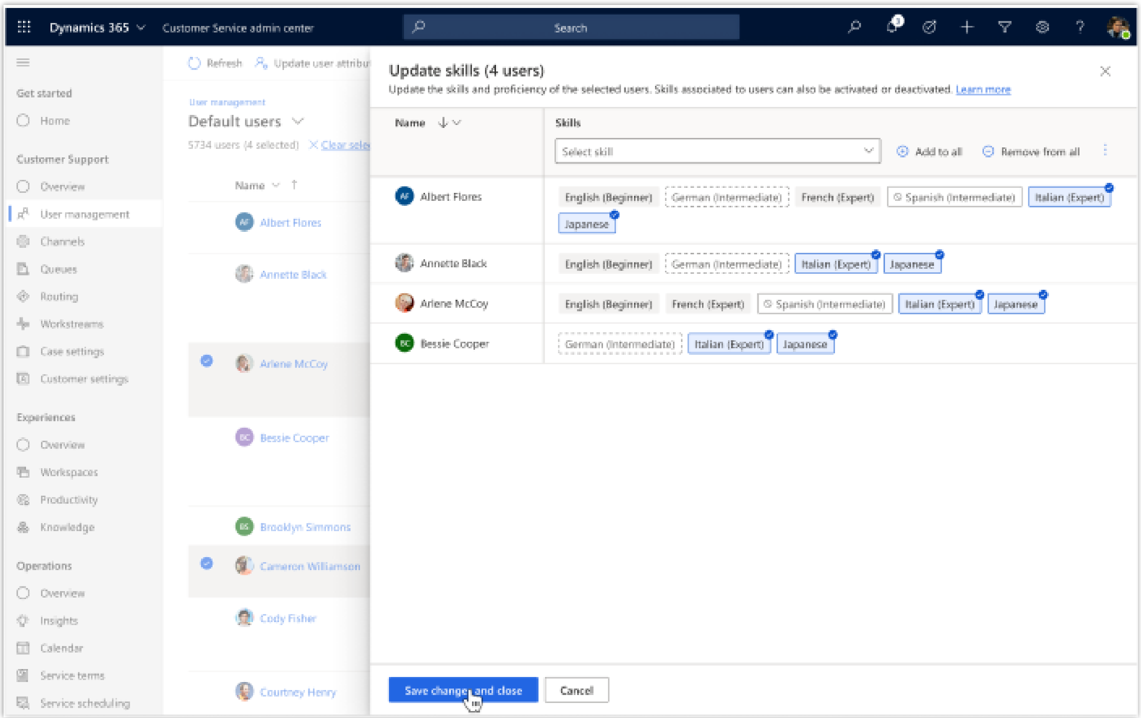
Business value

For efficient skills-based routing in the customer service centers, the administrators should be able to quickly set up the skills for users, manage the skills for multiple users, and manipulate user skills based on the fluctuations in demand.

Feature details

With the improvements in the admin experience, administrators will now be able to:

- Easily set up a skills-based workforce.
- Manage the skills for multiple users.
- Manipulate the users' skills to meet the fluctuations in demand.



Grid view of modifying skills of multiple agents

Route calls to agents who are idle for longest duration

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

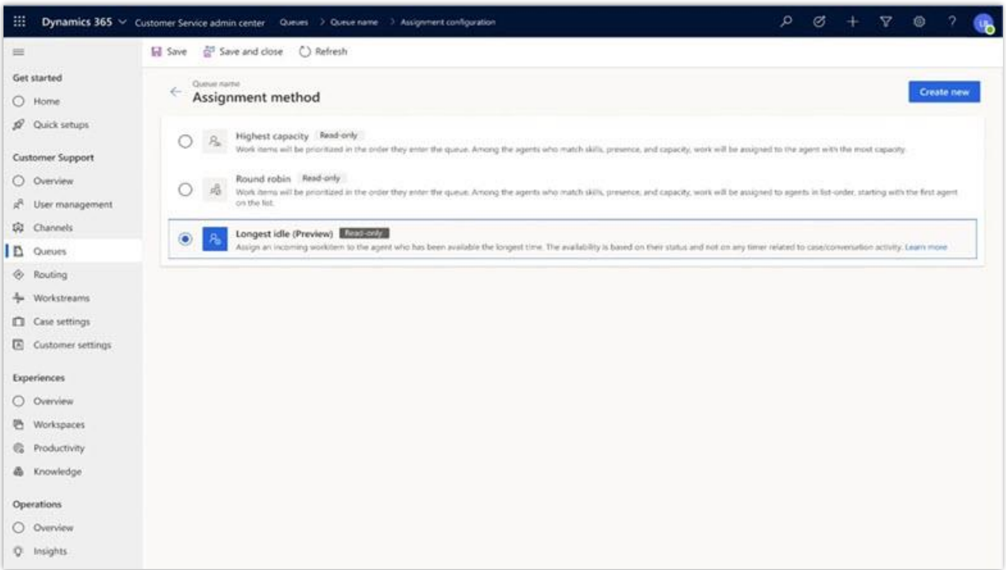
Business value

Organizations would like to route phone calls to agents who have been idle for the longest duration to ensure better utilization of agents, improved customer satisfaction, and better agent engagement as agents are well rested between calls.

Feature details

With this feature, administrators will be able to:

- Configure their voice queues to use the **Longest idle** assignment method that'll assign work items to the agent who has been idle for the longest period.
- Configure their custom assignment methods to sort the matching agents in the order of their idle times on the voice channel.



Longest Idle routing as a new assignment method

Try enhancements to overflow management

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

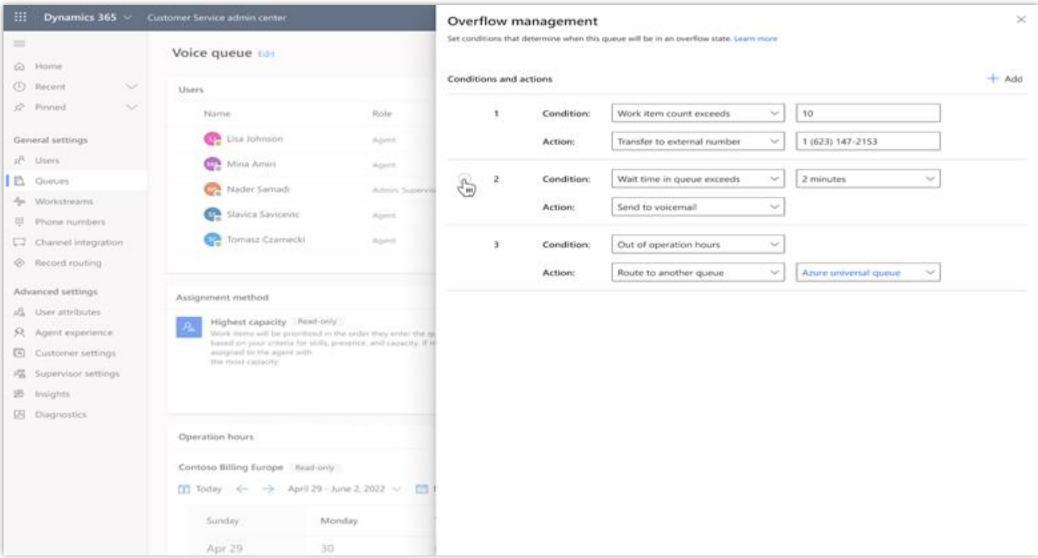
Business value

Organizations let customers go unattended at their peril. When some queues experience a sudden surge in volume and the workforce can’t meet the demand of incoming work, it affects customer satisfaction. Organizations want to move unattended queries to different queues or give options like voicemail or direct callback to customers.

Feature details

Administrators will now be able to configure the following overflow scenarios:

- Offer voicemail to callers if unassigned calls remain in the queue or the queue is not in operating hours.
- Offer direct callback if many unassigned calls are there in the queue.
- Transfer calls or records to alternative queues where agents are available to take up the work.



Configure overflow management to handle large volumes of workload.

Allocate work items to queues based on percentage

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

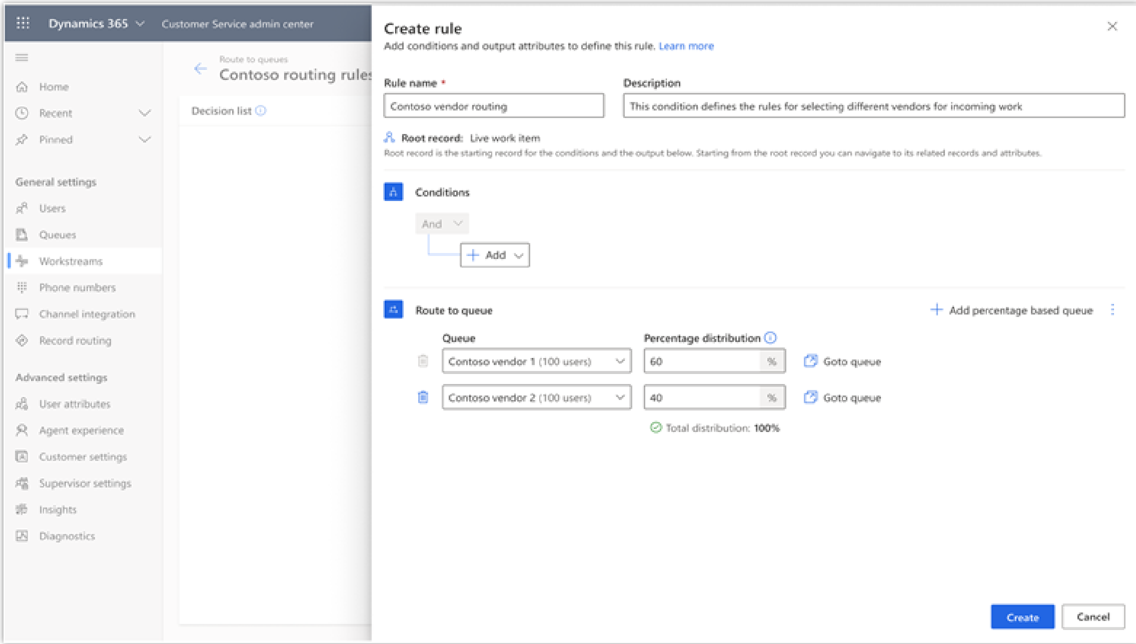
Business value

Some organizations want to allocate a specific percentage of work to a queue based on their business needs. For example, an organization may want to distribute its workload across different customer support vendors. With this feature, they can route their work items to specific queues based on the percentage allocation.

Feature details

By using the percentage-based routing capability, administrators can author route-to-queue rules, in which more than one output queue and associated percentage can be configured.

During runtime, all work items that match the route-to-queue criteria will be distributed to the respective queues as per the specified percentage.



Configure percentage-based routing

Route work items to preferred agents

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

Business value

With preferred agent routing, organizations can provide hyper-personalized service and foster deeper relationships with the customers. This will help improve customer satisfaction by connecting them with a familiar service agent and providing personalized service to the customers with relevant and journey-aware interactions.

Feature details

With the proposed feature, the administrators will be able to do the following:

- Set up the preferred agents for customers.
- Configure their organization to assign work to the preferred agent if available.
- Select the assignment logic if the preferred agent is unavailable.

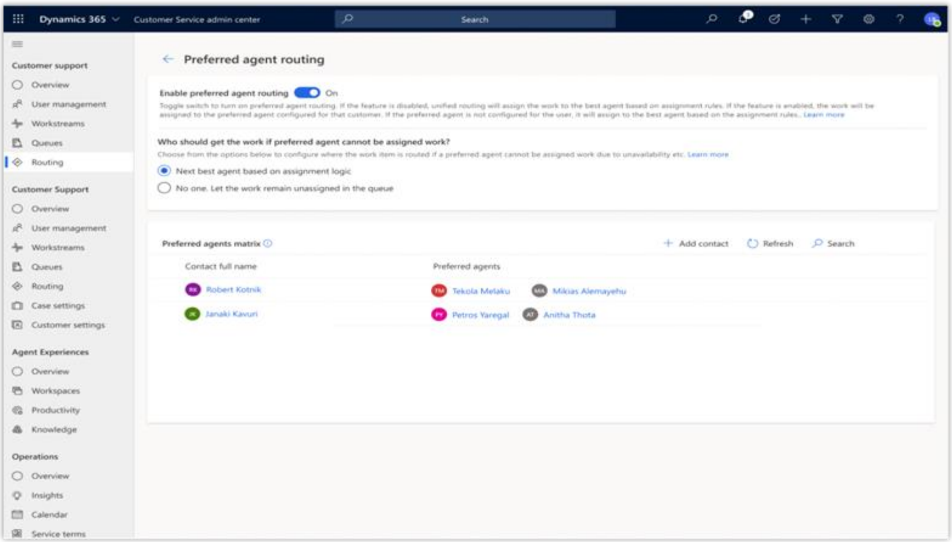


Image showing the set up and mapping of preferred agents

Plan and prepare for Dynamics 365 Field Service in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Field Service**.

Overview

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

For official product documentation and training, see:

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

Investment areas

Optimize service operations
Optimizing field service operations is all about empowering the service team with the right tools and processes to deliver world-class service. Organizations can streamline and automate operations to ensure customer satisfaction.

Resource scheduling
Resource management and scheduling optimization are at the heart of field service management. Resource scheduling is a powerful tool for service organizations to triage 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.

The 2022 release wave 2 includes:

- The new schedule board will get more performance and usability improvements.
- Resource optimization improvements for lock constraints and clustering logic for nearby work orders

Empower frontline workers
Service technicians and frontline workers are the essence of any field service organization. They're at the vanguard of providing excellent customer service by fixing their issues. It's critical that frontline workers have the best digital tools, enabling them to engage with their peers, the back office, and 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 features in this wave focus on multiple usability improvements to bring the relevant information to the fingertips of the users, such as the ability for makers to enhance the mobile grid control with additional fields and improve the user experience. We are also enabling access to SharePoint documents when the app is in offline mode - helping technicians access SharePoint files like manuals, blueprints, floor diagrams, asset images, and more.

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

Check out the release plan

For application administrators

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

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

Get the most out of Field Service

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

What's new and planned for Dynamics 365 Field Service

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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
Save time with mobile usability enhancements	Users, automatically	-	Aug 2022	Oct 2022

Optimize service operations

Dynamics 365 Field Service features for optimizing service operations empower organizations to enable and manage capabilities that drive process management and automation for the entire service team.

Feature	Enabled for	Public preview	Early access*	General availability
Maintain location, asset hierarchies for large facilities	Users, automatically	-	Aug 2022	Oct 2022
Manage relationships with vendors	Users, automatically	-	Aug 2022	Oct 2022
Manage work order costs using not to exceed function	Users by admins, makers, or analysts	Aug 2022	-	Oct 2022

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
Avoid double bookings with resource scheduling optimization	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022
Bing Maps disabled by default for EU regions	Users, automatically	-	Aug 2022	Oct 2022
New schedule board is now default for all deployments	Users, automatically	-	Aug 2022	Oct 2022

* You are able to opt into some features as part of early access on August 1, 2022, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

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. Frontline workers must have the best digital tools, enabling them to engage with their peers, the back office, and 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 features in this wave focus on multiple usability improvements to bring the relevant information to the fingertips of the users, such as the ability for makers to enhance the mobile grid control with additional fields and improve the user experience. We are also enabling access to SharePoint documents when the app is in offline-mode. This allows technicians to access their SharePoint files like manuals, blueprints, floor diagrams, asset images, and more.

Save time with mobile usability enhancements

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

Business value

Frontline workers need to use their digital tools to quickly and effectively get help for the tasks that they're performing. By streamlining common user experience patterns on mobile, the time spent on the app to perform repetitive tasks is reduced, and workers can be more efficient.

Feature details

As part of mobile usability enhancements, these are the upcoming changes for 2022 wave 2:

- Users will be able to switch tabs in a form even when they're at the bottom of the form. They won't have to scroll all the way up to switch between tabs, reducing time spent on the form.
- The mobile commanding bar will be updated on the most common tables to contain only functions relevant to the specific forms and views.

Optimize service operations

Overview

Optimizing field service operations is all about empowering the service team with the right tools and processes to deliver world-class service. Organizations can streamline and automate operations to ensure customer satisfaction.

Maintain location, asset hierarchies for large facilities

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

Business value

Both assets and locations can be complex and have hierarchical models. Building and understanding the hierarchy of an asset or location, such as a large office building or campus site, is critical to providing world-class service. This feature enhances the location and asset hierarchy experience that allows dispatchers and service managers to pinpoint the location of an asset within a physical space so a technician can deliver faster and more efficient service. Customers who manage large location and asset hierarchies can now leverage the asset and location tree control to visualize and adjust locations and assets.

Feature details

Asset managers, service managers, and frontline workers can now build and maintain location and asset hierarchies regardless of the size of the hierarchy. The tree control now loads asynchronously, enabling customers to make large location and asset hierarchies.

Manage relationships with vendors

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

Business value

There is a shift in the service industry where an increasing number of work orders are performed by vendors. This capability better enables customers to manage their relationships with their vendors.

Feature details

It's now possible to capture additional data about vendors, such as their rates, service areas, and skills. This enables Field Service customers to better manage work orders that are sub-contracted to vendors.

Manage work order costs using not to exceed function

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

Business value

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

Feature details

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

Service managers and frontline workers can optionally receive a warning when the not-to-exceed value is near or exceeds the limit, notifying the user they need to take action.

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

Customers will also be able to track when a not-to-exceed value was exceeded.

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 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, lists, and more), as well as extensibility capabilities for partners, to tailor functionality to meet their needs.

The 2022 release wave 2 includes:

- The new schedule board will get more performance and usability improvements.
- Resource optimization improvements for lock constraints and clustering logic for nearby work orders.

Avoid double bookings with resource scheduling optimization

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

Business value

Resource scheduling optimization can schedule many jobs simultaneously, maximizing overall utilization and minimizing total travel time. Booking lock options give customers the ability to constrain scheduling by resource and/or time. Sometimes, configurations result in overlapping bookings that must be manually updated.

Feature details

Today, the resource scheduling optimization feature will leave existing bookings associated with resource or time soft-booking locks to the dispatcher to make the final decision on the best match. We have heard from customers that they prefer that the soft-booking lock constraints (for example, this resource at any time or this time by any resource) are handled the same way as the hard-booking lock constraints (for example, this resource at this time).

In this release, resource scheduling optimization has been improved to avoid overlapping bookings due to association with soft booking lock constraints.

Bing Maps disabled by default for EU regions

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

Business value

Compliance with Microsoft's pledge to the European Union to minimize transfers of customer and personal data outside of the EU.

Feature details

Field Service scheduling routes frontline workers to customer locations for onsite service. Bing Maps provides mapping, directions, geocoding, address recommendations, and historical traffic for schedule optimizations.

In compliance with Microsoft's pledge to the EU, Bing Maps will be disabled by default for EU regions. EU customers will still have the option to enable Bing Maps for their Field Service deployments leveraging resources outside the EU boundary.

NOTE Bing Maps will remain enabled by default for non-EU regions.

New schedule board is now default for all deployments

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

Business value

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

Feature details

In 2022 release wave 2, we move beyond parity and deliver more performance, usability, and features to provide a better schedule board. We plan to retire the legacy schedule board by April 1, 2023.

Updates in this release include:

- Deployments default to a new board with a toggle to switch to the legacy board, if needed.
- Improved performance and usability.
- Improved booking tooltips for daily, weekly, and monthly views.
- Ability to select multiple bookings and bulk change booking status.
- Assistance with accurately booking errors.
- Auto-refresh requirements list with schedule board refresh.

Finance and Operations

Plan and prepare for Dynamics 365 Finance in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Finance**.

Overview

Organizations that are product-centric, service-centric, or in a diversified organization are moving users to value-added activities versus repetitive, manual tasks. Connecting data across systems, having an application that supports changing business models, and rapid adoption of economic changes are key to making effective decisions to drive this transformation. To continue the success and growth of our Dynamics 365 Finance customers, we will focus on delivering key enhancements that reflect the needs of their users.

Updates to Dynamics 365 Finance 2022 release wave 2 include:

- Enhancing our subscription billing solution with quotes and split billing.
- General availability of vendor invoice OCR (optical character recognition). This will automate the reading and recognition of vendor invoices by providing OCR capabilities to complete the full end-to-end automation of accounts payable.

Our customers run our solution in more than 180 countries and regions and must meet multiple tax compliance and local business practice requirements (localization). We provide out-of-the-box localization and continuous regulatory compliance for 44 countries and regions, and translations for 52 languages, extended by partners. Our no-code/low-code Globalization Studio makes localization easy for Microsoft, as well as partners and customers, to create, extend, automate, and maintain.

In 2022 release wave 2, we continue enhancing Globalization Studio to provide for more breadth, depth, and scalability out of the box:

- **Tax Calculation service**: Eliminates the need for costly customizations for many complex tax scenarios. We continue extending the scope of Tax Calculation service by integrating it with Dynamics 365 Project Operations (in preview) and provides several enhancements in the service.
- **Electronic Invoicing service**: To fight tax evasion, more countries are introducing mandatory business-to-business electronic invoicing with e-invoice clearance at tax authority agencies. To support the new upcoming e-invoice legislations, new e-invoicing capabilities are available that are legally required in France, Poland, and Saudi Arabia.

- **Electronic reporting**: Enhancements to Electronic reporting that enable switching a base data model, automatic uploading of parent configurations, a configurable way to run ad-hoc reports, and remove limitations of 2 GB file size.

Investment areas

Globalization Studio
We continue enhancing no-code/low-code capabilities and multicountry content of Globalization Studio in tax calculation, electronic invoicing, and electronic reporting.

Core financials
This release for Finance is focused on bringing additional enhancements to core financial capabilities, financial automation, and reporting.

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

Check out the release plan

For application administrators

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

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Get the most out of Finance

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

What's new and planned for Dynamics 365 Finance

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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Core financials

This release for Finance is focused on bringing additional enhancements to core financial capabilities, financial automation, and reporting.

Feature	Enabled for	Public preview	General availability
Try quotation enhancements in subscription billing	Users by admins, makers, or analysts	-	Oct 2022
Split billing in subscription billing	Users by admins, makers, or analysts	-	Oct 2022
Invoice automation – process vendor invoices during the import process	Admins, makers, marketers, or analysts, automatically	-	Oct 2022
Define financial tags to support analytical reporting	Users by admins, makers, or analysts	-	Jan 2023
Save time with ledger settlement automation	Users by admins, makers, or analysts	-	Jan 2023
Access new bank reconciliation report	Users by admins, makers, or analysts	-	Feb 2023
Vendor invoice OCR – try advanced configurations	Admins, makers, marketers, or analysts, automatically	-	Feb 2023
Vendor invoice OCR – try deployment wizard	Users by admins, makers, or analysts	-	Feb 2023
Vendor Invoice OCR - try image file management	Users by admins, makers, or analysts	-	Feb 2023
Vendor invoice OCR – vendor invoice OCR hub	Admins, makers, marketers, or analysts, automatically	-	Feb 2023

Feature	Enabled for	Public preview	General availability
Increase the length of invoice numbers	Users by admins, makers, or analysts	-	Mar 2023

Globalization Studio

We continue enhancing no-code/low-code capabilities and multicountry content of Globalization Studio in tax calculation, electronic invoicing, and electronic reporting.

Feature	Enabled for	Public preview	General availability
Access configurable Polish e-invoice integration	Users by admins, makers, or analysts	-	Oct 2022
Access Saudi Arabia e-invoice integration	Users by admins, makers, or analysts	-	Oct 2022
Improve import experience when parent configuration is missing	Users by admins, makers, or analysts	Aug 2022	Oct 2022
Switch a base data model in electronic reporting	Users by admins, makers, or analysts	Aug 2022	Oct 2022

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Core financials

Overview

This release for Finance is focused on bringing additional enhancements to core financial capabilities, financial automation, and reporting.

Try quotation enhancements in subscription billing

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

Business value

Today, many customers import Billing schedule information from an external system where quotations can be generated. Customers that start with a Billing schedule do not have an existing process to create a quotation within Dynamics 365 Finance.

Feature details

Enhancements to Subscription billing – Recurring contract billing enable generating sales quotations using the pre-existing quotation report from a Billing schedule. Along with generating the quotation report, data is stored in existing Sales quotation tables so you can reprint quotations.

Split billing in subscription billing

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

Business value

Split billing allows users of Recurring contract billing within Subscription billing to select additional customers as responsible parties on a billing schedule.

Feature details

Split billing allows for multiple customers to be billed from a single contract with a single billing schedule for each customer and their responsibility is defined. By specifying multiple customers on a billing schedule, an invoice can be produced for multiple customers from a single billing schedule.

Invoice automation – process vendor invoices during the import process

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

Business value

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

Feature details

Creating vendor invoices can involve multiple steps including applying prepayments, completing the invoice matching process, validating invoices, and workflow processing. Typically, those steps are completed manually before the invoices are posted. Prior to implementing this feature, importing vendor invoices resulted in a pending vendor invoice. Routine invoice processing steps, such as three-way matching, were completed in the background.

This feature processes vendor invoices automatically when the invoices are imported. This eliminates the need for additional background processing and frees accounts payable staff to focus their efforts on exceptions.

Define financial tags to support analytical reporting

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

Business value

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

Feature details

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

Save time with ledger settlement automation

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

Business value

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

Feature details

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

Access new bank reconciliation report

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

Business value

The bank reconciliation report provides clear, overall information of bank reconciliation status and bank transactions details within a certain period, supporting a better auditing evidence.

Feature details

The bank reconciliation report provides a clear overall information of bank reconciliation status and bank transactions details in a certain period. This is one of the highest requested items from our customers on the Ideas portal.

Vendor invoice OCR – try advanced configurations

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

Business value

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

Feature details

This feature provides a list of configuration settings that include:

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

Vendor invoice OCR – try deployment wizard

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

Business value

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

Feature details

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

Vendor Invoice OCR – try image file management

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

Business value

With image files workspace, a user can check the image file's state before sending to staging.

Feature details

This feature provides a central workspace used to track the image files that are imported from different channels. This feature allows users to:

- Configure settings for image files to do a precheck before sending the file into recognition services.
- Enable the real-time process or schedule a batch process to send image files into the recognition service.
- Identify the channel info for each image file.
- Trace all of the state changes of image files.

Vendor invoice OCR – try new hub

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

Business value

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

Feature details

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

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

Increase the length of invoice numbers

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

Business value

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

Feature details

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

Globalization Studio

Overview

We continue enhancing no-code/low-code capabilities and multicountry content of Globalization Studio in tax calculation, electronic invoicing, and electronic reporting.

Access configurable Polish e-invoice integration

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

Business value

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

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

Feature details

Poland introduces in phases, legislation to establish the continuous transaction control (CTC) system. The Polish CTC system, called Krajowy System of e-Faktur (KSeF), was made available for all taxpayers in 2022 for voluntary adoption. The KSeF platform supports issuing, receiving, and archiving e-invoicing for business to business (B2B), and when requested by a customer for business to consumer (B2C) transactions. Starting January 1, 2023, the KSeF system is to be rolled out as mandatory for all companies that are subject to VAT.

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

- Generation of XML files of Sales, Project, and Advance electronic invoices in the legally required format provided by KSeF.
- Integration with the KSeF services to enable automatic submission of generated electronic invoices to Polish tax authorities.

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

Access Saudi Arabia e-invoice integration

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

Business value

The Electronic Invoicing service, Microsoft's platform offering of a no-code/low-code e-invoicing solution, allows businesses to fully automate the electronic invoicing process end to end. This includes issuing Tax and Simplified invoices to submitting electronic invoices to the tax authorities for clearance or reporting purposes. This feature concludes the implementation of electronic invoicing in Saudi Arabia with addressing extended requirements.

Feature details

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

Requirements are mandated in phases:

- Phase 1, known as the Generation phase, requires taxpayers to generate and store tax invoices and notes through electronic solutions compliant with Phase 1 requirements.

  Phase 1 is enforceable as of December 4, 2021. Electronic Invoicing service has supported this scenario since 2021.

- Phase 2, known as the Integration phase and rolled out in waves by targeted taxpayer groups starting January 1, 2023, will involve the introduction of Phase 2 technical and business requirements for electronic invoices and electronic solutions, and the integration of these electronic solutions with the ZATCA (Zakat, Tax and Customs Authority) systems.

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

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

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

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

Improve import experience when parent configuration is missing

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

Business value

Improve the user experience for importing configurations with missing dependencies to allow for a quicker deployment of Electronic reporting (ER) configurations.

Feature details

You can import an Electronic reporting (ER) configuration that is dependent on other configurations into your Finance instance. When you import the ER configuration from the Global repository, all configurations that your target configuration depends on are imported automatically. When you import from another configuration storage and at least one of the configurations your target configuration depends on is missing, the import process fails. This feature improves the process of ER configurations import by reducing the number of exceptions and clarifying what dependencies are missing.

When a required dependency is missing and you're using a configurations location and the configuration isn't available in the Global repository, ER shows the friendly name of a missing configuration along with its global unique identifier.

Switch a base data model in electronic reporting

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

Business value

This feature empowers business users to change the base Electronic reporting (ER) data model for a derived format and mapping. This functionality may be needed when a derived format or mapping is initially created based on the original data model and you need to use a custom data model at some point after. Business users will be able to continue using modifications of a derived format or mapping along with using the derived data model.

Feature details

On the **Configurations** page, you can select an ER configuration that contains either the format or the mapping component. A new button enables you to open a dialog box and select the alternative data used as the base data model in the draft version of the selected ER configuration. By changing the base model, you don't need to manually repeat all changes you previously introduced when the selected component was configured by using the initial base data model.

Plan and prepare for Dynamics 365 Supply Chain Management in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Supply Chain Management**.

Overview

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

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

New features and improvements introduced during 2022 release wave 2 include:

- Supply-risk analytics to help businesses identify and mitigate the risks associated with their sourcing strategies.
- Improved support for supply forecasts and multiple external vendors in Planning Optimization to help organizations diversify their sourcing strategies.
- Planning Optimization enhancements to better support manufacturers in the process industry shorten their planning cycles.
- Simplified, guided implementation and configuration experiences to drive down warehouse management implementation time and effort, and enable companies to rapidly reconfigure their supply chains in response to changing demand patterns.
- Flexibility and mobility in the warehouse packing process allow warehouse workers to complete packing operations from their handheld barcode scanners using the Warehouse Management mobile app.
- Enhanced allocation capabilities through Inventory Visibility help organizations preallocate limited stocks to prioritized channels, regions, or customer groups. Real-time tracking of consumption within those allocated quantities lets organizations control oversell and make on-time replenishment decisions in support of promotions, special events, new product introductions, and so on.
- Prospect-to-cash scenario enhancements across Dynamics 365 Supply Chain Management and Dynamics 365 Sales.
- Advancements for multinational companies to make product information accessible in the user's own language, thereby reducing language barriers.

- Sensor Data Intelligence support for new asset management scenarios and opening up scenarios for customizations and extensions.

Investment areas

Inventory and logistics

The inventory and logistics enhancements in this release wave help businesses gain more visibility, efficiency, and resiliency in their supply chain operations.

- Businesses using advanced warehouse management (WHS) can now use the Inventory Visibility Add-in to make soft reservations and allocate inventory. Soft reservations let you track omnichannel sales demand in real time, thereby avoiding overselling, while inventory allocation lets you reserve on-hand inventory for your most important channels and corporate customers. This expanded support for WHS items enables businesses that rely on the advanced warehousing capabilities of WHS to benefit from the many business advantages brought by the soft reservation and allocation capabilities of Inventory Visibility.
- Organizations often want to track real-time consumption within the quantities allocated to specific stores, channels or markets in support of promotion events, new product launched, and so on. This ensures that immediate reallocation, follow-up replenishment decisions, and associated actions can be taken. Users can now track real-time consumption of allocated quantities. The Inventory Visibility service can deduct soft reserved quantities from allocated quantities and calculate *available-for-reservation* quantities within a specific allocation.
- Businesses using Inventory Visibility can now obtain a full inventory summary across channels and data sources from the *Inventory summary* entity in Dataverse. This opens a wide range of possibilities for businesses to use inventory summary data, such as for inventory analysis in Power BI (or your own analytics tool), field service integration, or distribution to downstream business partners.
- Prospect-to-cash scenario enhancements across Dynamics 365 Supply Chain Management and Dynamics 365 Sales enable true end-to-end process integration in the prospect-to-cash flow. Improving the entire process from quotation to invoice helps

organizations drive efficiencies in their sales and fulfillment processes, improve accuracy, and reduce lead times.

Planning

With Planning Optimization, companies experience significantly improved performance and scalability, which enables near-real-time insights into requirement changes. The enhancements delivered in this release wave add support for more process manufacturing scenarios, increase planning accuracy, and help users respond quickly to changes without disrupting the overall plan.

- Manufacturers can now use Planning Optimization in process manufacturing scenarios that include batch orders, co-products, and by-products.
- Batch disposition codes are now honored by Planning Optimization during materials requirement planning. This grants businesses greater control over how inventory is allocated and whether it is available for reservation.
- Planning Optimization can now take into account supply forecasts to enhance the quality and accuracy of the generated material requirements plans.
- Demand from sales quotations can now be considered by Planning Optimization for enhancing the quality and accuracy of the generated material requirements plans.
- It's now possible to have Planning Optimization respect finite material availability when automatically scheduling actual, firmed production orders. This ensures that planned production orders will not be delayed due to material shortages.

Product information management

In the area of product information management, this release wave brings improvements that enable users in each legal entity to work with product information in their local language, which is an important benefit for multinational companies.

Warehouse management

The warehouse management solution provides a rich and flexible set of capabilities that can be combined and configured to support a plethora of warehouse layouts and operational scenarios. The enhancements in this release focus on simplifying the configuration experience, reducing implementation time, and providing insights into the performance and usage of the warehouse management system.

- Customers shipping large items or having large packing areas will benefit from the new mobile packing experience, which allows warehouse workers to move around while performing packing activities using the Warehouse Management mobile app.
- The new rapid implementation and configuration experience dramatically reduces implementation time and cost for most customers. In many cases, it also enables warehouse professionals to configure and maintain the warehouse management solution without assistance from specialized consultants.
- Businesses have easy access to insights into the performance and usage of their warehouse management system through Azure Application Insights. This enables

effective self-service monitoring and diagnosis of problems without direct involvement from Microsoft.

Manufacturing
The manufacturing enhancements delivered in this release wave focus on driving increased agility on the shop floor—for example, by using sensor data from machines and other equipment on the production floor to drive business processes in Dynamics 365 Supply Chain Management.

- Enhancements to the Sensor Data Intelligence offering add new asset management scenarios for downtime registrations and asset counter updates, and make it possible for businesses to customize and extend the supported scenarios.
- Significantly reduce the latency some users may experience in the production report-as-finished process by separating the physical registration from any derived financial updates.

Procurement
Investments in the procurement and sourcing area help organizations be more agile and resilient in their supply chain operations. In particular, these improvements make it easier for businesses to identify and mitigate the risks associated with their sourcing strategies.

- A new supply-risk assessment dashboard makes it easy for businesses to identify and understand risks of sourcing shortages and delays. This helps businesses take proactive actions to balance cost and resilience as they optimize their supply chains.
- Help businesses build resilience in their supply chain by diversifying their sources of supply. That is, make it possible to source products and materials from multiple vendors, both when ordering manually or when driven by master planning.

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

Check out the release plan

For application administrators

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

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

Get the most out of Supply Chain Management

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

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

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Inventory and logistics

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

Feature	Enabled for	Public preview	General availability
Allocate and reserve WHS items in Inventory Visibility	Users by admins, makers, or analysts	Aug 2022	Oct 2022
Query the Inventory Visibility summary entity	Users by admins, makers, or analysts	Aug 2022	Oct 2022
Track soft reserved quantities within allocations	Users by admins, makers, or analysts	Sep 2022	Oct 2022
Enhance prospect-to-cash with Dynamics 365 Sales	Users by admins, makers, or analysts	Oct 2022	Jan 2023

Manufacturing

With this release, manufacturers can experience improved resilience and efficiency of their shop floor operations.

Feature	Enabled for	Public preview	General availability
Monitor equipment with Sensor Data Intelligence	Users by admins, makers, or analysts	Aug 2022	Oct 2022
Make finished goods physically available before posting	Users by admins, makers, or analysts	Oct 2022	Nov 2022

Planning

Planning Optimization enhancements add support for more process manufacturing scenarios, increase planning accuracy, and help users respond quickly to changes.

Feature	Enabled for	Public preview	General availability
Use batch disposition codes in Planning Optimization	Users by admins, makers, or analysts	Oct 2022	Dec 2022
Leverage supply forecasts in Planning Optimization	Users by admins, makers, or analysts	Nov 2022	Jan 2023
Use finite material scheduling in Planning Optimization	Users by admins, makers, or analysts	Dec 2022	Feb 2023
Consider sales quotations in Planning Optimization	Users by admins, makers, or analysts	Dec 2022	Feb 2023
Support process manufacturing in Planning Optimization	Users by admins, makers, or analysts	Dec 2022	Feb 2023

Procurement

New procurement and sourcing capabilities help organizations be more agile and resilient in their supply chain.

Feature	Enabled for	Public preview	General availability
Source products and materials from multiple vendors	Users by admins, makers, or analysts	Dec 2022	Feb 2023

Product information management

This release wave brings improvements for multinational companies that enable users to work with product information in their own language.

Feature	Enabled for	Public preview	General availability
Display product info in user's language	Users by admins, makers, or analysts	Aug 2022	Oct 2022

Warehouse management

Warehouse management enhancements that simplify the implementation and configuration experience, and provide insights into system performance and usage.

Feature	Enabled for	Public preview	General availability
Pack shipments with the Warehouse Management mobile app	Users by admins, makers, or analysts	Dec 2022	Feb 2023
Guided warehouse implementation experience	Users by admins, makers, or analysts	Jan 2023	Feb 2023
Optimize warehousing setup with Application Insights	Admins, makers, marketers, or analysts, automatically	Jan 2023	Feb 2023

Description of **Enabled for** column values:

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

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

Inventory and logistics

Overview

The inventory and logistics enhancements in this release wave help businesses gain more visibility, efficiency, and resiliency in their supply chain operations.

- Businesses using advanced warehouse management (WHS) can now use the Inventory Visibility Add-in to make soft reservations and allocate inventory. Soft reservations let you track omnichannel sales demand in real time, thereby avoiding overselling, while inventory allocation lets you reserve on-hand inventory for your most important channels and corporate customers. This expanded support for WHS items enables businesses that rely on the advanced warehousing capabilities of WHS to benefit from the many business advantages brought by the soft reservation and allocation capabilities of Inventory Visibility.

- Organizations often want to track real-time consumption within the quantities allocated to specific stores, channels or markets in support of promotion events, new products launched, and so on. This ensures that immediate reallocation, follow-up replenishment decisions, and associated actions can be taken. Users can now track real-time consumption of allocated quantities. The Inventory Visibility service can deduct soft reserved quantities from allocated quantities and calculate *available-for-reservation* quantities within a specific allocation.
- Businesses using Inventory Visibility can now obtain a full inventory summary across channels and data sources from the *Inventory summary* entity in Dataverse. This opens a wide range of possibilities for businesses to use inventory summary data, such as for inventory analysis in Power BI (or your own analytics tool), field service integration, or distribution to downstream business partners.
- Prospect-to-cash scenario enhancements across Dynamics 365 Supply Chain Management and Dynamics 365 Sales enable true end-to-end process integration in the prospect-to-cash flow. Improving the entire process from quotation to invoice helps organizations drive efficiencies in their sales and fulfillment processes, improve accuracy, and reduce lead times.

Allocate and reserve WMS items in Inventory Visibility

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

Business value

Businesses using warehouse management processes (WMS) can now use Inventory Visibility to make soft reservations and allocate inventory. Soft reservations let you track omnichannel sales demand in real time, thereby avoiding oversell, while inventory allocation lets you reserve on-hand inventory for your most important channels and corporate customers. This expanded support for WMS items enables businesses that rely on the advanced warehousing capabilities of WMS to benefit from the many business advantages brought by the soft reservation and allocation capabilities of Inventory Visibility.

Feature details

The following features of the Inventory Visibility service are now supported for WMS-enabled items in addition to non-WMS items:

- **Soft reservations for WMS-enabled items**: Soft reservations make a real-time temporary deduction of inventory based on the quantity and product dimensions specified in a sales order. The reservation occurs before the order is released to the warehouse, which means that businesses using WMS will be able to make soft reservations regardless of whether warehouse hierarchies are specified in the order.

- **Inventory allocation for WMS-enabled items**: Inventory allocation allows channel sales planners or sales account managers to preallocate on-hand inventory to tailor channel demands or fulfill requests from key corporate customers. Allocation occurs before sales transactions and therefore takes place before any physical warehouse work. As a result, Inventory Visibility will associate each item and quantity being allocated with top warehouse level information, regardless of whether the items are WMS-enabled and at which warehouse hierarchy level they are stored.

