Microsoft

Microsoft Dynamics 365

2021 RELEASE WAVE 1 PLAN

Features releasing from April 2021 through September 2021

Contents

Dynamics 365 2021 release wave 1 plan

The Dynamics 365 release plan for the 2021 release wave 1 describes all new features releasing from **April 2021** through **September 2021**. You can either browse the release plan online or in this PDF file. The PDF file also includes information about Power Apps, Power Automate, Power Virtual Agents, Microsoft Dataverse, Microsoft Power Platform governance and administration, and data integration.

The Microsoft Power Platform features coming in the 2021 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

2021 release wave 1 overview

The 2021 release wave 1 for Dynamics 365 brings new innovations that provide you with significant capabilities to transform your business. The release contains hundreds of new features across Dynamics 365 applications, including Marketing, Sales, Customer Service, Field Service, Finance, Supply Chain Management, Human Resources, Commerce, Fraud Protection, Business Central, Customer Insights, and Customer Voice.

Marketing

- Dynamics 365 Marketing focuses on delivering deeper personalization and more channels to engage and reach your customers with the right messages with built-in analytics dashboards and cross-journey insights to improve results and achieve your business goals.

Sales

- Dynamics 365 Sales focuses on adding productivity enhancements for sellers and providing more access to data-driven insights to help with decision making. Look for updates to automation and sequencing, conversation intelligence, and many exciting updates to the mobile app enhancing the mobile experience for sellers on the go.

Service

- Dynamics 365 Customer Service transforms the contact center by providing intelligent omnichannel routing across channels. The all-in-one contact center will ship with a logistic and integrated first-party voice and chat solution to enable customers to be up and running quickly.

- Dynamics 365 Field Service introduces a comprehensive experience for customers that will allow them to self-schedule service and rate technicians to ensure the maximum satisfaction. Other investments in 2021 release wave 1 include streamlined onboarding

experience, comprehensive customer engagement capabilities, and broader resourcing options.

Finance and Operations

- **Dynamics 365 Finance** brings the intelligent cash flow offering to public preview with automation based on predictive results. Users experience out-of-the-box machine learning including when customers are predicted to pay, forecasting the budget and viewing forecasted cash positions based on actual accounts payable, accounts receivable and project transactions, and predicted outcomes.

- **Dynamics 365 Supply Chain Management** expands on inventory and logistics scenarios providing a single, organization-wide source of truth for inventory quantity-on-hand with the Inventory Visibility Add-in. In Asset Management, customers will be able to bill for maintenance work. Manufacturing adds execution with scale units in the cloud to run mission-critical processes without interruption.

- **Dynamics 365 Project Operations** delivers rich new experiences with the ability to forecast, use, and invoice non-stocked materials on projects. Also included is the ability to set up contractual commitments like billing methods and chargeability rules by task or a work breakdown schedule. Customers using Dynamics 365 Project Service Automation will be able to upgrade to Project Operations.

- **Dynamics 365 Guides** is focusing on intelligent workflows. By taking further advantage of data captured with HoloLens as well as AI innovations, users can get to work and confirm their results faster and simpler than ever. In addition, new entities for completion time enable customers to build Power Automate flows that support their unique enterprise needs.

Human Resources

- **Dynamics 365 Human Resources** continues to broaden the human capital management (HCM) ecosystem through integration APIs and strategic partnerships. The employee experience expands to support benefit notifications and a summary statement providing a consolidated view of benefits for employees.

Commerce

- **Dynamics 365 Commerce** brings to market an integrated B2B and B2C e-commerce offering in a single Commerce solution with unified merchandising and site management capabilities that enable a wide range of business models across industries and verticals. Commerce also expands the native integrations with Bing for Commerce search for product search, as well as Customer Service and Power Virtual Agents, to unify business processes across prepurchase and post-purchase scenarios.

Fraud Protection

- **Dynamics 365 Fraud Protection** adds behavioral and mobile fingerprinting, improving the accuracy of fraud management rules.

SMB

- **Dynamics 365 Business Central** delivers a set of new features designed to simplify and improve the way our partners administer tenants, and the way administrators manage licensing and permissions. Application enhancements expand the integration with Microsoft Teams, add country and regional expansions, and include moves to Visual Studio Code to provide modern development tools, further enhancing the productivity for developers.

Dynamics 365 Customer Insights

- **Audience insights** capabilities enable every organization to unify and understand their customer data to harness it for intelligent insights and actions. Audience insights is adding customization and extensibility capabilities of the customer view, additional connectors for data ingestion, better controls for AI-based unification, and capabilities to enable marketing, sales, and service professionals to drive personalized engagements across channels.

- **Engagement insights** capabilities enable individual and holistic interactive analytics over web, mobile, and connected products customer journey touchpoints.

Customer Voice

- **Dynamics 365 Customer Voice** expands the capabilities to collect feedback with prefilled answers, file upload support, drill-down question type, and customized survey headers. Additional capabilities designed to improve survey response rate include pause and resume survey to enable users to complete a survey on a different device, automated survey reminders for recipients who have not filled out the survey, and over-survey management. Creating a follow-up action workflow is made easier with Power Automate survey response trigger.

Industry accelerators

Industry accelerators are foundational components within Microsoft Power Platform and Dynamics 365 that enable ISVs and other solution providers to quickly build industry vertical solutions. The accelerators extend Common Data Model to include new entities to support a data schema for concepts within specific industries.

Key dates for the 2021 release wave 1

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

Here are the key dates for the 2021 release wave 1.

Milestone	Date	Description
Release plans available	January 27, 2021	Learn about the new capabilities coming in the 2021 release wave 1 (April 2021 – September 2021) across Dynamics 365 and Microsoft Power Platform.
Early access available	February 1, 2021	Test and validate new features and capabilities that will be a part of the 2021 release wave 1, coming in April, before they get enabled automatically for your users. You can view the Dynamics 365 2021 release wave 1 early access features now.
Release plans available in 11 additional languages	To be announced	The Dynamics 365 and Power Platform release plans published in Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	April 1, 2021	Production deployment for the 2021 release wave 1 begins. Regional deployments will start on April 2, 2021.

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

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

- **Admins, makers, or analysts, automatically** – These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts** – These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

We've done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We're looking forward to engaging with you as you put these new services and capabilities to work, and we're eager to hear your feedback as you dig into the 2021 release wave 1.

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

2021 release wave 1 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning **February 1, 2021**.

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

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

The features from these apps update the existing user experiences. You can opt in early to enable these features in your environment. This will allow you to test these features and then adopt them across your environments. For information on how to enable these features, see Opt in to 2021 release wave 1 updates.

IMPORTANT If you are using Unified Interface or Power Automate, there might be early access features that could impact your users. For Microsoft Power Platform early access features, see 2021 release wave 1 features available for early access.

Dynamics 365 Sales

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

Feature	Enabled for	Early access	General availability
Enhance personal settings	Users, automatically	Feb 1, 2021	Apr 2021

Dynamics 365 Customer Service

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

Feature	Enabled for	Early access	General availability
Visual improvements for multisession apps	Users, automatically	Feb 1, 2021	Apr 2021
Weekly and monthly view support in new schedule board inside of core service scheduling solution	Users, automatically	Feb 1, 2021	Apr 2021

Dynamics 365 Field Service

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

Feature	Enabled for	Early access	General availability
Capture work order resolution details	Users, automatically	Feb 1, 2021	Apr 2021
Enhancements to the embedded optimizer within schedule board	Users, automatically	Feb 1, 2021	Apr 2021
Field Service mapping features are enabled by default	Users, automatically	Feb 1, 2021	Apr 2021
Improve service account address usability	Users, automatically	Feb 1, 2021	Apr 2021
Knowledge management articles to enhance technician productivity	Users, automatically	Feb 1, 2021	Apr 2021
Map view and weekly and monthly view support in new schedule board	Users, automatically	Feb 1, 2021	Apr 2021

Feature	Enabled for	Early access	General availability
Resource scheduling optimization available for every Field Service organization	Users, automatically	Feb 1, 2021	Apr 2021
Simplify first-line worker setup	Users, automatically	Feb 1, 2021	Apr 2021

Dynamics 365 Finance

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

Feature	Enabled for	Early access	General availability
Configurable business documents – additional barcode type support	Admins, makers, marketers, or analysts, automatically	Feb 1, 2021	Apr 2021
Configurable business documents – preview support for print management	Admins, makers, marketers, or analysts, automatically	Feb 1, 2021	Apr 2021
Country and region expansion – Egypt	Users, automatically	Feb 1, 2021	Apr 2021

Dynamics 365 Supply Chain Management

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

Feature	Enabled for	Early access	General availability
Apply rules for grouping work orders while running a maintenance plan	Users by admins, makers, or analysts	Feb 1, 2021	Apr 2021

Feature	Enabled for	Early access	General availability
Bill customers for maintenance work	Users by admins, makers, or analysts	Feb 1, 2021	Apr 2021
Coverage time fence support for Planning Optimization	Users by admins, makers, or analysts	Feb 1, 2021	Apr 2021
Enable change management on existing products	Users by admins, makers, or analysts	Feb 1, 2021	Apr 2021
Inventory Visibility Add-in for Dynamics 365 Supply Chain Management	Users by admins, makers, or analysts	✔Nov 30, 2020	Apr 2021
Landed cost	Users by admins, makers, or analysts	Feb 1, 2021	Apr 2021
Manufacturing execution with scale units in the cloud	Users by admins, makers, or analysts	Feb 1, 2021	Jun 2021
Plan maintenance based on accumulated asset counter values	Users by admins, makers, or analysts	Feb 1, 2021	Apr 2021
Purchase requisition support for Planning Optimization	Users by admins, makers, or analysts	Feb 1, 2021	Apr 2021
Schedule warehouse work creation	Users by admins, makers, or analysts	Feb 1, 2021	Apr 2021
Set default financial dimensions for inventory standard cost revaluation vouchers	Users by admins, makers, or analysts	Feb 1, 2021	Apr 2021
Warehouse execution with scale units in the cloud	Users by admins, makers, or analysts	Feb 1, 2021	Apr 2021
Warehouse management mobile application	Users by admins, makers, or analysts	Feb 1, 2021	Apr 2021

Finance and Operations cross-app capabilities

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

Feature	Enabled for	Early access	General availability
Allow configuration of the publish batch size in the Excel add-in	Users, automatically	Feb 1, 2021	Apr 2021
Finance and Operations data in Microsoft Dataverse – phase 4	Users by admins, makers, or analysts	Feb 1, 2021	Apr 2021
Freeze columns in grids	Users by admins, makers, or analysts	Feb 1, 2021	Apr 2021
Translation support for organizational saved views	Users by admins, makers, or analysts	Feb 1, 2021	Sep 2021
Updates to client feature states	Users, automatically	Feb 1, 2021	Apr 2021
Upgrade to React 17	Users by admins, makers, or analysts	Feb 1, 2021	Apr 2021

Dynamics 365 Human Resources

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

Feature	Enabled for	Early access	General availability
Enable simplified integration with payroll providers	Admins, makers, marketers, or analysts, automatically	Feb 1, 2021	Apr 2021

Dynamics 365 Commerce

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

Feature	Enabled for	Early access	General availability
B2B e-commerce	Admins, makers, marketers, or analysts, automatically	Jan 14, 2021	Apr 2021
Create discounts that apply after all other periodic discounts are applied	Users by admins, makers, or analysts	✔ Nov 9, 2020	Apr 2021
Dynamics 365 Commerce and Microsoft Teams integration – add org structure, stores, workers	Users by admins, makers, or analysts	Jan 29, 2021	Apr 2021
Edit partially fulfilled customer orders in POS	Users by admins, makers, or analysts	Jan 28, 2021	Apr 2021
Email receipt improvements and new features	Users by admins, makers, or analysts	Jan 29, 2021	Apr 2021
Exclusive threshold discounts compete with exclusive non-threshold periodic discounts	Users by admins, makers, or analysts	Jan 29, 2021	Apr 2021
Highly performant and scalable customer search experience using the new cloud search infrastructure	Users by admins, makers, or analysts	Jan 29, 2021	Jul 2021
Improved POS ordering and fulfillment experiences for serialized items	Users by admins, makers, or analysts	Jan 28, 2021	Apr 2021
Improved user experience for pickup order processing in point of sale	Users by admins, makers, or analysts	Jan 29, 2021	Apr 2021

Feature	Enabled for	Early access	General availability
Omnichannel support for incremental payment capture	Users by admins, makers, or analysts	Jan 28, 2021	Apr 2021
Refactored payment processing in storefront checkout	Users by admins, makers, or analysts	Jan 28, 2021	Apr 2021
Shop similar looks	Users by admins, makers, or analysts	✔Oct 5, 2020	Apr 2021
Synergize task management between Dynamics 365 Commerce and Microsoft Teams	Users by admins, makers, or analysts	Jan 29, 2021	Apr 2021

Dynamics 365 Business Central

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

Feature	Enabled for	Early access	General availability
Client performance improvements	Users, automatically	Feb 1, 2021	Apr 2021
Extension validation on upgrade	Admins, makers, marketers, or analysts, automatically	Feb 1, 2021	Apr 2021
Getting started checklists for guided and faster initial setup	Users, automatically	Feb 1, 2021	Apr 2021
Improved company setup experience	Users, automatically	Feb 1, 2021	Apr 2021
In-app contextual help improvements	Users, automatically	Feb 1, 2021	Apr 2021

Feature	Enabled for	Early access	General availability
Interface – obsolete support	Admins, makers, marketers, or analysts, automatically	Feb 1, 2021	Apr 2021
Look up Business Central contacts from within Microsoft Teams	Users, automatically	Feb 1, 2021	Apr 2021
Report extensibility	Admins, makers, marketers, or analysts, automatically	Feb 1, 2021	Apr 2021
Return record link instead of name when using lookups	Admins, makers, marketers, or analysts, automatically	Feb 1, 2021	Apr 2021
Usability enhancements for the Business Central web client	Users, automatically	Feb 1, 2021	Apr 2021

Marketing

Overview of Dynamics 365 Marketing 2021 release wave 1

The world is not the same place it was last year. The rules of engagement have changed, and customer expectations are evolving. It is becoming harder for companies to get through to their customers and to be heard above the noise. To build strong relationships, companies must deliver personalized messages that customers can identify with and add value to their lives. Companies need to deliver the right message, at the right time, using the channel that the customer chooses—explicitly or implicitly—to show that they understand and care about their customers. To grow, or even just survive, companies must not only reach new customers, but also help existing customers progress from one-time to repeat customers, and, ultimately, to fans of the company. Building deep engagement and meaningful connections has never been more important than it is today.

Our approach with Dynamics 365 Marketing is to unleash the power of all your data—infusing it with AI and empowering you to deliver meaningful messages to your customers. Making the product easy to use is a guiding principle for us as we build features to help you achieve your goals. In the current release, in response to customer feedback, our key themes are to deliver deeper personalization with your communications, to do more out of the box with channels, and give you the insights to deliver better results from your marketing activities.

Deeper **personalization** to engage your customers:

- Author dynamic content with ease through a new point-and-click interface.
- Create deeply personalized emails from a more flexible set of data sources.
- Target AI-generated segments using attributes such as recency, frequency, and monetization to target high-churn risk or high-value customers.

More **channels**, power, and ease to reach your customers with the right messages:

- Create emails quickly, with low effort, and without compromises using the new email editor experience.
- Search, version, manage, and use AI to tag your digital assets with a new centralized asset library.
- Use AI-driven recommendations to select and deliver the best image, video, document, or fragment for your messages.
- Create and send SMS messages to any mobile phone.
- Deliver push notifications to any Android or iOS app.

Analytics to improve results and achieve your business goals:

- Improve journey effectiveness with a new set of built-in analytics dashboards and cross-journey insights.

- In real time, monitor your customer journeys and channel KPIs.

- Set business goals for journeys and measure progress to the goal.

- Experiment with the next action in a journey to optimize for results.

What's new and planned for Dynamics 365 Marketing

This topic lists features that are planned to release from April 2021 through September 2021. 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.

AI powered

Feature	Enabled for	Public preview	Early access*	General availability
Use AI-generated segments and recency, frequency, and monetization attributes to target high-value customers	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	

Analytics

Analytics to improve results and achieve your business goals.

Feature	Enabled for	Public preview	Early access*	General availability
Experiment with the next action in a journey to optimize for results	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	

Feature	Enabled for	Public preview	Early access*	General availability
Improve journey effectiveness with a new set of built-in analytics dashboards and cross-journey insights	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	
In real time, monitor your customer journeys and channel KPIs	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	
Set business goals for journeys and measure progress to the goal	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	

Channels

More channels, power, and ease to reach your customers with the right messages.

Feature	Enabled for	Public preview	Early access*	General availability
Create and send SMS messages to any mobile phone	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	
Create emails quickly with low effort and without compromises	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	
Deliver push notifications to any Android or iOS app	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	

Feature	Enabled for	Public preview	Early access*	General availability
Search, version, manage, and tag your digital assets with a new centralized asset library	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	

Personalization

Deeper personalization to engage your customers.

Feature	Enabled for	Public preview	Early access*	General availability
Author dynamic content with ease through a new point-and-click interface	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	
Create deeply personalized emails with a more flexible set of data sources	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	
Use continuously updating, multidata source segments from Customer Insights in your marketing campaigns	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	
Use customer journeys to target leads in addition to contacts	Admins, makers, marketers, or analysts, automatically	Aug 2021	-	

* You are able to opt in to some features as part of early access on February 1, 2021, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

AI powered

Use AI-generated segments and recency, frequency, and monetization attributes to target high-value customers

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

Business value

Dynamics 365 Marketing enables you to leverage Dynamics 365 Customer Insights AI-generated segments based on attributes such as recency, frequency, and monetization to easily target high-churn risk or high-value customers.

Feature details

Recommended segments based on recency, frequency, and monetization data in Customer Insights.

Analytics

Overview

- Improve journey effectiveness with a new set of built-in analytics dashboards and cross-journey insights.

- In real-time, monitor your customer journeys and channel KPIs.

- Set business goals for journeys and measure progress to the goal.

- Experiment with the next action in a journey to optimize for results.

Improve journey effectiveness with a new set of built-in analytics dashboards and cross-journey insights

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

Business value

Dashboards and cross-journey insights present metrics, views, and insights summarized across single or multiple journeys, providing you with a deep understanding of journey, channel, and content performance. The built-in dashboards focus on engagement goals, so you can finetune the effectiveness of your journeys, channels, and content.

Feature details

- Evaluate the effectiveness of journeys against your objectives.

- Troubleshoot journeys by identifying areas of friction.

- Discover what is working so that you can amplify or recreate the same approach elsewhere.

- Understand the effectiveness of various channels of communication.
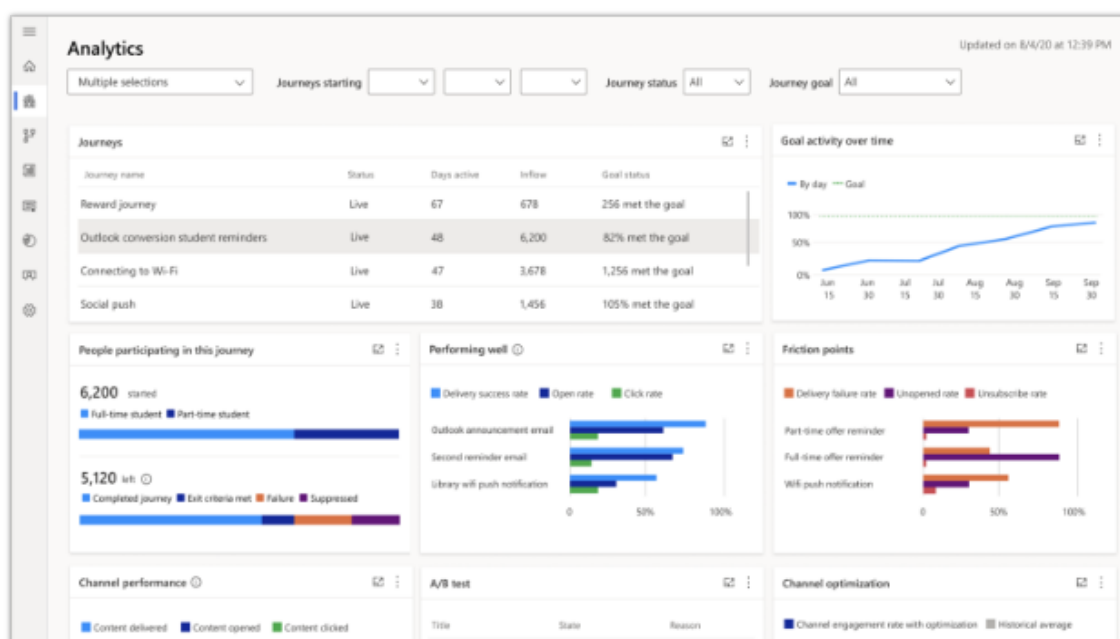
Dashboards and cross-journey insights present metrics, views, and insights summarized across journeys

In real time, monitor your customer journeys and channel KPIs

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

Business value

Evaluate your customer journey's effectiveness with real-time analytics updates. Analytics overlays give you the tools to examine your entire customer journey at a glance. Use the built-in Sankey chart to highlight the flow density of journey participants through each step. Analyze channel performance using the deliverability funnel and undelivered category pie chart breakdown. Monitor goal accomplishment using the goal attainment chart.

Feature details

- Monitor journey operation health in real time.
- Track the success and impact of various steps and channels in the journey.
- Identify key bottlenecks in the journey flow.
- Immediately see which channel or step in your journey is underperforming.
- Determine why participants are engaging or disengaging with channels or steps in your customer journey.

Set business goals for journeys and measure progress to the goal

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

Business value

Most customer journeys are created to drive a specific customer behavior or action, such as making a purchase, signing up for an event, or renewing an old subscription. You can now choose this intended behavior as the goal of your customer journey and set a target you want to hit. Using the goal, you can measure the success of the customer journey on an ongoing basis. Goal setting enables you to make incremental improvements to reach your targets more quickly and effectively.

Feature details

- Define goals that track customer engagement, customer satisfaction, general onboarding, or drive a purchase.

- Measure the success of the customer journey on an ongoing basis using the goal metric and a target.

- Optimize your A/B tests and channel selections based on the journey goal.

- Express goal targets in count or percentage to determine how well a journey is performing.

Experiment with the next action in a journey to optimize for results

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

Business value

Dynamics 365 Marketing now enables customers to optimize their customer journeys by creating A/B tests with the same message across different channels, different messages altogether, or any next action. This adds to the existing capability for marketers to be able to test two variants of the same message together in a customer journey. With the new set of A/B testing tools, marketers can confidently deliver the most engaging messages through the best channels and increase the ROI of their journeys.

Feature details

- Test any two variants against one another: different channels with the same message, different messages with the same channel, different channels with different messages, slight variants of the same message (with different subject lines or content), or any actions in the customer journey.

- The winning metric can be message-specific (for example, email clicked), or a journey goal (for example, cart checkout); the latter allows you to choose a winning variant that truly increases the journey goal attainment.

- Control the audience distribution between the two variants.

- End the test automatically once a winning variant is declared, or end the test at a date specified.

- Choose to send a default version if a clear winner is not declared by the date specified.

Channels

Overview

- Create emails quickly, with low effort, and without compromises using the new email editor experience.

- Search, version, manage, and use AI to tag your digital assets with a new centralized asset library.

- Use AI-driven recommendations to select and deliver the best image, video, document, or fragment for your messages.

- Create and send SMS messages to any mobile phone.

- Deliver push notifications to any Android or iOS app.

Create emails quickly with low effort and without compromises

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

Business value

With the revamped email editor, we have designed a completely new way of creating engaging and relevant content. The improved email editor optimizes for a productive workflow including real-time error information, making it easy to produce professional emails with far less time and effort.

Feature details

- Fast and fluid editor with a modern look and feel.

- AI-driven content recommendations.

- Powerful and reusable content fragments.

- Flexible layout options allow you to create emails without compromises.

- Updated workflow guides you through the editing experience.

- Advanced image manipulations and more fonts and styles.

- Reliable email previews.

- Quick and easy test sends.

- Immediately discover errors.
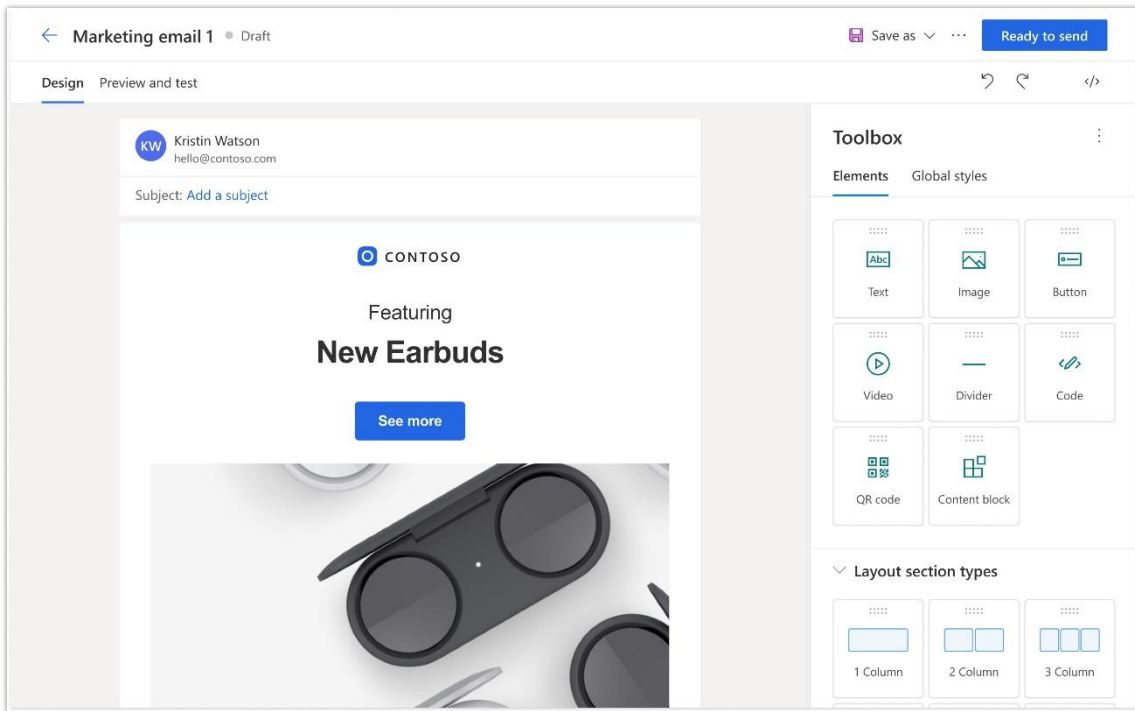
The revamped email editor

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.