Inventory Visibility

Inventory Visibility provides an independent and highly scalable microservice that enables real-time, on-hand inventory change postings and visibility tracking across all your data sources and channels. For more information about Inventory Visibility, see the [Inventory Visibility Add-in overview].

Query the Inventory Visibility summary entity

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

Business value

Businesses using Inventory Visibility can now obtain a full multichannel, cross-data-source inventory summary using the *inventory summary* data entity in Microsoft Dataverse. This makes it possible for businesses to do full inventory analysis using Power BI or a third-party analytics tool, integrate Dynamics 365 Supply Chain Management with Dynamics 365 Field Service, distribute inventory summary information to downstream retailors, and more.

Feature details

The Inventory Visibility service synchronizes inventory status information using the *inventory summary* data entity in Microsoft Dataverse. The service updates the data entity from its in-memory cache every 15 minutes. The data entity previously used a JSON data format, but many businesses needed to customize the format to make it possible to integrate with Power BI reports or to provide inventory availability information for Dynamics 365 Field Service. Therefore, we've updated the entity to use a non-JSON, human-readable data format, which makes the data easier to use for direct export or integration. The updated entity now provides easy, out-of-the-box functionality for fetching inventory summary details.

Inventory Visibility

Inventory Visibility provides an independent and highly scalable microservice that enables real-time, on-hand inventory change postings and visibility tracking across all your data sources and channels. For more information about Inventory Visibility, see the [Inventory Visibility Add-in overview](#).

Track soft reserved quantities within allocations

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

Business value

Organizations often need to track real-time consumption within allocated quantities for each store or web market. This can help support promotion events and new product launches, allowing organizations to make immediate reallocation and follow-up replenishment decisions.

Feature details

The current allocation feature allows you to plan the apportionment of your available on-hand inventory. But obtaining the physical consumption data from your ERP system can take a long time due to data sync latency. This can lead to oversell or overconsumption within your allocated channel or by your corporate customers. As a result, the ability to track actual booked quantities by demand in real time is important. You can now achieve this by making soft reservations within allocations.

This new feature helps you to achieve the following goals:

- **Avoid oversell**: The ability to make soft reservation requests against allocated inventory will prevent you from posting additional soft reservation requests when you don't have enough allocated inventory left.
- **Monitor overstock situations to optimize future allocation plans**: You can easily compare soft-reserved quantities against what's left in inventory pools allocated to individual channels or B2B customers. For allocations with a low soft-reservation to available-allocation ratio, you can consider adjusting your allocation plan to better manage your inventory turnover in the future.
- **Better protect your allocated inventory**: By minimizing oversell situations within each allocation channel, group, and/or customer, you will also better protect your allocated quantities.

Inventory Visibility

Inventory Visibility provides an independent and highly scalable microservice that enables real-time, on-hand inventory change postings and visibility tracking across all your data sources and channels. For more information about Inventory Visibility, see the [Inventory Visibility Add-in overview](#).

Enhance prospect-to-cash with Dynamics 365 Sales

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2022	Jan 2023

Business value

True end-to-end process integration in the prospect-to-cash flow, focusing on the entire process from quotation to invoice, helps businesses drive efficiencies in their sales and fulfillment processes, improve accuracy, and reduce lead times.

Feature details

This release introduces several important improvements to the prospect-to-cash scenario, which is enabled through dual-write integration between Dynamics 365 Supply Chain Management and Dynamics 365 Sales. The improvements address several areas, including:

- Sales quotation revisioning and state transitions
- Sales quotation and sales order line pricing
- Sales credit notes, especially with respect to negative charges and discounts
- Sales return orders

Manufacturing

Overview

The manufacturing enhancements delivered in this release wave focus on driving increased agility on the shop floor—for example, by using sensor data from machines and other equipment on the production floor to drive business processes in Dynamics 365 Supply Chain Management.

- Enhancements to the Sensor Data Intelligence offering add new asset management scenarios for downtime registrations and asset counter updates, and make it possible for businesses to customize and extend the supported scenarios.
- Significantly reduce the latency some users may experience in the production report-as-finished process by separating the physical registration from any derived financial updates.

Monitor equipment with Sensor Data Intelligence

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

Business value

Businesses can install automatic electronic sensors that enable Dynamics 365 Supply Chain Management to collect and display information about equipment usage and status. The resulting solution provides real-time visibility into maintenance, inventory, planning, and cost, enabling business-critical processes to be automated.

Feature details

The Sensor Data Intelligence Add-in for Dynamics 365 Supply Chain Management is an updated, renamed version of the IoT Intelligence Add-in previously available for Supply Chain Management. It enables your organization to drive business processes based on sensor data from machines and equipment on the production floor. The new version of Sensor Data Intelligence enables you to:

- Collect details from machines and equipment to update maintenance asset counter values in Supply Chain Management to drive predictive maintenance.
- Leverage a simple onboarding wizard to set up the solution, as opposed to manually installing and configuring components in Lifecycle Services.
- Deploy components on your own subscription, allowing you additional flexibility to manage Azure components.
- Configure, scale, and extend the solution as business logic running on Azure components, which are now managed on your own subscription, giving you the freedom to customize as needed to meet your unique business needs.

In addition to the business scenarios that were available with the IoT Intelligence Add-In, Sensor Data Intelligence now covers a broader range of use cases, as detailed in the following table.

Scenario	Description	Status
Machine status	Secure operation efficiency by using sensor readings to notify planners about machine outages and provide options to mitigate potential delays.	Existing
Product quality	Secure the quality of product batches by comparing sensor readings for actual properties of each product batch, such as moisture, temperature, or custom-defined quality metrics. The system will notify users when deviations occur.	Existing

Scenario	Description	Status
Production delays	Use sensor readings to compare actual cycle time to planned cycle time and notify supervisors when production is not on schedule. Supervisors can then intervene when needed to secure maximum operation efficiency.	Existing
Predictive maintenance	Minimize maintenance cost and extend asset life by improving maintenance plans based on sensor readings of critical control points for machine assets.	New
Asset downtime	Accurately track the efficiency of machine assets by using sensor data to track machine downtime.	New

Make finished goods physically available before posting

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2022	Nov 2022

Business value

This feature benefits manufacturers who may experience latency issues during the report-as-finished process.

Feature details

This feature lets you control whether the report-as-finished journal and related journal postings should be processed at the same time as the report-as-finished task is processed by the system. If you choose to defer the journal postings, then when a worker reports goods as finished, the system will register the goods as physically available, generate any required putaway work, and add the related journal postings to a batch queue to be processed later as system resources allow. If you choose to process the postings at the same time as the report-as-finished task, then it may take longer for the finished goods to become physically available (which is the legacy behavior).

Additional details:

- This feature supports items that are enabled for advanced warehouse processes (WMS) and items that aren't enabled for WMS.
- This feature supports reporting as finished from the Warehouse Management mobile app, the client user interface, and the production floor execution interface.
- You can configure this feature at any of several levels, including in the warehouse parameters, production control parameters, and production order default parameters.

Planning

Overview

With Planning Optimization, companies experience significantly improved performance and scalability, which enables near-real-time insights into requirement changes. The enhancements delivered in this release wave add support for more process manufacturing scenarios, increase planning accuracy, and help users respond quickly to changes without disrupting the overall plan.

- Manufacturers can now use Planning Optimization in process manufacturing scenarios that include batch orders, co-products, and by-products.
- Batch disposition codes are now honored by Planning Optimization during materials requirement planning. This grants businesses greater control over how inventory is allocated and whether it is available for reservation.
- Planning Optimization can now take into account supply forecasts to enhance the quality and accuracy of the generated material requirements plans.
- Demand from sales quotations can now be considered by Planning Optimization for enhancing the quality and accuracy of the generated material requirements plans.
- It's now possible to have Planning Optimization respect finite material availability when automatically scheduling actual, firmed production orders. This ensures that planned production orders won't be delayed due to material shortages.

Use batch disposition codes in Planning Optimization

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

Business value

By honoring batch disposition codes during materials requirement planning, Planning Optimization lets businesses have greater control over how inventory is allocated.

Feature details

By applying a disposition code to each batch, businesses can control whether the relevant inventory is available for reservation. With the addition of this capability, batch disposition codes will also be honored by Planning Optimization.

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

- Significantly improved performance and scalability with in-memory processing.

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

Learn more about Planning Optimization

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

Leverage supply forecasts in Planning Optimization

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Nov 2022	Jan 2023

Business value

Leverage supply forecasts to enhance the quality and accuracy of the materials requirement plans generated by Planning Optimization.

Feature details

Planning Optimization can now provide more accurate planning by incorporating supply forecasts into its calculations. Supply forecasts are typically used to ensure that a certain minimum quantity is purchased or produced during each period, regardless of the demand.

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

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

Learn more about Planning Optimization

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

Use finite material scheduling in Planning Optimization

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2022	Feb 2023

Business value

With automatic scheduling of production orders based on material availability, companies can ensure that planned production orders won’t be delayed due to material shortage.

Feature details

To ensure that production orders can be completed during the timeslot provided during production scheduling, it's important to ensure that both resource capacity and all required materials will be available at that time. Finite material scheduling respects dependencies on the availability of materials required for production. If there aren't enough components available, production will be delayed.

With finite material scheduling, you can specify the materials required to produce a product and use these as a basis for calculating the production schedule. By taking both resource capacity and the availability of materials into account, the system can schedule production according to these restrictions. With finite material scheduling, a production order can't be scheduled to start until both capacity and materials are available at the same time and in the required quantities.

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

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

Learn more about Planning Optimization

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

Consider sales quotations in Planning Optimization

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2022	Feb 2023

Business value

Businesses can generate more accurate material requirement plans by including demand from sales quotations in their master planning calculations.

Feature details

Planning Optimization can now provide more accurate material requirement plans by incorporating demand from sales quotations into its calculations. For each master plan, planners can specify the confidence level required for a sales quotation to be considered.

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

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

Learn more about Planning Optimization

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Support process manufacturing in Planning Optimization

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2022	Feb 2023

Business value

Process manufacturers can now use Planning Optimization to get near real-time insights into requirement changes during office hours, made possible by in-memory processing. The solution enables master planning to include supply from processes that output co-products and by-products.

Feature details

Companies can now take advantage of Planning Optimization in process manufacturing scenarios that include multiple outputs. These enhancements enable you to do the following actions:

- Create planned batch orders using formulas.
- Calculate component requirements based on formula measurement rules.

- Cover demand with supply that originates from batch orders that output co-products and by-products.

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

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

Learn more about Planning Optimization

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

Procurement

Overview

Investments in the procurement and sourcing area help organizations be more agile and resilient in their supply chain operations. In particular, these improvements make it easier for businesses to identify and mitigate the risks associated with their sourcing strategies.

- A new supply-risk assessment dashboard makes it easy for businesses to identify and understand risks of sourcing shortages and delays. This helps businesses take proactive actions to balance cost and resilience as they optimize their supply chains.
- Help businesses build resilience in their supply chain by diversifying their sources of supply. That is, make it possible to source products and materials from multiple vendors, both when ordering manually or when driven by master planning.

Source products and materials from multiple vendors

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2022	Feb 2023

Business value

The COVID pandemic has highlighted the need for resilience in the supply chain to succeed as a business. Diversifying the supply network helps businesses be agile and responsive to changes. Automatic vendor selection based on predefined split ratios helps secure improved supplier resilience.

Feature details

Planning Optimization now supports multivendor sourcing by allowing you to establish vendor sourcing ratios that are applied during master planning. For example, you could set a rule to ensure you will purchase 70 percent of materials from Vendor X and 30 percent from Vendor Y.

Planning Optimization benefits

With Planning Optimization, companies can benefit from:

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

Learn more about Planning Optimization

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

Thank you for your idea

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

Product information management

Overview

In the area of product information management, this release wave brings improvements that enable users in each legal entity to work with product information in their local language, which is an important benefit for multinational companies.

Display product info in user's language

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

Business value

For companies operating worldwide, in multiple countries or regions, it's important to enable each user to work with product information in their own language. Sales representatives communicating with customers by phone will see product names in their local language. Purchasers will be able to search for products in the language they speak. Shop floor workers will get product names and instructions in familiar terms. In each case, the information can be shown in a language other than the system language.

Feature details

With this feature, each user can see product data (names and descriptions) translated into the language of their own legal entity. This lets users see product data that has been translated into their local language, which can be different from the system language.

The system enables you to specify a language for each legal entity. Then, when a user signs in to their legal entity, all product names and descriptions will automatically be shown in that entity's assigned language throughout the system.

For example, a company could have two different legal entities. The first (LE1) is located in Italy and its users speak Italian, while the second (LE2) is located in the US and its language is English. The system language is set to English because that is the company's official language. The resulting solution makes it easier for Italian users working at LE1 to communicate with their local suppliers and customers because they will see familiar, localized product names and descriptions while working in the system.

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.

Warehouse management

Overview

The warehouse management solution provides a rich and flexible set of capabilities that can be combined and configured to support a plethora of warehouse layouts and operational scenarios. The enhancements in this release focus on simplifying the configuration experience, reducing implementation time, and providing insights into the performance and usage of the warehouse management system.

- Customers shipping large items or having large packing areas will benefit from the new mobile packing experience, which allows warehouse workers to move around while performing packing activities using the Warehouse Management mobile app.
- The new rapid implementation and configuration experience dramatically reduces implementation time and cost for most customers. In many cases, it also enables warehouse professionals to configure and maintain the warehouse management solution without assistance from specialized consultants.
- Businesses have easy access to insights into the performance and usage of their warehouse management system through Azure Application Insights. This enables effective self-service monitoring and diagnosis of problems without direct involvement from Microsoft.

Pack shipments with the Warehouse Management mobile app

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2022	Feb 2023

Business value

Businesses that ship large items or have large packing areas will benefit from this mobile packing experience. The Dynamics 365 Warehouse Management mobile app now provides warehouse workers with the freedom to move around while performing their packing activities.

Feature details

Traditionally, warehouse workers have performed packing activities at a specific packing station configured in Dynamics 365 Supply Chain Management, using a process optimized for shipments of small to medium sized parcels. To improve efficiency when working in larger packing areas, and to better support the packing and shipment of larger items, the Dynamics 365 Warehouse Management mobile app now provides a mobile packing experience that gives workers the freedom to move around while performing packing activities.

Guided warehouse implementation experience

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2023	Feb 2023

Business value

The new rapid implementation and configuration experience dramatically reduces implementation time and cost of setting up warehouse operations in Dynamics 365 Supply Chain Management. In many cases, warehouse professionals will be able to set up, maintain, and optimize the configuration without assistance from specialized consultants.

Feature details

The warehouse management solution for Dynamics 365 Supply Chain Management provides a rich and flexible set of capabilities that can be combined and configured to support a plethora of warehouse layouts and operational scenarios. This release adds features that guide warehouse professionals through simple, business-focused implementation and configuration choices that will help them set up the warehouse solution quickly. New tools and visualizations help warehouse managers set up their warehouses to optimize warehouse processes. This is achieved through the following new capabilities:

- Simplified configuration of location directives and work templates

- Wizard-driven setup of wave templates and release-to-warehouse processes
- Predefined templates for setting up all putaway and picking strategies
- Simplified query setup
- Full visualization and simulation of both the current warehouse setup and the impact of any suggested changes
- System-suggested setup flow changes driven by artificial intelligence and machine learning (for example, to improve efficiency and performance)
- Digital twin of the warehouse to visualize impact
- System-suggested principles and strategies for picking and putaway

Optimize warehousing setup with Application Insights

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jan 2023	Feb 2023

Business value

Get insights into the performance and usage of your warehouse management system to quickly identify potential improvements and diagnose problems without requiring direct involvement from Microsoft.

Feature details

Businesses and consultants can now use Azure Application Insights to analyze the way users work with the warehousing functionality of Dynamics 365 Supply Chain Management. Application Insights provides easy-to-use tools for viewing and monitoring telemetry data, which enables effective self-service monitoring and diagnosis of problems without direct involvement from Microsoft.

Plan and prepare for Dynamics 365 Intelligent Order Management in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Intelligent Order Management**.

Overview

Built on a modern, open platform, Dynamics 365 Intelligent Order Management provides the flexibility companies need to capture orders from any order source, including e-commerce, marketplace, mobile apps, or traditional sources like electronic data interchange. Companies can fulfill those orders from their own warehouses, third-party logistics providers, stores, or drop-ship with vendors or other delivery fulfillment partners using out-of-the-box, prebuilt connectors from an ecosystem of more than 200 Microsoft Power Platform connectors.

Intelligent Order Management leverages an integrated, real-time inventory visibility service, a microservice built on Microsoft Dataverse that is highly scalable and extensible, providing a single, global view of the inventory positions across systems. Intelligent Order Management also uses distributed order management to give real-time recommendations for each order to fulfill orders accurately and cost-effectively, improving supply chain efficiency to better meet customer expectations.

With Intelligent Order Management, brand owners gain real-time visibility into each step of the order journey, and fulfillment insights in real time through customizable and integrated dashboards that enable their supply chain team to overcome constraints and improve operational efficiency.

Upcoming new features for 2022 release wave 2 include:

- Order types: Back orders and subscription orders.
- Support for Microsoft Teams.
- Purchase Orders: Expanding outbound support to include inbound orders.
- Order combination and delivery split: Choosing one or multiple warehouses to fulfill orders.
- Self-service product returns powered by FedEx.
- New providers.

Investment areas

Order types functionality
Dynamics 365 Intelligent Order Management will provide the flexibility you need to manage various order use cases by expanding the order types it can manage, including inbound order scenarios. An inventory view across the order lifecycle will also be available.

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

Check out the release plan

For application administrators

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

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

Get the most out of Intelligent Order Management

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

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

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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.

Order types functionality

The order orchestration capabilities in Intelligent Order Management will be expanded to handle more advanced order actions based on configurable business logic.

Feature	Enabled for	Public preview	General availability
Combine orders	Users, automatically	Oct 2022	Mar 2023
Support for order types	Users, automatically	Oct 2022	Mar 2023
Create purchase orders	Users, automatically	Feb 2023	Mar 2023

Description of **Enabled for** column values:

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

Order types functionality

Overview

Dynamics 365 Intelligent Order Management will provide the flexibility you need to manage various order use cases by expanding the order types it can manage, including inbound order scenarios. An inventory view across the order lifecycle will also be available.

Combine orders

Enabled for	Public preview	General availability
Users, automatically	Oct 2022	Mar 2023

Business value

This capability provides customers a way to directly reduce their cost of goods sold and provide better value to their end customer.

Feature details

Sometimes, a customer will receive multiple orders from one of their customers within the same processing window, and the items ordered are picked up from the same warehouse. In such cases, it is more cost-efficient to combine the orders, so delivery is made on the same trip. Dynamics 365 Intelligent Order Management will provide functionality that will allow the combining of orders. The feature will provide the following capabilities:

- Customers can process orders in bulk every <x> hours. This capability ensures that orders placed by the same customer address are combined into a single order for processing by the distributed order management (DOM) system.
- Customers can alternatively specify that they don't want the orders to be combined before DOM processes them.
- Allows customers to split the order across multiple warehouses.
- Allows customers to specify not to split orders across multiple warehouses and, as much as possible, fulfill the entire order from one warehouse.
- Ensures that if any part of the order is understocked, only the understocked part of the order goes into a backorder queue or gets dropped. The rest of the order is fulfilled.

Support for order types

Enabled for	Public preview	General availability
Users, automatically	Oct 2022	Mar 2023

Business value

This new functionality in Dynamics 365 Intelligent Order Management enables support for different order types so customers can complete various order fulfillment scenarios.

Feature details

This feature provides support for:

Backorders and preorders

- Place an order as a backorder when inventory is unavailable, and provide regular checks so that the order is placed back in for fulfillment when inventory becomes available.
- Place an order to be reserved for a later date.

Manual Orders

- Create and update an order and enable the order to be orchestrated in Intelligent Order Management.

Create purchase orders

Enabled for	Public preview	General availability
Users, automatically	Feb 2023	Mar 2023

Business value

Currently, Dynamics 365 Intelligent Order Management handles outbound orders or sales orders. With this new capability, customers can also create purchase orders from Intelligent Order Management. By providing end-to-end visibility of orders, this feature will help improve customer productivity.

Feature details

Purchase orders are commercial documents representing the first official offer issued by a buyer to a seller. They are used to control the purchase of products and services from external suppliers and include product or service types, quantities, and agreed prices. Purchase orders are an essential part of ordering within an enterprise resource planning system (ERP).

The purchase order feature in Intelligent Order Management will include the following capabilities:

- Create a purchase order through an integration with an ERP, external source, portal, or Microsoft Excel upload.
- Validate a purchase order in orchestration.
- Sync a validated purchase order and subsequent changes to an ERP so that the status in the ERP is in sync with Intelligent Order Management.

Plan and prepare for Dynamics 365 Project Operations in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Project Operations**.

Overview

In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams to win more deals, accelerate delivery, empower employees, and maximize profitability. The application provides the necessary visibility, collaboration, and agility across the project lifecycle to drive success for project-centric businesses. Powered by Microsoft Power Platform, customers are provided with an unmatched set of capabilities that enable everyone to analyze, act, and automate across their organization to transform their services business from the ground up. It's everything you need to run your project operations, from deal management to financials, all in one application.

For 2022 release wave 2, we're delivering functionally rich experiences in the following areas:

- Project budgeting and time-phased forecasting
- Project baselines and snapshots
- Import projects from Microsoft Project Desktop Client
- Progress-based billing on fixed price contracts
- Allow contacts as customers in Project Operations
- Ability to bulk-confirm project invoices
- Modernize user experiences in sales, billing, and pricing
- Cancel PO receipts with connected item requirements
- Use advanced subcontract capabilities with Project Operations for resource-based scenarios
- Use subscription billing with projects in Project Operations for stocked or production-based scenarios
- Use expense mobile application for delightful expense entry experiences
- Intercompany ledger posting category support for timesheets in Project Operations for stocked or production-based scenarios
- Modernize user experiences for time entry in Project Operations

Investment areas

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

Check out the release plan

For application administrators

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

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

Get the most out of Project Operations

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

What's new and planned for Dynamics 365 Project Operations

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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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
Baselines and snapshots	Users by admins, makers, or analysts	-	Mar 2023
Cancel PO receipts with connected item requirements	Users by admins, makers, or analysts	-	Mar 2023
Use advanced subcontract capabilities with Project Operations for resource-based scenarios	Users by admins, makers, or analysts	-	Mar 2023
Use expense mobile application for intuitive expense entry experiences	Users by admins, makers, or analysts	-	Mar 2023
Use subscription billing with projects in Project Operations for stocked or production-based scenarios	Users by admins, makers, or analysts	-	Mar 2023
Ability to bulk-confirm project invoices	Users by admins, makers, or analysts	Jan 2023	Mar 2023
Intercompany ledger posting category support for timesheets	Users by admins, makers, or analysts	Jan 2023	Mar 2023
Modernize user experiences for time entry	Users by admins, makers, or analysts	Jan 2023	Mar 2023
Modernize user experiences in sales, billing, and pricing	Users by admins, makers, or analysts	Jan 2023	Mar 2023
Progress-based billing on fixed price contracts	Users by admins, makers, or analysts	Jan 2023	Mar 2023
Project budgeting and time-phased forecasting	Users by admins, makers, or analysts	Jan 2023	Mar 2023

Description of **Enabled for** column values:

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

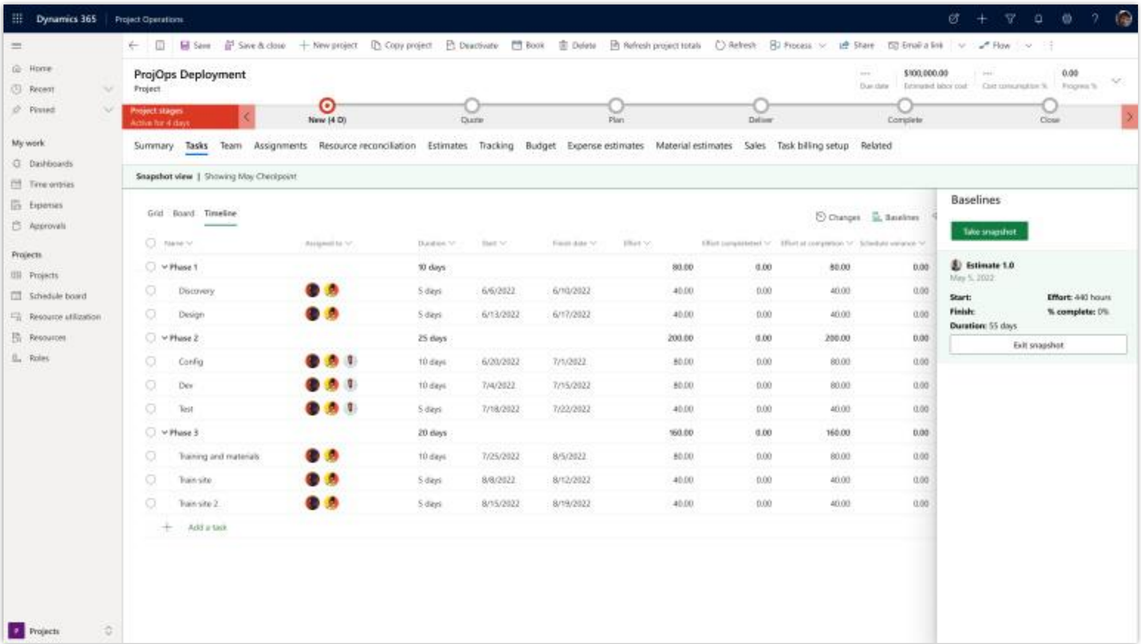
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Mar 2023

Business value

Customers require tangible metrics to gauge schedule performance and assess project health. Common metrics include schedule finish variance and schedule slip or gain. At a portfolio level, these metrics enable customers to manage by exception and identify risk early.

Feature details

With this release, project managers will have the ability to set a baseline work breakdown structure (WBS) that they can use to measure schedule variance. They will also be able to take snapshots of the WBS. These tools enable trend analysis of changes to a project. For example, using out-of-the-box visualizations, a customer can plot trend lines that show how a project's float (amount of time you can delay a task without impacting the project) is being used over time. This is an earlier signal of risk compared to seeing a specific delay surfaced in the schedule end date. When a practice manager observes negative trends in float, they have a chance to engage with a PM to mitigate risk before the project is delayed.



Project baselines and snapshots

Cancel PO receipts with connected item requirements

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

Business value

This feature provides a streamlined process for canceling product receipts that are associated with project item requirements. Users can perform this action using the cancel receipt function.

Feature details

When this feature is enabled, the system allows using the **Product receipt cancellation** function for **Project purchase orders** that are associated item requirements that have not been invoiced. Upon selection, the system will:

- Cancel any posted item requirement packing slips, and create posted project transaction reversals. The original entry and reversal entry will be connected and not available for further adjustments.
- Cancel the selected product receipt.

Use advanced subcontract capabilities with Project Operations for resource-based scenarios

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

Business value

The Subcontracts feature provides better visibility across the organization: from the project manager to the accounts payable clerk who records vendor invoices. Vendor-reported time, expense, and material consumption are automatically registered to streamline the three-way match process and ensure that the correct vendor invoices are posted, and the project cost is always up to date.

Feature details

Project manager-created and -managed subcontracts are visible to the accounts payable department as a purchase order. Receipts for those purchase orders are automatically created by the system when the subcontractor reports completion of work. To help ensure incorrect vendor invoices aren't accepted by the accounts payable clerk, the accounts payable clerk will be able to match the vendor invoice to the reported work by leveraging existing three-way match policy configuration capabilities in Finance.

Use expense mobile application for intuitive expense entry experience

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

Business value

This feature provides an intuitive expense mobile app that is effortless to use, accelerates the reimbursement process for the employee, and increases user productivity.

Feature details

The new expense mobile app lets you easily enter expense details on the go. You can capture receipts using the camera on your phone, and then match them to credit card or cash expenses. The expense mobile app will be available both on iOS and Android mobile devices.

Use subscription billing with projects for stocked or production-based scenarios

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

Business value

There's an increasing trend within modern organizations to transform their business models to sell project-based work and subscription-based services in a consolidated contractual agreement. Dynamics 365 Finance has released new features to help manage subscription-based services. These features include the ability to define and manage billing schedules, to record unbilled revenue based on the contractual agreement, and to defer costs and revenue and then recognize them based on the required schedule. With this update, Project Operations for production or stocked scenarios will support these features.

Feature details

This feature will include the following capabilities:

- Defining billing schedules with project reference
- Configuring revenue deferrals for different project transaction types
- Recording deferred cost and revenue to the project subledger
- Adjusting project transactions with cost and revenue deferrals

Ability to bulk-confirm project invoices

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

Business value

This feature adds efficiencies to **Project proforma invoice processing**.

Feature details

With this release, Dynamics 365 Project Operations will add the ability to bulk-confirm **Project invoices**. Users will have the ability to select multiple **Project invoices** that have been reviewed, and then confirm them simultaneously to create billed sales actuals. This greatly eases the confirmation function and helps improve efficiency in invoice management.

Intercompany ledger posting category support for timesheets

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

Business value

This feature reduces the amount of manual work required by providing the ability to post to accounts based on the category of the transaction when the transaction originates from intercompany.

Feature details

With this update, customers using intercompany support for time within the Finance and Operations stocked scenarios can define a posting profile based on dimensions in the lending company. These changes improve the lending company's ability to map transactions and improve the reporting capability while reducing the work required to perform them manually.

Modernize user experiences for time entry

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

Business value

Reduce the number of clicks and improve the user experience in time entry for consultants working on projects.

Feature details

This feature updates the time entry grid experience by aligning with the new OneGrid control. These improvements provide modern, new experiences such as:

- Inline editing for header and time entries
- In-table record creation
- Improved field customization support
- Optimizing for improved usability, accessibility, and extensibility

These changes will be released in stages to allow customers to move into the new grid experience when the feature set meets their needs while allowing us to ensure the best possible experience for all users.

Our first release will include basic time entry capabilities, like what is possible today in the grid, but will be built on the new OneGrid control. During this wave we will build the underlying infrastructure that allows us to add more extensive features in subsequent waves.

Modernize user experiences in sales, billing, and pricing

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

Business value

These enhancements reduce the number of clicks and improve the user experience in sales, estimation, and execution of projects.

Feature details

With investments in key features in the Unified Interface client during the last couple of releases, there's an opportunity to improve the user experience in the following areas:

- Project estimation experience during the sales cycle and project execution
- Invoice creation and editing
- Transaction Correction flows

The Project Operations team will be evaluating these areas with respect to the number of clicks, the availability of key information needed on screen to perform the required action, and other user experience paradigms. In the process, we'll be looking to uptake editable grids, quick actions, main form dialogs, and other newer constructs available on the Unified Interface client. This will be a recurring area of investment across multiple release waves with this release wave focusing on sales and estimation areas of projects.

Progress-based billing on fixed price contracts

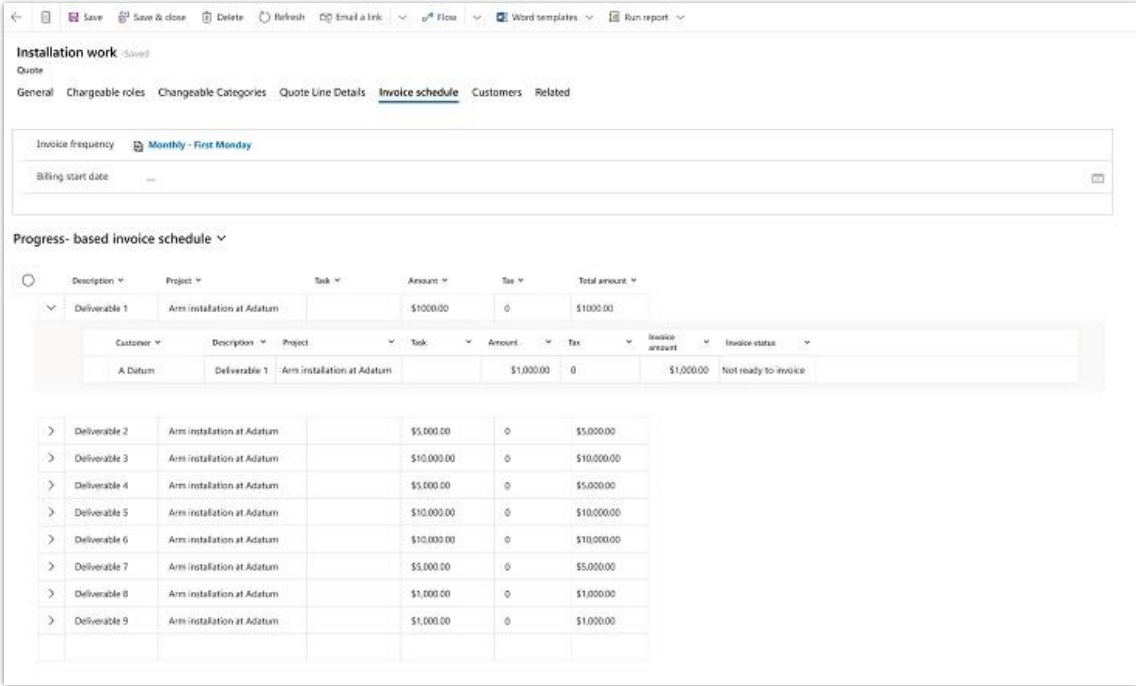
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2023	Mar 2023

Business value

This feature supports additional progress-based contracting models for project-based companies.

Feature details

Dynamics 365 Project Operations currently supports a milestone-based billing schedule so that companies can invoice their customers at predetermined amounts and dates during the course of the project. However, a variation of this exists where a portion of the milestone is invoiced each period instead of the whole milestone. This feature enables project managers to split the value of the contract into a distinct schedule of values that are invoiced based on the progress of the work.



Screenshot of a progress-based billing schedule

Project budgeting and time-phased forecasting

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

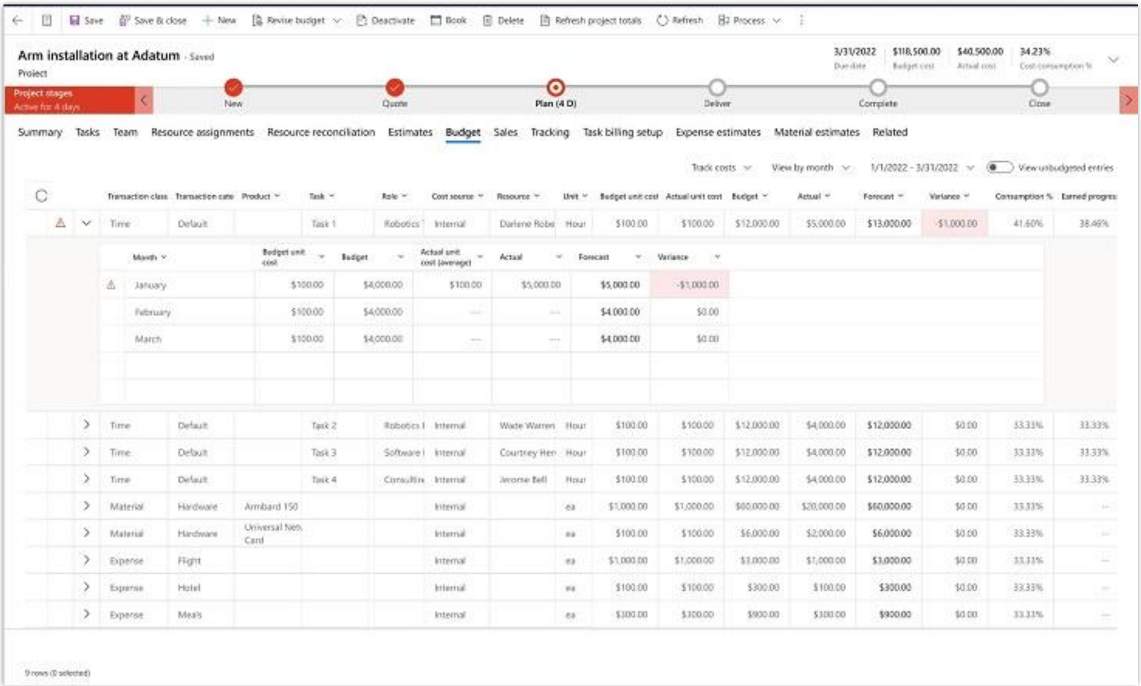
Business value

This feature provides better control over status of spend and work progress and helps project managers forecast trends for the future duration of the project.

Feature details

A project budget is a versioned snapshot of the financial estimation of time, expenses, and materials required on the project. Project managers can create these snapshots at different periods during the project life cycle based on revisions and re-estimations of project scope and work.

The latest snapshot represents the best-known scope of the project at any given time. All tracking of spend and consumption will be tracked against the latest snapshot. Project Operations adds this key capability to help the project manager get a clear view of how they are tracking to their spend and progress targets. This opens up the ability to add forecasts based on current spending trends, and tracks these within a desired granularity of periods that are configured using project calendars and working days. Comparison of actual spend to budgeted spend and forecasted spend will help project managers come up with earned value analysis for their project to understand schedule and financial progress.



Project budgeting sample screen that shows budget vs. actuals, variances, and forecast values

Plan and prepare for Finance and Operations cross-app capabilities in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Finance and Operations cross-app capabilities**.

Overview

Finance and Operations cross-app capabilities apply to all Finance and Operations apps, including Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations.

To enable businesses everywhere to accelerate their digital transformation, we are continuously enhancing the platform and services that support Finance and Operations apps with new capabilities. As we add product enhancements rapidly, we deliver frequent updates that help customers stay current in a consistent, predictable, and seamless manner. The key driver for the new core capabilities is increasing productivity and investment return.

Investment areas

One Dynamics One Platform
One Dynamics One Platform focuses on the convergence of Finance and Operations apps with Microsoft Power Platform, enabling customers to take full advantage of Power Platform with each Finance and Operations environment. These features improve the development, administration, and user experiences by removing barriers, tightening integrations, and enhancing cross-platform capabilities. In this release, we will make strides toward enabling a one-transaction developer experience, in which there is true transactional consistency between Finance and Operations apps and Microsoft Dataverse. Dataverse virtual tables for Finance and Operations apps will have improved performance and reliability. Developers will be able to select multiple legal entities to filter event registrations for Finance and Operations apps business events and data events. We will also converge the Finance and Operations batch framework with Dataverse jobs, maintaining a single scheduler across the platforms.

Finance and Operations API
The Finance and Operations API provides a simple and uniform way for developers to create integrations with the Finance and Operations service. We will enhance the performance and reliability of the service by implementing service protection API limits and related guidance on optimizing API integrations.

Cross-application features
Cross-app features provide ease of use to all users of Finance and Operations apps. These capabilities improve development, administration, and user experiences by addressing some of the key shortcomings we've heard from our customers.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Finance and Operations cross-app capabilities** below:

Check out the release plan

For application administrators

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

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

What's new and planned for Finance and Operations cross-app capabilities

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Cross-application features

Capabilities and features that apply to all Finance and Operations apps.

Feature	Enabled for	Public preview	General availability
Updates to client feature states with version 10.0.29	Users, automatically	Aug 2022	Oct 2022

Finance and Operations API

Enhancements to the Finance and Operations service API

Feature	Enabled for	Public preview	General availability
Increase stability with service protection API limits	Admins, makers, marketers, or analysts, automatically	Sep 2022	Oct 2022

One Dynamics One Platform

One Dynamics One Platform focuses on the convergence of Finance and Operations apps with Microsoft Power Platform, enabling customers to take full advantage of Power Platform with each Finance and Operations environment.

Feature	Enabled for	Public preview	General availability
Filter events by legal entity	Admins, makers, marketers, or analysts, automatically	Jul 2022	Oct 2022
Customer-managed encryption key using your Azure Key Vault key	Users by admins, makers, or analysts	Oct 2022	Jan 2023

Description of **Enabled for** column values:

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

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

Cross-application features

Overview

Cross-app features provide ease of use to all users of Finance and Operations apps. These capabilities improve development, administration, and user experiences by addressing some of the key shortcomings we've heard from our customers.

Updates to client feature states with version 10.0.29

Enabled for	Public preview	General availability
Users, automatically	Aug 2022	Oct 2022

Business value

This information helps customers stay current on the latest client capabilities of Finance and Operations apps.

Feature details

Mandatory features with the 10.0.29 release

- Saved views / Personalization
- Saved views
- Designate fields as required using personalization
- Translation support for organization views
- Improved legal entity support for saved views
- Full page apps
- Grid
- New grid control
- Grouping in grids
- Freezing columns in grids
- Other
- Align combo box interactions with lookup controls
- Allow admins to select default document types

- Allow configuration of the publish batch size in the Excel add-in
- Visual update for wizards
- Open-source software update - Upgrade to jQuery UI 1.13.0

Enabled-by-default features with the 10.0.29 release

These features will be turned on by default, but can still be manually disabled. These features are all targeted to become mandatory with 2023 release wave 1.