Search, version, manage, and tag your digital assets with a new centralized asset library

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

Business value

To build successful multitouch experiences, companies must serve quality content, at the right time, and in the right form. But for many companies, there is no 360-degree view and management of the company's assets. This makes it extremely challenging to manage, add, or share content. Our new asset library is shared with Dynamics 365 Commerce. The asset library allows you to search, create, update, delete, and version images, videos, and binaries. The new asset library also helps you avoid broken asset references in your messages. The search experience is improved with intelligent, AI-based image tagging.

Feature details

- Single asset library across Dynamics 365.

- Search, create, update, and delete images, videos, and binaries.

- Version, revert.

- Channel content is aware of asset updates or deletions to prevent broken asset references.

- Bulk import and management of images, videos, and binaries.

- Intelligent tagging of images and videos using AI for effective search.
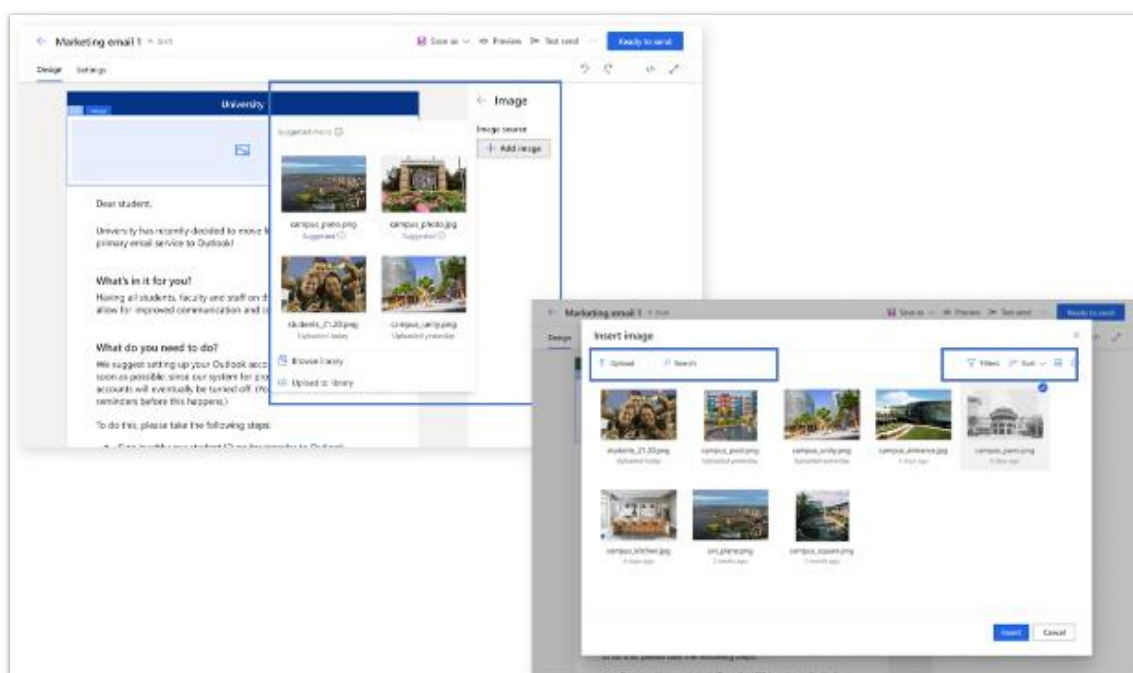
Dynamics 365 Marketing includes an advanced and centralized asset library

Create and send SMS messages to any mobile phone

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

Business value

SMS messaging using the Dynamics 365 Marketing mobile channel creates new opportunities to connect with mobile users. The SMS channel enables fast transactional

communication and marketing messaging as part of campaigns and customer service communication.

Feature details

- The SMS message channel includes transactional and marketing SMS and MMS messaging via toll-free numbers and short codes.

- Option to purchase or use existing phone numbers across select regions in North America and Europe.

- Craft an end-to-end experience with personalized messages inside the SMS editor and orchestrate timely delivery to mobile users.
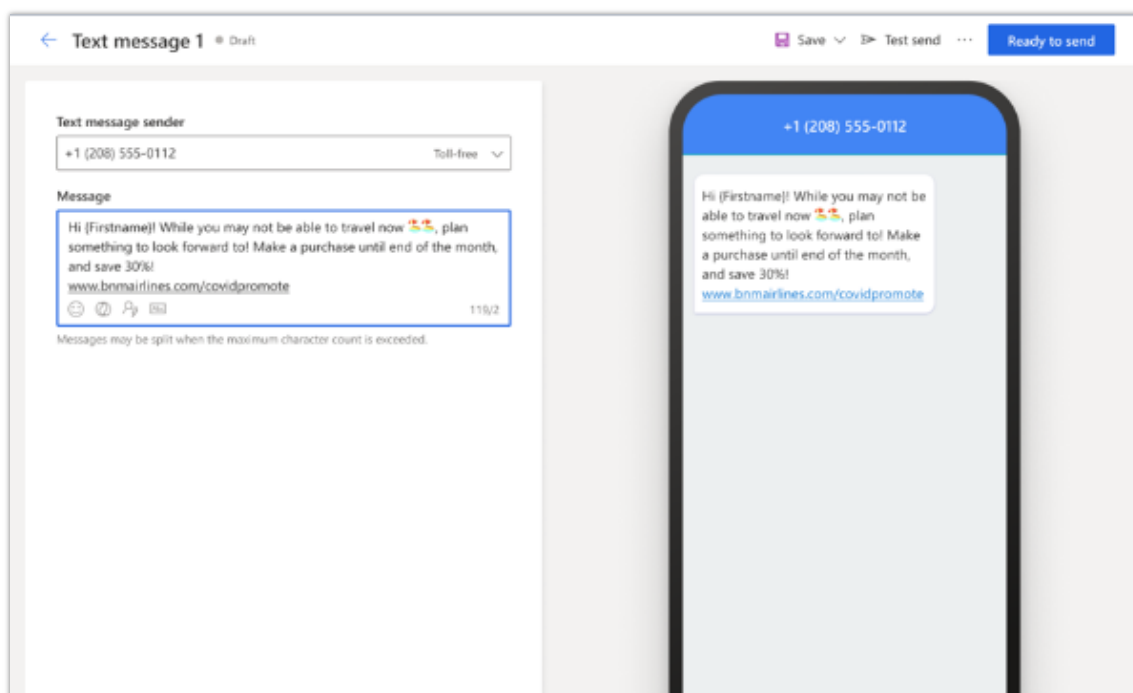
SMS messaging using the Dynamics 365 Marketing mobile channel

Deliver push notifications to any Android or iOS app

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

Business value

Businesses with mobile apps can now use Dynamics 365 Marketing to orchestrate beautiful, personalized push notifications to keep customers engaged.

Feature details

- The mobile push channel includes rich notification features such as customized messages with images, videos, and sound.

- Send push notifications in-app or outside the app.

- Push clicks can lead to links and deep links.

- Custom action buttons can link to a preferred action or a page inside or outside of the app.
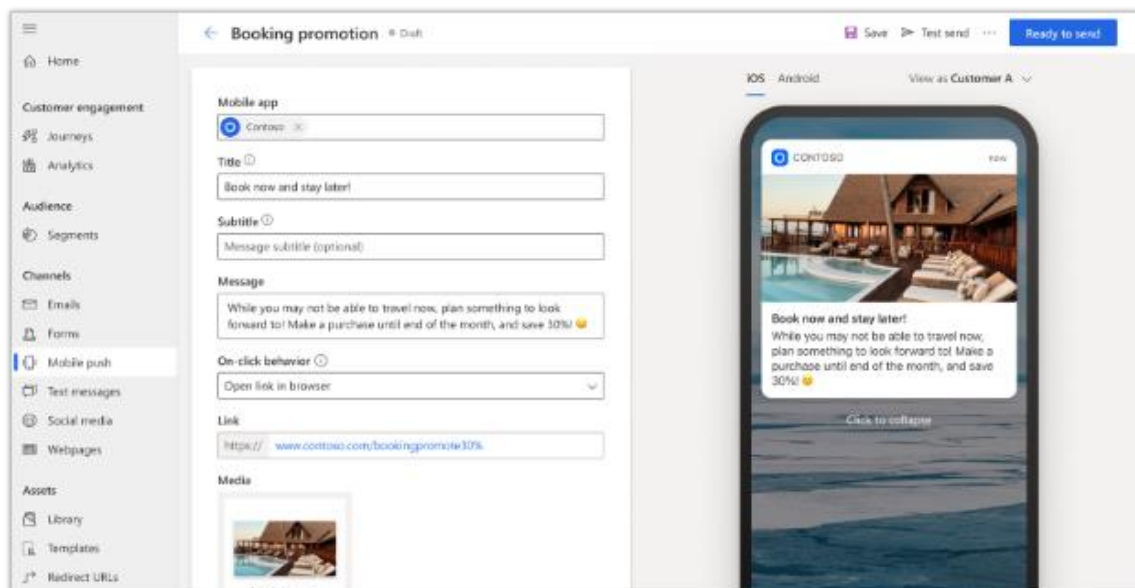
Businesses with mobile apps can now use Dynamics 365 Marketing to create personalized push notifications

Personalization

Overview

- Use customer journeys to target leads and opportunities in addition to contacts.

- Author dynamic content with ease through a new point-and-click interface.

- Create deeply personalized emails from a more flexible set of data sources.

- Target AI-generated segments using attributes such as recency, frequency, and monetization to target high-churn risk or high-value customers.

Create deeply personalized emails with a more flexible set of data sources

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

Business value

Sending personalized content to customers is a great way to increase engagement. With this release, we are extending personalization capabilities beyond information captured in the contact record. You can now use any data source that you can connect into Microsoft Dataverse as data for personalization, including lists of data.

In addition to more deeply personalized messages, you can combine multiple messages that differ only by the dynamic data into a single message for easier management and maintenance.

Feature details

- Use any data for personalization, not just contact records.
- Use lists of data.
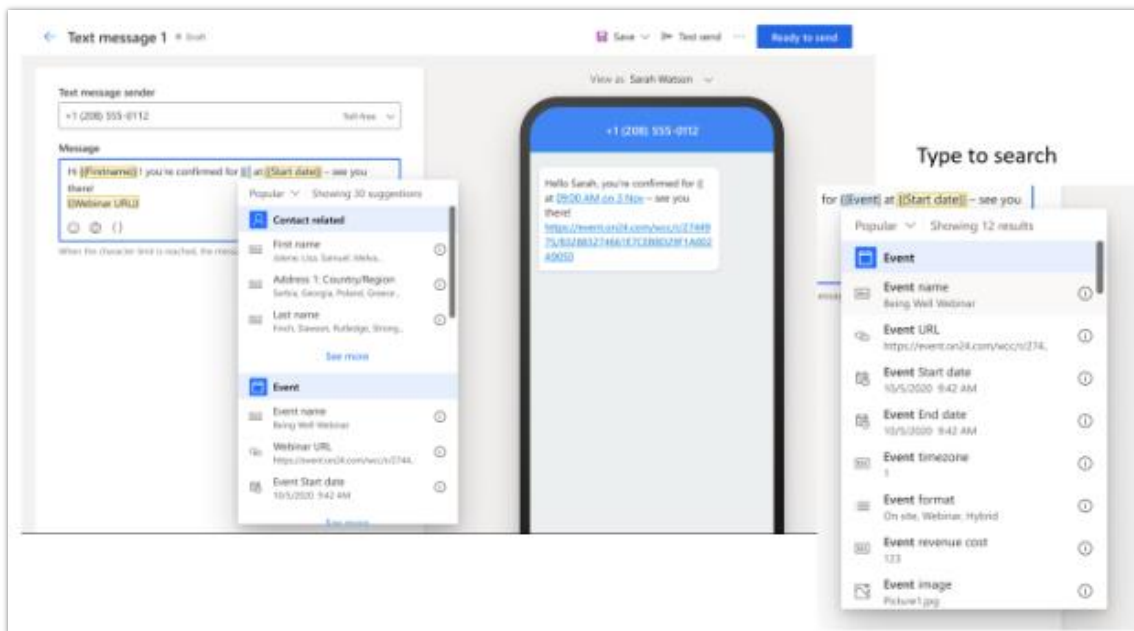
Dynamics 365 Marketing enables you to personalize content from a more flexible set of data sources

Author dynamic content with ease through a new point-and-click interface

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

Business value

Advanced dynamic content is key to delivering highly personalized messages to customers. But the complexity of setting up dynamic content can decrease productivity. With this release, you can easily create advanced dynamic content such as showing a block of content based on a condition and iterating through a dynamic list of data all from an easy-to-use UI editor that removes the need to write custom code into the HTML.