- Saved views support for dialogs
- Allow queries to be saved to views on Task Single and Task Double pages
- Allow users to select and change tile sizes
- Streamline tabbing behavior in full-page forms
- Removal of header/lines proxy buttons
- Optimize loading of Action center notifications

Finance and Operations API

Overview

The Finance and Operations API provides a simple and uniform way for developers to create integrations with the Finance and Operations service. We will enhance the performance and reliability of the service by implementing service protection API limits and related guidance on optimizing API integrations.

Increase stability with service protection API limits

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	Oct 2022

Business value

Service protection limits increase system performance and reliability. They also help to ensure that inefficient integrations or those with malintent don't bring down the service or cause a degraded experience.

Feature details

We will increase system performance and reliability by enabling service protection limits for OData and custom integrations. Requests that exceed the imposed service protection limits will be throttled, receiving a 429 response to the request. We will provide guidance for managing the service protection limits with your integrations.

One Dynamics One Platform

Overview

One Dynamics One Platform focuses on the convergence of Finance and Operations apps with Microsoft Power Platform, enabling customers to take full advantage of Power Platform with each Finance and Operations environment. These features improve the development, administration, and user experiences by removing barriers, tightening integrations, and enhancing cross-platform capabilities. In this release, we will make strides toward enabling a one-transaction developer experience, in which there is true transactional consistency between Finance and Operations apps and Microsoft Dataverse. Dataverse virtual tables for Finance and Operations apps will have improved performance and reliability. Developers will be able to select multiple legal entities to filter event registrations for Finance and Operations apps business events and data events. We will also converge the Finance and Operations batch framework with Dataverse jobs, maintaining a single scheduler across the platforms.

Filter events by legal entity

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

Business value

Applying filters to the event subscription streamlines the configuration experience for events in Power Automate when there is a need to register only in specific legal entities. This also improves performance by reducing the volume of unnecessary event traffic.

Feature details

When using the Microsoft Dataverse triggers in Power Automate to subscribe to Finance and Operations events, there is often a need to filter the event subscription on legal entity. To enable filtering on legal entity for business events, we will add an option on the **When an action is performed** Dataverse trigger to define the legal entities for which the event registration will be applied. The option will be available to define multiple legal entities in a single registration, rather than needing to create a separate flow for each legal entity.

The filter will be applied in the callback registration in Finance and Operations apps. This means that, rather than sending the event from Finance and Operations apps for all legal entities—and having Power Automate filter out the undesired events in the flow—Finance and Operations apps won't send events that don't meet the legal entity filter criteria. This will also be true when a legal entity is selected for filter criteria in the **When a row is added, modified, or deleted** Dataverse trigger. By applying the legal entity filter in the callback registration, we're able to improve performance by reducing the traffic of unwanted events being sent.

Customer-managed encryption key using your Azure Key Vault key

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2022	Jan 2023

Business value

This feature will allow customers to meet their data and privacy policy.

Feature details

Customers can use their own encryption key from their own Azure Key Vault to encrypt their Microsoft Power Platform environment database at rest. The encryption key is used to encrypt data at rest for all storage types: Azure SQL, Azure Storage, Azure Cosmos DB, Azure Data Lake Storage, and Azure Cognitive Search.

Human Resources

Plan and prepare for Dynamics 365 Human Resources in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Human Resources**.

Overview

The way we work, and the workplace has fundamentally changed—and yet, for many businesses, HR processes have not. Today people are connected via mobile devices, plugged into their network, have higher career path expectations, and want to work for organizations aligned with their values.

Legacy HCM systems are disconnected, and data is siloed across HR architectures typically made up of multiple vendor solutions. Many processes are still manual, and the employee experience is disconnected. Employee disruption ultimately impacts the organization by lacking product innovation, expensive operational errors, less satisfied customers, and suboptimal financial results.

We aim to help you limit the number of manual processes and connect your employee experiences. We also aim to bring systems together to ensure data is readily available and not siloed. Our goal is to enable employees to focus on their work, inspire managers to help employees grow, and help HR business partners focus on strategic areas of the organization.

For 2022 release wave 2, our themes are:

- **Improve efficiency** by limiting manual decisions and tasks for HR business partners, managers, and employees.
- **Expand the HCM ecosystem** to include learning management system integration through public APIs leveraging Dataverse.
- **Build better together experiences** that cross the Dynamics 365 space and Microsoft Viva.

Investment areas

Benefits management
Benefits management provides a flexible solution that supports a wide variety of benefit options. Human Resources also includes an easy-to-use employee experience that showcases your benefit offerings.

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.

Integrations and extensibility
We're making new integrations available and providing new features that streamline custom integrations through Microsoft Dataverse and with other Microsoft products.

Organization and personnel management
Organization management in Human Resources lets you define the groups, legal entities, operating units, and hierarchies in your organization. Personnel management allows managers and HR users to start the hiring process for a position, set up the approval process, and manage employees and positions.

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

[Check out the release plan]

For application administrators

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

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Get the most out of Human Resources

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

What's new and planned for Dynamics 365 Human Resources

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

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

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

Benefits management

Benefits management provides a flexible solution that supports a wide variety of benefit options including an easy-to-use employee experience that showcases your benefit offerings.

Feature	Enabled for	Public preview	General availability
Benefits notifications inform employees about key events	Users by admins, makers, or analysts	Sep 2022	Jan 2023
Use bulk editing in benefits management administration	Users by admins, makers, or analysts	Oct 2022	Mar 2023

Integrations and extensibility

We're making new integrations available and providing new features that streamline custom integrations through Microsoft Dataverse and with other Microsoft products.

Feature	Enabled for	Public preview	General availability
Enable resource management integration	Users by admins, makers, or analysts	Oct 2022	Mar 2023
Integrate training data from learning management providers	Users by admins, makers, or analysts	Oct 2022	Mar 2023
Create employee profile with Microsoft Viva integration	Users by admins, makers, or analysts	Oct 2022	Mar 2023

Leave and absence

The leave and absence workspace provides a flexible framework for creating new leave plans, workflows for managing requests, and an intuitive self-service page for employees to request time off.

Feature	Enabled for	Public preview	General availability
Configure, track compliant employee time and attendance	Admins, makers, marketers, or analysts, automatically	Oct 2022	-
Manage employee sick leave	Users by admins, makers, or analysts	Sep 2022	Jan 2023

Organization and personnel management

Organization management in Human Resources lets you define the groups, legal entities, operating units, and hierarchies in your organization.

Feature	Enabled for	Public preview	General availability
Complete HR business processes more efficiently	Admins, makers, marketers, or analysts, automatically	Oct 2022	Mar 2023

Description of **Enabled for** column values:

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Benefits management

Overview

Benefits management provides a flexible solution that supports a wide variety of benefit options. Human Resources also includes an easy-to-use employee experience that showcases your benefit offerings.

Benefits notifications inform employees about key events

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2022	Jan 2023

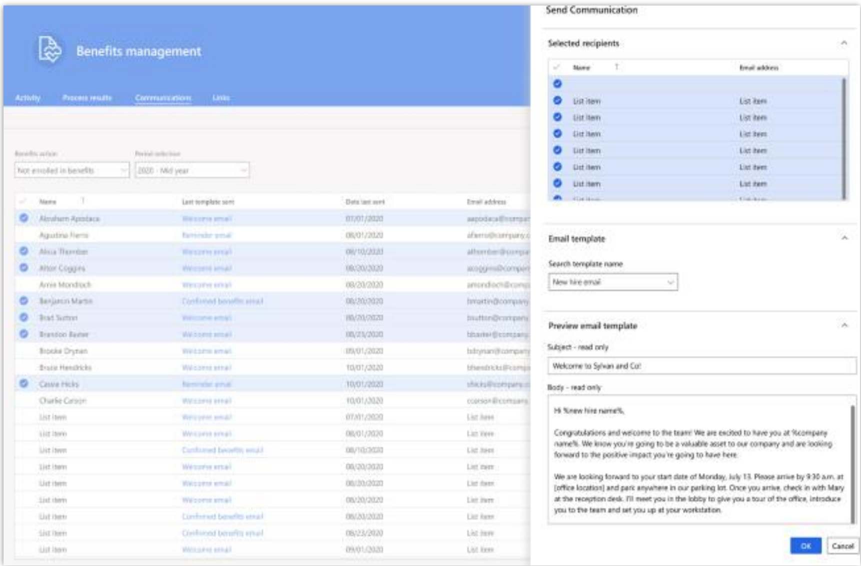
Business value

Employees often need to be contacted about their benefits. The benefits notifications feature allows benefits administrators to contact employees through email based on the employee's benefits enrollment progress. Email notifications can be used to send instructions to employees or reminders to complete their enrollment.

Feature details

Enhancements to benefits notifications will help benefits administrators notify:

- Employees of their open enrollment status.
- Employees about plan updates due to qualifying events.
- New hires when they are able to select their benefits.



Benefit notification definition

Use bulk editing in benefits management administration

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2022	Mar 2023

Business value

This feature simplifies the user experience by adding bulk editing capabilities to benefits management administration in Dynamics 365 Human Resources.

Feature details

Often, benefits administrators enroll employees or confirm the selections employees make from **Employee self service**. Currently, the only way to do that is through the **Worker benefits update** page on an employee-by-employee basis, which can be time-consuming and repetitive.

With the new inquiry view, benefits administrators will be able to:

- Quickly select and confirm the selection of all employee benefit enrollments.
- Look at different data pivots based on plan types and plan bundles, and make 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.

Integrations and extensibility

Overview

We're making new integrations available and providing features that streamline custom integrations through Microsoft Dataverse and other Microsoft products.

Enable resource management integration

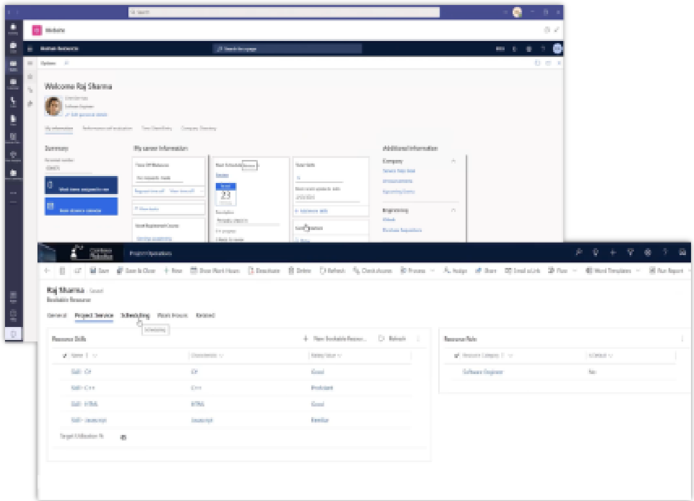
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2022	Mar 2023

Business value

This new capability enhances the resource manager experience by bringing together all the employee information around skills, time, and more in Human Resources so it can be used when resourcing projects.

Feature details

Service-centric customers aspire to deploy a cohesive end-to-end story from resource demand to billable time. Along this journey, collaboration is needed between HR and the operations team. The availability, cost, and absence of the employee require alignment to reflect accurate information for project-based planning. For many companies, this handoff is a point of friction and duplication. Often, it's not clear what the system of record should be as it is related to defining the resource's capabilities, experience, and availability. Integration between universal resource scheduling and Human Resources will close this gap. This will ensure billable resources will have their contributions to the organizations financially tracked and document their professional growth.



Employee information available in resource management

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.

Integrate training data from learning management providers

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2022	Mar 2023

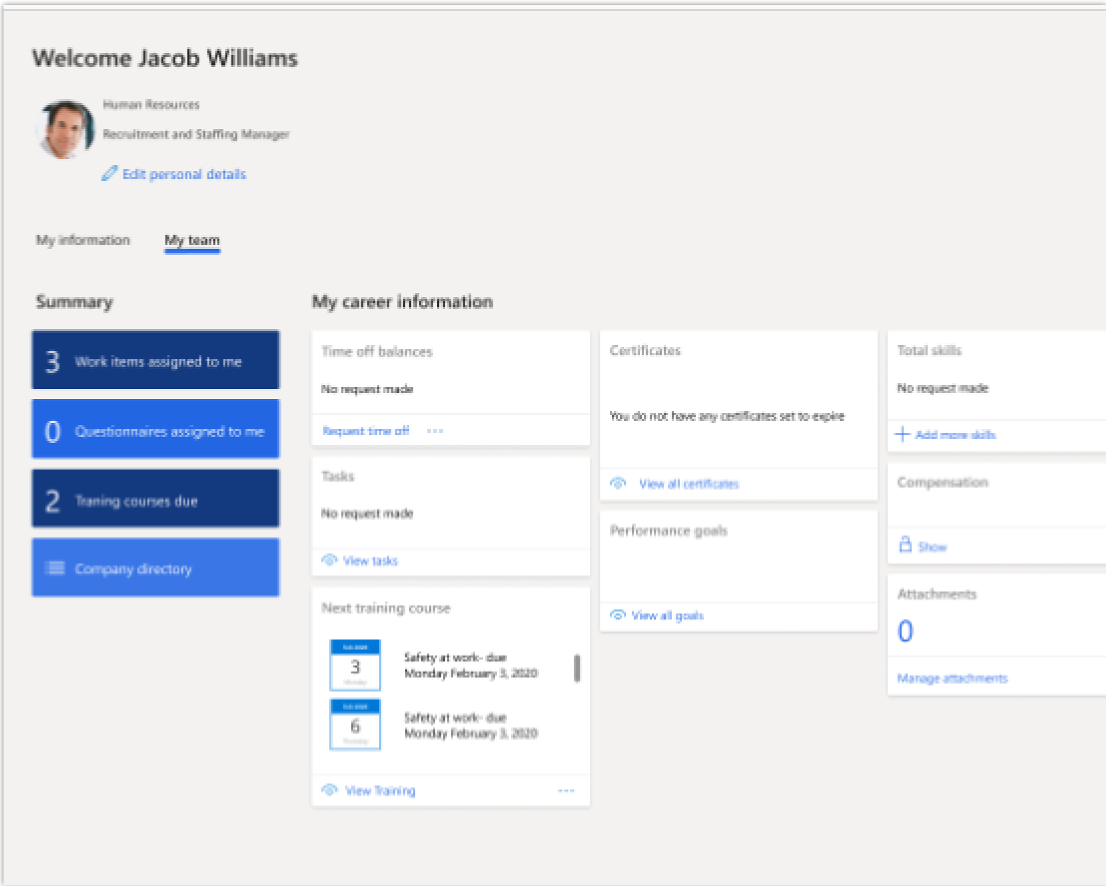
Business value

This new capability will enhance employee, manager, and HR business partner experiences by bringing together all the training data from partner learning management systems in a single view, right next to all other employee data.

Feature details

With the continued globalization of workforces, the ability to assign, deliver, and track employee training is becoming more of a challenge for companies than ever before. To bring the utility of existing learning management systems closer to Dynamics 365 Human Resources, we need to build integrations with partners. This will fill a gap in functionality by creating a centralized place to view training data right next to all their other employee data.

We will create a set of scenario-specific APIs in our integration platform, based on Microsoft Dataverse, that are streamlined to enable partners to quickly create tight integrations with Human Resources. This will enable an end-to-end scenario of assigning online training to an employee for companies using a wide range of partner-learning management systems.



Learning content from learning management system available to employee

Thank you for your idea

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

Create employee profile with Microsoft Viva integration

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2022	Mar 2023

Business value

This new capability will provide a consistent employee profile across the business and a single area for employees to maintain this information.

Feature details

Bringing together employee data with the employee experience is a gap for most organizations that are looking to transform their human resources processes.

Having a consistent employee profile across the business and a single area for employees to maintain this information is key. By integrating employee profile information with Microsoft Viva, we'll enable companies to give employees this cohesive experience while also simplifying their employee data footprint.

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.

Configure, track compliant employee time and attendance

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

Business value

This capability will allow organizations to configure and track compliant employee time and attendance.

Feature details

Compliance-based time and attendance solutions enable organizations to meet the regulatory requirements in their geographies. Dynamics customers today use time and attendance to capture time that drives costing and billing, not compliance. Providing a compliance-based time and attendance solution enables organizations to configure time entry to meet compliance needs.

This feature will enable:

- Human resources to configure rules for time entry.
- Employees to enter compliant time sheets for approval.
- Managers to approve compliant time sheets.
- Employees to leverage leave data during time entry.

Manage employee sick leave

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2022	Jan 2023

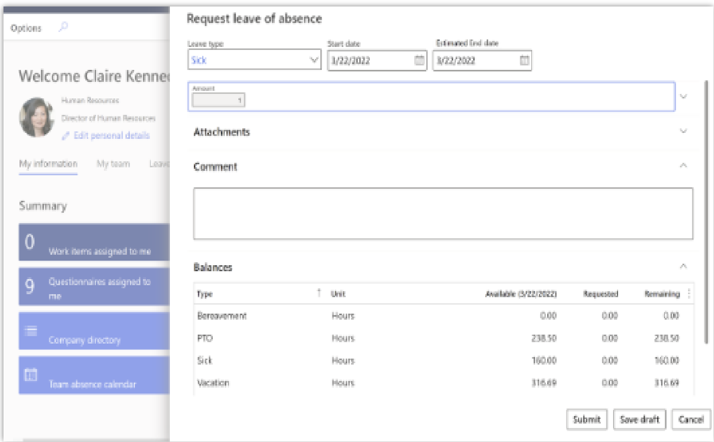
Business value

This feature provides organizations with the ability to manage employee sick leave in more detail to meet company and regulatory policies.

Feature details

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.



Open ended leave request

Organization and personnel management

Overview

Organization management in Human Resources lets you define your organization's groups, legal entities, operating units, and hierarchies. Personnel management allows managers and HR users to start the hiring process for a position, set up the approval process, and manage employees and positions.

Complete HR business processes more efficiently

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2022	Mar 2023

Business value

This capability will enhance human resources manager experiences by providing more efficient processes when dealing with employee information and Human Resources business processes.

Feature details

HR struggles with not having the right information available when hiring employees and missing critical steps in the onboarding process. Too much time is spent enrolling or unenrolling employees individually from offered HR programs. HR pros will have the ability to tailor experiences and automatically complete processes, such as setting defaults for hiring, automatically assigning guides based on job or position information, and automatically enrolling employees in compensation, benefit, and leave plans based on certain criteria.

Thank you for your idea

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

Commerce

Plan and prepare for Dynamics 365 Commerce in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Commerce**.

Overview

Dynamics 365 Commerce is an end-to-end solution delivering seamless commerce across all channels. It encompasses sales, mobility, intelligence, and productivity, to help customer-facing businesses achieve more in a cloud-first, mobile-first way. The solution offers comprehensive support to operate a broad range of business processes, including e-commerce, point of sale, call center, clienteling, merchandising, inventory, and channel management, while providing a unified and immersive customer experience for B2C and B2B engagements across physical and digital channels.

There are many areas that are being invested in for Dynamics 365 Commerce as a part of 2022 release wave 2. Organizations can leverage Commerce to drive better business outcomes by:

- **Engaging customers across channels**: Give your customers or partners the option to purchase when, how, and where they want — on any device — by delivering a frictionless and consistent engagement across physical and digital channels.
- **Building your e-commerce presence**: Grow your business with a unified digital commerce solution that scales to meet your needs and is optimized for both business (B2B) and consumer (B2C) sales.
- **Enabling AI-driven intelligent commerce**: Delight your customers with engaging, personalized, and item-based AI-powered recommendations discovery experiences to increase repeat visits, customer retention, and loyalty.
- **Modernizing retail stores and streamlining operations**: Create personalized and friction-free retail commerce experiences through user-friendly applications powered by robust back-office operations.
- **Gaining agility and scalability through a natively headless solution**: Support traditional and emerging channels by using an agile, API-driven headless commerce engine to help adapt to current and emerging needs. Employ a configurable and extensible platform that expands and grows to fit your business needs.

Key features for this release include:

- **New B2B e-commerce business opportunities**: New capabilities such as sales agreements, and on-behalf-of ordering to facilitate and grow B2B business opportunities.
- **Streamlined omnichannel media management**: Leverage new workflows in headquarters to manage media assets that are used across channels.
- **More performant point of sale**: The Store Commerce app, available for Windows, Android, and iOS, delivers better performance, easier serviceability and more deployment choices.
- **New digital wallet options**: E-commerce customers benefit from out-of-box support for Apple Pay and Google Pay.
- **Customer service chat options for e-commerce**: Use chat to connect customers with call center agents or virtual agents on your e-commerce site.

Investment areas

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

Check out the release plan

For application administrators

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

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

Get the most out of Commerce

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

What's new and planned for Dynamics 365 Commerce

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Feature	Enabled for	Public preview	General availability
Chat in Commerce with Omnichannel for Customer Service	Admins, makers, marketers, or analysts, automatically	Aug 2022	Oct 2022
Support B2B partner catalogs in e-commerce channel	Admins, makers, marketers, or analysts, automatically	-	Oct 2022
Enable B2B sales agreement and contract-based pricing	Admins, makers, marketers, or analysts, automatically	Aug 2022	Oct 2022
Integrate e-invoices in retail stores in Saudi Arabia	Users by admins, makers, or analysts	Sep 2022	Oct 2022
Chat in Commerce with Power Virtual Agents	Admins, makers, marketers, or analysts, automatically	Sep 2022	Nov 2022
Use Store Commerce app with network peripheral support	Admins, makers, marketers, or analysts, automatically	Oct 2022	Nov 2022
Order on behalf of a B2B user	Admins, makers, marketers, or analysts, automatically	-	Jan 2023
Enable Commerce localization features for new Commerce SDK	Users by admins, makers, or analysts	-	Feb 2023
Create purchase orders from POS	Users by admins, makers, or analysts	Oct 2022	Feb 2023
Enable Apple Pay with Dynamics 365 Payment Connector for Adyen	Users by admins, makers, or analysts	Oct 2022	Feb 2023

Feature	Enabled for	Public preview	General availability
Enable Google Pay with Dynamics 365 Payment Connector for Adyen	Users by admins, makers, or analysts	Oct 2022	Feb 2023
Use integrated omnichannel media management features	Admins, makers, marketers, or analysts, automatically	Jan 2023	Mar 2023

Description of **Enabled for** column values:

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

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

Chat in Commerce with Omnichannel for Customer Service

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

Business value

A first-class customer support experience is key to providing a personalized and delightful commerce experience for consumers. Multiple commerce touchpoints exist today, such as physical stores, online channels, and social channels. Consumers expect a personalized support experience in all of them.

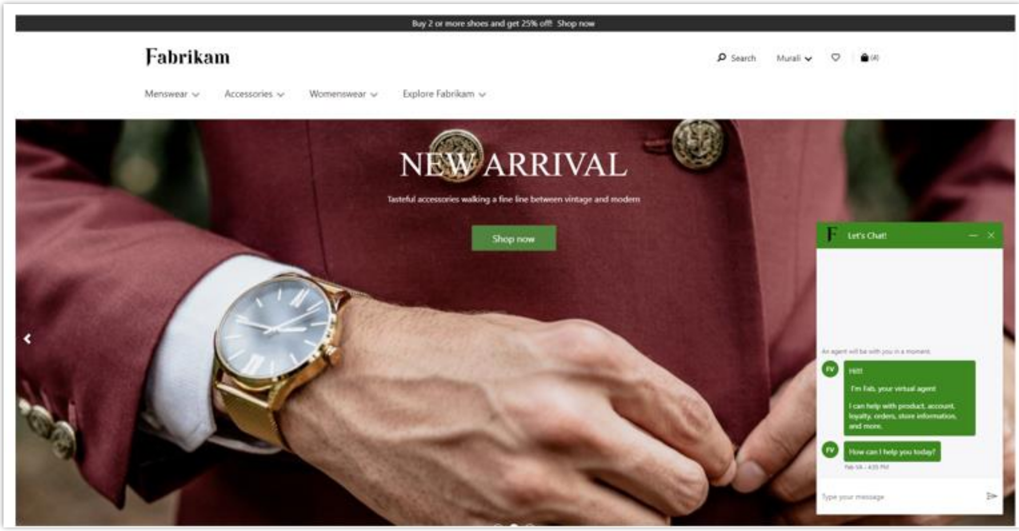
This feature helps you increase cart conversions to sales, increase personalized engagement with consumers, and enhance customer service by integrating a human agent and self-service using Power Virtual Agents chatbots integrated within Omnichannel for Customer Service.

Feature details

Customer service functionality is now a part of Dynamics 365 Commerce. This functionality leverages the capabilities of Dynamics 365 Omnichannel for Customer Service.

Site administrators can configure a chat widget on their e-commerce site with proactive notification capabilities based on different criteria. The chat can be invoked proactively based on different triggers like time spent on the site, number of visits to a page, cart value, or the number of items in the cart. Customer context is passed to the Omnichannel for Customer Service for the chatbot and the live agent to act on behalf of the customer.

Customer service agents can better serve customers by using a unified view of profile and transaction data across the Dynamics 365 apps in the Omnichannel for Customer Service support channel. Agents can act on data from the service channel.



Example of chat module in Dynamics 365 Commerce e-commerce.

Support B2B partner catalogs in e-commerce channel

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

Business value

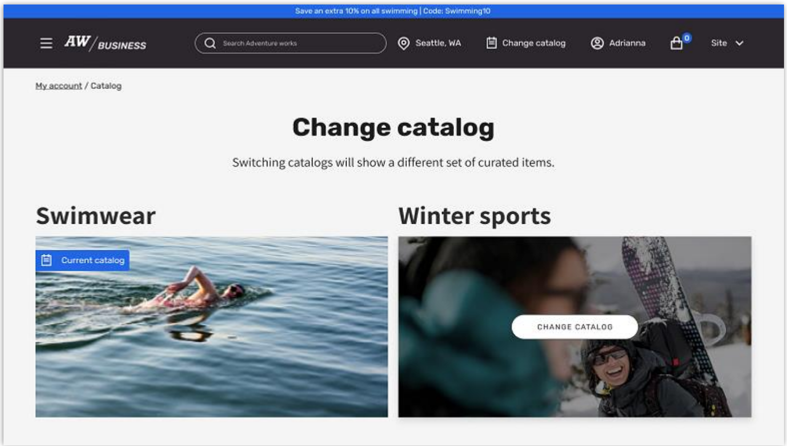
B2B seller organizations can define partner-specific product catalogs for the B2B buyers they work with. This capability enables the seller to offer a subset of products that may include special pricing to individual buyer organizations. This capability helps automate the B2B selling process for organizations and ensures that unintentional spending is reduced for their B2B buyers, as they can quickly and easily honor existing contracts.

Feature details

In a B2B e-commerce business model, B2B buyer organizations can contract to purchase a subset of products from a B2B seller organization's catalog at a special, negotiated price. Buyers will want to be shown and buy only these contracted products. This functionality can be enabled by defining one or more buyer-specific catalogs with products that have pre-negotiated prices.

The following capabilities are part of this feature:

- Associate a default catalog with an e-commerce website.
- Associate one or more catalogs with the customer hierarchies associated with a B2B buyer organization.
- Define a default catalog when more than one catalog is assigned to the buyer's hierarchy.
- Display products from the signed-in buyer's default catalog.
- Allow buyers to switch between catalogs when more than one catalog is assigned to them.



Screenshot of the UI that allows customers to switch catalogs.

Enable B2B sales agreement and contract-based pricing

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

Business value

With this new capability, B2B seller organizations can model complex buyer/seller agreements and ensure they are honored throughout the e-commerce experience, providing time to value for all parties.

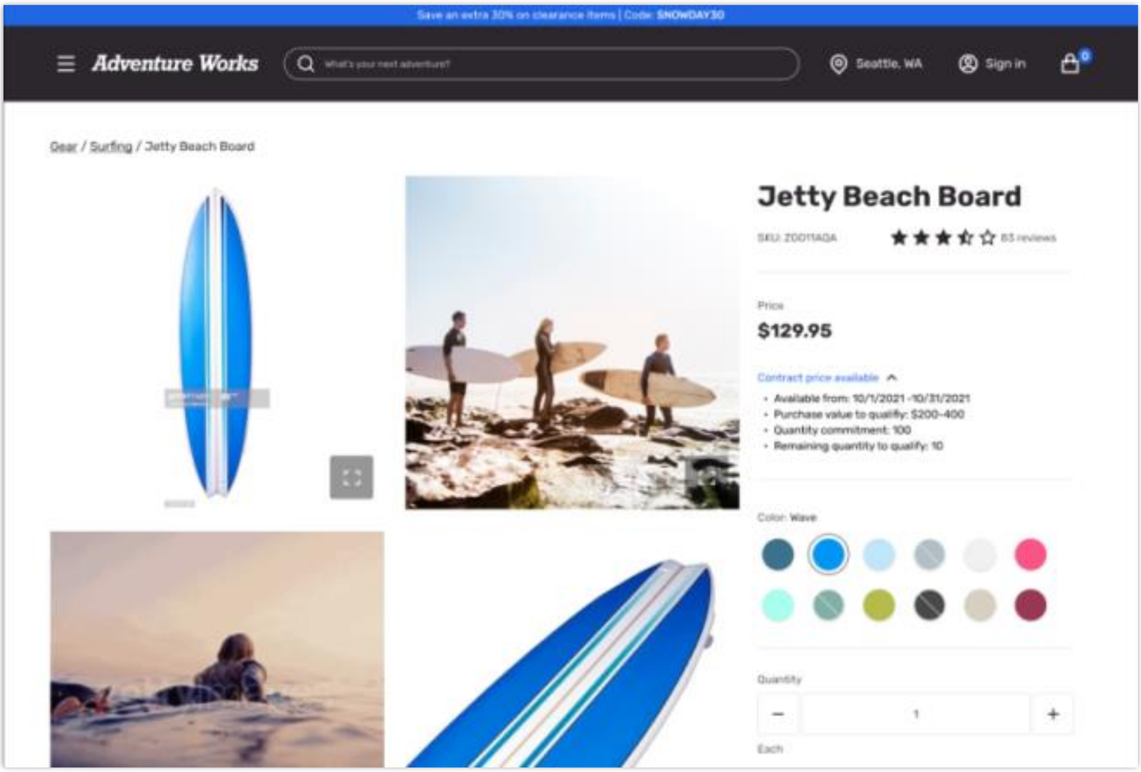
Feature details

Contracts often drive trade relationships between businesses. B2B pricing can vary for several reasons, such as customer, transaction volume, or quantity purchased. B2B buyer organizations generally expect trade agreements to incorporate a more flexible pricing strategy that reflects these complex buyer/seller agreements and use the contracts to drive the ordering experience in the selling channels.

This feature provides an end-to-end experience for B2B seller organizations to define contract-based pricing and sell products with contracted prices to B2B buyers.

The following capabilities are part of this feature:

- B2B seller organizations can use sales agreements in Commerce headquarters to define contract-based pricing for products that incorporate volume, quantity, and validity period criteria.
- When a B2B buyer shops on the e-commerce website, the contract-based pricing configured for the B2B buyer organization is automatically applied to the entire product discovery, purchase, and checkout experience.



Business partners can see contract-based pricing on B2B e-commerce website product details page.

Integrate e-invoices in retail stores in Saudi Arabia

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

Business value

This feature addresses the requirements of Phase 2 of the electronic invoicing implementation in Saudi Arabia as applicable to simplified e-invoices generated for sales in retail stores. It covers the requirements for the generation and cryptographic stamping of e-invoices, the printing of QR codes in receipts printed for retail sales, and submission of the simplified e-invoices to Saudi Arabian tax authorities in the format legally required in Saudi Arabia.

Feature details

The Saudi Arabian Tax Authority announced and published the electronic invoicing regulations on December 4, 2020. According to the regulations, the electronic invoice is defined as an invoice that is generated, stored, and amended in a structured electronic format through an electronic solution, which includes all the requirements of a tax invoice or a simplified invoice. A handwritten or scanned invoice is not considered to be an electronic invoice. For more details, see the regulation itself.

Simplified e-invoices are mostly used in B2C transactions where the buyer does not need to use the invoice for input value-added tax deduction. In Commerce, simplified e-invoices are generated for cash and carry and customer order sales transactions.

E-invoicing requirements, as applicable to simplified e-invoices, are mandated in phases:

- Phase 1, known as the generation phase, requires taxpayers to generate simplified e-invoices in human-readable formats and include QR codes that are compliant with the Phase 1 requirements. Phase 1 is enforceable as of December 4th, 2021. Commerce supports this scenario since 2021.
- Phase 2, known as the integration phase will be rolled out in waves by targeted taxpayer groups starting from January 1, 2023. It will involve the introduction of Phase 2 technical and business requirements for electronic invoices and electronic solutions, and the integration of these electronic solutions with ZATCA's (Zakat, Tax and Customs Authority) systems.

To comply with the Phase 2 requirements, as applicable to simplified e-invoices, the following functionality is available in Commerce:

- Generation of an XML file of a simplified e-invoice upon concluding a sales transaction in Commerce point of sale.
- Generation of a cryptographic stamp for the simplified e-invoice.

- Generation and printing of QR code for the simplified e-invoice that includes the cryptographic stamp.
- Submission of the simplified e-invoice from Commerce headquarters to Saudi Arabian tax authorities for reporting purposes.

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

Chat in Commerce with Power Virtual Agents

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	Nov 2022

Business value

A first-class customer support experience is key to providing a personalized and delightful commerce experience for consumers. Multiple commerce touchpoints exist today, such as physical stores, online channels, and social channels. Consumers expect a personalized support experience in all of them.

This feature will give a choice to use Power Virtual Agents, as a chat bot on an e-commerce site, without needing to use Omnichannel for Customer Service.

Feature details

Customer service functionality is now a part of Dynamics 365 Commerce. This functionality leverages the capabilities of Power Virtual Agents.

Site administrators can configure a chat widget on their e-commerce site with proactive notification capabilities based on different criteria. The chat can be invoked proactively based on different triggers like time spent on the site, number of visits to a page, cart value, or number of items in the cart. Customer context is passed to Power Virtual Agents.

Use Store Commerce app with network peripheral support

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2022	Nov 2022

Business value

Retailers with iOS and Android devices can benefit from the robust and performant Store Commerce app. This app provides more deployment choices, improved performance, easier updates, and better long-term framework support for both iOS and Android device administrators and users. The Store Commerce app in Dynamics 365 Commerce is the next generation offering for physical stores. It unifies Modern Point of Sale and Cloud Point of Sale (CPOS) into a single app and offers superior application lifecycle management (ALM).

Feature details

Previous versions of the Store Commerce app and the hybrid app for iOS and Android were shipped as source code in the Retail SDK. Developers were required to build these apps to generate the packages, but there was no support for native hardware integration on iOS. To simplify the app ALM experience, the Store Commerce app for iOS and Android will be published to the iOS and Android stores as native apps for retailers to download and use. The app will host CPOS with support for some network hardware devices like printers, scanners, and payment terminals.

Order on behalf of a B2B user

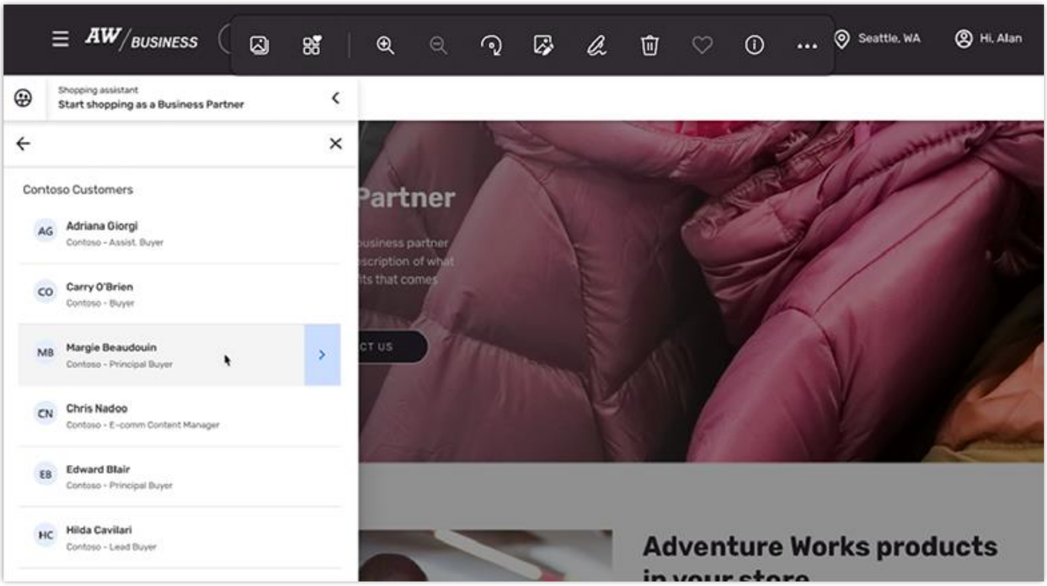
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Jan 2023

Business value

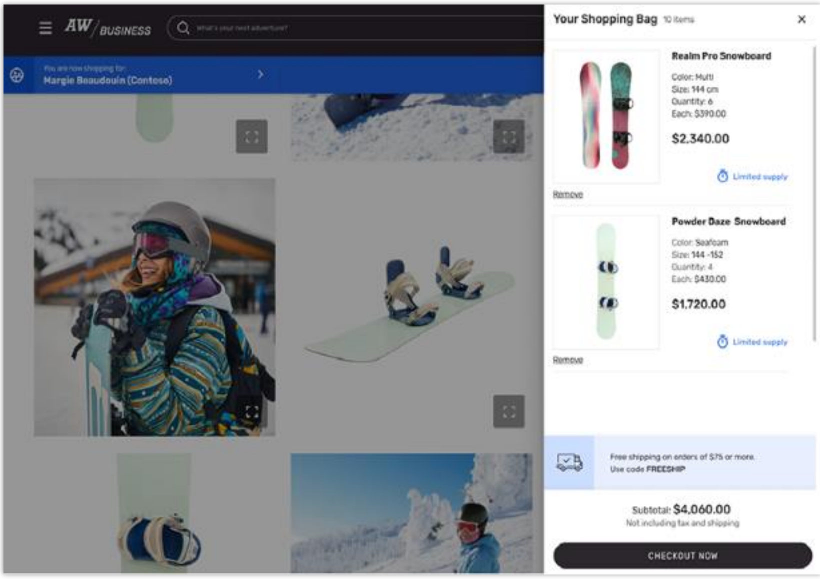
This new functionality allows B2B account managers to sign into the B2B e-commerce website on behalf of the B2B buyers they work with. The account manager can see all the same information that the buyer sees and can take actions such as adding items to the cart and placing orders. This capability is extremely useful when a buyer is experiencing difficulties and needs an account manager’s assistance or needs to complete a purchase offline.

Feature details

B2B account managers can sign in to the B2B e-commerce website and select a B2B buyer organization and buyer that they want to work on behalf of. The account manager can then view the same products, prices, promotions, and discount experience as the buyer and can add items to a cart and place orders on behalf of the buyer. This capability enables scenarios where account managers receive orders offline and must enter those orders into the system on behalf of the buyer.



An account manager selects a business partner to order on their behalf.



Account manager is placing items into the shopping cart on behalf of the business partner.

Enable Commerce localization features for new Commerce SDK

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

Business value

Before this feature was added, many Commerce localization features were delivered as part of the out-of-the-box product, but they had to be enabled via extension configuration files for corresponding Commerce components, requiring additional configuration steps. Some end-to-end localization solutions, such as various fiscal integration samples, were included in the Retail SDK and were required to be packaged with other customizations. The new feature provides the possibility to enable Commerce localization features from Commerce headquarters by using the feature management framework or parameters. Fiscal integration samples are included in the new Commerce SDK and support independent packaging, thereby reducing Commerce deployment, configuration, and maintenance efforts. This feature also enables the adoption of the Store Commerce app by global Commerce customers.

Feature details

With this new functionality, Commerce localization features are delivered either as end-to-end sample solutions included in the Commerce SDK on GitHub or included out-of-the-box in the core Commerce solution. In the latter case, you no longer need to enable Commerce localization features by using extension configuration files. You also no longer have to rebuild point of sale (POS) when enabling these features. Instead, you can enable the features from Commerce headquarters in the **Feature management** workspace, **Commerce parameters** page, functionality profiles, and more.

The features concerned include:

- Localized audit events for Austria, France, and other countries or regions.
- Custom receipt fields for the Czech Republic, Germany, and other countries or regions.
- Localized end-of-day statements (X- and Z-Reports) for France, Norway, and other countries or regions.
- Localized customer information, such as tax registration ID or lottery code, for Brazil, India, and other countries or regions.

For end-to-end sample localization solutions included in the Commerce SDK, such as various fiscal integration samples, you can use the modern independent packaging and extension approach.

You can also use all Commerce localization features with the Store Commerce app.

Below is the timeline for Commerce localization features per country or region:

- Features for Austria, the Czech Republic, France, Germany, Italy, Norway, Poland, and Saudi Arabia are currently planned for October 2022.
- Features for India are currently planned for November 2022.
- Timeline for features for Brazil, Russia, and Sweden will be defined later.