Feature details

- Dynamic content editor.
- Point-and-click creation of conditions to show content.
- Point-and-click iteration over lists of data.
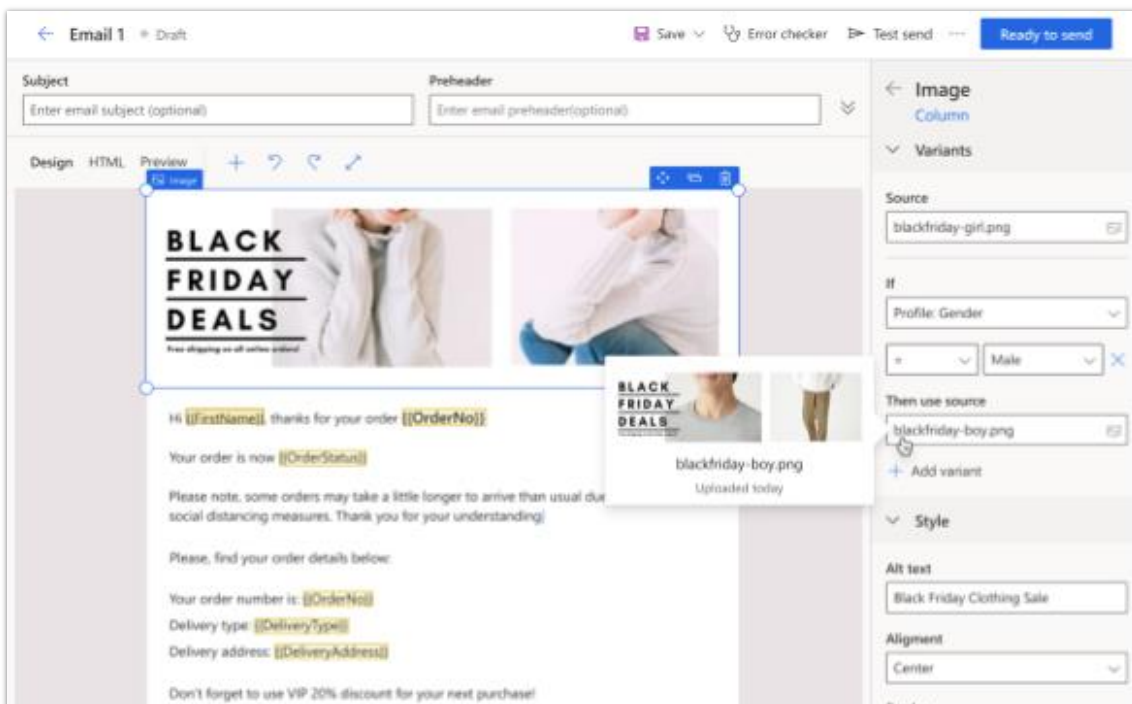
The updated Dynamics 365 Marketing dynamic content editor quickly creates personalized messages

Use customer journeys to target leads in addition to contacts

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

Business value

The customer journey editor can now target customers who are represented as *Leads* and *Opportunities* in addition to *Contacts*. This creates new, flexible avenues to reach customers in segments and journeys.

Feature details

- Target customers through Lead or Opportunity entities without creating a parent Contact.

- Personalize messages by inserting dynamic content for Lead and Opportunity entities.

Use continuously updating, multidata source segments from Customer Insights in your marketing campaigns

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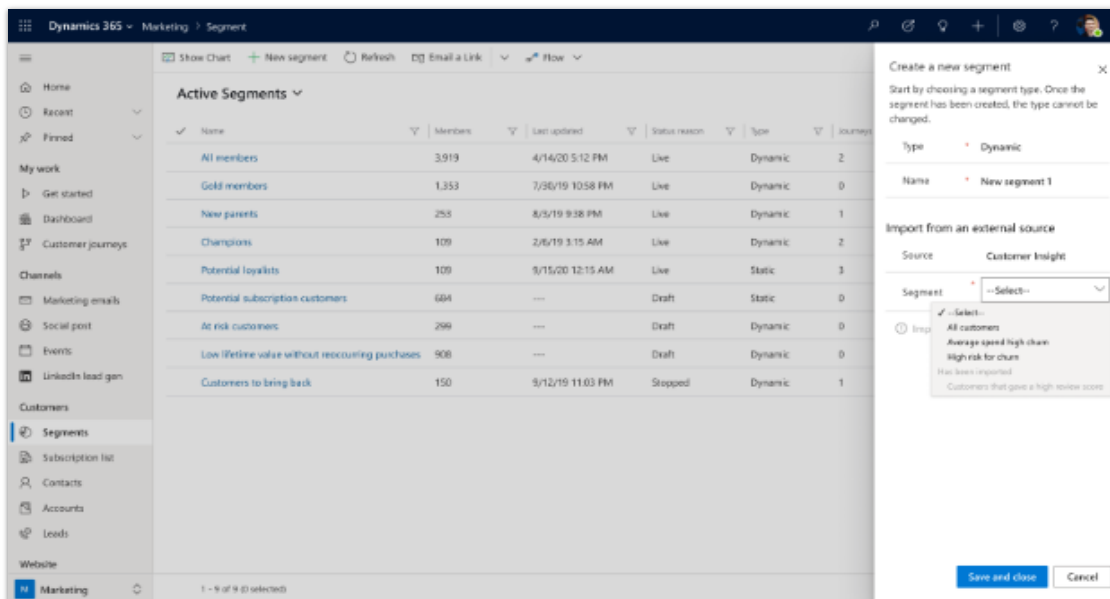
Business value

Dynamics 365 Customer Insights integration enriches Dynamics 365 Marketing's segmentation capabilities, allowing precise audience targeting and increased campaign effectiveness.

Feature details

- Discover Customer Insights segments instantly, see the segment creation logic, and use the segments for Marketing customer journeys.

- Customer Insights segments in Marketing are dynamically updated as long as Customer Insights and Marketing are connected.

- Save snapshots of Customer Insights dynamic segments as static segments in Marketing.

- Use Customer Insights segments directly in customer journeys, just like native Marketing dynamic segments.

Customer Insights segments are automatically usable within Marketing for campaign execution

Sales

Overview of Dynamics 365 Sales 2021 release wave 1

Dynamics 365 Sales continues to be the market-leading sales tool that empowers every organization to sell more by understanding their customers and the way they want to buy—powered by data, intelligence, and experiences that people love. Dynamics 365 Sales is centered on the customer relationship. It helps organizations understand customer needs, drives more relevant and authentic engagements, and makes it more efficient for you to sell.

With the 2021 release wave 1 of Dynamics 365 Sales, we're releasing some exciting new functionality, making some updates and optimizations based on valuable customer feedback, and including some bug fixes. Your continued feedback is important to us, so please reach out to us at Sales Ideas.

The focus areas included in our 2021 release wave 1 are:

- **Saving you time**: Get tasks done more easily to keep the focus on selling.

  Sellers need to take a number of steps to identify the right customers and the next actions to take. We're excited to introduce more automation and sequences that will adapt to the changing needs and behaviors of your customers. The record side panel will allow you to customize your workspace to your unique business requirements and trigger key actions, all in the same place. The deal manager workspace will allow sellers to quickly view the right deals, get the right context, and take action in no more than one click.

- **Intelligence at your fingertips**: Provide data-driven insights to help with decision making.

  Sellers want data to help inform their day-to-day decisions, but also require important insights to be surfaced to help parse through the noise. Conversation intelligence will provide insights on top of video calls and calls with multiple participants. New filters in the deal manager workspace will allow sellers to easily locate opportunities by searching, quickly setting a column filter, or choosing a time-based slicer. We're also introducing new, out-of-the-box data visualizations that will be both interactive and configurable. Sellers will now also be able to select "stats," out-of-the-box calculated metrics to help them quickly understand their pipeline.

- **Helping you on the go**: Enhancing the mobile experience for sellers on the go.

  Field sellers need to be able to manage their work from their mobile devices. With the Dynamics 365 Sales mobile experience, sellers can get up-to-date LinkedIn information on meeting participants, insights about a deal, account and contacts integrated with AI, and easy access to files, notes, emails, and more. Sellers can now also easily manage their activities and take follow-up actions promptly. Lastly, Microsoft Teams customer calls or

online meetings can be transcribed and assigned to a Dynamics 365 record, with AI giving sellers access to insights, sentiment, and follow-up actions.

What's new and planned for Dynamics 365 Sales

This topic lists features that are planned to release from April 2021 through September 2021. 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.

Digital selling

Aims to help inside sellers sell smarter by building a strong pipeline, offering context, and surfacing automated recommendations throughout a sales sequence.

Feature	Enabled for	Public preview	Early access*	General availability
Discover Sales Premium	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2021
Improve trial experience	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2021
Enhance personal settings	Users, automatically	-	Feb 2021	Apr 2021
Automation and adaptive sequences	Users by admins, makers, or analysts	Apr 2021	-	
Personalize work queue	Users by admins, makers, or analysts	Apr 2021	-	
Query for leads from lead acquisition services	Users by admins, makers, or analysts	Apr 2021	-	

Feature	Enabled for	Public preview	Early access*	General availability
Seller KPIs and manager dashboards to encourage productivity	Users by admins, makers, or analysts	Jun 2021	-	

Engagement platform

Aims at enabling a smooth integration of varied communication providers with Dynamics 365 Sales so sellers can easily onboard digital selling capabilities.

Feature	Enabled for	Public preview	Early access*	General availability
Easily integrate your telephony provider with out-of-the-box functionalities	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	-
Provide business insights on top of any type of sales call	Users by admins, makers, or analysts	Apr 2021	-	To be announced

Mobile

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

Feature	Enabled for	Public preview	Early access*	General availability
Come prepared to customer engagements	Users by admins, makers, or analysts	Feb 2021	-	Apr 2021
Find, interact, and create customer information easily	Users by admins, makers, or analysts	Feb 2021	-	Apr 2021
Log and share information effortlessly	Users by admins, makers, or analysts	Feb 2021	-	Apr 2021

Feature	Enabled for	Public preview	Early access*	General availability
Never miss a detail in your customer engagements	Users by admins, makers, or analysts	Jun 2021	-	-

Pipeline manager workspace

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

Feature	Enabled for	Public preview	Early access*	General availability
Ability to customize and configure the record side panel form	Users by admins, makers, or analysts	Apr 2021	-	
Advanced editable grid to update deals with ability to personalize columns	Users by admins, makers, or analysts	Apr 2021	-	
Enhanced productivity with new record side panel form	Users by admins, makers, or analysts	Apr 2021	-	
Enhanced workspace experience with Sales Insights	Users by admins, makers, or analysts	Apr 2021	-	
Interactive visual charts that can be personalized by sellers	Users by admins, makers, or analysts	Apr 2021	-	
New workspace experience that is engaging, intuitive, and accessible from Sales hub and other custom apps	Users by admins, makers, or analysts	Apr 2021	-	
Quickly filter data within workspace through data slicers	Users by admins, makers, or analysts	Apr 2021	-	

Feature	Enabled for	Public preview	Early access*	General availability
Track the most relevant metrics with stats	Users by admins, makers, or analysts	Apr 2021	-	
Trigger key actions and activities directly from the grid and the record side panel	Users by admins, makers, or analysts	Apr 2021	-	

* You are able to opt in to some features as part of early access on February 1, 2021, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Mobile

Overview

Mobile is an essential part of solving one of the biggest challenges faced by sales organizations today: How to help sellers access what they need, when they need it, wherever they are, and make it easy for them to log and share information in real time. As part of our commitment to simplify customer experiences and help sellers focus on selling, we're introducing an intuitive mobile experience to offer quick access to customer information and make it easy to keep this information current.

This application will provide experiences optimized for the core day-to-day seller's scenarios, leveraging Microsoft assets and the device's features. Using the new sales application, available on iOS and Android platforms, field sellers can be productive anywhere, anytime.

Log and share information effortlessly

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

Business value

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

Feature details

- Scan card and notes.

- Notes analysis and tasks extraction.

NOTE This feature is available in Unified Interface only.

Never miss a detail in your customer engagements

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

Business value

Never miss a detail in your customer engagements. Sellers conduct dozens of weekly customer engagements, often from their mobile device. Each engagement has implicit and explicit information, and some can be easy to overlook, especially if the deal is new or the seller is new. The seller's attention might be spread across multiple items while speaking, or perhaps the situation doesn't allow for taking notes.

Feature details

- Automatic transcription for each call and online meeting.

- Automatic assignment of each call to its relevant Dynamics 365 entity and populating the data within Dynamics 365.

- Conversation insights and action item extractions.

NOTE This feature is available in Unified Interface only.

Come prepared to customer engagements

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

Business value

Sellers are constantly engaging with their customers and often do that intensively with little time to prepare. Getting the required information about the customer and the relevant deal can be the difference between win and loss.

Feature details

- Enriched information per participant taken from LinkedIn and Dynamics 365 insights.

- Access to personal contacts and a quick way to integrate them with Dynamics 365.

- Access to engagement-related resources like files, notes, and emails.

NOTE This feature is available in Unified Interface only.

Find, interact, and create customer information easily

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

Business value

Customer relationship management systems shouldn't be rigid databases that are painful to use from mobile devices. When sellers can comfortably interact with customer information, find relevant data quickly, and take follow-up actions promptly, they gain more from the sales organization and eventually sell more.

Feature details

- Activity management inbox and to-do experience.

- One-click follow-up actions.

NOTE This feature is available in Unified Interface only.

Digital selling

Overview

Inside sellers manage customer lists. Sales organizations vary—some manage leads that need to be converted, others manage opportunities that need to be won. Our vision is to tailor Sales acceleration to meet specific business needs, whether managing leads, opportunities, or any custom entity.