Create purchase orders from POS

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2022	Feb 2023

Business value

Organizations use purchase orders to track the purchase, shipment, and receipt of items replenished from vendors. The current version of the Dynamics 365 point of sale (POS) app supports the receipt of purchase orders, but you have to use Commerce headquarters to create purchase orders. Enabling the creation of purchase orders in POS will eliminate the use of multiple tools and make POS the single app for store employees to handle the end-to-end purchase order business processes.

Feature details

This feature aims to add the following capabilities into the inbound inventory operation in the POS app:

- Create purchase order requests in POS.
- View purchase orders requests in POS.
- Edit purchase order requests in POS.
- Confirm purchase order requests in POS.

Enable Apple Pay with Dynamics 365 Payment Connector for Adyen

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2022	Feb 2023

Business value

Dynamics 365 Commerce provides support for Apple Pay through the native Dynamics 365 Payment Connector for Adyen for both point of sale (POS) and e-commerce checkouts using Apple Pay's checkout capability. On supported iOS devices, this functionality saves customers time during the checkout process and enables order review, updates, payment, and express checkout.

Feature details

Using the express checkout module, e-commerce customers with supported iOS devices can use their Apple Pay account information for checkout and choose order details from within the Apple Pay experience. Submitting the order from the Apple Pay experience will process and complete the order, returning the user to the order summary page.

Retail customers can also use their Apple Pay devices as a touchless payment option at the POS payment terminal. Configuration is easy using the Dynamics 365 Payment Connector for Adyen to quickly configure Apple-specific merchant account information.

Enable Google Pay with Dynamics 365 Payment Connector for Adyen

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2022	Feb 2023

Business value

Dynamics 365 Commerce provides support for Google Pay through the native Dynamics 365 Payment Connector for Adyen for both point of sale (POS) and e-commerce checkouts. This functionality enables information stored by Google to populate the billing, shipping, and email address form fields, saving consumers time during the checkout process. This benefit is proven in the industry to improve customer conversion rates.

Feature details

E-commerce customers will be able to use Google Pay on the cart and checkout pages that are configured with the express checkout module. Adding this module to the page will provide customers with the option to pre-populate the checkout form with their Google Pay account information. Customers can then review their order information and place the order efficiently while having confidence that their personal details have been captured properly.

Retail shoppers will be able to use their Google Pay devices at the POS payment terminal. Configuration for Google Pay will be easy using the Dynamics 365 Payment Connector for Adyen.

Use integrated omnichannel media management features

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jan 2023	Mar 2023

Business value

Dynamics 365 Commerce now provides native media management features shared between Commerce headquarters and site builder. This capability streamlines media asset management workflows by placing them directly where merchandising occurs in Commerce headquarters, reducing complexity for both integrators and merchandisers by providing an omnichannel media management option that works right out of the box.

Feature details

This feature addresses the need for integrated omnichannel media asset management within Commerce merchandising workflows. This functionality includes native media asset workflows to upload, choose, define metadata, and manage media assets such as product images directly within the omnichannel product merchandising workflow. The improvements work seamlessly with the point of sale and e-commerce channels and solve many product merchandising workflow issues that are difficult for detached media management implementation architectures. The improvements also provide the ability to associate video, PDF, Word, Excel, and other types of documents to a product.

Fraud Protection

Plan and prepare for Dynamics 365 Fraud Protection in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Fraud Protection**.

Overview

Microsoft Dynamics 365 Fraud Protection brings together account protection, payment protection, and loss prevention, providing a 360-degree view of the fraud landscape to partners and businesses and helping them discover and combat fraud efficiently and effectively.

In this release, we are introducing a transaction acceptance booster that enables all businesses to increase bank approval rates without having to replace their incumbent fraud provider.

Investment areas

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

Check out the release plan

For application administrators

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

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

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

Get the most out of Fraud Protection

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

What's new and planned for Dynamics 365 Fraud Protection

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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
Gain higher approval rates with transaction acceptance booster	Users, automatically	-	Oct 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.

Gain higher approval rates with transaction acceptance booster

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

Business value

Use the Dynamics 365 Fraud Protection transaction acceptance booster (TAB) to increase your business approval rating. Even businesses with incumbent fraud providers can benefit from Fraud Protection TAB and increase their fraud bank approval rates up to 200 basis points.

Feature details

Fraud Protection will introduce a new TAB offering that enables businesses to increase bank approval rates without having to replace their incumbent fraud provider.

SMB

Plan and prepare for Dynamics 365 Business Central in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Business Central**.

Overview

Dynamics 365 Business Central is a comprehensive business application solution designed and optimized for small and midsized organizations. In 2022 release wave 2, we help users get onboarded, whether they are new or existing customers of ours, by giving them easy access to the right apps to help them get started. We will improve tooltips to help new and existing users. We continue our geographic expansion, and we will improve performance and usability by making it easier to navigate menus. To help more users be more productive, we will enhance our automation story with Power Automate.

Additional updates in 2022 release wave 2 include:

- **Seamless service**: No matter the industry type of a small or midsized business (SMB), business users expect a dependable service and platform that they can run their business on.
- **Administration**: Business Central delivers a set of features for better and improved communication about the health of each environment.
- **Application**: We will continue to improve the application to support integration with Shopify. The finance and supply chain capabilities in Business Central are improved with several optimizations and enhancements so that users can run their business processes more efficiently.
- **Better with Microsoft 365**: We improve the efficiency of collaborative business processes in Microsoft Teams. Users can pin cards inside Teams, and delegated admins can now use the Excel add-in.
- **Country and regional**: In 2022 release wave 2, Business Central is generally available in more countries and regions.
- **Onboarding**: Organizations can get to productive usage faster because it's easier to discover and install apps.
- **Development tools**: We have moved entirely to Visual Studio Code where we continue to invest in areas that enhance the productivity for developers.
- **Power Platform**: More efficient automation with Power Automate so that users can set up workflows for the specific needs of their organization.

Investment areas

Onboarding
When a company decides on a cloud solution such as Dynamics 365 Business Central online, they have certain expectations for how well *connected* the solution is to surrounding business productivity services, such as banking, payroll, and electronic invoicing providers. Cloud connectivity to operational productivity services is expected with a modern business solution in the cloud. Connectivity to these types of providers largely exists already, but is not easily discovered by customers of Business Central, who will have to manually search AppSource for the right solution for their business. Thus, customers of Business Central meet some friction when they want to realize the expectations of their investments into a cloud solution. By offering customers better **discoverability**, **installation**, and **setup** of these types of apps, unnecessary friction is removed, and their business can more quickly become productive and focus on the more complex areas of onboarding.

In 2022 release wave 2, we are adding an in-product experience that will make it easy for users to find relevant *connectivity apps* that are available in AppSource. We also make these apps easy to install and easy to set up. We start with the apps that offer online bank connectivity.

The apps that are shown in this in-product experience will have certain requirements imposed upon them, such as usage and quality criteria, as well as a minimum set of features and capabilities. More information about what is required for ISVs to get apps listed will be published at a later stage.

Foundational improvements to installation and setup of AppSource apps will be added in this release, to the benefit of all ISVs who have published apps to AppSource.

Application
In 2022 release wave 2, we deliver updates based on the most popular requests for improvement.

In the financial area, we continue to improve bank reconciliation. In this release wave, we improve the test report, add a statement report with two sections for outstanding reconciliations, and provide better automation for check ledger entries.

Users will be able to reverse the journal entries from posted payment reconciliation journals. This way, they can more efficiently recover the books from mistakes that may happen. Just like with other journal entries, the user must unapply the entries manually first.

For businesses that use check payments, they will now have multiple remit addresses available for vendors.

To make financial reporting more transparent for newcomers and experienced users alike, we're renaming *account schedules* to *financial reporting*. We're also changing the feature slightly to give a better overview of the available reports. A *financial report* is now defined as a combination of *row and column definitions* plus a few parameters. This means that variants of the same report can now be stored as separate reports. The core functionality is the same, but the name changes make it easier to grasp the concepts. New templates for row and column definitions will become available in updates over the next release waves, making it easier for business users to get started and get productive.

Country and regional
More countries are added to bring Business Central to more than 100 countries. Expansion to more countries and regions is achieved through partner-led localization. Our partners create the relevant localization apps and publish them to AppSource. In combination with the built-in language offerings, Business Central is available to serve customers in more than 100 countries and regions worldwide.

Productive with Microsoft 365
The 2022 release wave 2 gives more control to administrators to manage OneDrive and Excel, while business users benefit from enhancements to report layouts and how they can edit data in Excel.

Reporting
The 2022 release wave 1 introduced Excel layouts for reports. In 2022 release wave 2, we'll continue to improve this experience.

When a business user runs a report with an Excel layout, they can now choose the Excel layout in the report's request page. For example, if a report has several Excel layouts, the user can choose the exact layout they want when they run the report.

In addition to the Excel layout capability, we're creating an API for the finance area that can be consumed in both Excel and Power BI. This way, users can create their own more detailed analysis on data from the general ledger and G/L budgets with dimensions. We'll provide a new template Power BI app that is based on the new API. The app will be published to the BCTech Samples GitHub repo for users who want to get started with reporting in Power BI. The Power BI app contains a set of standard financial reports and a dashboard with financial KPIs and aggregated general ledger info.

User experiences
Information workers who connect to Business Central from the desktop app, browser, or their mobile device benefit from improved usability, accessibility, performance, and stability

in 2022 release wave 2. Users looking to increase their efficiency can take advantage of powerful new capabilities when they work across companies.

Governance and administration
In 2022 release wave 2, Business Central provides a set of admin and governance capabilities to help admins and IT pros set up, secure, manage, govern, and monitor customer environments. We add and improve several capabilities to make it easier to keep up with important service notifications, to automate and manage operations at scale, across many customers and environments, with service-to-service authentication to the Admin Center API. Admins will be able to recover any environments that were recently deleted, which keeps customer data safe.

Development
Demand for developers is continuously rising worldwide, increasing the requirement for attracting and raising the productivity of Business Central AL developers. In this release wave, we continue the investment in our Visual Studio Code experience by adding visual abstractions on top of AL code. This way, we bring better and more efficient management of AL objects across projects and workspaces and respond to the requests from multiple productivity partners across the tools experience. We are also investing in building new AL constructs for writing more performant code, as well as defining a more flexible and more consistent action pane structure in our clients.

Microsoft Power Platform
Building on top of the work delivered so far, we continue to improve the way that Business Central integrates with Power Platform: Power BI, Power Automate, Power Apps, Logic Apps, Power Virtual Agents, and Dataverse.

This includes improvements to the Power BI integration as well as the Power Automate connector and the **Automate** action—bridging Business Central and Power Automate with a modern toolset that empowers makers and citizen developers to easily extend and connect Business Central with other systems.

We also continue improvements for our Dataverse virtual tables data change events so that our partners can use Dataverse as a platform for more ambitious integrations.

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.

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

[Check out the release plan]

For application administrators

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

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

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

Get the most out of Business Central

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

What's new and planned for Dynamics 365 Business Central

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Application

In 2022 release wave 2, we deliver updates based on the most popular requests for improvement. We'll invest in better reporting, and several improvements to the finance and supply chain areas.

Feature	Enabled for	Public preview	General availability
Better bank reconciliation for checks	Users, automatically	Sep 2022	Oct 2022
Extended text functionality for VAT clauses	Users, automatically	Sep 2022	Oct 2022
Financial reporting replaces account schedules	Users, automatically	Sep 2022	Oct 2022
New VAT Date field on documents and entries	Users, automatically	Sep 2022	Oct 2022
Reverse payment reconciliation journal entries	Users, automatically	Sep 2022	Oct 2022
Use multiple remit-to addresses for vendors	Users, automatically	Sep 2022	Oct 2022

Country and regional

More countries are added to bring Business Central to availability in more than 50 percent of all countries worldwide.

Feature	Enabled for	Public preview	General availability
Configurable and redesigned Intrastat solution	Users, automatically	Sep 2022	Oct 2022
Service declarations F01DGS for Belgium and Intrastat for Italy and France	Users, automatically	Oct 2022	Nov 2022

Development

This release continues investments in improving AL developer productivity in Visual Studio Code.

Feature	Enabled for	Public preview	General availability
Promoted action groups and action references	Admins, makers, marketers, or analysts, automatically	Sep 2022	Oct 2022
Use ByRef, XmlPort parameters in OData	Users, automatically	Oct 2022	Oct 2022
Access database row version from AL code	Users, automatically	Oct 2022	Oct 2022
Write faster upgrade code	Users, automatically	Oct 2022	Oct 2022

Governance and administration

Business Central 2022 release wave 2 delivers a set of admin and governance capabilities to help admins and IT pros set up, secure, manage, govern, and monitor customer environments.

Feature	Enabled for	Public preview	General availability
Get more, better communications as admin	Admins, makers, marketers, or analysts, automatically	-	Oct 2022
Get more visibility into outages	Users, automatically	-	Oct 2022
Restore deleted environments	Admins, makers, marketers, or analysts, automatically	-	Oct 2022
Use service-to-service authentication with admin API	Users, automatically	Sep 2022	Oct 2022

Microsoft Power Platform

In 2022 release wave 2, we continue to improve the way that Business Central integrates with Power Automate, Power Apps, Power Virtual Agents, and Dataverse. We also continue improving the integration with Power BI.

Feature	Enabled for	Public preview	General availability
Personalize and design the Automate action group in the web client	Users, automatically	Sep 2022	Oct 2022
Power Apps and Power Automate support for document attachments	Admins, makers, marketers, or analysts, automatically	Sep 2022	Oct 2022
Rely on personalization to show or hide Power BI parts on lists	Users, automatically	Sep 2022	Oct 2022

Feature	Enabled for	Public preview	General availability
Try Power BI apps with dimensions	Users, automatically	Sep 2022	Oct 2022

Onboarding

Onboarding is a key focus in every release wave. Better onboarding experiences allow customers to get started with Business Central in minimal time, with minimal friction. In this release wave, we focus on connectivity to third-party operational productivity services.

Feature	Enabled for	Public preview	General availability
New field descriptions improve clarity	Users, automatically	Sep 2022	Oct 2022
Easily access setup pages for new apps	Users, automatically	Sep 2022	Oct 2022
Easily find apps to connect to core services	Users, automatically	Sep 2022	Oct 2022
Easily install and set up new apps	Users, automatically	Sep 2022	Oct 2022

Productive with Microsoft 365

Empower SMBs to work smarter with collaborative experiences, tools, and insights within the flow of work.

Feature	Enabled for	Public preview	General availability
Configure OneDrive integration	Admins, makers, marketers, or analysts, automatically	Sep 2022	Oct 2022
Delegated admins can edit in Excel	Admins, makers, marketers, or analysts, automatically	Sep 2022	Oct 2022

Reporting

In this release wave, we continue the work we introduced in the previous release wave for Excel layouts.

Feature	Enabled for	Public preview	General availability
Use new Excel report datasets	Users, automatically	Sep 2022	Oct 2022
Run, send reports from the request page	Users, automatically	Oct 2022	Oct 2022
Choose the report layout on request page	Users, automatically	Oct 2022	Oct 2022

Service and platform

No matter the type of industry 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
Get Power BI reports on telemetry with one-click	Users, automatically	Oct 2022	Oct 2022

User experiences

Improvements across the portfolio of clients for desktop and mobile devices.

Feature	Enabled for	Public preview	General availability
Legacy list views are hidden	Users by admins, makers, or analysts	Oct 2022	-
Experience new UI design elements	Users, automatically	Sep 2022	Oct 2022
Switch companies across environments	Users, automatically	Sep 2022	Oct 2022

Description of **Enabled for** column values:

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

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

Application

Overview

In 2022 release wave 2, we deliver updates based on the most popular requests for improvement.

In the financial area, we continue to improve bank reconciliation. In this release wave, we improve the test report, add a statement report with two sections for outstanding reconciliations, and provide better automation for check ledger entries.

Users will be able to reverse the journal entries from posted payment reconciliation journals. This way, they can more efficiently recover the books from mistakes that may happen. Just like with other journal entries, the user must unapply the entries manually first.

Businesses that use check payments will now have multiple remit addresses available for vendors.

To make financial reporting more transparent for newcomers and experienced users alike, we're renaming *account schedules* to *financial reporting*. We're also changing the feature slightly to give a better overview of the available reports. A *financial report* is now defined as a combination of *row and column definitions* plus a few parameters. This means that variants of the same report can now be stored as separate reports. The core functionality is the same, but the name changes make it easier to grasp the concepts. New templates for row and column definitions will become available in updates over the next release waves, making it easier for business users to get started and get productive.

Better bank reconciliation for checks

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

Business value

Bank reconciliation is a key task in every company, and performing the task efficiently is important to every finance department. Better matching rules improve the speed with which bank reconciliation is done.

Feature details

In bank reconciliation, we now match check entries from the bank based on information from the check ledger. This gives a much higher degree of match confidence than only using information from the bank ledger. The matching rules are also made more clear, and more rules are added to increase matching success rates.

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.

Extended text functionality for VAT clauses

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

Business value

Users can meet local requirements for long text on VAT clauses.

Feature details

The extended text feature is implemented on VAT clauses, so that if a country requires a longer text, customers can enter the text as extended text. Users are also able to see the text printed in sales and purchase reports.

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.

Financial reporting replaces account schedules

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

Business value

In order to make it easier for new users to get started with Business Central, we rename the account schedules capability *Financial Reporting*. We also separate the definition of a financial report from that of the definition of rows and columns, so that it's clearer that a financial report is a combination of row and column definitions plus additional parameters.

Feature details

You can now search for *Financial Reporting* in the in-product search field as well as links from some Home pages.

The link **Financial Reporting** will open a list of financial reports, and you can add user-defined reports to the list. The financial reports will have their own name, a row definition, a column definition, and additional parameters that will be set when you open the **Financial Report** page. In earlier versions, this page was called **Overview**.

The objects that have been known as account schedules will now be called **Row Definitions**, for which you can still define a default column layout and an analysis view. Column layouts become **Column Definitions**. For both row and column definitions, you can edit the definitions separately from the financial reports.

More details coming: The name changes will be propagated to pages that referenced Account Schedules.

TIP When you search for *Account Schedules*, you'll see search results for *Financial Reporting*.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

New VAT Date field on documents and entries

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

Business value

Users can report VAT statements and returns based on the new **VAT Date** instead of the **Posting Date** to meet requirements by certain countries.

Feature details

Some countries require reporting for VAT statements and VAT returns by using a date that's different than the **Posting Date**. Sometimes, the date can be **Document Date**, but even this date can differ from the requirement. For this reason, the new **VAT Date** exists on all purchase and sales documents, as well as on journals. During setup, users can choose the default value for **VAT Date**, but the date can be changed on individual documents and journals. When a document is posted, the new **VAT Date** will be visible in VAT entries and in GL entries.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

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.

Reverse payment reconciliation journal entries

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

Business value

With this release wave, you can use different number series in the payment reconciliation journals. You can also reverse any posting done through the journal.

Feature details

If you use the **Payment Reconciliation Journal** page to register and apply customer payments, you can set up the journal to use a specific number series. This way, it might be easier to identify any entries that were posted through the journal.

Similar to other journals, when you correct posted entries you can reverse entries that were posted through the payment reconciliation journal from the **G/L Register** page. For example, it might be helpful to reverse entries if you applied a payment to the wrong customer. As always, you must unapply the posted customer ledger entries first, and then you can use the **Reverse Register** action in the **G/L Register** page to reverse the journal that posted the payments. Alternatively, on the **Posted General Journals** page, you can use the **Copy Selected Lines to Journal** action to reverse specific lines from the posted payment reconciliation journal.

When you use automatic application, Business Central recognizes bank ledger entries that have already been posted, which helps prevent double-posting.

See also

Reconcile Customer Payments from a List of Unpaid Sales Documents (docs)

Use multiple remit-to addresses for vendors

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

Business value

Having multiple remit-to addresses for each vendor adds flexibility when paying invoices.

Feature details

Vendors can have multiple remit-to addresses for payments. For example, a vendor might supply an item from a subsidiary company, but wants to receive payment at their headquarters. Business Central lets you set up multiple mailing addresses for each vendor, making it easy to choose the correct location to send payments to on an invoice-by-invoice basis.

See also

Register New Vendors (docs)

Country and regional

Overview

More countries and regions are added to bring Business Central to more than 100 countries and regions. Expansion to more countries and regions is achieved through partner-led localization. Our partners create the relevant localization apps and publish them to AppSource. In combination with the built-in language offerings, Business Central is available to serve customers in more than 100 countries and regions worldwide.

Configurable and redesigned Intrastat solution

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

Business value

Users can use one common W1 Intrastat feature for all countries and regions with configurable reporting.

Feature details

The new Intrastat solution is in the form of a document with different statuses that provide the history of periods already reported. Intrastat works for both purchase and sales documents. The subject of Intrastat entries includes Items (Type=Inventory) and Fixed Assets. Many existing functionalities are also improved, and reporting is configurable without hard-coding file exports.

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 declarations F01DGS for Belgium and Intrastat for Italy and France

Enabled for	Public preview	General availability
Users, automatically	Oct 2022	Nov 2022

Business value

When required by local authorities, users are able to report when they export services from one EU country to other EU countries.

Feature details

Currently, Belgian, Italian, and French authorities require reporting for exporting services to the other EU countries.

- In Belgium, this includes the F01DGS form.
- In France this includes the DES form.
- In Italy, this includes Intrastat for services.

This feature is available as an extension and can be used in all countries. Reporting is configurable, so it won't have a hard-coded format for export.

It works with the Items (Type=Service), Resources, and Item Charges as services in both purchase and sales documents.

Tell us what you think

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Development

Overview

Demand for developers is continuously rising worldwide, increasing the requirement for attracting and raising the productivity of Business Central AL developers. In this release wave, we continue the investment in our Visual Studio Code experience by adding visual abstractions on top of AL code. This way, we bring better and more efficient management of AL objects across projects and workspaces and respond to the requests from multiple productivity partners across the tools experience. We are also investing in building new AL constructs for writing more performant code, as well as defining a more flexible and more consistent action pane structure in our clients.

Promoted action groups and action references

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	Oct 2022

Business value

Up until now, it has been possible to promote actions by setting a property in the action that pointed to predefined promoted action categories. This was not flexible, and the personalization story wasn't optimal. In this release we are adding a new promoted action model to address these shortcomings, while retaining the old model for compatibility.

Feature details

Pages and page extensions can now contain a new action group for promoted actions. These groups can contain references to existing actions. It's possible to add to already existing groups or add new groups in page extensions. Users can personalize their experience by promoting actions themselves. The platform and client will stay backward-compatible by keeping the existing promoted actions property, but a page or page extension must be consistent in using either the old or the new model. There will be a code action to convert from the old model to the new.

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 ByRef, XmlPort parameters in OData

Enabled for	Public preview	General availability
Users, automatically	Oct 2022	Oct 2022

Business value

Developers of Business Central web service endpoints can use ByRef and XmlPort parameters in OData unbound actions.

Feature details

SOAP web services support codeunits that expose procedures with parameters defined by reference and parameters of type XmlPort.

Until this release, neither of these types was supported in the OData stack. By adding support for these parameters, partners find better parity with the SOAP stack for OData, and the migration from SOAP becomes easier.

Access database row version from AL code

Enabled for	Public preview	General availability
Users, automatically	Oct 2022	Oct 2022

Business value

Developers and administrators can get insights into the version of database rows. They can either add this to indexes or use it to query most recent changes to the database.

Feature details

The database for a Business Central environment tracks a global number called rowversion across all tables. With this feature, the Business Central platform makes this data accessible from AL code. Developers can then add the rowversion field to indexes or use it to query most recent changes to the database.

Write faster upgrade code

Enabled for	Public preview	General availability
Users, automatically	Oct 2022	Oct 2022

Business value

Using a new language construct, developers can write faster upgrade code when they want to move a field (with data) from one table to another.

Feature details

When refactoring an app, it's common to move a field from one table to another. With this feature, the developer can copy the data from the old field to the new field in a set-based manner without the need to write a loop. This makes upgrade code significantly faster.

Governance and administration

Overview

In 2022 release wave 2, Business Central provides a set of admin and governance capabilities to help admins and IT pros set up, secure, manage, govern, and monitor customer environments. We add and improve several capabilities to make it easier to keep up with important service notifications, to automate and manage operations at scale, across many customers and environments, with service-to-service authentication to the Admin Center API. Admins will be able to recover any environments that were recently deleted, which keeps customer data safe.

Get more, better communications as admin

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

Business value

Admins get more proactive communications in this release wave. We will send info about more types of changes and issues that affect their environments.

Feature details

Recently, we moved to the Microsoft 365 Message Center and Service Health Dashboard as our primary channels for communicating with admins. This move means that we retired the notification recipient feature from the Business Central admin center.

Communications about availability, schedule, and runs of upgrades have been in those channels since we started. We are now adding more types of communication to these channels so that admins can be proactive in more scenarios.

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

Administration of Business Central Online (docs)

Get more visibility into outages

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

Business value

Now, it's easier for business users and administrators to learn about any outages that have been declared and that affect their environments if they are experiencing issues.

Feature details

With this release wave, we will more proactively inform business users and administrators in case we have declared an outage that affects their environments. Business users will see outage details when they try to sign in but the sign-in fails, and administrators will see a notice in the Business Central administration center.

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.

Restore deleted environments

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

Business value

Environments are occasionally deleted by mistake. In other cases, a trial expires, but the prospect wants to take their data with them. With this release wave, we put environments into a soft-deleted state for seven days after someone deletes them. During this time, admins can restore the deleted environment in the Business Central admin center.

Feature details

Environments in the soft-deleted state are visible in the admin center. Admins can restore such an environment without having to involve Microsoft support. Our aim is to reduce the risk of data loss if an environment is deleted by accident, which today would require urgent assistance from Microsoft support.

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

Managing Production and Sandbox Environments in the Admin Center (docs)

Use service-to-service authentication with admin API

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

Business value

Service-to-service authentication for the tenant administration center API will make it easier to manage environments in multiple Azure Active Directory (Azure AD) tenants without having to manually reauthenticate for each Azure AD tenant.

Feature details

In this release, we add service-to-service (S2S) authentication for the Business Central administration center API. This way, admins can run lifecycle operations across all environments in all Azure AD tenants that they manage in one go, without having to reauthenticate for each Azure AD tenant.

Tell us what you think

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Thank you for your idea

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

Microsoft Power Platform

Overview

Building on top of the work delivered so far, we continue to improve the way Business Central integrates with Power Platform: Power BI, Power Automate, Power Apps, Logic Apps, Power Virtual Agents, and Dataverse.

This includes improvements to the Power BI integration as well as the Power Automate connector and the **Automate** action—bridging Business Central and Power Automate with a modern toolset that empowers makers and citizen developers to easily extend and connect Business Central with other systems.

We also continue improvements for our Dataverse virtual tables data change events so that our partners can use Dataverse as a platform for more ambitious integrations.

Personalize and design the Automate action group in the web client

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

Business value

Giving users freedom and flexibility in designing and adjusting their workspace is essential for productivity in the cloud.

Feature details

Actions added in the new **Automate** action group in the action bar now rely on personalization or designer, so that they can be moved, promoted, or hidden.

This applies to personalizing for a single user, customizing user profiles for user groups, or designing a global customization (page extension) for the whole company.

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.

Power Apps and Power Automate support for document attachments

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	Oct 2022

Business value

Being able to access attachments, media, and other data that are linked to business records opens new possibilities with scenarios related to rich data.

Feature details

The new capability of the connector allows for easy access to document attachments (for instance, an original order request linked as a PDF to a sales order), related record media (for instance, images linked to items) and other data linked to business records. This opens up for Power Automate flows or Power Apps to support additional scenarios where rich external data is entered into Business Central. For example, this could be an app allowing service workers to take photos of inventory and upload to Business Central. Or, it could be an automated flow that creates a sales order from an attachment received earlier as an email, which is processed and linked as a PDF document to the Business Central order entry.

Tell us what you think

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Thank you for your idea

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

Rely on personalization to show or hide Power BI parts on lists

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

Business value

Allowing users to personalize their workspace in a consistent manner creates a better user experience.

Feature details

Previously, whether the Power BI part was shown on lists was controlled by a combination of the **Show/Hide Power BI Reports** action on the page and personalization of the page's FactBox. In this release, the **Show/Hide Power BI Reports** action is removed, and visibility relies only on personalization.

Tell us what you think

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Try Power BI apps with dimensions

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

Business value

Dimensional analysis is key to getting insights into how the business operates. Now, the standard Power BI apps in AppSource for Business Central can demonstrate the use of dimensional data. They show both a powerful feature for Business Central, as well as the reporting capabilities when data is analyzed in Power BI.

Feature details

There are Power BI apps available in AppSource that show reporting for a specific area of business. There's one for Finance, one for Sales, and one for Customer Relationship Management.

Demo data in Business Central has been updated, so specific reporting scenarios in Power BI will demonstrate the advantage of using dimensions in Business Central, and Power BI for reporting.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Onboarding

Overview

When a company decides on a cloud solution such as Dynamics 365 Business Central online, they have certain expectations for how well *connected* the solution is to surrounding business productivity services, such as banking, payroll, and electronic invoicing providers. Cloud connectivity to operational productivity services is expected with a modern business solution in the cloud. Connectivity to these types of providers largely exists already, but isn't easily discovered by customers of Business Central, who will have to manually search AppSource for the right solution for their business. Thus, customers of Business Central meet some friction when they want to realize the expectations of their investments into a cloud solution. By offering customers better **discoverability**, **installation**, and **setup** of these types of apps, unnecessary friction is removed, and their business can more quickly become productive and focus on the more complex areas of onboarding.

In 2022 release wave 2, we are adding an in-product experience that will make it easy for users to find relevant *connectivity apps* that are available in AppSource. We also make these apps easy to install and easy to set up. We start with the apps that offer online bank connectivity.

The apps that are shown in this in-product experience will have certain requirements imposed upon them, such as usage and quality criteria, as well as a minimum set of features and capabilities. More information about what is required for ISVs to get apps listed will be published at a later stage.

Foundational improvements to installation and setup of AppSource apps will be added in this release, to the benefit of all ISVs who have published apps to AppSource.

New field descriptions improve clarity

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

Business value

We make it easier to get started and unblocked with Dynamics 365 Business Central by providing better tooltip descriptions for sensitive and essential fields.

Feature details

Business Central includes many fields on each page, and the field descriptions, or tooltips, provide a first layer of self-help for users. In this release wave, we improve these tooltips for essential and sensitive fields so that it's easier to learn how to use Business Central. Based on analysis of how tooltips are used, we'll improve and clarify the text to make the descriptions easier to understand. This element of embedded user assistance reduces friction in learning how to use Business Central, which ultimately boosts satisfaction with the product.

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.

Easily access setup pages for new apps

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

Business value

We provide easy access to an app's setup page from the Extensions Management page so you can use apps faster in Business Central, both large vertical add-ons and smaller productivity apps.

Feature details

In earlier release waves, users told us they couldn't figure out what to do next after they installed an app. They also said they didn't know where to find any setup pages. In this release wave, we add an option to run a setup page directly from the **Extensions Management** page if the app has specified a setup page. The developer of the app should provide a reference to the setup page in the app manifest, so that Business Central knows which page to run for the specific app.

In practical terms, we add two new features:

- A new app.json property that developers can use to specify the setup page ID.
- A new action on the **Extensions Management** page that runs the page that the developer specified.

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

Overview of Tasks to Set Up Business Central (docs)

Easily find apps to connect to core services

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

Business value

Easily identify the right app that connects your business to external business productivity services in your market space.

Feature details

In this release wave, we add a new experience in Business Central so that users can easily discover and install third-party apps that connect to external business productivity services, such as banks. This capability is powered by AppSource and provides an additional layer of app suggestions to let users filter by category, so they can easily choose the type of offer they are looking for.

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.

Easily install and set up new apps

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

Business value

Easier onboarding of ISV add-ons for Dynamics 365 Business Central.

Feature details

In earlier versions, users who installed an app from AppSource or through the Extension Marketplace page in Business Central were guided to *initiate* the installation. After that, the user had to remember to go to the Extensions Management page, find the Deployment Status subpage, and there find information about the installation status. This caused friction and wasn't a helpful experience for getting apps.

In this release wave, the app installation guide in Business Central is improved so the user can choose to wait for the installation of the app and subsequent initiation of the setup page that was brought by the app. This allows for a smoother app installation experience from beginning to end.

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.

Productive with Microsoft 365

Overview

This release wave gives more control to administrators to manage OneDrive and Excel, while business users benefit from enhancements to report layouts and how they can edit data in Excel.

Configure OneDrive integration

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	Oct 2022

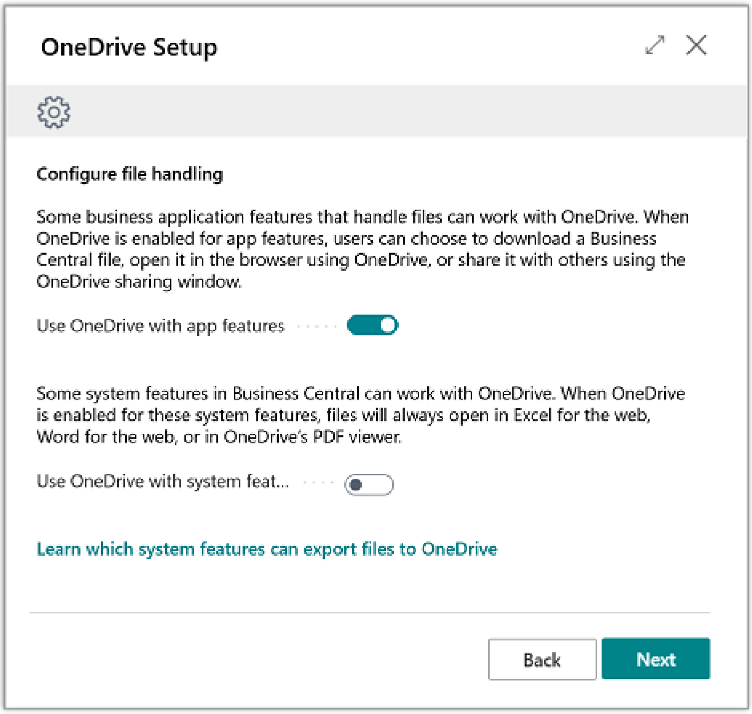
Business value

Admins are in control. With 2022 release wave 2, organizations can easily manage which OneDrive-related features are switched on for Business Central, so that people can collaborate on business documents and work with other files in the browser.

Feature details

Administrators can access the OneDrive Setup guide in Business Central to specify which capabilities can connect to OneDrive for Business.

- Choose between enabling one, both, or none of the system and application integrations to OneDrive.
- For Business Central on-premises, this setup guide includes configuring the connection to OneDrive.
- The setup guide detects if the environment had been set up to use the legacy OneDrive or SharePoint integration, and it helps you switch to the newer OneDrive integration. As part of this change, we are announcing deprecation of the legacy SharePoint Connection Setup page and SharePoint integration capabilities.



An illustration of the new OneDrive guided setup experience.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Delegated admins can edit in Excel

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	Oct 2022

Business value

Customers often delegate support and administration to their supporting partner. When these delegated administrators need to bulk correct or insert data, Excel is the tool of choice. The add-in now empowers admins to refresh and publish to Business Central, making this a powerful tool for data manipulation.

Feature details

Delegated administrators can now use the Excel add-in like any other user in the customer's Azure Active Directory organization. The **Edit in Excel** system action in the client opens the add-in, but admins can also create new datasets in Excel directly. Use this to provide bulk data support, such as correcting data entry mistakes, importing tables from legacy systems, and making data adjustments that cannot be done via data upgrade scripts.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Reporting

Overview

The 2022 release wave 1 introduced Excel layouts for reports. In 2022 release wave 2, we will continue to improve this experience.

When a business user runs a report with an Excel layout, they can now choose the Excel layout in the report's request page. For example, if a report has several Excel layouts, the user can choose the exact layout they want when they run the report.

In addition to the Excel layout capability, we're creating an API for the finance area that can be consumed in both Excel and Power BI. This way, users can create their own more detailed analysis on data from the general ledger and G/L budgets with dimensions. We'll provide a new template Power BI app that is based on the new API. The app will be published to the BCTech Samples GitHub repo for users who want to get started with reporting in Power BI. The Power BI app contains a set of standard financial reports and a dashboard with financial KPIs and aggregated general ledger info.

Use new Excel report datasets

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

Business value

With dedicated Excel report datasets, it's easier to create Excel layouts for selected data.

Feature details

The new report datasets are created for selected data. The first datasets dedicated for Excel reporting are based on the following data:

- General ledger data, including budgets and global dimensions
- Customer and vendor ledger entries

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Analyzing Financial Statements in Microsoft Excel (docs)

Run, send reports from the request page

Enabled for	Public preview	General availability
Users, automatically	Oct 2022	Oct 2022

Business value

From the request page, a user can run a report and send it directly to the report inbox. This allows the user to keep working and then pick up the report from the report inbox later when it has finished.

Feature details

On the request page, users can select **Send to inbox** to run the report in the background and keep working in the client.

Similar to printing a document on Windows, the user is no longer blocked by waiting for the report to finish.

Choose the report layout on request page

Enabled for	Public preview	General availability
Users, automatically	Oct 2022	Oct 2022

Business value

Users can choose which report layout to use on the request page. This will make it easier to use different report layouts for different purposes, especially for Excel layouts.

Feature details

On the request page, users can use a dropdown menu to choose from available report layouts for the report.

This feature will enable your organization to have multiple layouts (like Excel layouts) for the same report dataset. For example, you could have a layout for a planning meeting, another layout used for mail merge, and a third layout for the board meeting.

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.

Get Power BI reports on telemetry with one-click

Enabled for	Public preview	General availability
Users, automatically	Oct 2022	Oct 2022

Business value

Tenant admins can get Power BI reports on telemetry with a one-click installation. These reports will give them insights into the performance, stability, and usage of Business Central.

Feature details

With a simple click on a link, tenant administrators can install a Power BI app that reads data from the environment telemetry resource in Azure Application Insights. The app will show insights into different aspects of performance in the environment as well as any errors that occur.

User experiences

Overview

Information workers who connect to Business Central from the desktop app, browser, or their mobile device benefit from improved usability, accessibility, performance, and stability in 2022 release wave 2. Users looking to increase their efficiency can take advantage of powerful new capabilities when they work across companies.

Legacy list views are hidden

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

Business value

The April 2019 release of Business Central introduced a new way to implement filtered list views that makes them available across form factors, and empowers business users to easily create, modify, hide, show, reorder, and remove views from the web client. Customers benefit from all of these capabilities when using views created using this newer model.

Feature details

Legacy views are list views that were created by developers in previous versions of Business Central by placing them on the role center page. Business Central displays legacy views side by side with modern views directly on the list page, but these offer a degraded experience and fewer options compared to modern views.

Starting with 2023 release wave 2 (version 23.0), which is currently targeting Q3 of calendar year 2023, legacy views will no longer be supported and won't be displayed on list pages.

You can already experience this change in 2022 release wave 2 (version 21.0) by enabling **Legacy list views are hidden** in the **Feature Management** page in Business Central.

Resources

- Migrating to modern list views (article coming soon)
- Frequently asked questions about views
- Technical reference for views

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.

Experience new UI design elements

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

Business value

Lowering the learning curve through familiarity in visual design.

Feature details

The web client keeps up to date with fluent UI design elements across the different application pages and system controls.

The release plan will be updated with a list of specific changes closer to the launch of release wave 2.

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.

Switch companies across environments

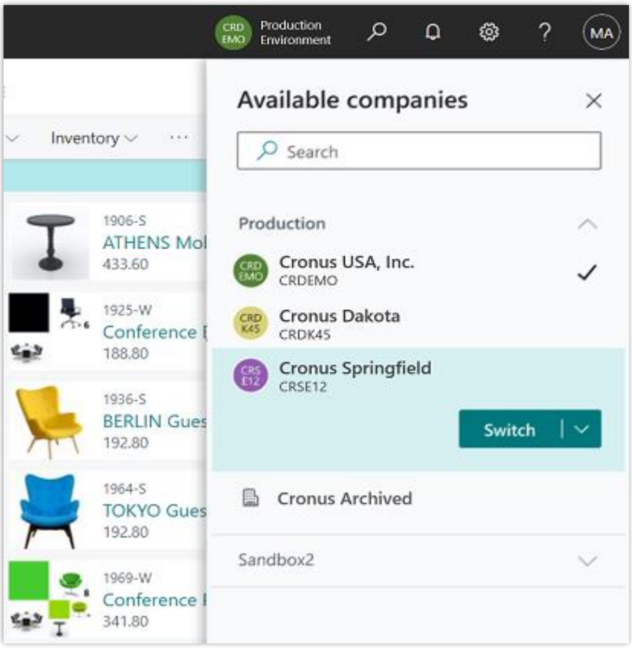
Enabled for	Public preview	General availability
Users, automatically	Sep 2022	Oct 2022

Business value

Business Central is ready to adapt to the needs of complex SMB organizations by organizing multiple companies across environments. While most employees are bound to a single company, some users need to view, edit, and compare data across companies. The 2022 release wave 2 makes it easier to get an overview of the companies and environments you have access to, and to rapidly switch contexts.