Personalize work queue

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

Business value

Salespeople are busy each day with a large number of tasks, meetings, emails, and calls with customers. In order to adapt the work surface to the seller's tasks, the work list should contain updates on all types of tasks with flexible views that will make it easier for the seller to initiate a call and send an email directly from the customer's record without having to switch between different types of applications, enabling them to complete tasks quickly.

Feature details

User personalization:

- User-defined advanced settings and views for the work queue.

Upcoming meetings:

- Integrated view into Outlook meetings.
- Start new Microsoft Teams meeting from within the accelerator.

NOTE This feature is available in Unified Interface only.

This functionality might require a separate add-in license. Please see the plan comparisons for more information.

Improve trial experience

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

Business value

Currently, the trial experience for Sales Insights Add-in for Dynamics 365 Sales is not optimal and customers are unable to install, configure, and realize the value of the features. For the new SKU, we will optimize the trial so that admins and business users can realize the full value of premium features easily and quickly.

Feature details

- Faster and simpler add-on installation.

- New sample premium data for new trials.

- Manage sample data.

- Improve trial experience.

- Welcome trial screens.

- License indication enhancements.

NOTE This feature is available in Unified Interface only.

Seller KPIs and manager dashboards to encourage productivity

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

Business value

KPIs and dashboards are an effective way to keep the organization's sales goals organized and continuously updated for the sellers and their managers. Without these data points, it can be difficult to know the status of the organization's sales, how quickly the sellers can achieve their goals, and if guidance or help is needed to speed up the sales process.

Feature details

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

- Number of active leads in the org versus previous periods.

- The conversion ratio between leads and opportunity.

- Leads by sources types.

- Leads per sellers.

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

- Number of qualified leads.

- Number of calls.

- Number of meetings.

- Estimated value.

NOTE This feature is available in Unified Interface only. This functionality might require a separate add-in license. Please see the [plan comparisons](#) for more information.

Discover Sales Premium

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

Business value

Currently, Sales Insights features are not easily discoverable by admins of the existing Sales SKU. The existing customers are effectively using the premium features and increasing the sales revenues. We will increase the discovery of premium features by admins through the features.

Feature details

- Increase the awareness of premium features.

- Promote premium features in main settings area.

NOTE This feature is available in Unified Interface only.

This functionality might require a separate add-in license. Please see the [plan comparisons](#) for more information.

Enhance personal settings

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

Give users the option and flexibility to create email templates and email signatures using the new editor. Move personal settings to a dedicated area to get more traction by sellers and to host both Sales and Sales Insights personal settings.

Feature details

- Access to modern email template and signature editor.

- Move personal settings to a dedicated area switcher in Dynamics 365 Sales hub app.

- Reorganize personal settings items.

NOTE This feature is available in Unified Interface only.

Automation and adaptive sequences

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

Business value

Today, sellers are required to check the customer status and accordingly decide on the next task to perform, create a new email task, edit the email with the relevant information, send it to the customer and wait for a response. This process can be automated and will require explicit action from the seller when needed, so they are able to spend their spare time closing other business opportunities.

Feature details

Sequence automation: Execute activities automatically without requiring seller intervention, such as automatically sending emails when email activity is the next step in the sequence.

- Adding email automation support.

- Personalization email template to send from the seller account.

Sequence forks: Reactive sequences that can smartly pick the next step based on external or internal triggers.

Sequence listener:

- Adding listener for email engagement: email open, email link click, attachment viewed, and sentiment.

- Adding listener for phone or meeting conversation: sentiment, keyword, competitor, mentioned, and more.

NOTE This feature is available in Unified Interface only.

This functionality might require a separate add-in license. Please see plan comparisons for more information.

Query for leads from lead acquisition services

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

Business value

Take the prospecting experience to its next level by integrating with third-party lead acquisition services. With these integrations, sellers can query for new leads that match a certain segment or criteria. Depending on the service provider, sellers can also search for similar contacts and companies to reveal new potential opportunities and enrich their customer base so that the information is complete and up to date.

Feature details

Query for leads from lead acquisition services.

NOTE This feature is available in Unified Interface only.

This functionality might require a separate add-in license. Please see the plan comparisons for more information.

Pipeline manager workspace

Overview

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

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

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

Quickly filter data within workspaces through data slicers

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

Business value

Locating the right opportunities is hard. Currently, users need to create new views every time they want to find a specific set of opportunities. The data filtering capabilities in the deal manager workspace will allow users to easily locate opportunities by either searching, quickly setting a column filter, or choosing a time-based slicer.

Feature details

- Data slicers based on grid column.

- Time slicers to filter data based on different time parameters.

- Quickly find a record with a search filter.

NOTE This feature is available in Unified Interface only.

Ability to customize and configure the record side panel form

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

Business value

There are times when a full opportunity form is not needed. Sellers want to quickly view the most relevant information and catch up on the latest activities. To do so, we are introducing record side panel. A record side panel is a streamlined representation of a form delivered through a side panel as part of the pipeline management workspace. Organizations will be able to customize the record side panel form to fit their unique business requirements.

Feature details

- Out-of-the-box record side panel forms for opportunity, contact, and account entities.

- Ability to customize the out-of-the-box record side panel form with custom attributes.

- Support for business rules.

- Support server side plug-ins.

NOTE This feature is available in Unified Interface only.

New workspace experience that is engaging, intuitive, and accessible from Sales hub and other custom apps

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

Business value

Today, to manage their pipeline, sellers are expected to view a dashboard, navigate to the list of opportunities, drill down into a specific deal, and then acquire the context needed to move the deal forward. These are a lot of steps that take the seller out of their workflow.

With the deal manager workspace, we are releasing a new experience that is intuitive, modern, and personal, allowing sellers to quickly view the right deals, get the right context, and take action no more than one click away. The workspace experience will change the way sellers interact with their opportunities, making them more productive, and ultimately more successful at closing deals.

Feature details

- A new sitemap entry in the Sales hub pointing users to the deal manager.

- Workspace container with all components shipped out of the box.

- Support workspace for organizations using custom apps.
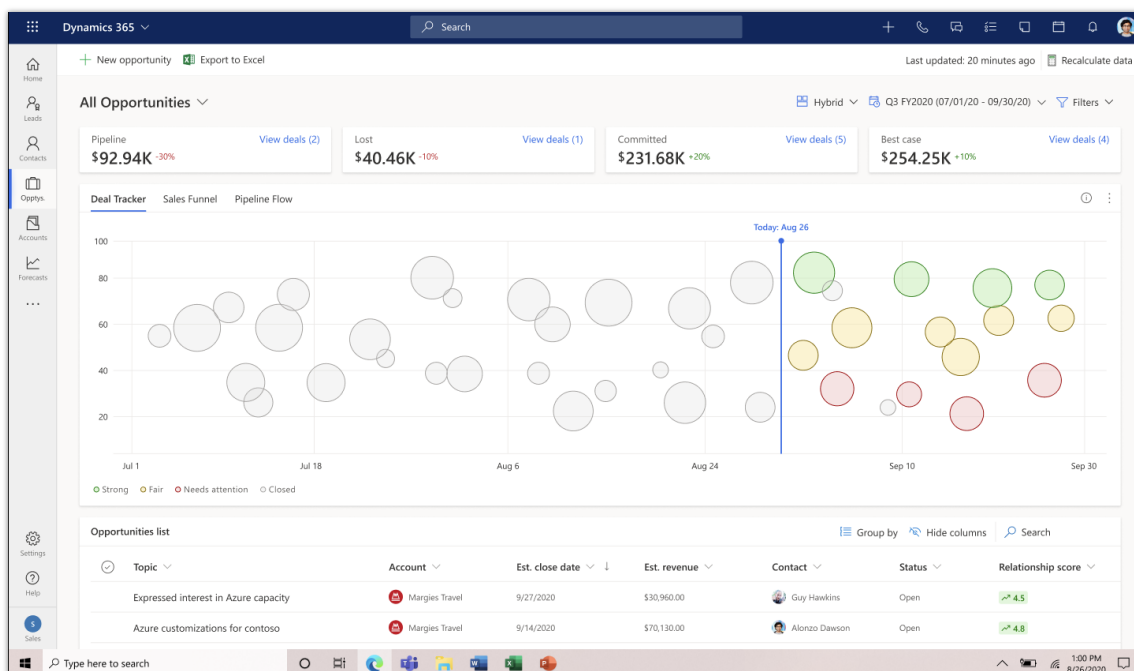
Deal manager

NOTE This feature is available in Unified Interface only.

Interactive visual charts that can be personalized by sellers

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

Business value

The ability to quickly view opportunities in a visual representation is one of the top requests by sellers. It allows sellers to, at a glance, get the insights they need to identify the deals they need to work on next.

In the deal manager workspace, we are introducing out-of-the-box charts that not only provide sellers a visualization of their opportunities but also allows them to filter through these opportunities.

Feature details

- Three out-of-the-box charts (bubble, funnel, and bar chart).
- Charts are interactive and act as filters when selected.
- Chart fields can be configured by sellers to fit their needs.

NOTE This feature is available in Unified Interface only.

Enhanced workspace experience with Sales Insights

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

Business value

This feature provides enhanced experience and insights with relationship score, predictive opportunity score, and other insights for quick next actions.

Feature details

- Sales Insights score in record side panel.
- Relationship score and insights within the grid.
- Opportunity score and predictive opportunity score accessible from record side panel view.
- Predictive opportunity score and health grade in bubble chart.

NOTE This feature is available in Unified Interface only.

This functionality might require a separate add-in license. Please see the [plans comparisons](#) for more information.

Advanced editable grid to update deals with ability to personalize columns

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

Business value

When managing their pipeline, sellers want to update key information and do so quickly. The deal manager workspace places the inline editable grid front and center for that reason. Users can quickly sift through their opportunities in a tabular format and instantly make updates. Sellers can also personalize the grid to only include the columns that are relevant to them.

Feature details

This feature offers the ability to:

- Edit fields inline.
- Filter, sort, search, and reorder data in the grid.
- Show or hide columns in the grid.
- Add columns in the grid.
- See aggregations for numeric columns.
- Run business logic on grid actions.

NOTE This feature is available in Unified Interface only.

Enhanced productivity with new record side panel form

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

Business value

There are times when a full opportunity form is not needed. Sellers want to quickly view the most relevant information and catch up on the latest activities. To do so, we are introducing a record side panel form. A record side panel form is a streamlined representation of a form delivered through a side panel as part of the pipeline management workspace. The record

side panel form provides quick and easy access to the opportunity record that can be updated without navigating away or losing context.

Feature details

- New record side panel form layout loaded through side panel.

- Quick edit capabilities.

- Access to key activities and action (notes and task).

- Drill in to contact or account within record side panel.

NOTE This feature is available in Unified Interface only.

Track the most relevant metrics with stats

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

Business value

Getting quick visibility into the performance metrics that matter is key to sellers understanding their current progress. In the deal manager workspace, we are providing sellers the ability to select out-of-the-box calculated metrics, called stats, to help them quickly understand their pipeline. Out of the box, we are including seven preconfigured stats that the user can choose from and even configure to map to relevant opportunity fields.

Feature details

- Predefined stats (metrics from opportunity management).

- Ability to select metrics from a predefined set.

- Ability to configure stats.

NOTE This feature is available in Unified Interface only.

Trigger key actions and activities directly from the grid and the record side panel

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

Business value

Today, to create a new note, email, or task, users have to navigate to the opportunity form.

In the pipeline manager workspace, sellers will be able to quickly trigger key actions or manage activities directly through the grid or the record side panel. This quick access will allow sellers to efficiently move through their work without having to navigate away from their work surface.

Feature details

- New optimized experience for managing notes and tasks.

- Quick access to notes, tasks, and appointments either from the grid or from the record side panel.

NOTE This feature is available in Unified Interface only.

Engagement Platform

Overview

Aims at enabling a smooth integration of various communication providers with Dynamics 365 Sales, so sellers can easily onboard digital selling capabilities.

Provide business insights on top of any type of sales call

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

Business value

Organizations interact with their customers in various ways as a result of diverse industrial, domain-related, geographical, and other business needs. Corporations and enterprises tend to have an on-premises telephony system where sales teams (digital agents and managers) conduct audio conversation; SMBs, for the most part, conduct video conversations through online meeting providers. Inside sellers usually conduct one-to-one calls, whereas account managers tend to have multiple-participant conversations.

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

Feature details

- Provide insights on top of video calls.

- Analyze and extract business insights for multiple-participant calls.

- Support online meetings and the ability to add participants (escalations, domain experts).

- Support answering calls within Dynamics 365 and provide insights on top.

NOTE This feature is available in Unified Interface only.

This functionality might require a separate add-in license. Please see the plan comparisons for more information.

Easily integrate your telephony provider with out-of-the-box functionalities

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

Feature details

- **Dial-record playback**: Customers using Dynamics 365 Channel Integration Framework for their computer telephony integration (CTI) needs can now record those calls and use conversation intelligence within Sales Insights Add-in for Dynamics 365 Sales.

- **Extend strategic partnership to more recording platforms**: Continue to work with recording players and telephony systems to build easy-to-deploy integrations.

NOTE This feature is available in Unified Interface only.

This functionality might require a separate add-in license. Please see the plan comparisons for more information.

Service

Overview of Dynamics 365 Customer Service 2021 release wave 1

Dynamics 365 Customer Service is an end-to-end service for customer support, spanning self- and assisted-service scenarios across multiple channels of customer engagement. Customer Service provides comprehensive and efficient case routing and management for agents. It also provides add-ons for insights and omnichannel engagement, and enables authoring and consumption of knowledge management articles. For 2021 release wave 1, we are focused on the following areas:

- Enable customers to be up and running quickly.

- Deliver the all-in-one contact center.

- Transform contact center routing.

What's new and planned for Dynamics 365 Customer Service

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

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

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

Agent experiences

Customer Service agent experiences include Customer Service workspace, Omnichannel for Customer Service, and Customer Service hub.

Feature	Enabled for	Public preview	Early access*	General availability
Appointments data included in core service scheduling solution	Users by admins, makers, or analysts	-	-	Apr 2021

Feature	Enabled for	Public preview	Early access*	General availability
Invoke Power Automate flows from macros in Customer Service workspace	Users by admins, makers, or analysts	-	-	Apr 2021
Navigation improvements for multisession apps	Users by admins, makers, or analysts	-	-	Apr 2021
Visual improvements for multisession apps	Users, automatically	-	Feb 2021	Apr 2021
Weekly and monthly view support in new schedule board inside of core service scheduling solution	Users, automatically	-	Feb 2021	Apr 2021

Agent productivity

Agent productivity tools enable agents to help customers more efficiently and effectively.

Feature	Enabled for	Public preview	Early access*	General availability
Multiple language support for AI-suggested knowledge articles and similar cases	Users by admins, makers, or analysts	-	-	Apr 2021

Case management

Improvements to the case management capabilities in the Customer Service agent experiences.

Feature	Enabled for	Public preview	Early access*	General availability
Improved embedded analytics for customer service managers	Users by admins, makers, or analysts	-	-	Apr 2021

Feature	Enabled for	Public preview	Early access*	General availability
Configuration to allow updates to cases in resolved and canceled status	Users by admins, makers, or analysts	-	Feb 2021	Apr 2021

Email

Email is a critical communication tool in Dynamics 365 that is leveraged heavily in Customer Service scenarios.

Feature	Enabled for	Public preview	Early access*	General availability
Improved user experience through email configurability	Admins, makers, marketers, or analysts, automatically	-	Feb 2021	Apr 2021

Knowledge management

Provide the right content at the right time and on the right channel, via a significant expansion of our knowledge management solution and experiences.

Feature	Enabled for	Public preview	Early access*	General availability
Configure knowledge article search filters	Users by admins, makers, or analysts	-	-	Apr 2021
Personalize language settings for knowledge article authoring, and filters for search experience	Users by admins, makers, or analysts	-	-	Apr 2021
Knowledge search analytics	Users by admins, makers, or analysts	✔️Oct 1, 2020	-	Apr 2021

Feature	Enabled for	Public preview	Early access*	General availability
Configure knowledge search control in the new form designer	Admins, makers, marketers, or analysts, automatically	Feb 2021	-	Apr 2021
Federated knowledge search	Users by admins, makers, or analysts	Feb 2021	-	Apr 2021

Omnichannel chat

Chat is Microsoft's first-party chat channel built on the Microsoft Teams IC3 communication service.

Feature	Enabled for	Public preview	Early access*	General availability
Embedded analytics for chat and digital messaging	Users by admins, makers, or analysts	-	-	Apr 2021
Enhanced supervisor experiences for operational monitoring of chat and digital messaging	Users by admins, makers, or analysts	-	-	Apr 2021
Historical topic clustering for all channels	Users by admins, makers, or analysts	-	-	Apr 2021
Modern administration experience for Omnichannel chat and digital messaging	Users by admins, makers, or analysts	-	-	Apr 2021

Omnichannel voice

Deliver the all-in-one contact center by shipping a holistic and integrated first-party voice solution as part of Dynamics 365 Customer Service.

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

Feature	Enabled for	Public preview	Early access*	General availability
Supervisor monitoring and barge	Users by admins, makers, or analysts	-	-	Aug 2021
Topic clustering for voice	Users by admins, makers, or analysts	-	-	Aug 2021
Voice channel powered by Azure Communication Services	Users by admins, makers, or analysts	✔Oct 28, 2020	-	Aug 2021

Service-level agreements

Service-level agreements enable businesses to track and deliver against contractual support agreements.

Feature	Enabled for	Public preview	Early access*	General availability
SLA usability improvements and enhancements	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2021

Timeline

Timeline helps Dynamics 365 users see the collection of activities and interactions that occur over time.

Feature	Enabled for	Public preview	Early access*	General availability
Configuration enhancements for timeline in the new form designer	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2021

Feature	Enabled for	Public preview	Early access*	General availability
Modern administration experience for auto-post configuration	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2021
Usability enhancements for timeline	Users by admins, makers, or analysts	-	-	Apr 2021

Unified routing

Transform contact center routing by providing intelligent omnichannel routing across all channels to improve issue resolution times and customer satisfaction.

Feature	Enabled for	Public preview	Early access*	General availability
Dynamic assignment rules based on record values	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2021
Intelligent routing and assignment for entities and channels	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2021
Intelligent skill finder for improved classification	Users by admins, makers, or analysts	-	-	Apr 2021
Modern authoring experience for classification and assignment rules	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2021

Feature	Enabled for	Public preview	Early access*	General availability
Out-of-the-box assignment strategies including round robin and highest capacity	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2021
Prioritization rules for work items used in agent assignment	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2021
Support for rule-based classification using attributes and related entities	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2021

* You are able to opt in to some features as part of early access on February 1, 2021, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Agent experiences

Overview

In Dynamics 365 Customer Service 2021 release wave 1, we continue to invest in usability experience improvements and feature enhancements to improve agent experiences.

Invoke Power Automate flows from macros in Customer Service workspace

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

Business value

With macros, you can enhance agent productivity by automating common and repetitive tasks, and help ensure consistency and quality of these tasks across large teams. The macros to run Power Automate flows allow you to apply complex logic to the automation process, reduce the burden on agents, and allow for quicker turnaround time to help customers.

Feature details

Service administrators can define macros that run Power Automate flows using the **Run Flow** connector. Subsequently, when agents run the macros within the Customer Service workspace, the logical conditions will be evaluated and appropriate steps that are defined in the macros will be run. Some example scenarios are:

- Run a macro to authenticate a customer.

- Run a macro to pass customer information from a case form to an external system.

Visual improvements for multisession apps

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

Customer Service workspace and Omnichannel for Customer Service allow agents to multitask on several customer cases simultaneously and switch among issues seamlessly without losing context of the in-progress work.

Feature details

Look-and-feel enhancements have been made in the multisession apps, including the following:

- Icons in multisession tabs.

- Multisession tabs with reduced height.

- Browser tab label displays the app name.

Weekly and monthly view support in new schedule board inside of core service scheduling solution

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

We're bringing critical feature functions from the legacy schedule board that were released in 2020 release wave 2 to the new schedule board. With these updates, schedulers will be able to manage their bookable resource schedules without having to switch between legacy and new boards. The new board has an enhanced user experience that will improve the productivity of the scheduler.

Feature details

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

- **Weekly and monthly views**: Schedulers will be able to view bookings in weekly and monthly views and schedule eligible bookable resources.

- **Enhancements for resource informational cards**: Schedulers will be able to edit multiday booking experiences.

Appointments data included in core service scheduling solution

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

Business value

Outlook availability information is not currently considered in scheduling. This means schedulers have to switch between two separate tools (Outlook and Dynamics 365) to get a complete view of availability, which can lead to scheduling errors and time lost in rescheduling. Including Outlook data in core service scheduling will increase schedulers' productivity and reduce avoidable scheduling errors.

Feature details

With this feature, core service scheduling operation uses appointments in conjunction with bookings to provide availability information during the scheduling process. The Schedule Board view will also show appointments in addition to bookings.

Navigation improvements for multisession apps

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

Business value

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

Feature details

Enhancements in Customer Service workspace and Omnichannel for Customer Service apps include the following default actions:

- Session will start when records are opened from the Home session and dashboard pages.
- Tabs will open when related records are opened from an anchor tab in a session.
- Form to create records will open in a new session when **New** is selected.

Additionally, when you open a record that's already launched as a session, focus will be set on the currently open session.

Case management

Overview

We continue to make enhancements to the case management capabilities in Dynamics 365 Customer Service.

Configuration to allow updates to cases in resolved and canceled status

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

Business value

Administrators and customizers can update case records (incident entity) that are in a resolved or canceled state.

Feature details

Administrators and customizers can now update case information by using Power Automate flows, APIs, or a plug-in for cases that are in the resolved or canceled status. The user experience on the case form will continue to be read-only.

Improved embedded analytics for customer service managers

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

Business value

Traditional dashboards have limited interactive capabilities and provide a narrow view into the overall organization. Omnichannel's embedded analytics for chat and digital messaging allows service managers to identify problem areas and opportunities to improve from historical data, along with rich slice-and-dice capabilities powered by Power BI.

Feature details

The redesigned reports include many changes to help supervisors get a comprehensive view of key metrics such as volume, CSAT, and sentiment over time to understand how agents and queues are performing. New key insights cards provide a glimpse into notable trends on core metrics and topics that are important for a supervisor to investigate further in the comprehensive reports. Agent-focused views surface core metrics in order to better understand the primary areas an agent worked on and where the opportunities are for coaching.

- Historical analytical dashboards for cases and agents.

- Integrated AI features including topic clustering.

Agent productivity

Overview

We continue to invest in new and improved agent productivity tools to ensure customer service agents can help customers faster and improve overall customer satisfaction.

Multiple language support for AI-suggested knowledge articles and similar cases

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

Business value

Agents typically use several resources to efficiently resolve customer cases and provide consistent responses. Surfacing the best knowledge articles and similar cases with AI in the right languages helps agents find the right solutions quickly, increase agent productivity, and provide better and faster service to customers.

Feature details

Leveraging AI, the feature gives agents suggestions on knowledge articles and similar cases in Customer Service workspace and Omnichannel for Customer Service, based on real-time context in cases and conversations.

It helps agents with the following:

- Find the right solutions.

- Increase productivity.

- Provide better and faster service to customers.

With general availability in 2020 release wave 2, this feature supported only English content and was available for administrators to set up only in organizations that had the base language set as English.

In this release, the following languages are supported:

- French

- German

- Spanish

- Dutch

- Italian

- Japanese

Timeline

Overview

We continue to make updates to the timeline component and the ability to configure it to ensure it helps Dynamics 365 users see the history of activities and interactions over time to gain a 360-degree view of the customer history.

Usability enhancements for timeline

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

Business value

The timeline control provides an easy and immersive experience to view a customer's history across cases, accounts, or contacts. This experience gives agents a better understanding of the customer's history, which helps them deliver more personalized service in an efficient and effective manner.

Feature details

Enhancements to the timeline control include the following:

- Rich text and embedded image support for user post records.
- At sign (@mention) functionality in notes.
- Improved @mention usability.
- Ability to filter timeline records by status reason.

Modern administration experience for auto-post configuration

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

Business value

The timeline control provides an easy and immersive experience for viewing a customer's history across cases, accounts, or contacts. This experience gives agents a better understanding of the customer's history, which helps agents deliver more personalized service in an efficient and effective manner.

Feature details

This feature enables a new auto-post configuration experience in Unified Interface, removing the need to use the activity feed in the legacy web client configuration experience. The new experience can be used to configure which activity record type automatically posts information to the timeline.

Configuration enhancements for timeline in the new form designer

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

Business value

The timeline configuration experience enables the timeline to show a customer's history across cases, accounts, or contacts. 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

Administrators need configuration options to enable maximum agent productivity and minimize distractions. In this release, the enhancements to the timeline configuration include the ability to:

• Set the command buttons for each record type.

• Select default filters to apply on the timeline.

• Remove unnecessary filters.

• Visually configure fields and labels on each record type.

Each instance of the timeline control can be configured independently.

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. As per Gartner, improved contextual knowledge delivery

reduces time-to-answer by 20 to 80 percent, and can reduce customer service costs by up to 25 percent.

The challenge for most companies is that knowledge is typically fragmented across an organization and stored in different formats, such as documents, video files, blogs, wikis, structured knowledge, and so forth. This makes it difficult to curate and surface the right content. The engagement points for surfacing knowledge have also increased with the advent of digital messaging (SMS and WhatsApp), bots, and social sites.

Federated knowledge search

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

Business value

Knowledge in organizations is typically spread across multiple sources like SharePoint sites, OneDrive, and third-party knowledge management systems. The ability to quickly find and share knowledge from as many sources as possible helps agents be more productive and resolve issues for customers more quickly.

Feature details

Customers will be able to plug an external search provider into the knowledge search experience. We'll provide connectors for SharePoint search, Microsoft search (which is the search service for Microsoft 365 apps and other external content indexed through their connectors), and cross-Dynamics 365 search. We'll add more connectors later based on customer feedback.

Knowledge search analytics

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Oct 1, 2020	-	Apr 2021

Business value

Understanding what agents are searching for while working on customer issues can help organizations improve the content of their knowledge base, which improves all agents' ability to help customers.

Feature details

Knowledge managers will have visibility into issues users face and whether the knowledge content effectively addresses those problems. Managers can use reports such as "top search terms with no matching knowledge articles" and "top search terms with poor engagement rate" to quickly identify and act on gaps in their knowledge content.