Feature details

- Visual cues in the app bar help to quickly understand which company and environment you are currently working in.
- Activate the company switcher pane from anywhere in Business Central, either from the app bar or using a keyboard shortcut.
- Search for companies you have access to, grouped by environment including production and sandbox environments within your organization.
- Switch company in the current browser tab, or open the selected company in a new tab to multitask or compare data side by side.



An illustration of the web client pane where users can easily switch companies across environments.

The experience and capabilities may vary between Business Central online and on-premises.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Connected Spaces

Plan and prepare for Dynamics 365 Connected Spaces in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Connected Spaces**.

Overview

Dynamics 365 Connected Spaces is a computer vision AI solution that uses cloud and edge topologies to extract unique insights from a physical space by using video cameras. Connected Spaces uses skills to continuously get insights from any space. Customers use data from video cameras to get real-time actionable recommendations to make physical spaces more efficient or improve the customer experience. Connected Spaces is simple to set up and configure, similar to consumer-grade services, with a responsible-AI assurance.

Connected Spaces uses the following hybrid approach:

- **Intelligent edge**: A managed on-premises gateway converts camera streams into observational data that's sent to the cloud.
- **Intelligent cloud**: A multitenant software as a service (SaaS) solution correlates observational signals from the edge and customer insights to provide an analytics dashboard.
- **Prebuilt AI models**: Out-of-the-box and ready-to-use AI models apply computer vision and AI to reason within a physical space.

For 2022 release wave 2, we'll continue to deliver enhancements in the cloud, and at the edge. For example, space managers can ask to be notified whenever the dwell time at an area of interest in the space exceeds a specified threshold or if parking lot occupancy reaches a specified threshold.

At the edge, we'll provide support for Azure Stack Edge Pro 2, which offers more flexible mounting options and lower noise levels. In 2022 release wave 2, customers will also be able to run up to 10 skills on a given gateway device.

Finally, we'll expand support of Connected Spaces to Germany, in addition to the United States and the United Kingdom.

Investment areas

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

Check out the release plan

For application administrators

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

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

Get the most out of Connected Spaces

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

What's new and planned for Dynamics 365 Connected Spaces

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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
Business skill alerts provide near real-time actionable insights	Users, automatically	Oct 2022	
Support for 10 or more cameras for each Azure Stack Edge Pro gateway	Admins, makers, marketers, or analysts, automatically	Oct 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.

Business skill alerts provide near real-time actionable insights

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

Business value

This feature empowers physical space managers to receive alerts in near real time for events related to queue management and display engagement.

Feature details

This feature allows physical space managers to use out-of-the box alerts to quickly create real-time notifications when thresholds are met for queue wait time, queue length, or dwell time at displays.

Support for 10 or more cameras for each Azure Stack Edge Pro gateway

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

Business value

This feature will enable customers to maximize their return on investment (ROI) for existing hardware by supporting more operable cameras per gateway.

Feature details

In the preview release of Dynamics 365 Connected Spaces, you could connect up to 10 network cameras to a single Azure Stack Edge Pro gateway. In reality, only 7 of those cameras could be operable, however. With this feature, all 10 cameras will be operable, which means you'll be able to add 10 camera skills per gateway. With the ability to support 10 cameras per gateway, customers will be able to run more skills for a given hardware cost, which means they can cover more of their retail space, or run more skills within a given space.

Guides

Plan and prepare for Dynamics 365 Guides in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Guides**.

Overview

Microsoft Dynamics 365 Guides is a mixed-reality application that displays step-by-step holographic instructions right where the work happens, enabling employees to learn and execute complex tasks quickly.

Dynamics 365 Guides:

- 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.

For 2022 release wave 2, we'll continue investing in capabilities to improve collaboration experiences for authors and operators on HoloLens 2. We'll also update the app to provide more advanced content-authoring workflows, versioning, and publishing of guides.

Authors can easily create guides without 3D or programming skills by using a simple PC app and a HoloLens app. Operators use guides on HoloLens in training and on the job to get guidance while they work in a heads-up, hands-free style. Trainers and managers can analyze usage data to optimize their workflows.

Investment areas

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

Check out the release plan

For application administrators

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

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

Get the most out of Guides

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

What's new and planned for Dynamics 365 Guides

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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
Annotate the HoloLens user's space	Users, automatically	-	Oct 2022
Make group calls and join Teams meetings	Users, automatically	-	Oct 2022
Automatically apply Microsoft Teams policies	Admins, makers, marketers, or analysts, automatically	-	Oct 2022
Record calls	Users, automatically	-	Oct 2022
Send chat messages	Users, automatically	-	Oct 2022
Storing Dynamics 365 Guides call data	Admins, makers, marketers, or analysts, automatically	-	Oct 2022
View a remote expert's screen	Users, automatically	-	Oct 2022
View, share, and save files	Users, automatically	-	Oct 2022
Object anchoring becomes widely available	Admins, makers, marketers, or analysts, automatically	-	Dec 2022
Add version info to guides	Users, automatically	-	Feb 2023
Create publishing workflows	Users, automatically	-	Feb 2023
Organize media and 3D assets more efficiently	Users, automatically	-	Feb 2023
Simplified content permissions for images and 3D models	Users, automatically	-	Feb 2023

Description of **Enabled for** column values:

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

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

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

Annotate the HoloLens user's space

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

Business value

Getting expert help on a plant floor or in a training environment is usually costly and time-consuming. Experts may not be available because they're in a different location or in a different time zone. Field technicians can solve problems faster if they can receive instructions and visual guidance in context during a call with an expert.

Feature details

Remote experts on Microsoft Teams desktop or Teams mobile will be able to annotate the space of a field technician using the Dynamics 365 Guides HoloLens app. The remote expert will be able to draw on the HoloLens user's space or add arrows. For example, the expert could point to parts that may be difficult or dangerous to reach, or the expert could explain complex details to help the technician solve the problem quickly. The HoloLens user will also be able to annotate their own space for the remote expert to see.

Make group calls and join Teams meetings

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

Business value

With group calling and Microsoft Teams meeting support, technicians will be able to extend their one-to-one calling ability to include additional colleagues just as they would if they were using Teams from a desktop or mobile device. Adding a remote expert to an in-progress call will help technicians get additional support to resolve issues. Technicians will also be able to access regularly scheduled meetings (for example, for a weekly inspection) directly from the HoloLens app.

Feature details

Dynamics 365 Guides currently provides one-to-one calling, which enables two participants to collaborate while on a call. This feature enables users to add additional participants to the call from the HoloLens app. HoloLens users will also be able to access their existing Teams meetings from the app and join meetings to collaborate with others.

Automatically apply Microsoft Teams policies

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

Business value

Dynamics 365 Guides operators in the organization will automatically receive the global policy set in Microsoft Teams to avoid confusion or access limitations for Dynamics 365 Guides calls. This allows admins to enable or disable calling features (for example, call recording, or video and chat messaging) for privacy or security purposes.

Feature details

Dynamics 365 Guides will automatically support the following Microsoft Teams policies: video, call recording, and chat messaging. An admin can edit the settings in the global policy or create and assign one or more custom policies to turn the features on or off.

Record calls

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

Business value

It’s important for businesses to keep a record of training and support provided by remote experts so that training materials can be improved and optimized for future sessions. It’s also important to keep a recording of service incidents that happen frequently. Operations managers will be able to use call recordings to create a knowledge base of calls for other technicians or to improve processes.

Feature details

Technicians using the HoloLens app will be able to record their calls with remote experts who are using Microsoft Teams desktop or Teams mobile. Links to recordings will be available in the Teams chat for future reference or download.

Send chat messages

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

Business value

Participants in a Dynamics 365 Guides call will be able to chat asynchronously with other participants on the call without interrupting the live conversation.

Feature details

Microsoft Teams chat support will enable HoloLens users to send and receive chat messages asynchronously during a Dynamics 365 Guides call so that they can provide context for a problem they're trying to solve. The HoloLens user will be able to view Teams chat messages from other participants in the meeting.

Storing Dynamics 365 Guides call data

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

Business value

Operations managers need to monitor key metrics for software tools used by their organization. These metrics are critical to get insights on potential operational efficiencies and the usefulness of tools and processes used by remote experts and field technicians. Dynamics 365 Guides call data will be used to understand how calling is used so field technicians and remote experts can work together more effectively.

Feature details

To understand calling usage, Dynamics 365 Guides will track the identity of the remote expert on the call as well as when the remote expert starts and ends the call. Call data will be stored in the PhoneCall table.

View a remote expert's screen

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

Business value

Dynamics 365 Guides users can collaborate with colleagues on Microsoft Teams and add mixed-reality annotations to each other's video feeds. With added screen sharing, remote colleagues will be able to view a specific document, file, or other item to gain more contextual information. A HoloLens user on the call will then be able to view the screen content projected by the remote collaborator, just like they would on Teams desktop or Teams mobile.

Feature details

When a remote collaborator shares their screen, a new window will appear in the HoloLens user's space that shows the shared content. The HoloLens user will be able to resize or move the window as needed and will be able to easily switch back and forth between the shared screen and any other video feed, just like in Microsoft Teams desktop or Teams mobile.

View, share, and save files

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

Business value

During a repair or inspection, a Dynamics 365 Guides operator might want to refer to an image or PDF file related to the asset they're working on or the task they're completing. For example, they might want to place a wiring diagram in the space next to the asset. During a video call, a remote collaborator will be able to share a file to help the operator better understand what the asset should look like after it's successfully repaired. Anyone on the call will be able to annotate the file, just as they would annotate a physical object in the operator's space. File sharing saves time because the operator doesn't have to switch to a different app or device to view a file.

Feature details

HoloLens users will be able to access OneDrive files at any time. They won't need to be on a call to access files and place them in the workspace.

To view their OneDrive file directory, the HoloLens user will select the **Files** tab or use a voice command. When they select a file, it will pop up as a new window in the space.

When they're on a video call, remote collaborators will be able to see an image or PDF file when it's in the HoloLens user's view. Remote collaborators will also be able to send files through Microsoft Teams chat. The HoloLens user can then open and save the file.

Object anchoring becomes widely available

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

Business value

Customers need an anchoring option that does not require a physical marker. Physical markers are subject to wear and tear, placement inconsistency, and sometimes cannot be placed on objects for compliance reasons. Object anchoring in Dynamics 365 Guides enables customers to use existing objects in their space to anchor holographic content, which makes it easy for users to just walk up and work.

Feature details

Customers will be able to convert a 3D model of an existing real-world object to an object anchor in the Guides model-driven app. The object anchor can then be used to anchor holographic content in the real world. Object Anchors provide improved accuracy and consistency for holographic anchoring. Additional region support, migration tool support, and experience improvements will be added for GA.

Add version info to guides

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

Business value

As Dynamics 365 Guides authors make changes to their guides and associated 3D content, they'll be able to communicate the latest state of the content by adding version numbers. Operators and other collaborators will use the version numbers to make sure they're using the latest instructions and content as production floor assets and procedures change over time. This will help to avoid errors caused by out-of-date guides.

Feature details

A version field will be added to the Guides model-driven app so that authors can specify the version of the guide. The version number will be displayed in the HoloLens app, so the operator knows exactly which version of the guide to select.

Create publishing workflows

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

Business value

Customers will be able to use publishing workflows to ensure that only reviewed and approved guides are available to operators.

Feature details

Dynamics 365 Guides will be updated with tools and guidance for customers to implement publishing workflows for their guides. A workflow enables teams to create, review, and approve guides for production use.

Organize media and 3D assets more efficiently

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

Business value

As authors create more guides and use more images, 3D assets, and videos, they need a simple way to organize their content so that they can create guides in a faster and more efficient manner.

Feature details

Dynamics 365 Guides will be updated to include simple and efficient ways to organize media and 3D content. New organization capabilities could include solutions such as filters, folders, and categories.

Simplified content permissions for images and 3D models

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

Business value

When sharing a guide, an author will be able to check the permissions of related images and 3D models to ensure the recipient has access to the related content.

Feature details

This feature simplifies the process of sharing a guide that contains related content that must also be shared for the guide to function correctly. When sharing a guide, the author will be able to share related guide content at the same time.

Customer Insights

Plan and prepare for Dynamics 365 Customer Insights in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Insights**.

Overview

Dynamics 365 Customer Insights, Microsoft's customer data platform, breaks down data, technology, and people silos. This empowers businesses to own and control their data while unifying customer profiles from different data sources, enriching them with Microsoft's unique data assets. This helps to create powerful AI-driven predictions, segments, and measures to better understand customers, personalize experiences, and enable ubiquitous insights.

The past two years have seen an exponential growth in data from digital channels, radical changes in data privacy, and the unprecedented expectation that organizations will work seamlessly as one to deliver real-time personalized experiences. This has turned first-party data into the most valuable asset organizations have today. To align with these market changes, we have continued to invest in the following feature themes for this release:

- Customer understanding
- Personalized experiences
- Ubiquitous insights

Get the most out of Customer Insights

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

Supply Chain Insights

Plan and prepare for Dynamics 365 Supply Chain Insights in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Supply Chain Insights**.

Overview

Dynamics 365 Supply Chain Insights is a SaaS product that helps organizations make their supply chains resilient, efficient, and sustainable. It provides end-to-end holistic visibility into in-house manufacturing processes, multiple tiers of suppliers and customers, service providers, and external factors such as natural catastrophes, the financial health of partners, and geopolitical and weather events. With Supply Chain Insights, manufacturing organizations leverage the AI-powered predictive and prescriptive analytics that promptly assess and surface insights and risks and recommend the next best actions for supply chain managers, sustainability officers, and business leaders. As a result, internal and external stakeholders can collaborate deeply to make decisions and implement measures needed to effectively manage risks and optimize resiliency, sustainability, and efficiency.

Upcoming new features for 2022 release wave 2 in Supply Chain Insights include:

- Data management – Improved data mapping, ingestions, audit, and export capabilities.
- Risk signals – New real-time weather events.
- Deep analytics – Multi-tier visibility with enhancements to supply and demand analytics.
- Extensibility – Users can create Power BI reports with their Supply Chain Insights data set.
- People collaboration – Case management capability with Teams integration.

Get the most out of Supply Chain Insights

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

Microsoft cloud for industry

Plan and prepare for Microsoft Cloud for Healthcare in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Microsoft Cloud for Healthcare**.

Overview

Microsoft Cloud for Healthcare provides capabilities to manage health data at scale and makes it easier for healthcare organizations to improve the patient experience, coordinate care, and drive operational efficiency.

By bringing together capabilities from Microsoft Dynamics 365, Microsoft 365, and Microsoft Azure, Microsoft Cloud for Healthcare expedites a healthcare organization’s ability to roll out solutions. Patients, providers, and care coordinators can perform daily duties in a modern yet familiar user interface.

Investment areas

Deliver trusted member experiences for payors
We're scaling existing Care management solutions to payors. Improvements to Microsoft Cloud for Healthcare solutions will provide better support to payor use cases. We're adapting and scaling Patient 360 to build Member 360 services for payors.

Empower health team collaboration
Provider solutions by Dynamics 365 and Power Platform enable healthcare providers to coordinate safe and effective care. As part of Microsoft Cloud for Healthcare, Dynamics 365 and Power Platform support the following healthcare solutions for healthcare providers:

- **Care management**: Coordinate care plans and care teams standalone and in Microsoft Teams (powered by Power Apps).

- **Home health**: Schedule and coordinate home visits (powered by Dynamics 365 Field Service).

We're focused on enhancing the Care management solution and improving the coordination between team members.

Data management
To help Microsoft Cloud for Healthcare customers accelerate the use of Dynamics 365 and Microsoft Power Platform, we provide a starter healthcare data model. We're providing improvements to ensure health data is accessible across provider, payor, and pharma, which will facilitate integration of EHR/EMR systems.

The model aligns with HL7 FHIR standards to support data interoperability with other services. We support near real-time data exchange between Microsoft Dataverse and FHIR endpoints. We provide a new data integration console and improve capabilities of virtual data tables, Sync Admin, and support for 1P/3P connectors.

Improve clinical and operational insights
Healthcare data models and data ingestion provide the foundation for healthcare customers to be successful on Dynamics 365 and Power Platform. Customers can connect data across provider, payor, and pharma to improve decision making, predict risk, improve patient care, and operationalize efficiencies.

The health provider solution connects data from across systems to improve patient care and operational efficiencies through data interoperability.

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

Check out the release plan

For application administrators

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

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

What's new and planned for Microsoft Cloud for Healthcare

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may**

change and projected functionality may not be released. For more information, go to Microsoft policy.

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.

Data management

We provide improvements to ensure health data is accessible across provider, payor, and pharma, and to facilitate integration of EHR/EMR systems.

Feature	Enabled for	Public preview	General availability
Pharma data model update for sales and marketing	Users by admins, makers, or analysts	Dec 2022	-
Enhanced provider data model	Users, automatically	✔ May 6, 2022	Oct 2022
Updated Payor data model	Users by admins, makers, or analysts	✔ May 6, 2022	Oct 2022
Integrate with FHIR-enabled endpoints using health data exchange APIs	Admins, makers, marketers, or analysts, automatically	Jul 2022	Oct 2022
New data integration admin console	Admins, makers, marketers, or analysts, automatically	Jul 2022	Oct 2022
Enhanced virtual health data tables	Admins, makers, marketers, or analysts, automatically	Aug 2022	Oct 2022

Deliver trusted member experiences for payors

Scale existing care management solutions to payors.

Feature	Enabled for	Public preview	General availability
Drive optimized member outcomes for payors	Users by admins, makers, or analysts	Dec 2022	

Empower health team collaboration

Provider solutions by Dynamics 365 and Power Platform enable healthcare providers to coordinate safe and effective care.

Feature	Enabled for	Public preview	General availability
Enhance care team collaboration through Teams	Users by admins, makers, or analysts	Jul 2022	Oct 2022
Provide care plans in Patient access portal	Users, automatically	Aug 2022	Oct 2022
Enable integration into healthcare workflows using Bookings Graph APIs	Users by admins, makers, or analysts	Aug 2022	Dec 2022

Improve clinical and operational insights

Connect data across provider, payor, and pharma to improve decision making, predict risk, improve patient care, and operationalize efficiencies.

Feature	Enabled for	Public preview	General availability
Improve virtual visit experiences for patients	Users, automatically	Aug 2022	Oct 2022

Description of **Enabled for** column values:

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

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.

Data management

Overview

To help Microsoft Cloud for Healthcare customers accelerate the use of Dynamics 365 and Microsoft Power Platform, we provide a starter healthcare data model. We're providing improvements to ensure health data is accessible across provider, payor, and pharma, which will facilitate integration of EHR/EMR systems.

The model aligns with HL7 FHIR standards to support data interoperability with other services. We support near real-time data exchange between Microsoft Dataverse and FHIR endpoints. We're providing a new data integration console and improve capabilities of virtual data tables, Sync Admin, and support for 1P/3P connectors.

Pharma data model update for sales and marketing

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

Business value

Pharma data model will contain a set of entities, relationships, and resources to manage processes such as physician relationship management, therapy marketing, supply chain management, and drug manufacturing.

Feature details

Microsoft's pharma data model contains the set of entities and relationships suggested for customers and partners building their own pharma and life sciences apps.

NOTE Public preview is limited to decentralized clinical trials data model support and is now extended to sales and marketing.

Enhanced provider data model

Enabled for	Public preview	General availability
Users, automatically	✔ May 6, 2022	Oct 2022

Business value

The provider data model will contain updated entities, relationships, and resources to manage processes such as clinical communication, appointments, encounters, care teams, procedures, and medication.

Feature details

Microsoft's Healthcare Data Model contains the updated set of entities suggested for customers and partners building their own healthcare apps for providers or leveraging and integrating to Microsoft Cloud for Healthcare apps.

NOTE Elements of this data model are already included when you add a Microsoft Cloud for Healthcare app in Solution Center.

See also

Healthcare data model overview (docs)

Updated payor data model

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ May 6, 2022	Oct 2022

Business value

Payor data model enables partners and customers to create interoperable applications for payor scenarios.

Feature details

Microsoft's payor data model contains an updated set of entities suggested for customers and partners building their own payor apps or leveraging and integrating to Microsoft Cloud for Healthcare apps.

See also

Healthcare data model overview (docs)

Integrate with FHIR-enabled endpoints using health data exchange APIs

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

Business value

This feature enables exchange of health data with Microsoft Cloud for Healthcare solutions as FHIR bundles with EHRs. You're not required to set up an FHIR server in your environment to take advantage of this feature.

Feature details

The health data exchange APIs leverage Dataverse custom APIs and give you the ability to create and update records in Dataverse with basic search capabilities. This will be accompanied by documentation to guide administrators through the setup and configuration using Azure Logic Apps for a full end-to-end integration experience.

New data integration admin console

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

Business value

IT administrators and Interop specialists can easily discover the different components available for health data integration in the toolkit.

Feature details

The Microsoft Cloud for Healthcare data integration toolkit will provide an overview of each of the first-party integration components (health data exchange APIs and Virtual health data tables) along with a step-by-step guide for setup and configuration.

It will also enable discoverability of third-party partner APIs or connectors available for integration with Cloud for Healthcare data.

Enhanced virtual health data tables

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

Business value

Robust support for virtual health data tables provides greater flexibility for health data exchange between FHIR endpoints and Dataverse without having to duplicate data and pay for additional cloud storage.

Feature details

These updates expand virtual data tables (VDT) to support key clinical, diagnostic, and financial FHIR resources, including improved support for create, read, update, and delete (CRUD) operations. The updates provide customers with more flexibility to take advantage of VDT without duplicating data across systems.

Deliver trusted member experiences for payors

Overview

We're scaling existing care management solutions to payors. Improvements to Microsoft Cloud for Healthcare solutions will provide better support to payor use cases. We're adapting and scaling Patient 360 to build Member 360 services for payors.

Drive optimized member outcomes for payors

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

Business value

In healthcare, particularly in the payor vertical, there's a mandate to provide value-based care across the care continuum (quality care over time) with improved outcomes and reduced costs to their members.

Feature details

To achieve value-based care, payors need the right set of tools in the form of a holistic solution, data, and insights to:

- Design personalized health plans
- Assess gaps in care
- Provide risk stratification
- Access care
- Adjust health plans (as per the driving market forces and population needs)

Empower health team collaboration

Overview

Provider solutions by Dynamics 365 and Microsoft Power Platform enable healthcare providers to coordinate safe and effective care. As part of Microsoft Cloud for Healthcare, Dynamics 365 and Power Platform support the following healthcare solutions for healthcare providers:

- **Care management**: Coordinate care plans and care teams within the Care management solution and in Microsoft Teams (powered by Power Apps).
- **Home health**: Schedule and coordinate home visits (powered by Dynamics 365 Field Service).

We're focused on enhancing the Care management solution and improving the coordination between team members.

Enhance care team collaboration through Teams

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

Business value

Care team members will be able to collaborate more seamlessly by leveraging the capabilities offered by Microsoft Teams.

Feature details

Care team members will be able to collaborate in the context of patient information by using embedded Teams capabilities. This enables faster alignment on care goals and care plans, which helps providers offer better care to their patients.

Provide care plans in Patient access portal

Enabled for	Public preview	General availability
Users, automatically	Aug 2022	Oct 2022

Business value

The payment for healthcare services is switching to value-based care, oriented to the quality and cost of care. Care plans are core to redesigning financial incentives to provide higher quality and lower costs.

Feature details

The user experience improvements for care plans include the following updates:

- Improved user experience for care plan creation and customization
- Care plan template recommendations by partners
- Integrated view of the patient's goals and activities
- Care plan access from the Patient access portal
- Progress tracking by patients

Enable integration into healthcare workflows using Bookings Graph APIs

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

Business value

Flexibility of embedding Teams bookings into any Cloud for Healthcare workflow.

Feature details

To accomplish a deep level of Microsoft Teams integration with existing Dynamics 365 and Azure Bot scheduling workflows, we're developing a robust Bookings Graph API that will include features for booking businesses, services, staff, appointments, and customers.

Improve clinical and operational insights

Overview

Healthcare data models and data ingestion provide the foundation for healthcare customers to be successful on Dynamics 365 and Power Platform. Customers can connect data across provider, payor, and pharma to improve decision making, predict risk, improve patient care, and operationalize efficiencies.

The health provider solution connects data from across systems to improve patient care and operational efficiencies through data interoperability.

Improve virtual visit experiences for patients

Enabled for	Public preview	General availability
Users, automatically	Aug 2022	Oct 2022

Business value

Business analytics technology is helping healthcare organizations regulate existing data to improve clinical and business operations.

Feature details

Enhancements include the use of branded waiting rooms and improved access and visibility to virtual solutions from solutions such as Care management and Patient access portal. Operational staff can use dashboards to analyze their virtual visit usage.

Plan and prepare for Microsoft Cloud for Financial Services in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Microsoft Cloud for Financial Services**.

Overview

Microsoft Cloud for Financial Services provides capabilities to manage financial services data at scale and makes it easier for financial services organizations to improve their customer experience, coordinate engagement, and drive operational efficiency. By bringing together capabilities from Microsoft Dynamics 365, Microsoft 365, and Microsoft Azure, Microsoft Cloud for Financial Services expedites a financial services organization's ability to achieve its digital transformation. Our commitment is to offer industry-relevant data gravity and interoperability that comes to life at the application layer in a consistent and meaningful way, while enabling high-value scenarios that are seamlessly extended and enriched by premier industry partners.

With 2022 release wave 2, we're focusing on three primary dimensions:

- **Data gravity and interoperability**: Reduce barriers to entry by simplifying the flow of data into the Microsoft Cloud for Financial Services. Expand the current retail banking data model and add new verticals such as wealth management and insurance.
- **New high-value scenarios**: Improve customer engagement by leveraging high-value services in Dynamics 365 to streamline consultation appointment scheduling and intelligent customer outreach to engage with customers on their terms. Empower wealth management scenarios and customer onboarding scenarios.
- **Rich partner network**: Enable our ecosystem to deeply integrate with Microsoft Cloud for Financial Services and extend its value, helping to further accelerate the data flywheel. Align cloud assets and ecosystem by meeting the demands of specific verticals to ensure that Microsoft Cloud for Financial Services can support industry-relevant business outcomes.

Investment areas

General insurance
We're introducing a new data model for the general insurance industry.

Wealth management
We're introducing a new set of offerings for the wealth management industry, adjusting building blocks that were developed in the context of retail banking to the needs of investment and financial advisors serving higher net-worth customers.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Microsoft Cloud for Financial Services** below:

Check out the release plan

For application administrators

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

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

What's new and planned for Microsoft Cloud for Financial Services

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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.

Introducing the general insurance data model

Introduction of a new data model for the general insurance industry.

Feature	Enabled for	Public preview	General availability
Introducing the general insurance data model	Users by admins, makers, or analysts	Sep 2022	Mar 2023

Introducing wealth management data model

Building blocks that were developed in the context of retail banking to the needs of investment and financial advisers serving higher net-worth customers.

Feature	Enabled for	Public preview	General availability
Introducing wealth management data model	Users by admins, makers, or analysts	Sep 2022	Mar 2023

Description of **Enabled for** column values:

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

General insurance

Overview

We're introducing a new data model for the general insurance industry hosted in Dataverse that captures new dimensions, such as policies, coverages, and claims linked to customers.

Introducing the general insurance data model

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2022	Mar 2023

Business value

A dedicated general insurance data model hosted in Microsoft Dataverse captures new dimensions, such as policies, coverages, and claims linked to customers. To help insurers quickly take advantage of the benefits of Microsoft Cloud for Financial Services, we support their business model out-of-the-box. These changes will accelerate time to value for financial institution solutions by ensuring that the data structure and measures available out of the box are consistent and relevant for insurance business processes.

Feature details

We're introducing extensions to Common Data Model that are customized for insurance scenarios.

- **Policy, coverage, claims schema**: Policies, coverages, and claims are critical entities that are specific to insurance distributors and underwriters. We're providing relevant tables to help property and casualty insurers take advantage of Microsoft Cloud for Financial Services, with their business model supported out of the box. The new tables in the data model will cover these insurance-related items: policies, coverages, and claims.

Wealth management

Overview

We're introducing a new set of offerings for the wealth management industry, adjusting building blocks for retail banking to serve the needs of investment and financial advisors serving higher net-worth customers.

Introducing wealth management data model

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2022	Mar 2023

Business value

A dedicated wealth management data model hosted in Microsoft Dataverse captures new dimensions, such as financial goals and investment instruments linked to customer portfolios. To help wealth managers quickly take advantage of the benefits of Microsoft Cloud for Financial Services, we support their business model out-of-the-box. These changes will accelerate time to value for financial institution solutions by ensuring that data structure and measures available by default are consistent and relevant for wealth management business processes.

Feature details

We're introducing extensions to Common Data Model and the Retail banking data model that are customized for wealth management scenarios.

- **Financial goals schema**: Financial goals assessment and tracking are critical elements of financial advice in order to assess suitability and structure investment portfolios. We're providing the ability to track and capture financial goals and time horizons as part of the wealth management domain of the financial services data model.
- **Investment instruments schema**: Understanding the constituents of investment portfolios is critical for wealth managers to serve their customers. We're adding the ability to capture investment instruments, such as securities, funds, or cash, as part of the wealth domain of the financial services data model.

Plan and prepare for Microsoft Cloud for Nonprofit in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Microsoft Cloud for Nonprofit**.

Overview

Microsoft Cloud for Nonprofit transforms Microsoft's industry-leading technologies—productivity and collaboration tools, business applications, cloud services, and infrastructure—by connecting them to the most common nonprofit scenarios. Built for roles unique to nonprofit organizations, these products address the sector's most urgent challenges, including constituent and supporter engagement, award management, fundraising, volunteer management, program design and delivery, nonprofit operations, and data management.

This nonprofit-specific cloud is built on the Nonprofit Common Data Model, a flexible and robust framework created in partnership with nonprofit leaders and technologists to unify nonprofit data and connect technology across the organization. Common Data Model is a platform-agnostic set of nonprofit entities, attributes, and relationships for the most common nonprofit scenarios. It takes the guesswork out of relating nonprofit data across platforms and applications, helping organizations eliminate expensive data silos.

With unified data, nonprofits work smarter by raising more revenue, effectively delivering more programs and services to communities, and more easily measuring their impact. Our ambition is to make it easier, faster, and less expensive for nonprofits to adopt modern technology so they can focus on what's important—their mission.

Investment areas

Know your donors and supporters
Nonprofit development operations and database administrators will benefit from faster and more secure donation processing. As we continue to invest in leveraging Microsoft platform

capabilities, we have further redesigned the architecture of Fundraising and Engagement to ensure Azure is delivering real-time processing and market-leading transaction security.

Nonprofit organizations and UN agencies that leverage Dynamics 365 Marketing and Microsoft Cloud for Nonprofit will benefit from a nonprofit marketing template that will provide a guided journey to campaign segmentation and analysis.

Microsoft Cloud for Nonprofit provides:

- **Constituent management**: Attract, retain, and grow donor and supporter bases.
- **Personalized engagement**: Connect through compelling content by using the most proven channels.
- **Donation and award management**: Payment processing, fund accounting, and designation management to support fundraising efficiency for simple to complex funding types.

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

Check out the release plan

For application administrators

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

Features that must be enabled by application administrators
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What's new and planned for Microsoft Cloud for Nonprofit

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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
Import and clean data from other systems	Users, automatically	-	Nov 2022
View campaign performance reports	Users, automatically	-	Nov 2022

Description of **Enabled for** column values:

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

Know your donors and supporters

Overview

Nonprofit development operations and database administrators will benefit from faster and more secure donation processing. As we continue to invest in leveraging Microsoft platform capabilities, we have further redesigned the architecture of Fundraising and Engagement to ensure Azure is delivering real-time processing and market-leading transaction security.

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- **Donation and award management**: Payment processing, fund accounting, and designation management to support fundraising efficiency for simple to complex funding types.

Import and clean data from other systems

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

Business value

Nonprofits rely on timely consolidation of data to understand their donors, the success of their campaigns, and their overall financial situation. Improvements to the donation import process will make it easier for nonprofits to bring new data into Fundraising and Engagement.

Feature details

The donation import capability enables nonprofit data analysts, grants managers, and other professionals to load data from other systems into Fundraising and Engagement. These enhancements will give users better visibility into the data they're importing and provide tools for deduplication and cleanup of ambiguous records. This simplified process will reduce error rates and move nonprofits quickly from import to insight.

View campaign performance reports

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

Business value

Nonprofit marketers need to understand their campaign performance by tracking the impact of the campaign all the way to the donation entered into Fundraising and Engagement. This allows them to understand campaign performance and ROI across two key systems.

Feature details

Through the campaign performance report, marketing managers can understand how many and the amount of donations that are driven by campaigns in Dynamics 365 Marketing. The report lets marketers understand campaign performance and ROI across two key systems.

Plan and prepare for Microsoft Cloud for Retail in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Microsoft Cloud for Retail**.

Overview

Microsoft Cloud for Retail empowers retailers with industry-specific solutions to accelerate innovation for sustainable growth by bringing together trusted cloud capabilities from Microsoft and our partners. These capabilities help retailers maximize their data's value, provide a delightful and engaging shopping experience for their shoppers, and empower store associates to be productive and customer savvy. These capabilities also enable retailers to build an optimized, real-time, and sustainable supply chain. Microsoft Cloud for Retail is supported with retail industry-specific data models, APIs, and an ecosystem of partners to build retail-specific scenarios.

Microsoft Cloud for Retail drives accelerated time to value by unlocking the power of Microsoft Azure, Microsoft Power Platform, Microsoft 365, Microsoft Dynamics 365, and Microsoft Advertising.

Investment areas

Empower the store associate
Equip store associates with solutions to enable real-time store communications, workforce management, and store automation. Retail always has been and always will be a people business, with many employed on retail’s frontline. If there was any doubt about the importance of retail’s frontline, then their herculean efforts during the past two years have put those doubts to rest. These superheroes shouldered much of the change we’ve seen and experienced with minimal training and astonishing grace.

Maximize the value of your data
Realize the true value of a retailer's data by unifying disparate data sources across the shopper journey, discovering insights that enable better experiences.

With Microsoft Cloud for Retail, we're using data models to bring multiple systems and applications together, unifying disparate data sources to establish a singular, in-depth profile of each shopper. Capabilities here include unified customer profile and shopper and operational analytics.

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

Check out the release plan

For application administrators

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

Features that must be enabled by application administrators
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What's new and planned for Microsoft Cloud for Retail

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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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 the store associate

Equip store associates with solutions to enable real-time store communications, workforce management, and store automation.

Feature	Enabled for	Public preview	General availability
Empower the frontline worker with real-time data	Users by admins, makers, or analysts	Nov 2022	Mar 2023

Maximize the value of your data

Realize the true value of a retailer's data by unifying disparate data sources across the shopper journey, discovering insights that enable better experiences.

Feature	Enabled for	Public preview	General availability
Provide shopper data and insights from dunnhumby	Users by admins, makers, or analysts	Jan 2023	Mar 2023

Description of **Enabled for** column values:

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

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

Empower the store associate

Overview

Equip store associates with solutions to enable real-time store communications, workforce management, and store automation. Retail always has been and always will be a people business, with many employed on retail's frontline. If there was any doubt about the importance of retail's frontline, then their herculean efforts during the past two years have put those doubts to rest. These superheroes shouldered much of the change we've seen and experienced with minimal training and astonishing grace.

Empower the frontline worker with real-time data

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Nov 2022	Mar 2023

Business value

Make the retail outlet operations more efficient, maximize sales and improve the shopper's experience in a retail outlet by empowering the store associate with digital tools to execute their audits and get a holistic view of the customer and their preferences.

Feature details

Real-time data:

- Enables store associates to digitally execute their daily audits, accounting for unique requirements by vertical and customer, poor and low connectivity in retail outlets, and disparate line-of-business systems (such as POS, ERP, and work order management systems).
- Provides a 360-degree customer view for deeper and more meaningful customer conversations to assist the associate in selling.

Maximize the value of your data

Overview

Realize the true value of a retailer's data by unifying disparate data sources across the shopper journey, discovering insights that enable better experiences.

With Microsoft Cloud for Retail, we're using data models to bring multiple systems and applications together, unifying disparate data sources to establish a singular, in-depth profile of each shopper. Capabilities here include unified customer profile and shopper and operational analytics.

Provide shopper data and insights from dunnhumby

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

Business value

A better understanding of shoppers is key to retailers for driving better and more personalized engagement with them. With the integration of Microsoft Cloud for Retail solutions with dunnhumby, retailers can seamlessly access dunnhumby customer data science and insights from within Microsoft Cloud for Retail solutions. This will enable retailers to further enrich their customer 360 profiles, seamlessly deliver more relevant personalized offers and recommendations, enable the creation of custom segments, and integrated measurement to improve customer engagement, all driven by dunnhumby's world-class customer data science.

Feature details

Microsoft Cloud for Retail is partnering with dunnhumby on data integration, data enrichment, and data analytics. This partnership includes the following efforts:

- Integration of dunnhumby data with Azure Synapse on customer's tenant for bespoke advanced analytics by the retailer.
- Enrich Dynamics 365 Customer Insights with custom segments, integrated measures, and personalized offers and recommendations from dunnhumby.

Deprecation of Dynamics 365 apps

A feature or capability that's deprecated is one that we intend to remove in a future release. The feature or capability will continue to work and will be fully supported until it's officially removed. After it's removed, the feature or capability will no longer work. Deprecation notifications can span a few months or years.

We encourage you to use this information, along with the release plans, to prepare for future releases. This notice is intended to give you sufficient time to plan and update your code before a deprecated feature or capability is removed.

- A deprecated feature is not in active development and may be removed in a future update.
- A removed feature is no longer available in the product.

For the current lists of Dynamics 365 deprecations, visit:

- Sales
- Customer Service
- Field Service
- Finance and operations apps
- Universal Resource Scheduling
- Healthcare accelerator
- Financial services accelerator

Other deprecations

For the lists of other deprecations, visit:

- Important changes (deprecations) coming in Power Apps and Power Automate

See also

- Dynamics 365 and Microsoft cloud for industries 2022 release wave 1 plan
- Microsoft Power Platform 2022 release wave 1 plan
- Dynamics 365 and Microsoft Power Platform release plans
- Microsoft Lifecycle Policy

2022 release wave 2 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning **August 1, 2022**. Features from the following apps are available as part of early access:

- Power Apps

The features from these apps update the existing user experiences. You can opt in early to enable these features in your environment. This will allow you to test these features and then adopt them across your environments. For information on how to enable these features, go to Opt in to 2022 release wave 2 updates.

IMPORTANT If you are using Dynamics 365 apps, such as Sales, Service, Marketing, Finance, Supply Chain Management, Business Central, and Commerce, there are early access features that could impact your users. For Dynamics 365 early access features, go to 2022 release wave 2 features available for early access.

Power Apps

For a complete list of the Power Apps features, go to What's new and planned for Power Apps.

Feature	Enabled for	Early access	General availability
Appointment description supports rich text	Users, automatically	Aug 1, 2022	Oct 2022
Create and join Teams meetings in-app or from appointments	Users, automatically	Aug 1, 2022	Oct 2022
Easily configure mobile offline for modern converged apps	Users, automatically	Aug 1, 2022	Nov 2022
Easily copy links to records	Users, automatically	Aug 1, 2022	Oct 2022
Filter grid data, save results as view	Users, automatically	Aug 1, 2022	Oct 2022
Model-driven app client toasts moved to the toast stack	Users, automatically	Aug 1, 2022	Oct 2022

Feature	Enabled for	Early access	General availability
Modern advanced find turned on by default	Users, automatically	Aug 1, 2022	Oct 2022
View only relevant activities in dropdown	Users, automatically	Aug 1, 2022	Oct 2022
View your colleague's presence	Users, automatically	Aug 1, 2022	Oct 2022

Power Apps

Plan and prepare for Power Apps in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Power Apps**.

Overview

Microsoft Power Apps is the industry-leading low-code application development platform that underpins Dynamics 365 extensibility, Microsoft 365 customization, and a standalone custom line of business applications for customers worldwide. Power Apps dramatically lowers the cost, complexity, and time of software development through powerful low-code development tools, a robust and secure data platform in Microsoft Dataverse, and hundreds of connectors to common business data sources.

Power Apps is investing in several areas as part of Microsoft Power Platform 2022 release wave 2:

- **Trust**: Secure and governable enterprise apps are critical to creating trust with your users and enterprise IT teams.
- **Data**: Makers and developers of all skill levels will be more productive over Microsoft Dataverse, multiply their productivity with fusion teams, and leverage intelligence to assist development.
- **Fusion**: Power Apps will add built-in collaboration for end users and integration with Microsoft 365 to allow teams to collaborate and act on business data, as well as key updates to modernize user experiences.
- **Intelligence**: Organizations can now build and deliver flagship apps to the entire company through Power Apps with offline and standalone apps.