Search analytics include the following:

- Search Term Volume

- Search Term Average Click Position

- Search Term Engagement Rate

- Top Search Terms by Volume and other KPIs

- Searches that return no results

- Searches with low engagement rate

See also

Knowledge search analytics dashboard (docs)

Configure knowledge article search filters

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

Business value

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

Feature details

Customer Service agents can currently filter knowledge article search results based on status, visibility, modified date, and language. This feature allows administrators to configure custom fields as filters, providing additional flexibility for agents so they can quickly narrow down search results and improve productivity.

Personalize language settings for knowledge article authoring, and filters for search experience

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

Business value

Agents can personalize the languages in which they want to write and search articles. This improves their efficiency and productivity.

Feature details

Using the personalization setting, agents can set a default language to use for writing articles and preferred filters for article searches.

Currently, the default language is the UI language for authoring a new knowledge article. The personalization feature allows authors to set their preferred default language for writing articles.

Similarly, agents can currently search articles based on certain filters such as status, visibility, modified date, and language. The personalization feature allows agents to set filter preferences for searching articles.

Configure knowledge search control in the new form designer

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

Business value

The ability to configure the knowledge search control in the new form designer will improve the user experience for makers by removing the need to switch to the legacy form designer.

Feature details

Currently, makers need to switch to the legacy form designer to configure the knowledge search control. This feature enables makers to add and configure the knowledge search control within the new form designer. All of the knowledge search control configuration capabilities that are supported in the legacy form designer will be available in the new form designer.

Omnichannel voice

Overview

At Ignite in September, we announced our voice channel for Dynamics 365 Customer Service. Using our Microsoft-built solution, we're providing simpler administration and management experiences without traditional cloud component integration complexities. Embracing this

simplicity allows customers to focus on their core business outcomes while benefiting from the purpose-built abstractions of the Microsoft cloud.

With this release, we bring together voice, SMS, and digital messaging channels, and an intelligent interactive voice response (IVR) powered by Power Virtual Agents, real-time voice intelligence, and insights across all channels, speech-based self-service, and intelligent skills-based routing.

Voice channel powered by Azure Communication Services

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Oct 28, 2020	-	Aug 2021

Business value

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

Feature details

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

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

create better customer and agent experiences. This single, holistic solution also makes it easier to scale to meet changing business needs.

This new voice channel for Customer Service enables an all-in-one customer service solution without fragmentation or manual data integration required, and a faster time to value. Our solution provides a single view of the customer that empowers agents to provide personalized service across all channels, and true omnichannel analytics and insights for agents and supervisors alike.

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

- Phone number procurement and management

- Ability to handle and distribute incoming calls

- Ability to make outbound calls

- Ability to manage SMS (inbound and outbound)

- Deep integration of voice into core Omnichannel functionality

- Real-time sentiment analysis

- Real-time transcription

- Real-time translation

- Real-time smart assist suggestions

- Operations management thought supervisor dashboards

- Ability to record and manage phone calls

Embedded analytics for voice channel

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

Business value

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

Feature details

Customer service managers or supervisors are responsible for managing the agents who work to resolve customer queries every day through the phone channel. With this release, the embedded analytics provide trends over a period to understand how agents and queues

are performing, so that service managers can take corrective measures, provide appropriate guidance to agents, and improve the customer support experience. Key insights cards provide an at-a-glance view into notable trends on core metrics and topics that are important for a supervisor to investigate further in the comprehensive reports. Agent-focused views display core metrics to better understand the primary areas an agent worked in and identify opportunities for coaching.

With these views, supervisors can:

- Monitor operational metrics, such as inbound calls, calls handled, abandon rate, average talk time, and average speed to answer calls, across channels, queues, agents, and topics.

- Monitor support quality through sentiment analysis across channels, queues, agents, and topics.

Geographic areas

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

- United States

- Canada

Modern administration experience for Omnichannel voice (number management)

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

Business value

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

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

Feature details

Until now, administrators created resources and managed phone numbers in a separate telephony application and then manually deployed the numbers in the CRM solution. The

long fragmented process is inconsistent and requires continuous maintenance to keep both applications in sync.

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

The key highlights of this feature include:

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

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

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

Business value

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

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

Feature details

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

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

The key highlights of this feature include:

- Telephony resource deployment using connection string or sign-in to the Azure account.

- Acquiring phone numbers of various types and plans.

- Releasing phone numbers.

Topic clustering for voice

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

Business value

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

Feature details

Topics, which represent semantically similar support issues, help organizations better identify and respond to issues their customers are facing. Correlating these topics along with core historical analytics makes it quick and easy for a supervisor to see common issues by volume, CSAT impact, and new cases, helping to identify where they should invest their time.

In this release, the same capability will now be applied to voice channel, generating topics off of the transcript. This will help organizations better understand issues that customers face and their impact on core business metrics across the spectrum of engagement.

Supervisor monitoring and barge

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

Business value

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

Feature details

When supervisors sign in to the application, they receive a list of phone calls that are in progress. From the list, they can choose to join a call with the option to join anonymously as a hidden participant. If they want to intervene, they can join the call, referred to as "barging," which then becomes a group call.

Call recording

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

Business value

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

Feature details

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

Call transcription and real-time sentiment analysis

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

Business value

Customer service agents often need to take notes while helping customers during a phone call. Call transcription converts a phone conversation into written words, reducing the amount of notes an agent needs to take and helping with accessibility. Furthermore, sentiment analysis examines the conversation and identifies the general sentiment or mood of the customer—if they are slightly angry or very disappointed, for example. Call

transcription and sentiment analysis are both used by the system to proactively analyze cases and provide agents with suggestions to resolve the issue.

Feature details

Call transcription converts a phone conversation into written words and stores them as plain text as the call is in progress. Sentiment analysis, built on award-winning AI, tags a sentiment on the top of a conversation and is constantly updated as the conversation evolves.

Both call transcription and sentiment analysis are included out of the box with no additional setup or configuration.

Consult and transfer

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

Business value

Omnichannel for Customer Service offers customer service agents the ability to easily consult with and transfer calls to other customer service representatives and helps agents have a greater chance to resolve customer issues.

Feature details

While on a call with a customer, an agent can put the customer on hold and consult with another agent or manager on an issue that requires specific expertise. Agents can also transfer the call to a specific customer service agent, which is referred to as a warm transfer. In other scenarios, the agent can transfer the call to a queue from where it is routed to the best available agent based on rules configured by your business.

Intelligent voicebot via Power Virtual Agents and Microsoft Bot Framework

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

Business value

With speech-enabled Power Virtual Agents, businesses can empower business users to build and update intelligent voice bots that use built-in natural language processing capabilities to engage conversationally with customers and provide personalized self-service always. Bots can be built once and deployed across messaging and voice channels for maximum

efficiency and consistency. For more advanced scenarios, businesses can integrate bots built with the Microsoft Bot Framework to work on the voice channel.

Feature details

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

The key highlights of this feature include:

- Enable Power Virtual Agents and Microsoft Bot Framework bots to provide intelligent voicebots on the voice channel.

- Support for built-in dual-tone multifrequency (DTMF) as a secondary means to interact with the bot.

- Transfer calls to human agents with full transcript and context.

- Use bots for post-call surveys.

Call intelligence

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

Business value

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

Feature details

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

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

- Talking speed

- Switches per hour

- Pause before speaking

- Longest customer monologue

Direct outbound calling

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

Business value

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

Feature details

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

- Cases

- Customer profiles

- Call back activities

- Ongoing chat conversations

- Via a phone dialer

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

This feature includes the following key highlights:

- Fully integrated outbound voice channel without third-party voice integration.

- Sample outbound voice channel configured automatically on voice channel provisioning.

- Easy channel administration within the Omnichannel admin experience.

- Outbound voice conversations are just another conversation type in Omnichannel.

- Supervisors can monitor outbound calls from within the ongoing conversations dashboard like any other agent or customer interaction.

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 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 Omnichannel for Customer Service uses a combination of AI models and rules to assign incoming service requests from all channels (cases, email, chat, digital messages, and voice) to the best-suited agents. The assignment rules take into account customer-specified criteria, such as priority and autoskills matching. The new routing service eliminates the need for constant queue supervision and manual work distribution, to offer operational efficiencies for organizations.

Modern authoring experience for classification and assignment rules

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

Business value

Routing rules are complex and can be tedious to author and manage. An improved user experience helps simplify the classification and work assignment rules used in routing.

Feature details

The improved authoring experience makes it easy for users to create, update, and organize routing rules across the classification and assignment stages. Simplified tabular views and the ability to quickly and easily edit rules inline help organizations ensure that work items are being routed correctly across their business.

Support for rule-based classification using attributes and related entities

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

Business value

Incoming service requests don't always have sufficient information included to route the work item correctly. Classification rules allow organizations to update the work item with details like skills, issue, severity, support center, and language.

Feature details

Classification rules configured at the workstream level help ensure that the work item has all the required information to be assigned to the best-suited agent. Classification rules to update work item attributes and attach skills to the work item can be done manually or automatically, via machine learning. Create conditions to define rules based on multiple entity attributes.

Intelligent skill finder for improved classification

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

Business value

In addition to rule-based classification, intelligence can be used to add information such as the skills needed for a particular work item. Intelligent skill finder provides this capability for administrators to use machine learning instead of creating custom models.

Feature details

Intelligent skill finder is one of the machine learning model-based classification rules. These rules can be used to attach skills to the work item using the AI Builder text classification. Administrators start by training the model using data from an existing entity or uploading a training data set. Once approved, the text or tag pairs are used to train the classification model customized to that organization. Once trained, classification rules can be created to configure which work item attributes are sent to the trained and published model. When the rule is executed, the inputs are sent to the model and the returned tags are attached as skills

on the work item. The resulting skills are shown with a lightbulb icon and confidence score to show the users they were stamped using AI.

Out-of-the-box assignment strategies including round robin and highest capacity

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

Business value

Assignment methods determine how work items will be assigned to available agents, and can be customized to a particular queue. Common patterns are provided out of the box to help users quickly configure assignment without having to create custom rules.

Feature details

Users can start with the standard assignment strategies provided out of the box like round robin or highest capacity. These preconfigured options come with prioritization and assignment rules configured automatically, simplifying the creation and management of the assignment stage. Custom assignment methods are also available, allowing users to create priority and assignment rules based on a variety of parameters.

A few provided assignment strategies are as follows:

- **Highest capacity**: Incoming work items are assigned to an agent who has the maximum available capacity, the ones who have the skills identified during the classification stage, and ones who have the presence as specified in the allowed presence of the workstream.

- **Round robin**: Incoming chats are assigned to the agent in a list order, starting with the first agent on the list, among those who have the skills identified during the classification stage, and who have the presence as specified in the allowed presence of the workstream.

Dynamic assignment rules based on record values

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

Business value

Assignment rules for queues determine how work items can be assigned to available agents. Custom assignment rules can be configured according to the business requirements. Dynamic assignment rules simplify the assignment scenarios by allowing for comparisons between the assignment parameters and incoming work item fields.

Feature details

An assignment rule represents a set of conditions that is used to filter agents and sort them after they match the criteria. During runtime, the assignment rule on the top is evaluated first.

The dynamic assignment rules help assign work items to the best-suited agent by matching the work item requirements against the corresponding agent's capabilities dynamically. For example, if a rule has the condition *preferred customer type equals conversation contact membership level*, then, in this rule, the preferred customer type of every agent will be matched against the dynamically calculated membership level of the customer associated with the work item. Dynamic matching reduces the effort of having to write and maintain multiple static rules for each permutation and combination of the possible values.

Prioritization rules for work items used in agent assignment

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

Business value

As part of the assignment stage, work items might have different properties that determine which order they need to be assigned in. Specifying prioritization rules will ensure work items coming into the queue are assigned in the correct order.

Feature details

Prioritization rule set is an ordered list of rules that helps ensure incoming work items are assigned in the correct order. Every prioritization rule represents a priority bucket in the queue. In a prioritization rule you can specify a set of conditions and 'order by' attributes. During evaluation, the prioritization rules will be run in the order they are listed. For the first prioritization rule, the work items in the queue that match its conditions will be put in the same priority bucket. In that bucket the items will be further sorted by the order specified in the prioritization rule. The second rule will run on the rest of the items in the queue, to identify the next priority bucket, and sort that bucket by the 'order by' attribute, and so on.

Intelligent routing and assignment for entities and channels

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

Business value

Organizations typically use queue-based routing, where incoming service requests are routed to a relevant queue, and agents work on service requests picked from the queue. This can be error-prone, inefficient, and necessitate continuous queue supervision. Intelligent routing and assignment capabilities leverage rule-based and machine learning classification to ensure incoming work items are routed to the best-suited worker or queue.

Feature details

The intelligent routing and assignment services use a combination of artificial intelligent models and rules to assign incoming service requests from all channels, including cases, chat, digital messages, and custom entities. The consistent engine ensures agent work is accurately accounted for regardless of the channel it is coming from. The service works alongside the legacy routing and can offer operational efficiencies for organizations by eliminating the need for constant queue supervision and manual work distribution.

Service-level agreements

Overview

We continue to make usability investments in service-level agreement capabilities in Dynamics 365 Customer Service.

SLA usability improvements and enhancements

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

Business value

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

Feature details

Enhancements to the SLA feature include:

- Improve the usability of the **Send email via template** experience in Power Automate.
- Improve the validation experience when the same entity attribute is used for both **applicable when** and **success** conditions.