For official product documentation and training for Power Apps, go to:

- Power Apps docs
- Power Apps training on Microsoft Learn

Investment areas

Fusion of components, composition, and collaboration
Power Apps allows everyone to be productive by supporting a collaborative environment for fusion teams to bring together the best of their assets and skills into a single solution. Power Apps will invest in ensuring makers can work collaboratively on an app, bringing together the skills, insights, and knowledge of multiple makers into a single application in real time. We'll also ensure that skills across highly visual custom UI, data and model driven UI, and code-first components can all be leveraged in a single application.

Every system connected
Dataverse and the ecosystem of connectors allows organizations to build apps that leverage data from multiple sources, including Dataverse and data from Microsoft and third-party sources. To continue to enable makers to build applications including a rich set of data from multiple sources, we'll continue to improve our Dataverse experiences to manage and leverage data within the platform, simplifying virtual tables and connections to external data sources, and improving offline capabilities to ensure data can be used in apps regardless of connectivity.

Collaborative workloads
Power Apps will continue to ensure that app users are as productive as they can be. This will be achieved through a modern and simple experience and enabling collaboration between users. Power Apps will ensure that app experiences are familiar and allow users to leverage both collaboration with team members in their apps and work with data from their apps in their existing tools like Microsoft Teams.

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

[Check out the release plan](#)

For application administrators

User-impacting features to the user experience enabled automatically
User-impacting features should be reviewed by application administrators. This facilitates

release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

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

Get the most out of Power Apps

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

Helpful links	Description
Product trials	Get started with Power Apps.

What's new and planned for Power Apps

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Collaborative workloads

Collaborative workloads let users leverage app experiences and data, allowing them to collaborate with team members using existing tools like Teams.

Feature	Enabled for	Public preview	Early access*	General availability
Grid control support for grouping, aggregation, nested grids	Users by admins, makers, or analysts	Oct 2022	-	
Filter grid data, save results as view	Users, automatically	-	Aug 2022	Oct 2022
Modern advanced find turned on by default	Users, automatically	-	Aug 2022	Oct 2022
Power BI quick reports in Power Apps	Admins, makers, marketers, or analysts, automatically	Aug 2022	-	Oct 2022
View form updates to command bar, business process flow, header, and tabs	Admins, makers, marketers, or analysts, automatically	Aug 2022	-	Oct 2022

Feature	Enabled for	Public preview	Early access*	General availability
Model-driven app client toasts moved to the toast stack	Users, automatically	-	Aug 2022	Oct 2022
Use Teams chat with others in app	Users by admins, makers, or analysts	Oct 2022	-	Mar 2023

Every system connected

Power Apps enables organizations to remove data silos and connect every system for consistent and reliable access to data.

Feature	Enabled for	Public preview	Early access*	General availability
Dataverse tables integrated inside Power Apps Studio	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022
Easily configure mobile offline for modern converged apps	Users, automatically	-	Aug 2022	Nov 2022
Connect to external data from Dataverse	Admins, makers, marketers, or analysts, automatically	Oct 2022	-	Jan 2023

Fusion of components, composition, and collaboration

Fusion of components, composition, and collaboration brings together the skills, insights, and knowledge of makers into a single application.

Feature	Enabled for	Public preview	Early access*	General availability
Custom pages are responsive by default with rich layouts	Admins, makers, marketers, or analysts, automatically	Oct 2022	-	
Appointment description supports rich text	Users, automatically	-	Aug 2022	Oct 2022

Feature	Enabled for	Public preview	Early access*	General availability
Create and join Teams meetings in-app or from appointments	Users, automatically	-	Aug 2022	Oct 2022
Easily copy links to records	Users, automatically	-	Aug 2022	Oct 2022
View only relevant activities in dropdown	Users, automatically	-	Aug 2022	Oct 2022
View your colleague's presence	Users, automatically	Aug 2022	-	Oct 2022

* You are able to opt into some features as part of early access on August 1, 2022, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

Overview

Power Apps will continue to ensure that app users are as productive as they can be. This will be achieved through a modern and simple experience and enabling collaboration between users. Power Apps will ensure that app experiences are familiar and allow users to leverage both collaboration with team members in their apps and work with data from their apps in their existing tools like Microsoft Teams.

Grid control support for grouping, aggregation, nested grids

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

Business value

You can be more productive in the grid by being able to access related records without leaving the grid and by getting meaningful insights into your data through grouping and aggregation capabilities.

Feature details

The **Power Apps grid control** for model-driven apps entered a public preview stage during the last release wave and featured the following capabilities:

- **Infinite scrolling**: Users no longer need to page to see more records. Instead, users can continue scrolling to get to the row(s) they are interested in. The grid can be configured to use paging buttons instead by the maker if desired.
- **Inline editing within views and subgrids**: In addition to being available for read-only scenarios, this control can also be used as an editable grid. When editing is enabled by the maker, users can be more productive by making edits directly in the grid instead of having to make changes in the corresponding form.
- **Customizable cells**: If the default visualization for the cells in one or more columns doesn't meet your needs, makers can create custom cell renderers and editors to modify how cells look when showing data and when users are editing data.

Building on this effort, the **Power apps grid control** is now being extended in the following ways to not only reach parity with the legacy read-only and editable grids but also provide even more advanced functionality. It's important to note that these capabilities are available regardless of whether the grid is being used in read-only or editable mode.

- **Nested grids**: Expand a row to see a grid of related records. Multiple rows in the grid can be expanded simultaneously.
- **Grouping**: Organize tabular data in interesting ways by grouping the data based on one column. Each group of rows can then be expanded and collapsed as desired.
- **Aggregation**: Get meaningful insights into tabular data by enabling aggregation on one or more numeric columns in a grid. For each column, users can choose to see the total, minimum value, maximum value, or average of values from that column. If grouping has been applied to the group, then this aggregate value will also be displayed for each group.

Filter grid data, save results as view

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

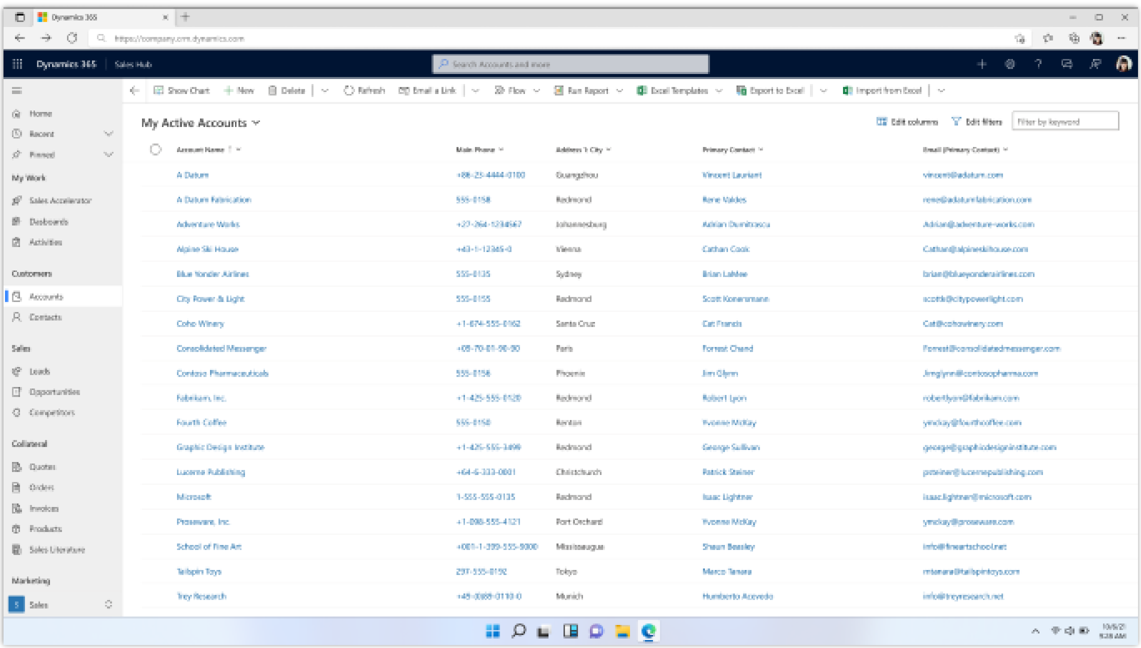
Business value

Updates to placeholder text and the ability to save quick find filters as a view allow users to create powerful personal views.

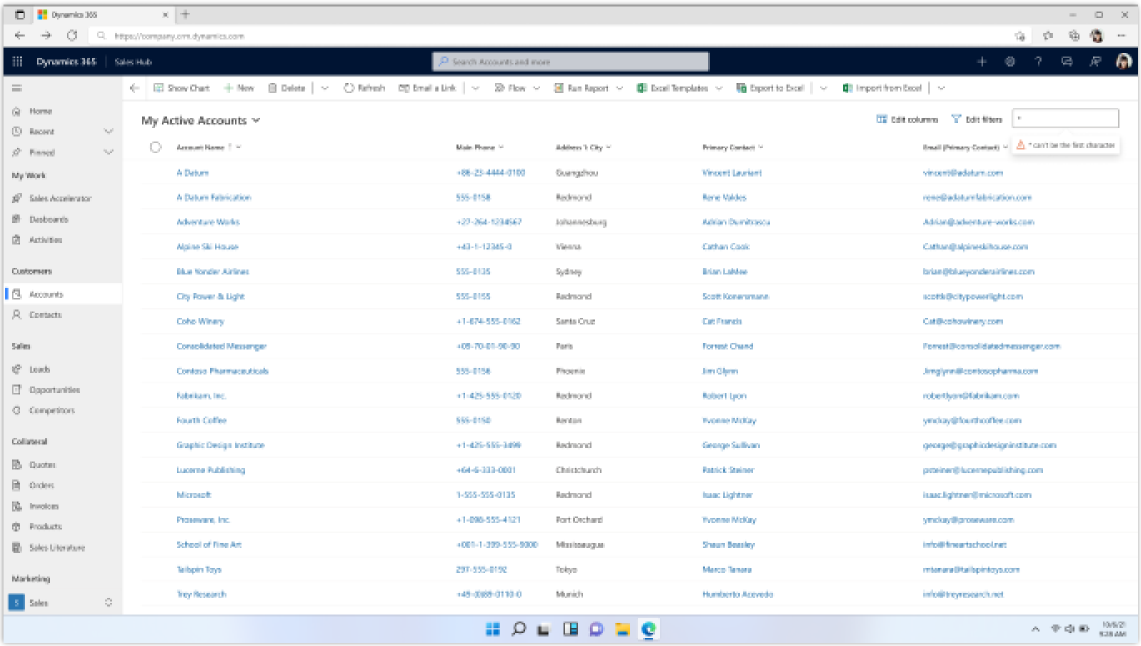
Feature details

The following usability enhancements to grids in model-driven apps allow you to be more productive when you're exploring data ad-hoc:

- The placeholder text in grid search is updated to filter by keyword which indicates how it can be used.
- When you filter by keyword, you can save the quick find filter conditions as a personal view.
- When Dataverse search is enabled, invalid queries, such as searches that begin with an asterisk are blocked.



Screen of filter by keyword.



Screen of non-performant query optimization.

Modern advanced find turned on by default

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

Business value

With modern advanced find, you can access any table in a model-driven app through search and use advanced filters to explore the data easily. Be more productive with navigation by searching for a view by its name in the enhanced view selector. The new view management experience will provide you with options to share views so you can collaborate with your team easily. Managing views is simpler with personalization options to build your own set of views.

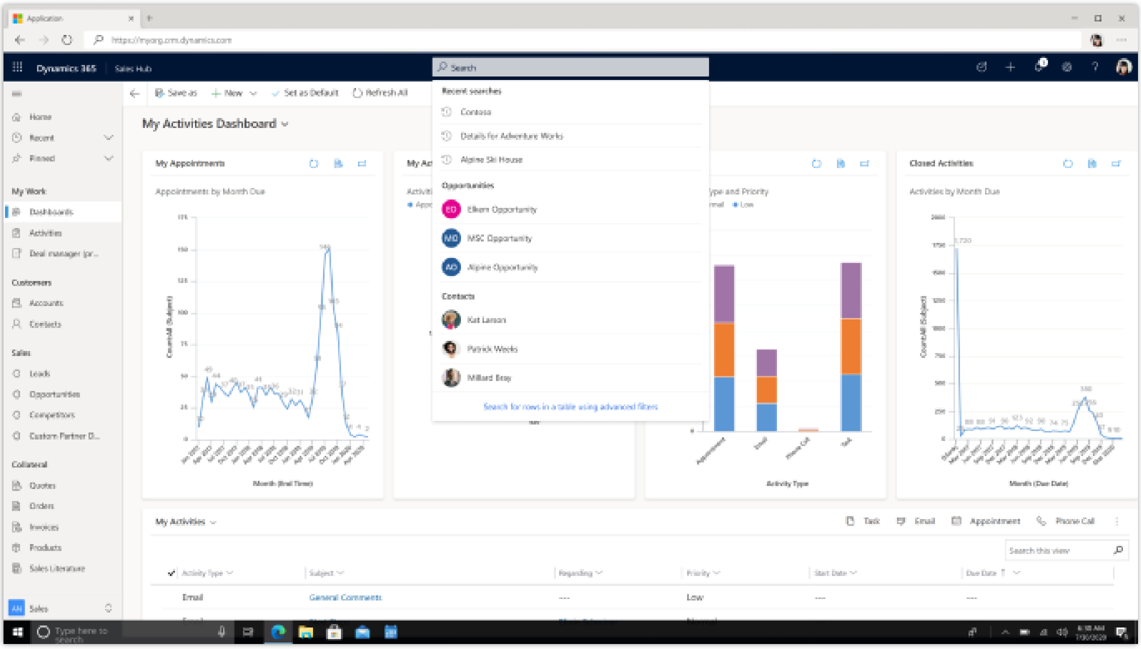
Feature details

With modern advanced find you can:

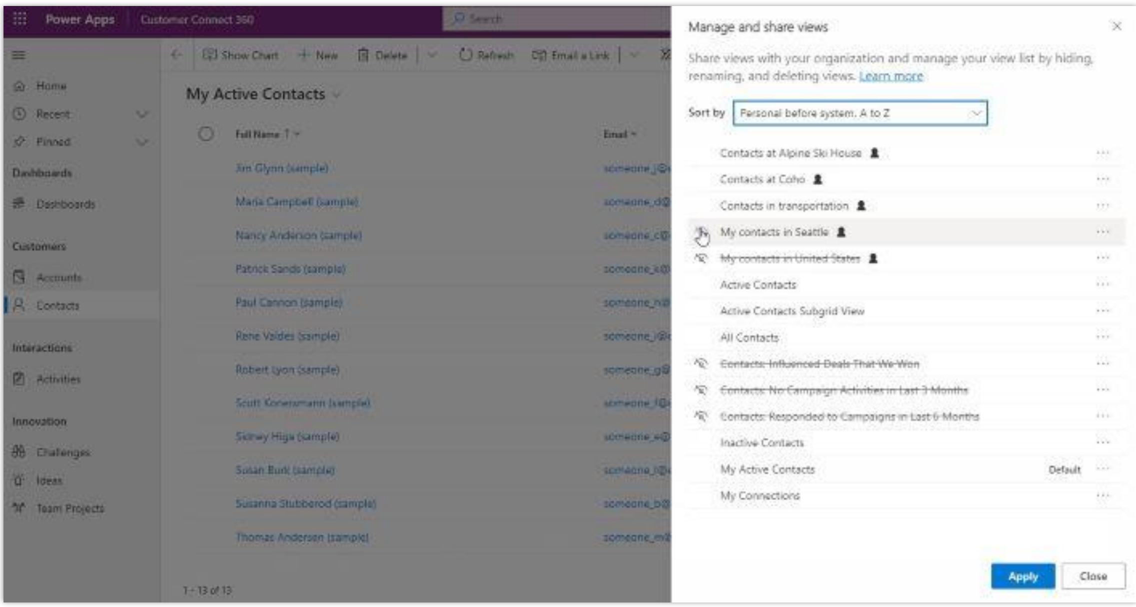
- Explore any table in a model-driven app through structured search and filters.
- Edit columns and filter data and construct views that will help you apply the right lens to your data.
- Search for a view and easily find the view that you're looking for with the enhanced view selector.

- Managing views is simpler with personalization options that let you build your own set of views. You can hide views and order them differently. Your personalized view list travels with you across all apps and devices both in online mode and in offline mode.
- Collaborate with your team by sharing views easily and managing the views shared with you.

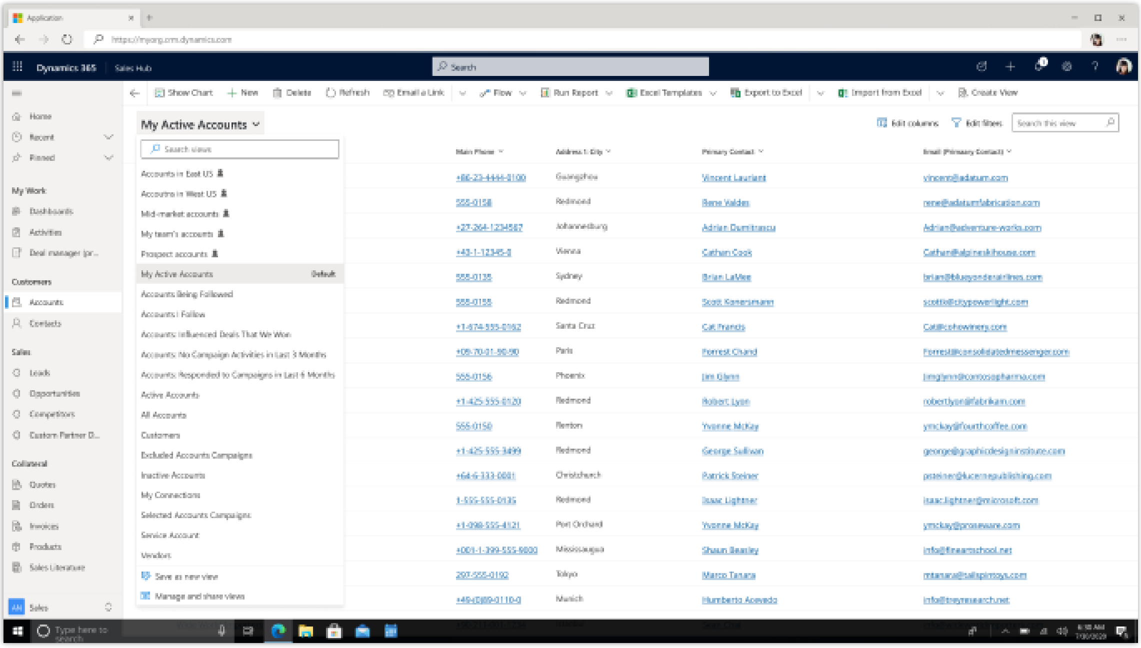
All the new capabilities will replace the legacy advanced find experience.



Screen of modern advanced find entry point.



Screen of modern advanced find hide view.



Screen of modern advanced find view selector.

Power BI quick reports in Power Apps

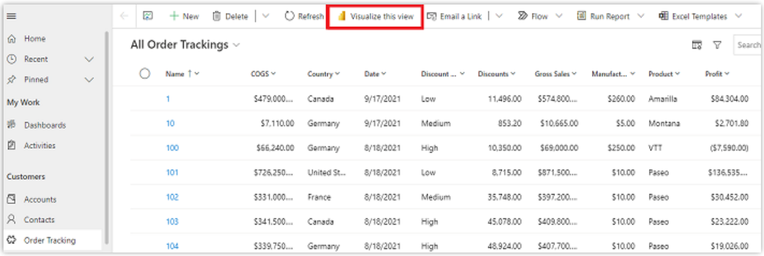
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2022	-	Oct 2022

Business value

Create reports in the Power BI service starting with a view in a model-driven app. Power BI automatically generates the visuals for you, so you can start exploring the data with just a few clicks.

Feature details

The capability to enable Power BI quick report visualization on a table on an existing app is generally available. All new apps have this capability enabled by default, with the app setting still available for makers to disable.

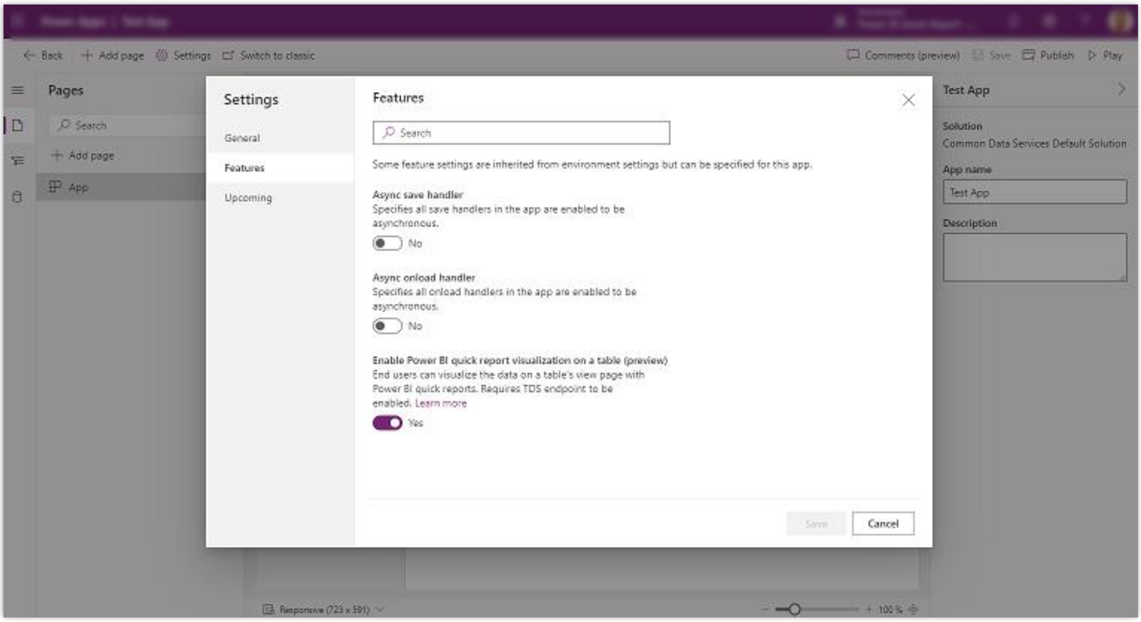


Screen of visualize this view.

With **Visualize this view** option on all grid pages, you can:

- Create a Power BI quick report, starting from a view with just one button-click. The Power BI service generates visuals and a layout intelligently based on the underlying data.
- Make any necessary modifications to visuals or the filters or the columns (or any combination of all three) using the display name of the columns on the quick report.
- Save the Power BI report to a workspace of your choice, so you can access it anytime and customize it for your needs.

A subset of these capabilities is already available as a preview.



Screen of app settings.

View form updates to command bar, business process flow, header, and tabs

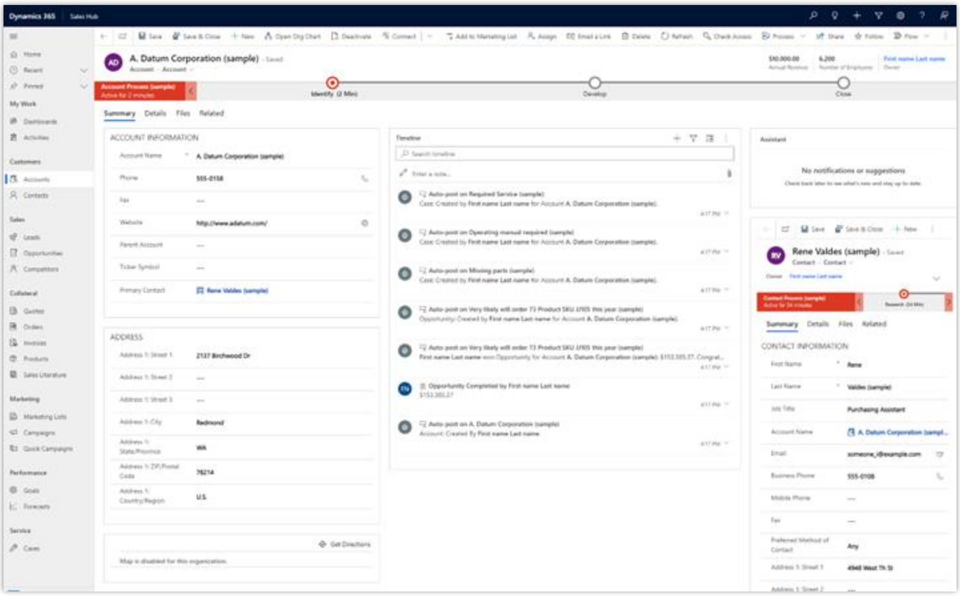
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2022	-	Oct 2022

Business value

Makers can now build complex multi-entity forms that support highly productive experiences in model-driven apps. They can work on related records with additional capabilities without leaving the larger context where the form component control is added. Full control on the form component gives customizers the ability to light up individual capabilities as per their business need.

Feature details

Form component will support rendering model-driven app forms that can be used on another form, or easily added to other pages including dashboards and views in model-driven apps. Users will be able to configure command bar, business process flows, show or hide tabs, and form header.



Screen of form component control with BOF, commands, and header.

Model-driven app client toasts moved to the toast stack

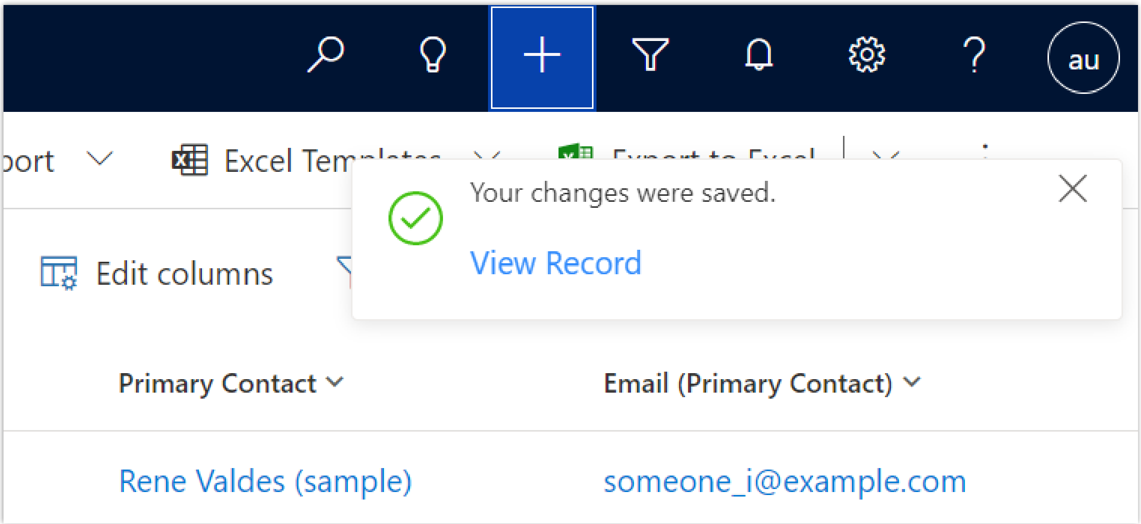
Enabled for	Public preview	Early access	General availability
Users, automatically	-	Aug 2022	Oct 2022

Business value

This feature improves the user experience by using a single location for all toast notifications.

Feature details

With the in-app notification feature, we introduced a toast stack in the upper-corner of model-driven apps. When in-app notification is enabled for an app, both the in-app notification toasts and the client toasts are shown in the unified toast stack. With this release, we're moving the client-side toasts (like quick create **View Record**) from the lower center to the toast stack.



Screen of client-side toasts displayed in upper right corner within the toast stack.

Use Teams chat with others in app

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

Business value

Start multiple Teams chats with anyone else who is working on the same record without leaving your app.

Feature details

Start multiple Teams chats with colleagues without leaving your model-driven app. You can easily find existing chats related to a record or start a new one with anyone else who is working on the same record.

All chats are shown in a side-panel on the right. The chats are tracked as chat activities in the timeline and activities views.

NOTE This feature will be available in preview for all stand-alone model-driven apps.

Every system connected

Overview

Dataverse and the ecosystem of connectors allows organizations to build apps that leverage data from multiple sources, including Dataverse and data from Microsoft and third-party sources. To continue to enable makers to build applications including a rich set of data from multiple sources, we'll continue to improve our Dataverse experiences to manage and leverage data within the platform, simplifying virtual tables and connections to external data sources, and improving offline capabilities to ensure data can be used in apps regardless of connectivity.

Dataverse tables integrated inside Power Apps Studio

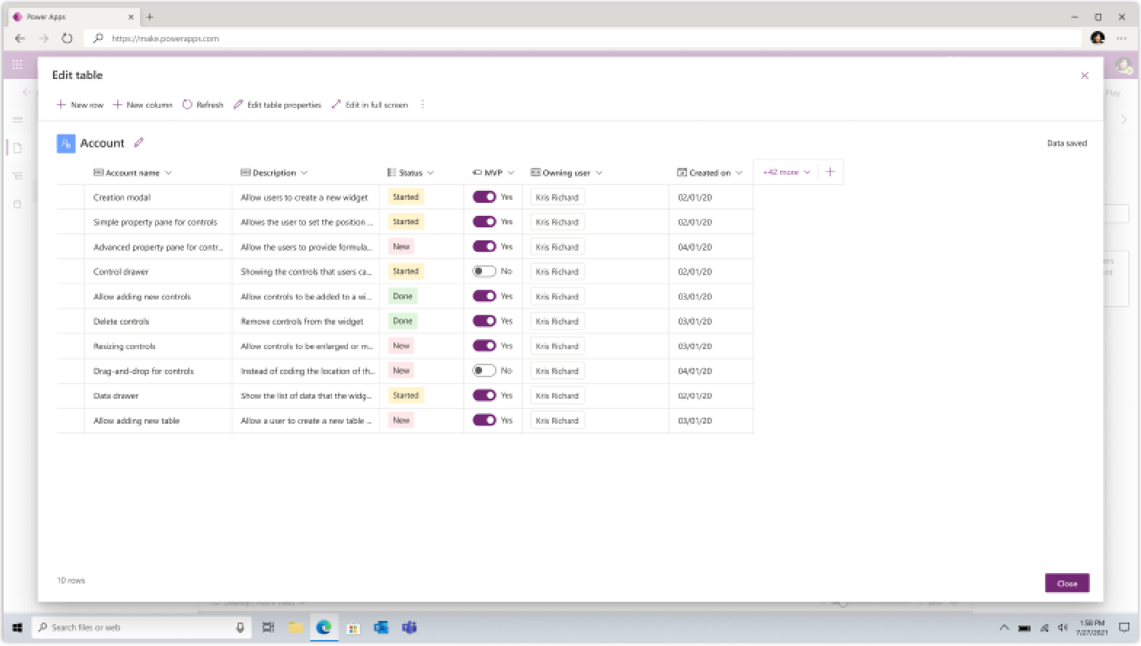
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022

Business value

Working with Dataverse tables inside Power Apps Studio will make your app building experience easy and efficient to create or update both data and metadata.

Feature details

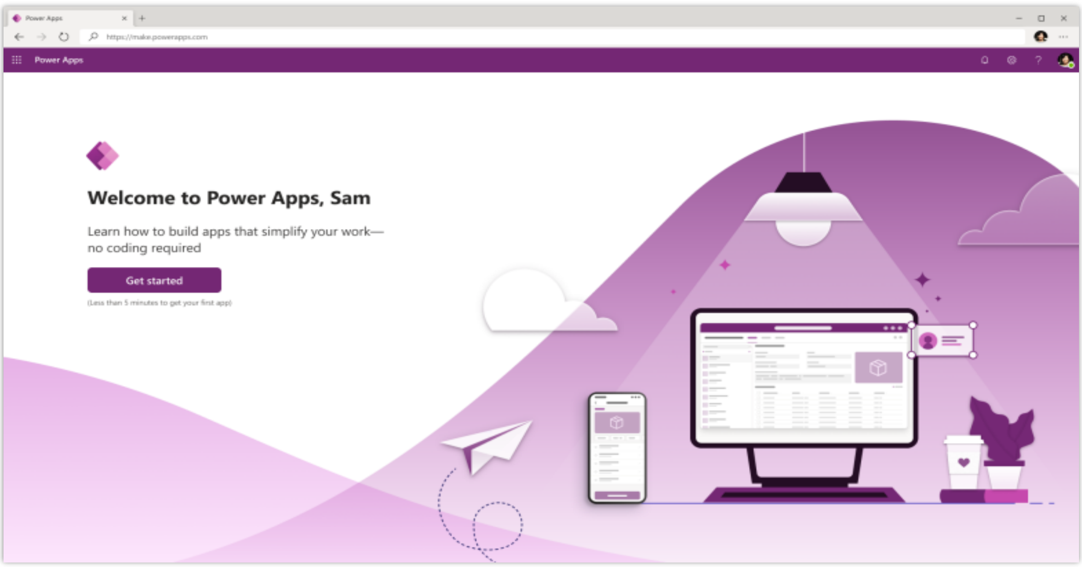
Everyone will be able to easily get started with Microsoft Dataverse using a familiar, table-centric experience directly within the Power Apps, including a fresh onboarding experience for new makers.



Screen of edit table accounts.

Included capabilities:

- Familiar table experiences in Power Apps, app designers, other Power Platform products, and within Microsoft Teams.
- Dataverse will also support Power Fx calculated columns, making a much wider audience of citizen developers able to build powerful tables.
- New makers are guided with the experience of how Power Apps works through examples while building their first app that uses Dataverse data.



Screen of guided onboarding.

Easily configure mobile offline for modern converged apps

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

Business value

The offline capability for custom pages helps further enable mobile scenarios.

Feature details

Modern converged applications have basic offline capabilities for custom pages. Custom pages have offline capabilities for all data types except files and images. Using the new offline infrastructure built for model-driven apps, the offline capabilities include incremental syncing, network detection, and data that persists across sessions. Updated UI to manage the offline profile (a specification of which tables and what filters are used) accompanies this feature. Offline profiles can be auto generated based on the tables currently in the application or you can use a previously created profile. Early preview will be in August.

Connect to external data from Dataverse

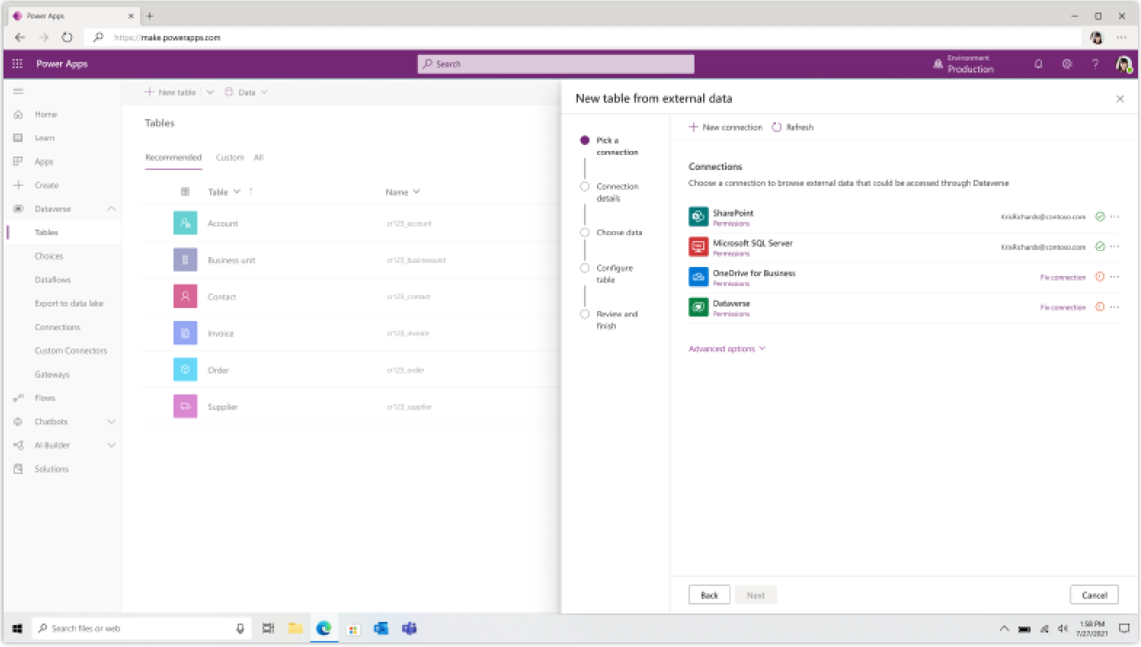
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2022	-	Jan 2023

Business value

Connect existing data sources, such as SQL Server, Excel file, or Microsoft List with Microsoft Dataverse and interact with that external data as if it's part of Dataverse.

Feature details

Microsoft Dataverse has supported virtual tables for a long time. They're extremely powerful but can be difficult to set up. With this release, you'll be able to create tables in Dataverse that surface external data by leveraging simple connections to find the external data. For example, a Dataverse table with data from an Excel workbook in OneDrive or a SQL Server in Azure.



Screen of creating a table using a tabular connector.

Depending on the connection, a table will be automatically generated with the correct schema and integration. You can do all this through a simple wizard in Power Apps, which gives you as much control as you need over configuring the details while creating the Dataverse table.

Fusion of components, composition, and collaboration

Overview

Power Apps allows everyone to be productive by supporting a collaborative environment for fusion teams to bring together the best of their assets and skills into a single solution. Power Apps will invest in ensuring makers can work collaboratively on an app, bringing together the skills, insights, and knowledge of multiple makers into a single application in real time. We'll also ensure that skills across highly visual custom UI, data and model driven UI, and code-first components can all be leveraged in a single application.

Custom pages are responsive by default with rich layouts

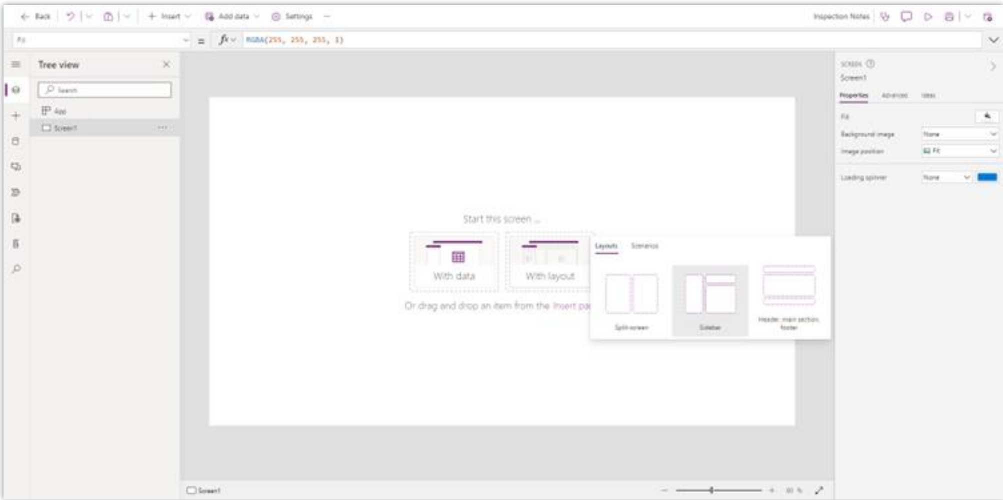
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2022	-	-

Business value

Makers can accelerate development by adding responsive custom pages in their converged apps while maintaining granular control over design.

Feature details

Custom pages brought the power and control of canvas apps to the model-driven world. Custom pages are now being extended to introduce more tools to support makers creating responsive layouts quickly while still maintaining the precision of canvas apps.



A screenshot of the custom page editor in the Modern App Designer showing responsive layout options.

- **Responsive layout templates**: Choose from a selection of rich responsive layouts for rapid, responsive custom page development.
- **Easy layout configuration**: Easily move controls from one responsive section to another in layouts and maintain the control and precision of canvas app development.
- **Multiple form factor support**: Support desktop, mobile and other form factors automatically with a single custom page just as you are accustomed to with model-driven apps.

Appointment description supports rich text

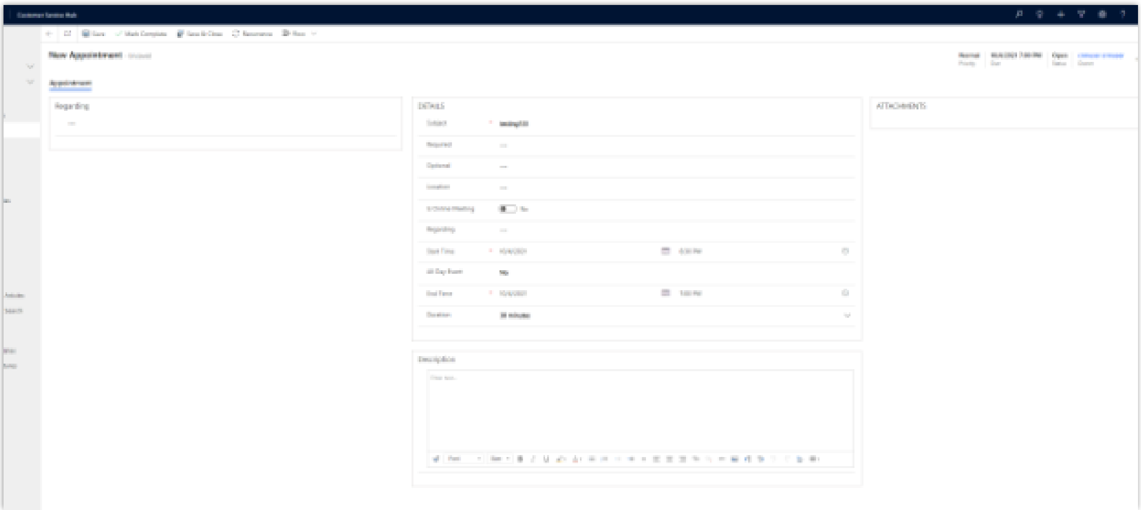
Enabled for	Public preview	Early access	General availability
Users, automatically	-	Aug 2022	Oct 2022

Business value

Include rich text descriptions in your appointments, including links to online meetings.

Feature details

You can now add links, lists, and other rich text in your appointment description with the new rich text editor control. This feature is now automatically enabled for all apps and can be disabled in Power Platform admin console under the environment settings. Previously, the feature was an opt-in setting in the environment.



Screen of rich text editor in appointment form.

Create and join Teams meetings in-app or from appointments

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

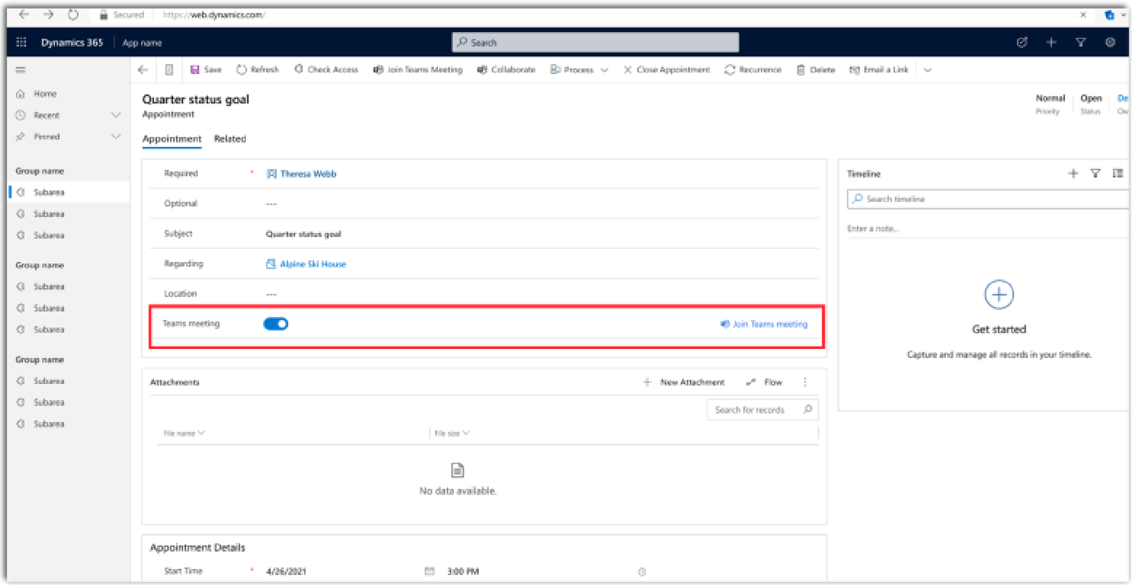
Business value

With the capability to join meetings directly from Power Apps, you can now save time with just one button click.

Feature details

Easily add Microsoft Teams meetings from an appointment in your model-driven app. You can also join a Teams meeting with a single button-click from the appointment or the timeline control.

While this feature was an opt-in through the environment settings earlier, it's now enabled by default for all appointments in tenants that use Teams.



Screen of join Teams meeting option in appointment form.

Easily copy links to records

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

Business value

This feature supports new features to improve productivity with better sharing of links.

Feature details

Share records as easy as Office documents. The new share button allows you to easily copy a link to the record and email links to records.

This feature is now automatically enabled for all records. Previously, it could be previewed by enabling the **Collaboration preview** feature in environment settings.

View only relevant activities in dropdown

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

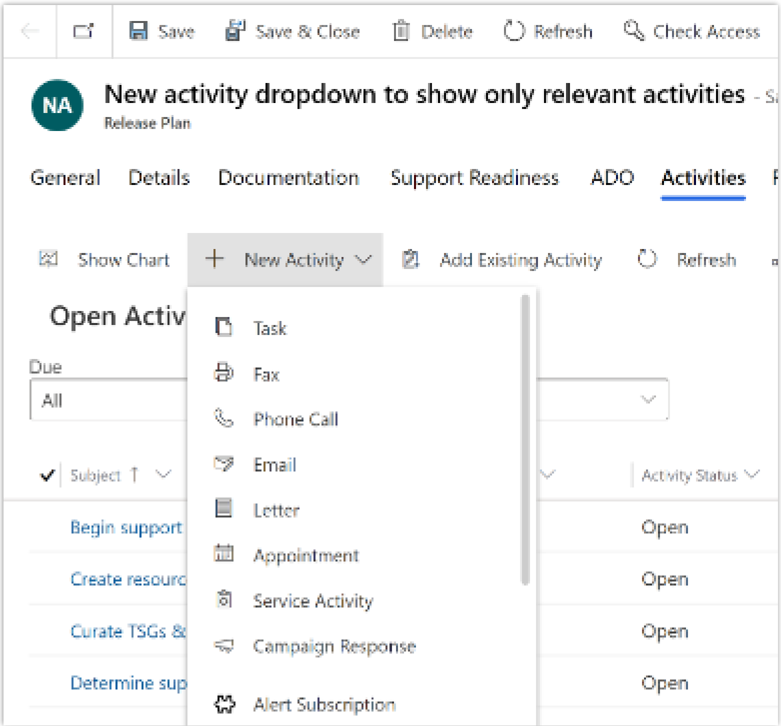
Business value

Improve productivity by showing only relevant tables in the drop-down list.

Feature details

The **New Activity** drop-down list will only show activities that are relevant to the app. Activities that aren't included in the app metadata now are hidden from the **New Activity** command.

This feature is now automatically enabled for all apps and can be disabled in Power Platform admin console under, environment settings. Previously, the feature was an opt-in setting in the environment.



Screen of new activity dropdown.

View your colleague's presence

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

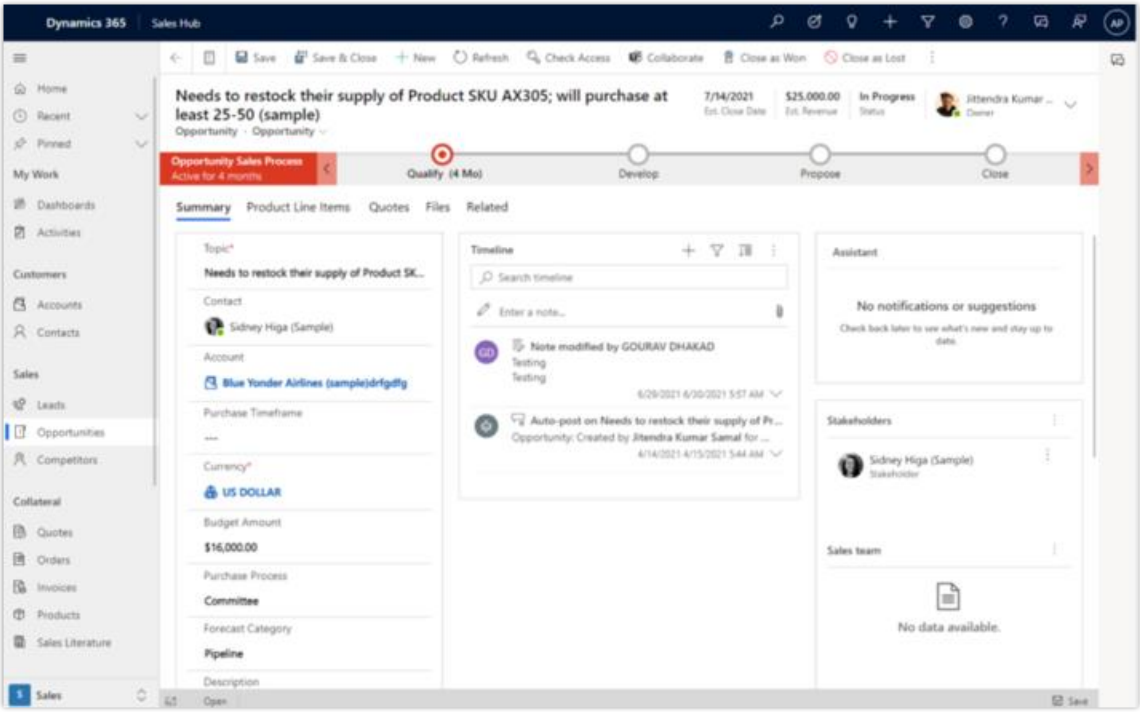
Business value

Collaborate with colleagues by viewing their availability in multiple places.

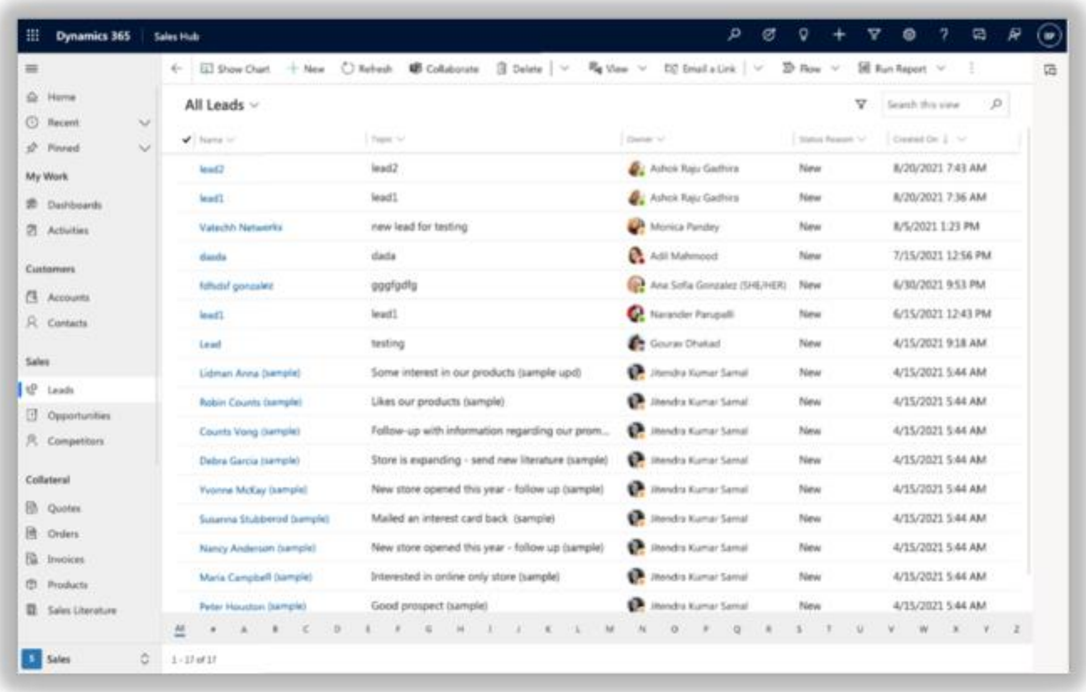
Feature details

You can now view your colleague's picture and online presence by default in all model-driven apps. This feature will be available in the record owner field, grids where users are shown, and lookup controls that show user information.

For the release, this feature will be in general availability. Previously, this feature was only available in preview, and it needed to be enabled in your environment settings.



Screen of persona control in lookup and owner field.



Screen of persona control in grid.

Power Automate

Plan and prepare for Power Automate in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Power Automate**.

Overview

Microsoft Power Automate provides the tools that you can use to improve productivity in your organization by automating repetitive, time-consuming tasks. Power Automate provides a better way to get things done across your organization through cloud flows and robotic process automation (RPA). It is deeply integrated with the Microsoft 365 ecosystem and the rest of Microsoft Power Platform.

Power Automate is investing in several areas as a part of Microsoft Power Platform 2022 release wave 2 around the following four themes.

- **Automation for everyone – exactly where you need it**: Today, the way that many people discover Power Automate is through integrations in other products, like Windows 11, SharePoint, or Microsoft Teams. During this release wave, we're making it easier to get started with automation through any application that you use in Windows or Microsoft 365.
- **Hyperscale Cloud RPA**: From our biggest enterprise customers to small and medium organizations, everyone is increasing the scale of their RPA deployments. We'll make it easier to roll out RPA at scale - with features to make it easier to manage your machines and the credentials for your users and accounts in Azure.
- **Automation that lets you sleep at night**: Fundamentally, the service must never go down. We'll deliver consumer-quality end-to-end experiences, and ultimately, everything about the platform needs to just work. All features will be reliable and consumable, and automatable by default (adhering to the API-first approach), so that you can "set it and forget it."
- **Anyone can get started**: We'll make it easier for anyone to get started with automation when they launch Power Automate for desktop or go to PowerAutomate.com for the first time. In addition to relevant first-run experiences, we'll add more intelligence throughout the product, making it easier to process even complex documents.

For official product documentation and training for Power Automate, go to the following documents.

- [Power Automate docs]
- [Power Automate training on Microsoft Learn]

Investment areas

Desktop flows
Desktop flows is the Robotic Process Automation (RPA) solution within Power Automate. Desktop flows provides automation for Windows desktop applications, services, and experiences for orchestration and deployment within Power Platform. In 2022 release wave 2, we'll invest in desktop flows in the following ways:

- Drive adoption within large and small enterprises, delivering features that enable organizations to deploy their automations at scale.
- Provide citizen developers with delightful first run experiences with high ease of use and fast access to hosted resources to build or run their automations.
- Enable ISV integrations, opening new options for partners to build RPA solutions based on desktop flows decoupled from cloud flows.

Cloud flows
Cloud flows is a core automation capability in Power Automate that allows customers to focus on what matters and automate the rest. This product area includes:

- Integration with applications like Microsoft Teams, SharePoint, OneDrive, Dynamics 365 suite of applications, and more.
- Integration with the rest of Microsoft Power Platform, including the ability to invoke workflows from an app created using Power Apps, when a data alert is triggered in Power BI, or to take an action in Power Virtual Agents.
- Mobile applications that help customers receive notifications, perform approvals, and invoke and monitor automation runs on the go.

Power Automate was first released in 2016, and it's updated on a weekly basis. In 2022 release wave 2, we're focusing on making it easier to build and share automations, and help organizations drive adoption with confidence through deeper governance and privacy controls.

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

[Check out the release plan]

For application administrators

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

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

Get the most out of Power Automate

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

What's new and planned for Power Automate

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Cloud flows

Use the new cloud flows features to automate tasks across hundreds of connectors.

Feature	Enabled for	Public preview	Early access*	General availability
Improvements to the flow sharing experience	Admins, makers, marketers, or analysts, automatically	Mar 2023	-	

Feature	Enabled for	Public preview	Early access*	General availability
Use customer-managed encryption key for data at rest	Admins, makers, marketers, or analysts, automatically	Mar 2023	-	-
Improvements to the OData editor in cloud flows	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022
Support for sequential approvals in Power Automate	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022
The Parse JSON action now handles null objects	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022
Greater control over connection reference creation and reuse	Admins, makers, marketers, or analysts, automatically	-	-	Nov 2022
Improved experience for editing expressions	Admins, makers, marketers, or analysts, automatically	-	-	Mar 2023
Improved experience for selecting dynamic values	Admins, makers, marketers, or analysts, automatically	-	-	Mar 2023
Improved Power Automate mobile app for iOS	Admins, makers, marketers, or analysts, automatically	-	-	Mar 2023

Desktop flows

Use the new desktop flows features to automate tasks on your Windows PC.

Feature	Enabled for	Public preview	Early access*	General availability
Enroll hosted machines in Intune	Admins, makers, marketers, or analysts, automatically	Oct 2022	-	

Feature	Enabled for	Public preview	Early access*	General availability
Run hosted RPA bots	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022
Set a selector based on text and use of operators	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2022
Use desktop flow signing	Admins, makers, marketers, or analysts, automatically	-	-	Nov 2022
Enable minimal flow log details	Admins, makers, marketers, or analysts, automatically	-	-	Nov 2022
More resilient UI automation in Citrix environments	Admins, makers, marketers, or analysts, automatically	-	-	Nov 2022
Use credentials from Azure Key Vault in desktop flow connections	Admins, makers, marketers, or analysts, automatically	-	-	Nov 2022
Improved runtime error messages for UI, Web, Excel, and mouse and keyboard actions	Admins, makers, marketers, or analysts, automatically	-	-	Dec 2022
Share flows from within Power Automate for desktop	Admins, makers, marketers, or analysts, automatically	-	-	Dec 2022
Troubleshooter for connectivity issues in Power Automate for desktop	Admins, makers, marketers, or analysts, automatically	-	-	Dec 2022
View desktop flow properties in Power Automate for desktop console	Admins, makers, marketers, or analysts, automatically	-	-	Dec 2022

Feature	Enabled for	Public preview	Early access*	General availability
Simplify selectors of UI elements	Admins, makers, marketers, or analysts, automatically	-	-	Mar 2023
Use web automation to access cross-domain iFrames	Admins, makers, marketers, or analysts, automatically	-	-	Mar 2023
Use SharePoint Connector in Power Automate for desktop	Admins, makers, marketers, or analysts, automatically	Sep 2022	-	Mar 2023

* You are able to opt into some features as part of early access on August 1, 2022, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Cloud flows

Overview

Cloud flows is a core automation capability in Power Automate that allows customers to focus on what matters and automate the rest. This product area includes:

- Integration with applications like Microsoft Teams, SharePoint, OneDrive, Dynamics 365 suite of applications, and more.
- Integration with the rest of Microsoft Power Platform, including the ability to invoke workflows from an app created using Power Apps, when a data alert is triggered in Power BI, or to take an action in Power Virtual Agents.

- Mobile applications that help customers receive notifications, perform approvals, and invoke and monitor automation runs on the go.

Power Automate was first released in 2016, and it's updated on a weekly basis. In 2022 release wave 2, we're focusing on making it easier to build and share automations, and help organizations drive adoption with confidence through deeper governance and privacy controls.

Improvements to the flow sharing experience

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

Business value

We've improved how you can share flows with others, so it'll be easier for your team members to use flows that you build. In 2022 release wave 2, you'll be able to send your flows in a Teams message or using a shareable link.

Feature details

We've added more capabilities to improve how you can share flows with others. For example, this feature allows you to send someone a flow using a shareable link, or you can share flows by sending them in a Teams message to a person, group, or channel. Also, you can include a personalized message to the person/group with whom you're sharing a flow. In this message, you can specify why you're sharing the flow, what it does, if you want them to collaborate with you or take any action on it, and so on.

Use customer-managed encryption key for data at rest

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

Business value

This feature provides greater data privacy and data protection when using Power Automate.

Feature details

Customers can use their own encryption keys that reside in their Azure Key Vault to encrypt all customer data Power Automate uses. Internally, Power Automate builds on many Azure services, including Logic Apps, Azure Storage, Azure Cosmos DB, Azure Cognitive Search, and more. No matter where the data is saved, it'll now be completely encrypted using these keys. Customers are also able to use different keys on different Power Platform environments.

Improvements to the OData editor in cloud flows

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

Business value

This feature provides easier filtering in actions like the SharePoint **Get Items** action that previously required OData syntax.

Feature details

With this new feature, cloud flow actions hide the OData syntax by default, making it easier to filter items without in-depth knowledge. Makers can switch between basic and advanced mode. Advanced makers can still use the OData syntax if they choose. This feature will first be available in the **Get Items** action for the SharePoint Online connector.

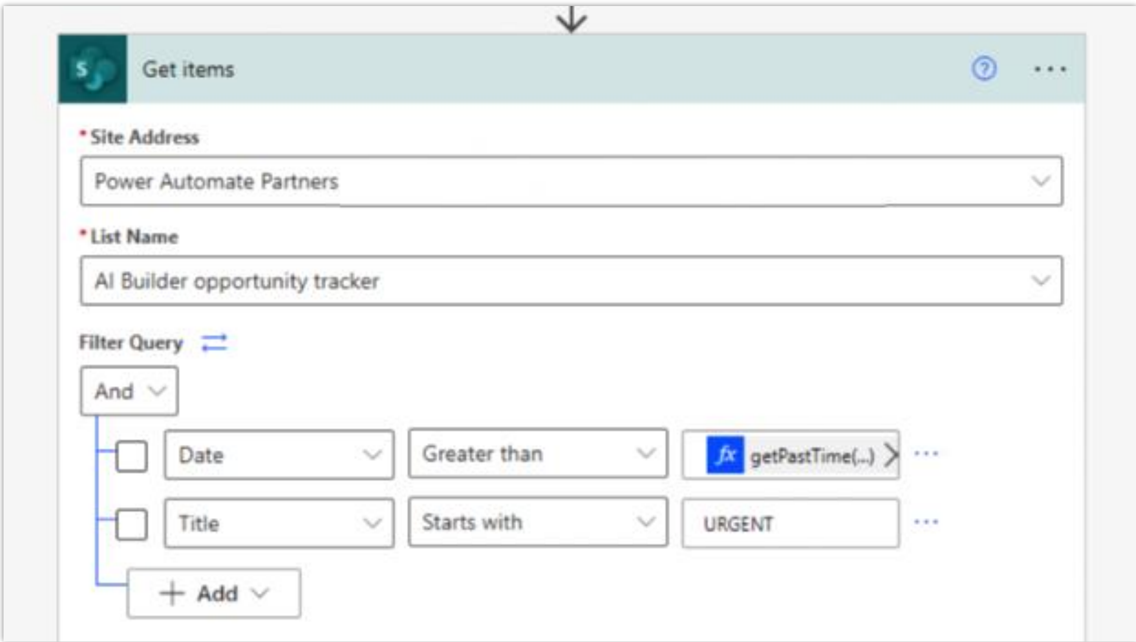


Image of the Get Items for SharePoint showing the new OData query options.

Support for sequential approvals in Power Automate

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

Business value

This feature allows users to create more complex approval workflows within Microsoft Teams and using Power Automate flows.

Feature details

With this feature, makers can define multiple levels/stages in an approval flow from within Microsoft Teams or from within Power Automate. Makers can define who needs to approve a flow at different levels/stages. The approval request goes to the next level/stage after all the approvers in a previous stage approve the flow. If someone rejects the flow at any stage, it's considered rejected, and it isn't passed on to subsequent stages. All approvers can see the history of the approvals at each stage and the outcome.

The Parse JSON action now handles null objects

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

Business value

Customers often use Power Automate to read data from a variety of formats, including JSON. This feature unblocks customers who encounter null values in the JSON parsing action.

Feature details

Currently, cloud flows don't handle null values in the **Parse JSON** action. For example, if you want to parse a JSON object, and you specify multiple fields in the JSON schema, you'll get an error if one of those fields isn't present in the parsed JSON object. When the **Parse JSON** action encounters a null object, it’s difficult for users to troubleshoot and requires makers to explicitly handle null values in their flows.

In 2022 release wave 2, we'll add support to handle null values in the **Parse JSON** action. Makers will no longer receive an error message that states that the "Schema Validation failed" if there are nulls in their JSON.

Greater control over connection reference creation and reuse

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

Business value

Connection references are an important cornerstone of the application lifecycle management (ALM) process for solution flows. This feature gives more control to cloud flow authors when creating and reusing connection references during flow creation.

Feature details

Currently, when you create flows, the connection references are automatically created or reused. This automatic creation can result in the use of connection references in other solutions and the creation of connection references in the wrong solution.

In 2022 release wave 2, cloud flow authors will have greater control over connection reference creation and selection.

Improved experience for editing expressions

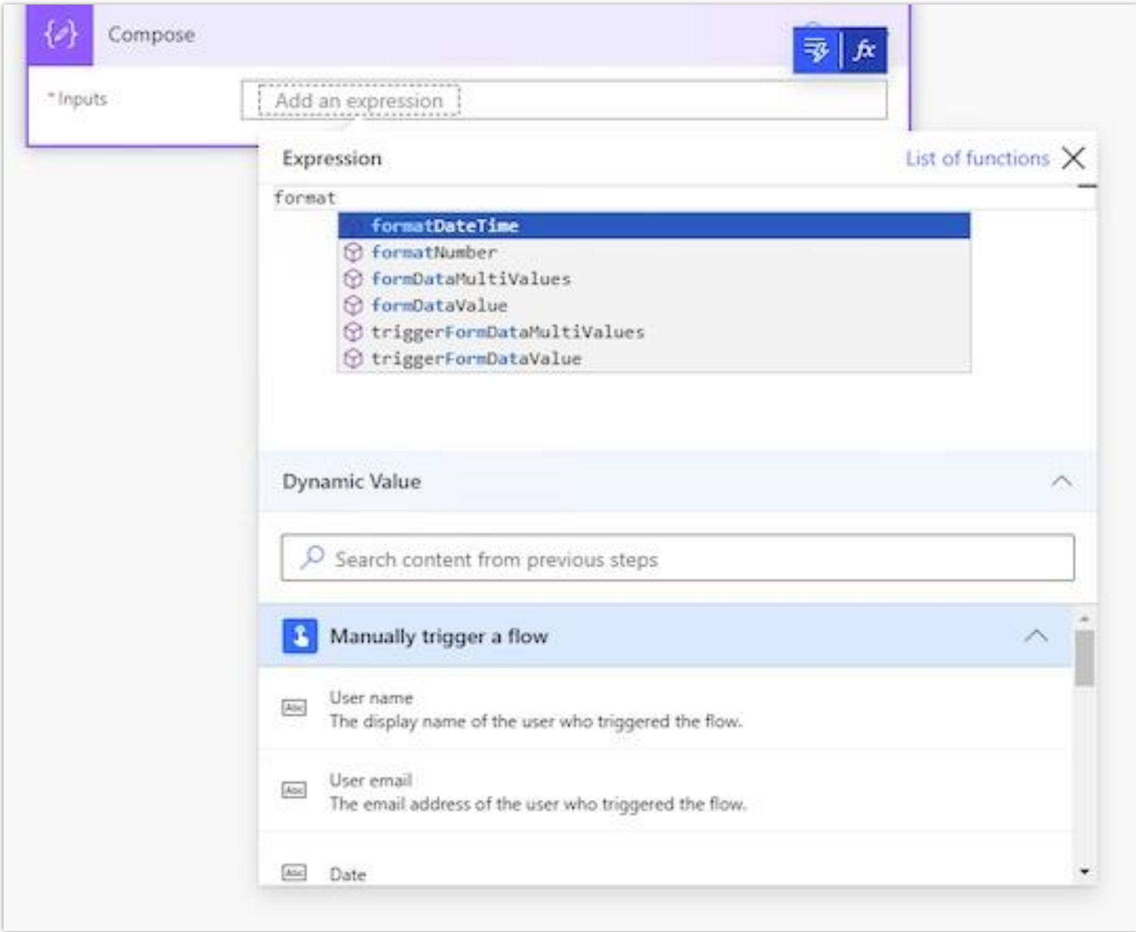
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Mar 2023

Business value

Updates to the expression editor enables makers to build richer expressions more easily.

Feature details

With the new expression editor, you can now build multiline expressions and add dynamic values without having to switch tabs. This feature makes it much easier to build richer expressions in the provided editing experience.



Screen of improved expression editor.

Improved experience for selecting dynamic values

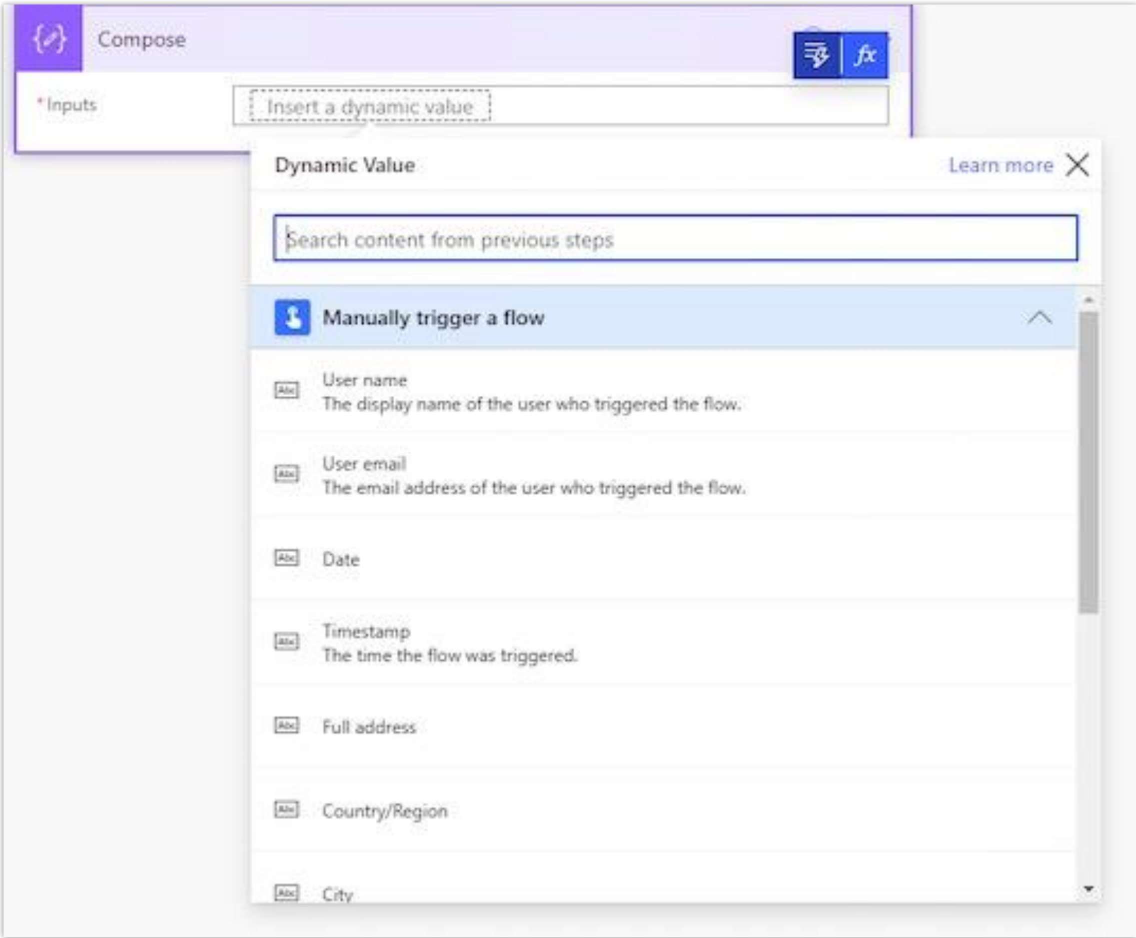
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Mar 2023

Business value

Upgrades allow users to easily interact with dynamic value picker on the designer.

Feature details

With this feature, users will have an improved dynamic values token picker experience while they build their flows. With the new dynamic values token picker, they'll be able to view the datatype of the tokens to avoid potential runtime errors. The token picker view pops open to the bottom of the card rather than drift on the side for a better user experience.



Screen of the new dynamic values token picker.

Improved Power Automate mobile app for iOS

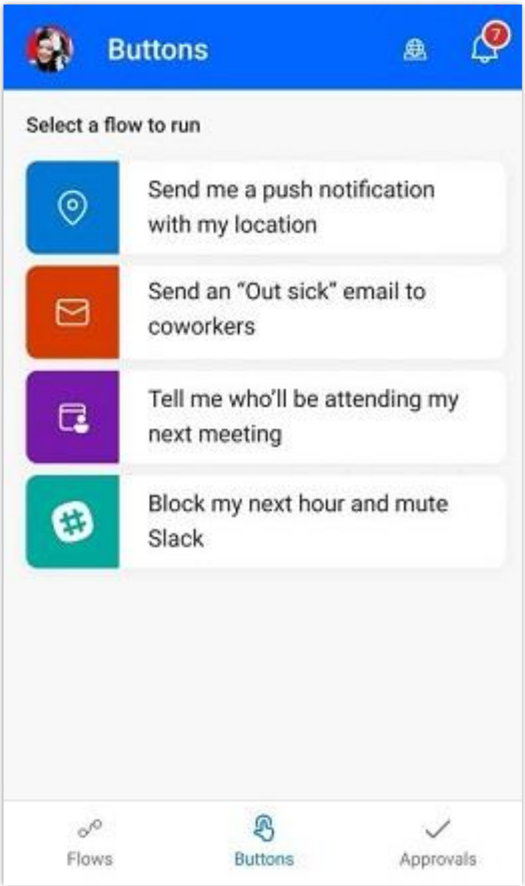
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Mar 2023

Business value

Improvements to the Power Automate mobile app for iOS provides a more usable and modern experience.

Feature details

The new version of the Power Automate mobile app for iOS provides an updated, modern experience for users on their iPhones. This experience aligns the mobile app with the Power Automate website experience. Users can receive notifications, trigger instant flows on the go, and create widgets (shortcuts to trigger instant flows from the home screen on their mobile home screen). You can view your list of approvals more quickly with the new design, too. The fast rollout of new features and updates will be supported as well.



Screenshot of Power Automate iOS mobile app.

Desktop flows

Overview

Desktop flows is the Robotic Process Automation (RPA) solution within Power Automate. Desktop flows provides automation for Windows desktop applications, services, and experiences for orchestration and deployment within Power Platform. In 2022 release wave 2, we'll invest in desktop flows in the following ways:

- Drive adoption within large and small enterprises, delivering features that enable organizations to deploy their automations at scale.
- Provide citizen developers with delightful first run experiences with high ease of use and fast access to hosted resources to build or run their automations.
- Enable ISV integrations, opening new options for partners to build RPA solutions based on desktop flows decoupled from cloud flows.

Enroll hosted machines in Intune

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

Business value

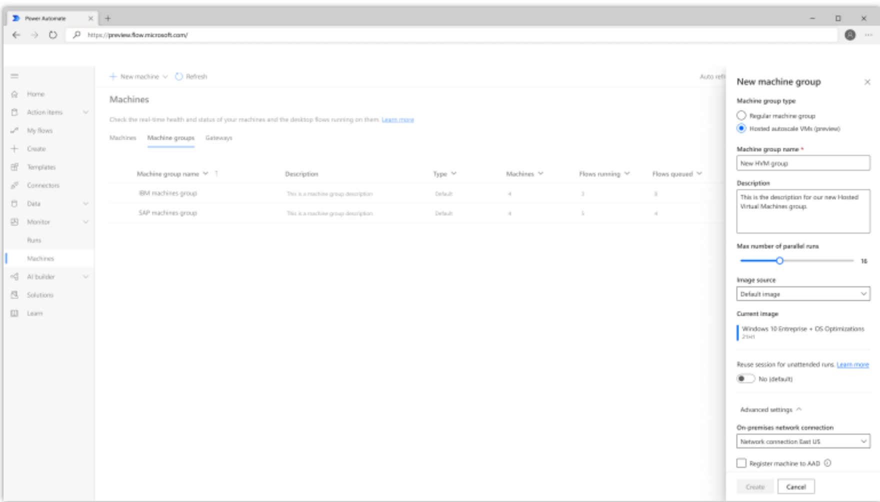
This feature enables the Intune enrollment for all machines created in a hosted machine group. Also, it allows hosted machine groups to access on-premises resources using virtual networks.

Feature details

Hosted machine groups get improved with:

- Automatic Intune enrollment for all created machines
- The ability to set up a virtual network to access on-premises resources

Organizations can use these features to ensure that the machines running their desktop flows can securely access their network's resources, a common need for legacy applications.



Screenshot of hosted machine groups with on-premises network access.

Run hosted RPA bots

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

Business value

Users can quickly and easily run desktop flows using fully managed virtual machines. This feature also allows customers to dynamically scale up and down the virtual machine used to run their automation.

Feature details

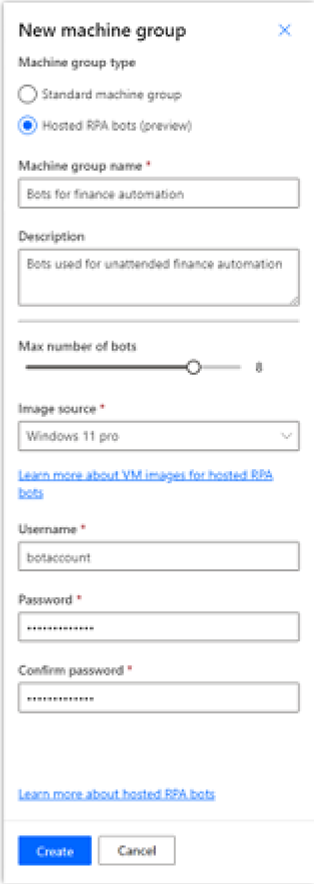
Since Power Automate launched desktop flows, our robotic process automation (RPA) capability in 2019, we've continued listening to your feedback and exploring ways we can further democratize automation for all.

With the release of Power Automate for desktop, automating repetitive, mundane tasks across legacy and modern systems became an easier reality. Now included for free in the Microsoft Store for Windows 10 users and built-in to Windows 11, users can begin using attended RPA bots right on their desktop—at no additional cost.

We're taking the next step in our journey with the preview of hosted RPA bots, now available in Power Automate. As a true software as a service (SaaS) for RPA, unattended RPA bots can now be created and automatically scaled across hosted virtual machines powered by Microsoft Azure.

Gone are the days of strenuous approval cycles and costly deployment. With Power Automate's hosted RPA bots, just create a group of bots by setting up basic parameters and use it to get virtual machines scaled automatically for your unattended RPA scenarios—with no Azure subscription required.

Power Automate will handle every aspect of machine management for you, helping focus your time where it's needed most.



Screen of new machine group.

Set a selector based on text and use of operators

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

Business value

Users can now create simpler selectors for UI elements in an easier and more straightforward manner.

Feature details

UI elements are essential to capture accurately. This new feature optionally allows users to add selectors based on text while capturing elements without needing to go into the selector editor and edit using CSS like `:contains()`.

Use desktop flow signing

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

Business value

Organizations gain an additional layer of trust with cloud storage and flow orchestration by signing desktop flows before they're stored in Microsoft Dataverse and verifying the signatures at runtime.

Feature details

Power Automate admins gain the ability to enable desktop flow signing and signature verification at runtime at an environment level. In doing so, the organization's admins manage valid certificates, which can be used to sign and verify desktop flows. This functionality adds an additional layer to ensure that an unauthorized user hasn't tampered with desktop flows running in attended or unattended mode.

Enable minimal flow log details

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

Business value

This new option allows admins to disable input and output details from being posted in flow run logs to ensure sensitive data isn't accidentally posted.

Feature details

Power Automate admins can limit the amount of action-related detail posted in cloud or desktop flow run logs. This feature includes an environment-level setting to exclude detailed input and output values for each posted event in the flow log.

At the desktop flow level, this feature ensures that no sensitive information is accidentally posted in run logs, whether a maker marks an input/output variable as sensitive or not.

Thank you for your idea

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

More resilient UI automation in Citrix environments

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

Business value

Power Automate improves the support for UI automation on Citrix environments by having a lightweight runtime inside the target Citrix environment.

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 isn't as reliable as UI automation, which leverages the UI elements using accessibility APIs.

With this feature, we improved the support for UI automation on Citrix environments by having a lightweight runtime inside the target Citrix environment. This runtime is 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 have a choice to use either this lightweight runtime approach or existing image processing for performing their automation.

Use credentials from Azure Key Vault in desktop flow connections

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

Business value

Users can leverage credentials from Azure Key Vault to connect to Windows sessions on desktop flow machines. This feature supports rotating passwords without the need to update the connection.

Feature details

With this feature, users can have their desktop flows run on Windows machines logged in with credentials from Azure Key Vault. The Windows machine retrieves the latest credentials at runtime. This enables desktop flows to keep running successfully even when the administrator changes the password.

Improved runtime error messages for UI, Web, Excel and mouse and keyboard actions

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

Business value

Users will be offered a straightforward explanation about what went wrong with their actions and have access to remediation steps, so that they don't always need to resort to support help.

Feature details

Currently, it's not always easy to understand what went wrong and what needs to be done to fix runtime errors. This feature provides more descriptive error messages, including troubleshooting steps, either incorporated in the error dialog or with links to knowledge articles for assistance.

The runtime error messages for the following modules will be improved:

- UI automation
- Web automation
- Mouse and keyboard
- Excel

Share flows from within Power Automate for desktop

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

Business value

Customers will be able to share desktop flows directly within the Power Automate for desktop console.

Feature details

This feature implements new sharing functionality in the Power Automate for desktop console. This feature allows makers to directly share desktop flows with their colleagues without having to go to the Power Automate website.

Troubleshooter for connectivity issues in Power Automate for desktop

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

Business value

Users will have access to a new troubleshooting and diagnostic tool that will help them resolve issues and get information about resolution steps for various problems that may occur.

Feature details

The troubleshooting and diagnostic tool gives the maker the ability to select an issue to troubleshoot with a standalone application.

The first phase of this tool checks basic connectivity requirements, like being able to connect to the proper public endpoints, which are needed for Power Automate to work properly.

View desktop flow properties in Power Automate for desktop console

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

Business value

Customers will be able to manage the properties of a desktop flow easily through the Power Automate for desktop console.

Feature details

A new properties page will be available for desktop flows in the Power Automate for desktop console. This page will make it possible to view and edit properties, such as flow details, sharing details, flow triggers, and resolutions for unattended runs.

Simplify selectors of UI elements

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

Business value

The UI automation is faster, both design and runtime, and the UI elements selector editing is now easier.

Feature details

The generated selectors for any UI element captured by Power Automate for desktop are now simpler. The minimum number of nodes should be included in the selector in order Power Automate for desktop to be able to locate the specific UI element.

Use web automation to access cross-domain iFrames

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

Business value

Power Automate for desktop supports web automation scenarios, including steps for interacting with web UI elements that consist of cross-domain iFrames.

Feature details

Although web automation is an important feature in desktop flows, some web pages can be extremely complicated to automate because of nested iFrames. With this feature, Power Automate for desktop can capture iFrames elements, unblocking scenarios where automations need to work with iFrames on web pages.

Use SharePoint Connector in Power Automate for desktop

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	-	Mar 2023

Business value

The new SharePoint actions in Power Automate for desktop increase the speed and ease of use of desktop automations.

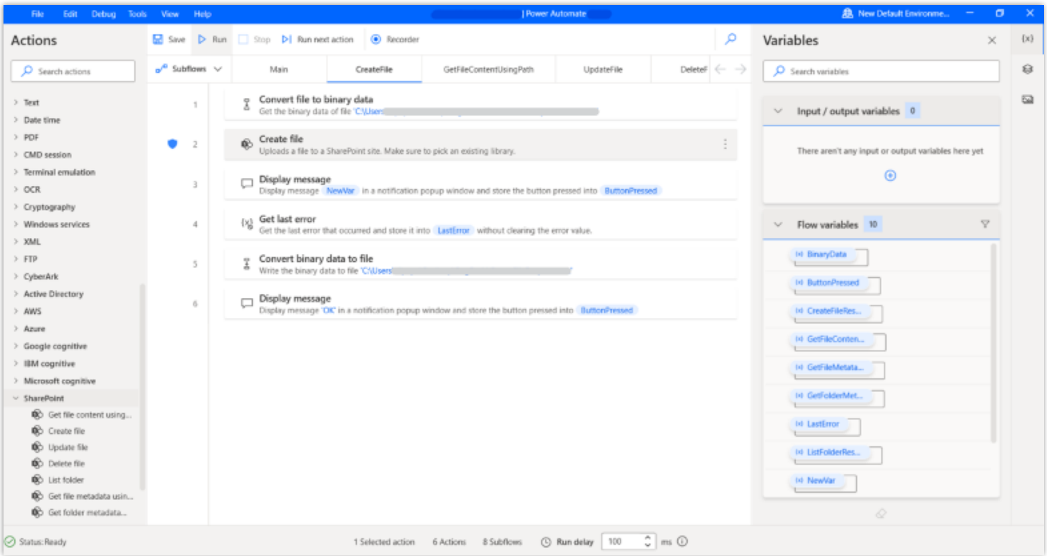
Feature details

The SharePoint Connector is the first cloud connector coming to desktop flows. It brings the power of the cloud right inside desktop automations.

With the SharePoint Connector in Power Automate for desktop, you can combine actions from both desktop (for example, extract data from web page) and the SharePoint Connector (for example, update a SharePoint list), all within a single desktop flow.

You get improved performance when looping between a desktop action (for example, reading from an SAP GUI or an Excel file from the local drive) and a SharePoint action (for example, uploading a file to SharePoint) compared to having them in separate cloud flows and desktop flows.

The SharePoint Connector is more discoverable for users who start their automation journey in Power Automate for desktop.



Screenshot of SharePoint actions in the action list within Power Automate for desktop.

Power Virtual Agents

Plan and prepare for Power Virtual Agents in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Power Virtual Agents**.

Overview

Power Virtual Agents enables anyone in your organization to create AI-powered bots that can chat with users about specific topics. Your bots can answer routine questions, resolve common issues, or automate tasks that take up valuable customer or employee time.

Creating a bot is typically a complex and time-intensive process, requiring long content update cycles and a team of experts. Power Virtual Agents gives anyone in your organization the ability to create powerful custom bots using an easy, code-free graphical interface without the need for AI experts, data scientists, or teams of developers. A bot can interact with users, ask for clarifying information, and answer a customer's questions.

With deep integration with Power Automate and the Microsoft Bot Framework, authors can extend their bots to integrate with API backends, which will enable the bots to handle additional topics, limited only by the author’s imagination. You can deploy bots to many channels, including websites, Microsoft Teams, and Facebook.

The 2022 release wave 2 brings improvements in the authoring experience with topic overlap detection available in all Power Virtual Agents languages, author adaptive cards, multi-modal response authoring, and more.

Investment areas

Bot configuration
Bots can be configured to suit the individual needs of an organization and to provide further extensibility with other services and features. This includes authentication provider support, the use of Microsoft Bot Framework skills to augment the bot's capabilities, integration with Microsoft Teams, Facebook, and other channels, and more.

Service and runtime
Power Virtual Agents continues to ensure it meets strict compliance and governance needs. Power Virtual Agents will be available for US Government customers in the Government Community Cloud (High) environment, as well as in our Germany and United Arab Emirates regions.

Power Virtual Agents will make it easier to govern your Microsoft Teams-based environments costs by offering inactivity-based environment deletion — cleaning up those environments that are in disuse — allowing your organization to focus on only active projects.

Core authoring
Creating a bot with Power Virtual Agents is easy to do with the no-code authoring canvas, and there are several ways you can manage how topics interact, how you want the conversation to flow, and what it should feel like.

It's easy to test the bot without having to fully deploy the bot whenever you make a small change. There are also lesson topics that guide you through topic authoring from simple to complex scenarios as well as default system topics. You can also choose what language you want your bot to use. Variables and entities make your bot more capable of understanding your users, and rich content makes your bot more relatable and easier to use.

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

Check out the release plan

For application administrators

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

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

Get the most out of Power Virtual Agents

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

What's new and planned for Power Virtual Agents

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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

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

Bot configuration

Configure bots to suit the individual needs of an organization and to provide further extensibility with other services and features.

Feature	Enabled for	Public preview	General availability
Create bots from existing online support content	Admins, makers, marketers, or analysts, automatically	-	Oct 2022
Trigger bot topics by events	Admins, makers, marketers, or analysts, automatically	Aug 2022	Nov 2022
Use Power FX expressions in authoring canvas	Admins, makers, marketers, or analysts, automatically	Aug 2022	Nov 2022
Use multi-digit DTMF input	Users, automatically	Nov 2022	Mar 2023
Notify Teams users about query updates	Admins, makers, marketers, or analysts, automatically	✓Oct 29, 2021	Mar 2023
Use voice responses over telephony channel	Users by admins, makers, or analysts	Nov 2022	Mar 2023

Core authoring

Use the Power Virtual Agents conversational editor to construct your dialogs with rich content, variables, and powerful entity types.

Feature	Enabled for	Public preview	General availability
Use multi-modal response authoring	Admins, makers, marketers, or analysts, automatically	Aug 2022	Nov 2022
Use Adaptive Cards in Power Virtual Agents	Users by admins, makers, or analysts	Aug 2022	Nov 2022

Feature	Enabled for	Public preview	General availability
Use list variables and looping in conversations	Users by admins, makers, or analysts	Aug 2022	Nov 2022

Service and runtime

Power Virtual Agents will be available for United States Government users in the Government Community Cloud (High) environment.

Feature	Enabled for	Public preview	General availability
Create bots in new datacenters	Users, automatically	-	Nov 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.

Create bots from existing online support content

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

Business value

Speed up your initial development time by automatically filling bots with simple topics from a website when they're created.

Feature details

As soon as you create a bot, it can use AI natural language capabilities to extract relevant topic and answer information from your website. This means bots will be production ready as soon as you create them, as they'll be able to respond to simple questions without the bot author needing to perform extensive content manipulation or topic authoring.

Trigger bot topics by events

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

Business value

Many bots need to perform pre- or post-message processing logic to meet key business requirements. For instance, each message may need to be added to a central audit trail or scanned for sensitive PII information which needs to be redacted before being processed and stored in analytics.

Feature details

Advanced triggering for Power Virtual Agents Bots provides a powerful extensibility point enabling bot authors to add processing logic at key events within a bot, such as when a message is received and sent. A topic can now be triggered by events, enabling an author to leverage connectors, Power FX expressions or any other node type, ensuring key extensibility needs can be met.

Use Power FX expressions in authoring canvas

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

Business value

A broad range of authoring personas can now author low-code expressions to perform system integration and data management tasks that previously required software engineers. For example, connectors can be invoked directly, and data returned can be manipulated to retrieve key information.

Feature details

Expression authoring is a key capability for any bot in order to implement more sophisticated logic. For example, you can now author expressions to perform data validation or control looping logic. In addition, you can better manipulate data, performing operations on variables (for example, adding a percentage). By retrieving data from connectors, you can, for example, retrieve data from a JSON object or array.

Use multi-digit DTMF input

Enabled for	Public preview	General availability
Users, automatically	Nov 2022	Mar 2023

Business value

Enable voice customers to answer bot questions using their phone keypads with multi-digit DTMF inputs. This reduces the time needed inputting long multi-character sequences and lowers errors.

Feature details

Authors will be able to set per-node multi-digit DTMF input options, including using a set number of digits, or terminator characters ("*" or "#"). Customers can enter their answers using a phone keypad, making for faster interactions with less errors.

Notify Teams users about query updates

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓ Oct 29, 2021	Mar 2023

Business value

Let your bot reach users proactively by notifying them when a time-off request is approved or send reminders for daily health check-ins.

Feature details

We're adding the ability to send proactive messages from a bot to its users in a Teams chat by using a Power Automate workflow. For example, a bot user might ask the bot *Has my budget been approved?* to which the answer is *Not yet*.

Now, instead of the user having to ask the question again every day, you can create a Power Automate flow that notifies the user that the response to their question has changed, and what the new response is.

See also

Send proactive messages and cards in Microsoft Teams (docs)

Use voice responses over telephony channel

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Nov 2022	Mar 2023

Business value

We've improved the experience of your customers when they use a bot with the telephony channel. In 2022 release wave 2, you can get insights for improving your interactive voice response (IVR) solution in the Power Virtual Agents built-in analytics.

Feature details

Today, you can build intelligent, no code chatbots in Power Virtual Agents that help your customers or employees get the right information or resolve their problem as soon as possible, over their preferred messaging channels.

In this release wave, Power Virtual Agents will add the ability to optimize your chatbots for voice interactions and make the bots available over telephony, whether that's on an existing phone number or a new phone number you get specifically for this purpose.

Core authoring

Overview

Creating a bot with Power Virtual Agents is easy to do with the no-code authoring canvas, and there are several ways you can manage how topics interact, how you want the conversation to flow, and what it should feel like.

It's easy to test the bot without having to fully deploy it 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 also choose what language you want your bot to use. Variables and entities make your bot more capable of understanding your users, and rich content makes your bot more relatable and easier to use.

Use multi-modal response authoring

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

Business value

Conversational experiences can support both text and speech and have more optimized speech talk tracks (for example, more succinct) along with multiple variations ensuring the experience is more natural.

Feature details

Response authoring within the authoring canvas now supports both text and speech variations. By default, text responses will be used for speech, but you can choose to provide a speech variation which will be used for speech-enabled channels, such as telephony. Speech variations can make use of SSML optimizations to improve pronunciation and provide more control generally on the text-to-speech operation.

Responses can use variables held in bot memory and multiple variations can be authored which are chosen randomly for a given user, ensuring a more natural experience.

Use Adaptive Cards in Power Virtual Agents

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

Business value

Enrich Power Virtual Agents conversational experiences and address business scenarios that require the bot user to interact with custom-formatted data or visual content.

Feature details

In this release wave, bot authors can create actionable and interactive rich media content using Adaptive Cards.

Cards can enrich Power Virtual Agents conversational experiences and address business scenarios that require the bot user to interact with custom-formatted data, manipulate visual content, fill a form, and more.

Bot authors can select from a set of pre-built Adaptive Card templates in Power Virtual Agents and fill them in with their data.

Use list variables and looping in conversations

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

Business value

Variable management ensures a wide range of datatypes can be stored at the bot or topic level, enabling topics to be more data-driven and well designed. You'll be able to create bots that better suit specific customer scenarios, based on data, and with better customization.

Feature details

Topic authors can use a list variables to take array outputs from Power Automate and Bot Framework skills and present them as a list of choices in a bot question.

Looping enables a group of nodes on a topic to be repeated until a condition (expressed through Power FX) is met, which means repeating actions can be easily created within bot conversations.

Service and runtime

Overview

Power Virtual Agents continues to ensure it meets strict compliance and governance needs. Power Virtual Agents will be available for US Government customers in the Government Community Cloud (High) environment, as well as in our Germany and United Arab Emirates regions.

Power Virtual Agents will make it easier to govern your Microsoft Teams-based environments costs by offering inactivity-based environment deletion — cleaning up those environments that are in disuse — allowing your organization to focus on only active projects.

Create bots in new datacenters

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

Business value

Grow your business by creating bots in new locations that cater to that location's specific needs or scenarios.

Feature details

Power Virtual Agents can be deployed into different Microsoft Azure datacenters, which are also referred to as regions. You can create a bot in your tenant's location by default, or you can choose the datacenter you want to use when you're setting up your environment.

With this release, we're adding Germany and United Arab Emirates (UAE) to the list of datacenters that you can choose when creating an environment for your bot.

Microsoft Dataverse

Plan and prepare for Microsoft Dataverse in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **Microsoft Dataverse**.

Overview

Microsoft Dataverse is a low-code data platform that allows you to easily build scalable and interconnected applications, automations, and agents using common data, security, and business logic.

Deliver services with agility

Quickly add business value with an extensible data platform that uses out-of-the-box common tables, extended attributes, semantic meanings, and an open ecosystem enabled by Common Data Model.

Increase scale and efficiency

Boost productivity and reduce costs by quickly developing applications, processes, and reusable data schemes. Repeatably build, validate, and deploy your applications using GitHub and Azure DevOps.

Make your data work smarter

Get accurate insights by adding low-code AI tools to your process automation. Identify and resolve duplicated and conflicting data with a managed data platform that includes built-in business logic and rules.

Rely on the security of a trusted platform

Protect your data with a robust security management infrastructure that provides critical security and compliance capabilities—advanced encryption, rich access control, and deep integration with Azure Active Directory.

Investment areas

Power Apps collaboration
We're building real-time collaboration infrastructure inside Microsoft Dataverse using Azure Fluid Relay services to fuel the co-presence and co-authoring capabilities for Power Apps makers and Unified Interface users. The infrastructure is scalable for third-party collaboration scenarios and becomes foundational for the expanding collaboration capabilities like commenting and notifications to minimize the collaboration gap between fusion teams.

Virtual tables
Virtual tables allow Microsoft Dataverse to surface data stored outside of the Dataverse relational storage for use in Power Platform. Data accessed through a virtual table looks and acts like a native Dataverse table. For example, your SQL Server data can be accessed through Dataverse tables, using Dataverse APIs and plugins and can have relationships to your native Dataverse tables like accounts, contacts, or other custom tables you create.

Virtual tables can be used to connect to tabular data (SQL, Excel, SharePoint), non-tabular data (data lake, Azure Cosmos DB, SAP), data accessed through direct OData calls, or custom connections that users can craft to meet their needs.

Dataverse APIs
Microsoft Power Platform depends on APIs exposed by Microsoft Dataverse. Canvas apps, model-driven apps, and Microsoft Power Automate depend on Dataverse APIs. ISVs and customers use our APIs to create integrations and custom applications. Dataverse APIs provide capabilities to work with business data in your Microsoft Dataverse tables and perform specialized operations on that data.

Microsoft 365 collaboration
Microsoft Dataverse powers many collaboration capabilities, including integrations with different Microsoft 365 products, such as Microsoft Exchange, Outlook, and Teams. Whether you are sending/receiving emails, creating/joining Teams meetings, or linking Teams chats to records, Dataverse enables users to collaborate with colleagues across your company without needing to switch between applications.

Dataverse extensibility
Microsoft Dataverse is an extensible data source. Customers can create custom logic, tables, forms, applications, .NET plugin assemblies, and so on to either extend the existing capabilities or create new capabilities that cater to their business needs. Low-code extensibility in Dataverse takes extensibility to fusion development teams, thereby making extensibility an easy-to-use experience.

Dataverse events
Business events and data events along with virtual tables provide the shared data layer for convergence of complementary technologies that are intended to work together. In 2022 release wave 2, we'll continue to grow the Microsoft Dataverse event platform capabilities by enhancing the performance, reliability, and scale of the event framework.

We'll also build on the event framework, enabling business process mining through an event analytics model. The model will provide a persisted, sequential series of events on which process mining applications, like process advisor in Power Automate, can provide rich process analytics.

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

Check out the release plan

For application administrators

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

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

What's new and planned for Microsoft Dataverse

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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.

Dataverse APIs

Microsoft Power Platform depends on APIs exposed by Microsoft Dataverse.

Feature	Enabled for	Public preview	General availability
Dataverse VNet injection for outbound connectivity	Users by admins, makers, or analysts	Sep 2022	Nov 2022
Use optimized APIs for bulk data operations	Users by admins, makers, or analysts	Oct 2022	Jan 2023
Enable conditional plug-in execution for improved efficiency	Admins, makers, marketers, or analysts, automatically	Dec 2022	Jan 2023

Dataverse events

We'll enhance the scale and reliability of the event framework and build a common event model to enable process mining and analysis.

Feature	Enabled for	Public preview	General availability
Send more business events	Admins, makers, marketers, or analysts, automatically	-	Oct 2022
Use process mining with events	Admins, makers, marketers, or analysts, automatically	Sep 2022	Oct 2022

Dataverse extensibility

Dataverse is an extensible platform.

Feature	Enabled for	Public preview	General availability
Dependent assemblies support for plug-ins	Users by admins, makers, or analysts	Jun 2022	Oct 2022
Enable Power Fx in Dataverse business rules	Users by admins, makers, or analysts	Sep 2022	Nov 2022

Microsoft 365 collaboration

Dataverse applications collaborate with Microsoft 365 applications.

Feature	Enabled for	Public preview	General availability
Delegate mailbox approval process	Users by admins, makers, or analysts	Sep 2022	Oct 2022

Power Apps collaboration

We're supporting Power Apps makers and Unified Interface users by building real-time collaboration within Microsoft Dataverse.

Feature	Enabled for	Public preview	General availability
Collaborate using co-presence, co-authoring	Users, automatically	Aug 2022	Oct 2022

Virtual tables

Use virtual tables to surface data from external data sources in Dataverse.

Feature	Enabled for	Public preview	General availability
Connector provider for non-tabular virtual tables	Users, automatically	Dec 2022	Mar 2023
Virtual tables between Dataverse instances	Users, automatically	Jan 2023	To be announced

Description of **Enabled for** column values:

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

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

Dataverse APIs

Overview

Microsoft Power Platform depends on APIs exposed by Microsoft Dataverse. Canvas apps, model-driven apps, and Microsoft Power Automate depend on Dataverse APIs. ISVs and customers use our APIs to create integrations and custom applications. Dataverse APIs provide capabilities to work with business data in your Microsoft Dataverse tables and perform specialized operations on that data.

Dataverse VNet injection for outbound connectivity

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

Business value

For enhanced security, customers calling Microsoft Dataverse from on-premises deployments will now use the Microsoft Azure backbone instead of the public internet.

Feature details

Outbound interactions between Microsoft Dataverse and customer's on-premises deployments will now use the Microsoft Azure backbone instead of the public internet. This feature applies to third party plug-ins only.

This feature will initially be released with a programmatic interface; however, a graphical user interface to configure the feature is planned.

Use optimized APIs for bulk data operations

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2022	Jan 2023

Business value

These new APIs enable significantly greater throughput for operations on multiple records.

Feature details

To optimize bulk data operation performance, we're introducing three new messages: `CreateMultiple`, `UpdateMultiple`, and `UpsertMultiple`. These messages improve performance in three ways:

1. These messages apply changes to the database for all the records at the same time rather than a sequence of individual row operations.

2. Common internal operations, such as authorization checks would be performed once for each request.

3. With these messages, you'll be able to apply business logic with plug-ins that are invoked just one time and apply logic to all the records in the operation.

When these messages are used and the business logic is designed to work with multiple records, the efficiency of the bulk operation is optimized.

Any business logic that uses the existing `Create`, `Update`, or `Upsert` single messages is still applied when the `CreateMultiple`, `UpdateMultiple`, and `UpsertMultiple` messages are used and there is a performance benefit; however, performance optimization requires that existing logic for single operations be moved to support multiple operations.

For tables where bulk operations are common, we'll recommend all new business logic for `Create`, `Update`, and `Upsert` messages be moved to the `CreateMultiple`, `UpdateMultiple`, and `UpsertMultiple` messages. Any existing logic for these messages should be migrated to use the messages that support multiple operations. Internal Dataverse logic will be modified to be optimized for this pattern.

Tables that aren't used with bulk operations can continue to have business logic triggered by the individual `Create`, `Update`, and `Upsert` messages. This pattern isn't deprecated, but it can't achieve higher throughput.

These new messages won't replace existing API patterns using `$batch` or `ExecuteMultiple`. The existing API patterns will continue to enable sending multiple requests that are processed individually. Because each operation is processed individually, they support continue-on-error capabilities that the new `CreateMultiple`, `UpdateMultiple`, and `UpsertMultiple` messages won't. You'll use these new messages when you have a high degree of confidence that all operations will succeed, and performance must be optimized.

A `DeleteMultiple` message isn't included with this feature because delete operations frequently involve cascading operations that can't be reconciled in a limited period.

Enable conditional execution for improved plug-in execution efficiency

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Dec 2022	Jan 2023

Business value

Improved system run-time performance is now available by enabling plug-in conditional execution.

Feature details

Plug-in calls are presently unconditional, which requires Microsoft Dataverse to execute each plug-in call and return the execution results back to the caller as a response message. For improved system performance, we're now enabling conditional execution of plug-ins so that Dataverse can execute the plug-in only when the specified condition is met. The condition is provided during the plug-in registration process.

This feature reduces the Dataverse call handling mechanics and improves plug-in execution efficiency.

Dataverse events

Overview

Business events and data events along with virtual tables provide the shared data layer for convergence of complementary technologies that are intended to work together. In 2022 release wave 2, we'll continue to grow the Microsoft Dataverse event platform capabilities by enhancing the performance, reliability, and scale of the event framework.

We'll also build on the event framework, enabling business process mining through an event analytics model. The model will provide a persisted, sequential series of events on which process mining applications, like process advisor in Power Automate, can provide rich process analytics.

Send more business events

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

Business value

External events will be ingested more quickly, leading to more responsive business processes.

Feature details

External business events use custom APIs that are configured so that no synchronous logic or data operations occur in Dataverse. Applications send external business events to Dataverse so that logic can be applied asynchronously.

These custom APIs are configured in this way:

- No plug-in type is registered for the main operation.
- The Allowed Custom Processing Step Type property is set to **Async Only**.
- There are no response properties.

This feature recognizes the unique configuration of these custom APIs and optimizes how Dataverse responds to these events. Without any synchronous logic or data operations in the custom API, these events can't be canceled. Knowing this, Dataverse will immediately respond to indicate that the event was accepted, skipping the time required for the logic that usually must occur to confirm the full processing of synchronous data or logic operations.

This results in a significant increase in the rate that applications can send events to Dataverse.

For more information, go to:

- Microsoft Dataverse business events
- Create and use custom APIs

Use process mining with events

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2022	Oct 2022

Business value

Process mining enables deep analysis of business processes, identifying bottlenecks and opportunities for process optimization.

Feature details

Process mining helps to analyze simple to complex business processes present in business applications and solutions we use every day. The objective of process mining is to help our customers identify process bottlenecks, create opportunities to optimize their business processes, and reduce handling costs.

This feature provides native platform capabilities for streaming your business events to a managed data lake and capture those events in a standard schema.

The event store in the lake will provide a persisted, sequential series of events on which process mining applications, like process advisor in Power Automate, use to provide rich process analytics.

Dataverse extensibility

Overview

Microsoft Dataverse is an extensible data source. Customers can create custom logic, tables, forms, applications, .NET plugin assemblies, and so on to either extend the existing capabilities or create new capabilities that cater to their business needs. Low-code extensibility in Dataverse takes extensibility to fusion development teams, thereby making extensibility an easy-to-use experience.

Dependent assemblies support for plug-ins

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

Business value

Enhanced plug-in functionality can now be added through the inclusion of dependent assemblies during the plug-in build and registration processes.

Feature details

This feature allows customers to include dependent assemblies as part of the plug-in build and registration processes. Customers can include all required plug-in assemblies into a NuGet package and register that package during the plug-in registration process using supported tools or solutions.

Another feature benefit is savings on system capacity utilization as these NuGet packages will be part of Microsoft Azure file store instead of the relational database. The NuGet package is stored on an Azure file store during the plug-in registration process after the plug-in assembly and plug-in type validations are run.

This feature makes use of sandbox plug-ins to decode the plug-in package and run the plug-in's business logic.

Enable Power Fx in Dataverse business rules

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

Business value

This capability will bring an improvement to the maker experience when working with business rules in Microsoft Dataverse.

Feature details

Today, business rules creation is a no-code and/or pro-developer's experience. No-code designer experiences are often limited to simple conditions or rules. We're expanding the business rule definition experience to low-code using Power Fx which is the low-code language that will be used across Microsoft Power Platform. It's a general-purpose, strong-typed, declarative, and functional programming language. This capability will enable fusion teams to write advanced business rules in Dataverse without having to go through the full development application lifecycle management (ALM).

Microsoft 365 collaboration

Overview

Microsoft Dataverse powers many collaboration capabilities, including integrations with different Microsoft 365 products, such as Microsoft Exchange, Outlook, and Teams. Whether you are sending/receiving emails, creating/joining Teams meetings, or linking Teams chats to records, Dataverse enables users to collaborate with colleagues across your company without needing to switch between applications.

Delegate mailbox approval process

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

Business value

If you're using Dynamics 365 with Exchange Online, a user with a global or Exchange administrator role is currently required to approve mailboxes before they can be enabled to synchronize with Dynamics 365. New Dynamics 365 users may be added on a regular basis and your company may want to delegate the mailbox approval process to someone who doesn't have a global or Exchange administrator role.

Feature details

A global or Exchange administrator will be able to delegate the mailbox approval process to other users or a team. A user who has been granted this delegate access will be able to approve a mailbox without needing to be a global or Exchange administrator.

Power Apps collaboration

Overview

We're building real-time collaboration infrastructure inside Microsoft Dataverse using Azure Fluid Relay services to fuel the co-presence and co-authoring capabilities for Power Apps makers and Unified Interface users. The infrastructure is scalable for third-party collaboration scenarios and becomes foundational for the expanding collaboration capabilities like commenting and notifications to minimize the collaboration gap between fusion teams.

Collaborate using co-presence, co-authoring

Enabled for	Public preview	General availability
Users, automatically	Aug 2022	Oct 2022

Business value

This feature facilitates real-time collaboration for co-presence and co-authoring scenarios for model-driven apps, thus empowering and encouraging fusion teams to be more collaborative and productive.

Feature details

A key part of enabling organization-wide adoption of low code is involving existing professional developers in the movement and empowering fusion teams of developers and citizens to work together. Enabling Microsoft Dataverse as the real-time collaboration platform helps to bring the fusion team players and experiences together, allowing both citizen and professional developers to start their work in the tool of their choice, yet seamlessly collaborate and jointly deliver value as part of the digital transportation journey.

Core to the fusion team experience is the ability to build collaboratively alongside multiple colleagues at the same time. In 2022 release wave 2, we'll enable co-presence and co-authoring experience for makers and co-presence experience for users. Makers will be able to see other people in real time as they build apps and make simultaneous edits across different pages of the same app. This will bring the high-productivity collaborative experiences that users have become accustomed to in document co-authoring to the world of software development, which has traditionally relied on the slower and asynchronous process of branching, merging, and compiling for teams of collaborators.

Virtual tables

Overview

Virtual tables allow Microsoft Dataverse to surface data stored outside of the Dataverse relational storage for use in Power Platform. Data accessed through a virtual table looks and acts like a native Dataverse table. For example, your SQL Server data can be accessed through Dataverse tables, using Dataverse APIs and plugins and can have relationships to your native Dataverse tables like accounts, contacts, or other custom tables you create.

Virtual tables can be used to connect to tabular data (SQL, Excel, SharePoint), non-tabular data (data lake, Azure Cosmos DB, SAP), data accessed through direct OData calls, or custom connections that users can craft to meet their needs.

Connector provider for non-tabular virtual tables

Enabled for	Public preview	General availability
Users, automatically	Dec 2022	Mar 2023

Business value

Provide an easier way to create virtual tables that connect to non-tabular data sources, such as Azure Data Lake, Azure Cosmos DB, and many more.

Feature details

Users will be able to use a connector provider to build virtual tables that can use data from sources that don't use a standard tabular format. These data sources include Azure Data Lake, Azure Cosmos DB, Azure Blob Storage, and other sources. The connector providers will remove the need to code API plugins to access the data.

Virtual tables between Dataverse instances

Enabled for	Public preview	General availability
Users, automatically	Jan 2023	To be announced

Business value

Users will be able to use virtual tables between two different Microsoft Dataverse environments. This feature will help organizations who have multiple organizations share key data within apps.

Feature details

With this feature, users will be able to create a virtual table in one Dataverse environment that can provide access to data in a different Dataverse environment. This allows users who may have multiple Dataverse organizations to use existing data and avoid duplicate content across organizations.

Governance and administration

Plan and prepare for governance and administration in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **governance and administration**.

Overview

Microsoft Power Platform offers a range of governance and administration capabilities that span Power Platform and Dynamics 365 applications and Microsoft Dataverse. These capabilities are designed to help administrators and IT professionals set up, secure, manage, govern, and monitor the use and adoption of Microsoft Power Platform and its components across the enterprise. The Power Platform admin center is the unified user experience we 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.

Key investments for this wave include:

- Improve admin's ability to understand organization use of licenses and easily assign licenses to users.
- Continue adding more products available to be "paid per use" using an Azure subscription.
- Bring Finance and Operations trial support into the Power Platform admin center for unified trial management.
- Deliver EU Data Boundary compliance across services.

Investment areas

Admin settings
Admins use a range of settings to govern and manage apps and services. These settings span across all the products in the Dynamics product families.

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

Check out the release plan

For application administrators

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

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

What's new and planned for governance and administration

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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.

Admin settings

Settings found in the Power Platform admin center allow admins to govern and manage apps and services.

Feature	Enabled for	Public preview	General availability
Manage business units, teams, and access team templates in the Power Platform admin center	Admins, makers, marketers, or analysts, automatically	Oct 2022	-

Feature	Enabled for	Public preview	General availability
[Modern security role editor experience in the Power Platform admin center]()	Admins, makers, marketers, or analysts, automatically	Oct 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.

Admin settings

Overview

Admins use a range of settings to govern and manage apps and services. These settings span across all the products in the Dynamics 365 product families.

Manage business units, teams, and access team templates in the Power Platform admin center

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

Business value

Provide a modern admin experience for administrators by replacing the legacy web client that doesn't meet accessibility needs and centralize the user management experience to manage business units, Dataverse teams, and access team templates.

Feature details

We'll provide a modern, intuitive UI experience within the Power Platform admin center, upgrading the legacy web client UI for managing business units, Dataverse teams, and access team templates. This will remove the need for administrators to navigate to the legacy web client and instead perform all management operations in the Power Platform admin center.

Modern security role editor experience in the Power Platform admin center

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

Business value

Admins can manage security roles and privileges in the modern security role editor in the Power Platform admin center. The modern experience is more accessible and replaces the need to navigate to the experience in the legacy web client.

Feature details

We'll provide a modern, streamlined, and simplified experience for admins to manage security roles and privileges in the Power Platform admin center. We'll remove the need to go to the legacy web client to manage roles and privileges.

Data integration

Plan and prepare for data integration in 2022 release wave 2

IMPORTANT The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for **data integration**.

Overview

Data integration is foundational for the Microsoft Intelligent Data Platform, enabling data connectivity, transformation, and integration across hundreds of enterprise-critical cloud and on-premises data sources.

Power Query enables users of Power BI, Excel, Azure Synapse, Power Apps, and other Microsoft products and services to ingest and transform data from hundreds of sources into the Microsoft data ecosystem with the M language. In this upcoming release wave, we will deliver various big data performance and high-scale improvements to connectivity scenarios from Azure Synapse, Dataverse, Snowflake, Databricks, Google BigQuery, and Amazon Redshift, as well as many other Power Query connectors.

You can also expect several enhancements, like additional security roles, logs, and diagnostics for VNET. Within the Power Query Editor and transformation experience in Power Query Online and Dataflows, you can expect new transforms and capabilities to simplify your visual data prep in a visual authoring environment.

Investment areas

Dataflows
Dataflows provides a low-code self-service data preparation experience using Power Query, including orchestration, automation, and monitoring capabilities that enable users across

Microsoft Power BI, Power Platform, Dynamics 365, and Azure to integrate data for downstream use by many other users and applications.

Power Query Online
Power Query Online is the data connectivity and data preparation experience for online users. This experience covers a wide variety of Microsoft products and services, including dataflows in Power BI, Power Platform, Dynamic 365 Insights Applications, and several more. For more information go to Power Query.

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

Check out the release plan

For application administrators

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

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

What's new and planned for data integration

This topic lists features that are planned to release from October 2022 through March 2023. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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.

Dataflows

Dataflows is a low-code data preparation experience using Power Query to integrate data across Power BI, Power Platform, Dynamics 365, and Azure.

Feature	Enabled for	Public preview	General availability
Apply actions to dataflows	Admins, makers, marketers, or analysts, automatically	Nov 2022	-
Load data into Azure Data Lake with dataflows	Users by admins, makers, or analysts	Nov 2022	
Load data to SharePoint in CSV format with dataflows	Users by admins, makers, or analysts	Nov 2022	
Load to Azure SQL database with dataflows	Users by admins, makers, or analysts	Nov 2022	
Load your data to Azure Data Explorer with dataflows	Admins, makers, marketers, or analysts, automatically	Nov 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, including Power BI, Excel, Customer Insights, and more.

Feature	Enabled for	Public preview	General availability
Define Azure Data Explorer KQL queries and views without coding	Admins, makers, marketers, or analysts, automatically	Nov 2022	-
Save and curate a personal query collection in Power Query	Admins, makers, marketers, or analysts, automatically	Mar 2023	-
Browse for SharePoint lists in Power Query Online and dataflows	Admins, makers, marketers, or analysts, automatically	-	Mar 2023
Browse SharePoint libraries and files in Power Query	Admins, makers, marketers, or analysts, automatically	-	Mar 2023

Description of **Enabled for** column values:

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

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

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

Dataflows

Overview

Dataflows provides a low-code self-service data preparation experience using Power Query, including orchestration, automation, and monitoring capabilities that enable users across Microsoft Power BI, Power Platform, Dynamics 365, and Azure to integrate data for downstream use by many other users and applications.

Apply actions to dataflows

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

Business value

You can develop dataflows more easily with extensible ETL pipelines with less effort and more flexibility.

Feature details

This feature provides the ability to apply actions, such as for/each and conditional branching, to Power Query dataflows from within the familiar Power Query editor. This feature also lets you create more robust and flexible extract, transform, and load (ETL) pipelines in Power Query dataflows.

Load data into Azure Data Lake with dataflows

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

Business value

You can use dataflows to store your data in Azure Data Lake.

Feature details

With this new feature, you can load your data into Azure Data Lake by using dataflows. Flexible options include the ability to control the update methods (for example, append and replace) for loading, and support for comma-separated values (CSV) or Parquet file formats.

Load data to SharePoint in CSV format with dataflows

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

Business value

In addition to the standard Power BI data lake option, you can use dataflows to store your data in SharePoint sites.

Feature details

With this new feature, you can load your data into any SharePoint folder in comma-separated values (CSV) format by using dataflows. There are also options to control the update methods (for example, append and overwrite) for loading, giving you great flexibility.

The default destination to load your data is the Power BI data lake, with SharePoint available as an additional destination.

Load to Azure SQL database with dataflows

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

Business value

In addition to the standard Power BI data lake as a destination, you can use dataflows to store your data in Azure SQL.

Feature details

With this new feature, you can load your data into any Azure SQL database by using dataflows. You can create new tables or load to existing tables with mapping. There are also options to control the update methods (for example, append or replace) for loading, so you have flexibility with how your data is loaded.

The default destination to load your data is the Power BI data lake, with Azure SQL as an additional destination.

Load your data to Azure Data Explorer with dataflows

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

Business value

Users can use dataflows to store their data in Azure Data Explorer.

Feature details

With this new feature, you can use dataflows to ingest and transform data, then load the final results into Azure Data Explorer. Data can be loaded into new tables or mapped to existing tables within Azure Data Explorer.

Use Azure Synapse serverless SQL and Spark engines with dataflows

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

Business value

This feature adds runtime options for dataflows to allow you to use Azure Synapse serverless SQL and Spark as the compute and transformation engines.

Feature details

Dataflows provide users with the ability to ingest and transform data with a low-code, easy-to-use experience. At the same time, dataflows need to provide high-scale capabilities to meet large enterprise data workload requirements.

With this feature, we're enhancing the dataflow runtime options to include Azure Synapse serverless SQL and Spark, which enable terabyte-scale low-code data transformations, empowering citizen and professional developers to achieve more within your data integration scenarios.

Power Query Online

Overview

Power Query Online is the data connectivity and data preparation experience for online users. This experience covers a wide variety of Microsoft products and services, including dataflows in Power BI, Power Platform, Dynamic 365 Insights Applications, and several more. For more information go to Power Query.

Define Azure Data Explorer KQL queries and views without coding

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

Business value

This feature allows Azure Data Explorer database creators to seamlessly define Kusto Query Language (KQL) views and queries through a no-code Power Query experience.

Feature details

Azure Data Explorer provides best-in-class experiences for creating no-code KQL queries and views in Power Query, enabling you to manage your business data in Azure Data Explorer databases that can be accessed and used by other members of your organization.

Save and curate a personal query collection in Power Query

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

Business value

With this feature, you can personalize your own Power Query experience by curating and managing your own query gallery.

Feature details

You can now tailor your Power Query experience by curating a personal query gallery to help you easily reuse queries at a later time. This gallery lets you access your saved queries directly in Power Query instead of needing to copy and paste from other sources.

You can add, edit, and remove queries from the gallery.

Browse for SharePoint lists in Power Query Online and dataflows

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

Business value

This feature speeds up the process of selecting SharePoint Online lists and SharePoint lists because you won't need to manually type the required site URL.

Feature details

Previously, when using the SharePoint list connector, you needed to know or find the correct URL to find your lists. In 2022 release wave 2, we've simplified that process, so you have a direct way to browse your SharePoint content for the lists you're seeking.

Browse SharePoint libraries and files in Power Query

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

Business value

You can easily browse SharePoint libraries and files directly in Power Query.

Feature details

Currently, finding the correct URL to use to get data from a file store in SharePoint can be difficult. In 2022 release wave 2, we've simplified that process, so you have a way to browse your SharePoint libraries and the files within them directly in Power Query.

Deprecation of Power Platform apps

A feature or capability that's deprecated is one that we intend to remove in a future release. The feature or capability will continue to work and will be fully supported until it's officially removed. After it's removed, the feature or capability will no longer work. Deprecation notifications can span a few months or years.

We encourage you to use this information, along with the release plans, to prepare for future releases. This notice is intended to give you sufficient time to plan and update your code before a deprecated feature or capability is removed.

- A deprecated feature is not in active development and may be removed in a future update.
- A removed feature is no longer available in the product.

For the current lists of Power Platform deprecations, including for Power Apps, Microsoft Dataverse, Power Automate, and AI Builder, visit:

- Important changes (deprecations) coming in Power Apps and Power Automate

Other deprecations

For the lists of other deprecations, visit:

- Sales
- Customer Service
- Field Service
- Finance and operations apps
- Universal Resource Scheduling
- Healthcare accelerator
- Financial services accelerator

See also

- Dynamics 365 and Microsoft cloud for industries 2022 release wave 1 plan
- Microsoft Power Platform 2022 release wave 1 plan
- Dynamics 365 and Microsoft Power Platform release plans
- Microsoft Lifecycle Policy

Got feedback?

Share your feedback on a community forum for Dynamics 365 or Power Platform. We'll use your feedback to make improvements. To find out about updates to these release notes, follow us on Twitter @MSFTDynamics365.

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