Email

Overview

We continue to make enhancements and usability improvements to email in Dynamics 365.

Improved user experience through email configurability

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

Business value

The email configuration experience enables users to be more effective and efficient when using email to communicate with customers. This experience gives administrators the ability to configure email experiences in ways that best meet their needs.

Feature details

Administrators need configuration capability to enable users to maximize their productivity and minimize distractions. In this release, our improvements enable the email editor, email template builder, and email signature builder to accept the full configuration capability of the Rich Text Editor control.

Key improvements include the ability to:

- Customize the list of available fonts.
- Set a default font.
- Add your own font.

- Adjust the toolbar location and buttons.

- Automatically increase the editor height to fit the content.

- Access the HTML.

For a complete list of configuration capabilities, refer to [Rich text editor control configuration options](#).

Omnichannel chat

Overview

Chat enables customers to connect with agents in real time using a conversational chat interface.

Embedded analytics for chat and digital messaging

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

Business value

Traditional dashboards have limited interactive capabilities and provide a narrow view into the overall organization. Omnichannel's embedded analytics for chat and digital messaging allows service managers to identify problem areas and opportunities to improve from historical data, along with rich slice-and-dice capabilities powered by Power BI.

Feature details

Customer service managers or supervisors are responsible for managing the agents who work to resolve customer queries every day through various service channels, chat, and digital messaging channels.

With this release, the embedded analytics for chat and digital messaging allows service managers to understand how agents and queues are performing. The analytics provide trends based on problem areas and opportunities, allowing the service managers to analyze the corrective measures they can take, provide appropriate guidance to agents, and improve the customer support experience. Key insights cards provide a glimpse into the notable trends on core metrics and topics that are important for a supervisor to further investigate.

With embedded analytics, supervisors can:

- Monitor operational metrics across channels, queues, agents and topics like incoming conversation, conversations handled, and abandon rate.

- Monitor SLAs across channels and queues like average first response time, average speed to answer, and average response time.

- Monitor support quality via sentiment analysis across channels, queues, agents and topics like average sentiment and CSAT.

Modern administration experience for Omnichannel chat and digital messaging

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

Business value

With the modern administration experience, administrators can easily start the first chat conversation with only a few clicks and see the immediate value of chat conversation powered by Omnichannel for Customer Service. The modern administration experience is intuitive to follow and allows administrators to quickly understand and perform the configuration steps.

Feature details

Introducing the first-run experience to help administrators automatically set up the chat channel and start the first chat conversation. Also, introducing the modern administration experience to guide administrators to set up the end-to-end configurations in Omnichannel for Customer Service.

The key highlights of this feature include:

- First-run experience of chat channel.
- Streamlined and simplified administration user experience of workstream, queue, and global setting configurations for digital messaging channels.

Historical topic clustering for all channels

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

Business value

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

Feature details

Topics, which represent semantically similar support issues, help organizations better identify and respond to issues their customers are facing. Correlating these topics along with core historical analytics makes it quick and easy for a supervisor to see common issues by volume, CSAT impact, and new cases, and helps them identify where they should invest their time.

In this release, the same capability will now be applied to chat and digital messaging channels. This will help organizations better understand issues that customers face and their impact on core business metrics across the spectrum of engagement.

Enhanced supervisor experiences for operational monitoring of chat and digital messaging

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

Business value

Supervisors need key metrics and channel-specific performance measures to make operational decisions to meet and exceed service-level goals.

Feature details

As contact centers deploy multiple channels to provide an omnichannel experience in customer service, supervisors can view and track relevant metrics for operational efficiency in the following ways:

- Equip team leads to monitor channel-specific performance metrics to handle agents who are dedicated to a single channel.

- Enable senior team leads and service delivery managers to monitor all-up metrics across all channelş.

- Provide the capability to quickly switch between the views.

Overview of Dynamics 365 Field Service 2021 release wave 1

Dynamics 365 Field Service is an end-to-end solution that allows customers to transform their service operations by connecting people, places, and things to deliver customer-centric experiences. Field Service empowers organizations to move from being reactive to providing proactive or predictive field service, and to embrace new business models such as outcome-based service or "anything-as-a-service."

For 2021 release wave 1, we will deliver rich scenarios in several areas including:

- Streamlined onboarding experience for faster time-to-value and ability to use Field Service in productive environments.

- Comprehensive customer engagement capabilities for companies to be in close communication with their customers.

- Broader resourcing options with embedded schedule optimization within core Field Service.

What's new and planned for Dynamics 365 Field Service

This topic lists features that are planned to release from April 2021 through September 2021. 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.

End-customer engagement

End-customer engagement features for 2021 release wave 1.

Feature	Enabled for	Public preview	Early access*	General availability
[Modernize your customer experience with technician location tracking and direct customer feedback](#)	Users by admins, makers, or analysts	Feb 2021	-	Apr 2021

Feature	Enabled for	Public preview	Early access*	General availability
Self-service scheduling for your customers	Users by admins, makers, or analysts	Apr 2021	-	Jul 2021

Proactive service delivery

Proactive service delivery features for 2021 release wave 1.

Feature	Enabled for	Public preview	Early access*	General availability
Simplify work order adoption	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2021
Capture work order resolution details	Users, automatically	-	Feb 2021	Apr 2021
Field Service mapping features are enabled by default	Users, automatically	-	Feb 2021	Apr 2021
Improve service account address usability	Users, automatically	-	Feb 2021	Apr 2021
Simplify first-line worker setup	Users, automatically	-	Feb 2021	Apr 2021

Scheduling

Scheduling features for 2021 release wave 1.

Feature	Enabled for	Public preview	Early access*	General availability
Appointments data included in resource scheduling	Users by admins, makers, or analysts	-	-	Apr 2021
Enhancements to the embedded optimizer within schedule board	Users, automatically	-	Feb 2021	Apr 2021
Map view and weekly and monthly view support in new schedule board	Users, automatically	-	Feb 2021	Apr 2021
Resource scheduling optimization available for every Field Service organization	Users, automatically	-	Feb 2021	Apr 2021

Technician success

Technician success features for 2021 release wave 1.

Feature	Enabled for	Public preview	Early access*	General availability
Knowledge management articles to enhance technician productivity	Users, automatically	-	Feb 2021	Apr 2021

* You are able to opt in to some features as part of early access on February 1, 2021, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Scheduling

Overview

Scheduling features for 2021 release wave 1.

Resource scheduling optimization available for every Field Service organization

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

New and existing Field Service customers can benefit from resource scheduling optimization capabilities to fully automate their scheduling needs. This frees up time for dispatchers to concentrate on other tasks, and help the business more easily achieve its goals, such as higher productivity or less travel for their technicians.

Feature details

In the 2020 release wave 2, we enabled resource scheduling optimization capabilities via the schedule board and empowered dispatchers to achieve their business objectives. This required customers to purchase and configure the resource scheduling optimization add-on. With the 2021 release wave 1, we are removing this step for our Field Service customers, both existing and new, and providing the resource scheduling optimization capabilities out of the box.

NOTE This feature is available in Unified Interface only.

Map view and weekly and monthly view support in new schedule board

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

We bring the critical feature functions from the legacy schedule board to the new schedule board, made generally available with the 2020 wave 2 release. With these updates,

dispatchers can manage their technicians' schedules without having to switch between previous and new schedule boards. The new schedule board has an enhanced user experience and embedded optimization capabilities for a better scheduling experience, driving dispatcher productivity while meeting business objectives.

Feature details

This functionality will be enabled with the following key features:

- **Map view**: Dispatchers can use the map view to see unscheduled work orders, scheduled bookings, technician locations or routes, and organizational units, and to schedule work orders for eligible technicians.

- **Weekly and monthly views**: Dispatchers can view bookings in the weekly and monthly views and schedule eligible technicians.

Along with these updates, we will release enhancements on the resource informational cards, such as editing multiday booking experiences.

NOTE This feature is available in Unified Interface only.

Appointments data included in resource scheduling

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

Business value

Currently Outlook availability information is not considered in scheduling, which means that schedulers have to switch between two separate tools (Outlook and Dynamics 365) to get a complete view of availability. It also increases the risk of scheduling errors, and time lost in rescheduling avoidable mistakes. Including Outlook data in resource scheduling increases schedulers' productivity and reduces avoidable scheduling errors.

Feature details

With this feature, resource scheduling operations take the Microsoft Dataverse appointments in conjunction with bookings to provide availability during the scheduling process. This includes the schedule board view to reflect the appointments in addition to bookings.

NOTE This feature is available in Unified Interface only.

Enhancements to the embedded optimizer within schedule board

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

The embedded optimizer was released as a preview in October in the 2020 release wave 2. In this release, we will enhance it with new capabilities to improve dispatcher productivity, reducing the time it takes to perform daily activities.

Feature details

- Increase schedulers' productivity and reduce avoidable scheduling errors.

- Create and manage different templates of scheduling rules as per the business priorities (scheduling objectives and constraints).

- Enable dispatchers to work across multiple schedule board tabs simultaneously without having to wait for results to be rendered.

NOTE This feature is available in Unified Interface only.

Technician success

Overview

Technician success features for 2021 release wave 1.

Knowledge management articles to enhance technician productivity

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

By embedding knowledge management into field service processes, technicians can reliably resolve work orders and install assets the first time. This increases customer satisfaction and reduces cost by avoiding follow-up visits.

Feature details

This new experience will be enabled with the following key features:

- Author and link knowledge articles to work orders, enabling technicians to fix issues and install assets properly the first time.

- Leverage articles online or offline through the new Field Service (Dynamics 365) mobile app.

NOTE This feature is available in Unified Interface only.

Proactive service delivery

Overview

Proactive service delivery features for 2021 release wave 1.

Simplify first-line worker setup

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

It is important for Dynamics 365 Field Service customers to deploy our product as quickly and efficiently as possible. A part of this deployment is the ability for admins to provision new technicians. We're simplifying this experience, making it easier to get new technicians set up more quickly.

Feature details

This new experience will be enabled with the following key features:

- Simplified user experience for admins to provision new technicians in their organization to help with deployment.

- Streamlined creation and setup for individual or bulk technicians into Field Service, enabling them to use the Field Service mobile app.

- New technicians receive email to download mobile app.

NOTE This feature is available in Unified Interface only.

Improve service account address usability

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

Service accounts capture the Field Service customer, which sits at the center of any field service project. Address recommendations from Bing Maps will help the admin quickly populate the account address, reducing the capacity for data entry errors.

Feature details

This new experience will be enabled on the account record type form and quick create.

- Address fields will be combined, making it easier to read complete addresses.
- On edit, address recommendations will be provided.

NOTE This feature is available in Unified Interface only.

Field Service mapping features are enabled by default

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

Admins spend a significant part of their time configuring Field Service features to ensure their project has the best possible experience. With this new experience, admins will find many of the most used features enabled by default, reducing project effort and configuration time and increasing time to provide value for their projects.

Feature details

This new experience will enable Bing Maps so the following features are available by default for new deployments:

- Inline maps with links for driving directions.
- Address recommendations.
- Auto geocoding addresses.

Admins can also disable this feature.

NOTE This feature is available in Unified Interface only.

Capture work order resolution details

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

It's critical for organizations to be able to report on how work orders are resolved for different reasons, including traceability or chargeability. This increases customer visibility into how work is resolved and provides data for the system to begin providing meaningful resolution suggestions.

Feature details

Work order resolution allows organizations to track how customer issues are actively resolved at the work order and work order incident level by capturing details on how an issue is resolved. Each work order and work order incident represents a scope of work that could have a number of resolution actions, paving the way for future analytics and insights so that field service managers can better understand customer work orders and incident trends.

NOTE This feature is available in Unified Interface only.

Simplify work order adoption

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

Business value

Work order setup and management is at the heart of any field service implementation. With this functionality, customers will be able to get started and self-navigate when trying to use the system to create their first work order, accelerating their ability to start using Field Service faster.

Feature details

In this feature, we will release a curated, self-guided adoption experience to create a work order, which also helps users understand some key elements of the Field Service solution while in the application. The guided experience will include the following components:

- Work order types

- Products and services

- Pricelists and pricelist items

- Tax codes

- Service task types

- Incident types

- Work orders and work order subrecords

NOTE This feature is available in Unified Interface only.

End-customer engagement

Overview

End-customer engagement features for 2021 release wave 1.

Self-service scheduling for your customers

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

Business value

Improve your customers' scheduling experiences by providing flexibility to schedule on their own time directly from their devices. This will provide your customers a more personalized experience, reducing scheduling errors and rescheduling events. Reduce your organization's back-office costs by reducing scheduling call volume, freeing up resources to focus on customer service.

Feature details

This new experience will be enabled with the following key features:

- Self-schedule from any device with a responsive customer interface.

- Suggest available time slots based on your resource availability.

- Collect important preservice visit customer information as part of the scheduling request.

- Fast solution deployment so you can quickly empower your customers.

NOTE This feature is available in Unified Interface only.

Modernize your customer experience with technician location tracking and direct customer feedback

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

Business value

Improve your customer experience by providing visibility into upcoming service visits. Automated service visit reminders will ensure customers are ready and available when the technician arrives, eliminating wasted trips due to customer unavailability. Real-time location tracking while the technician is in route helps your customers better plan their day around a service visit. Direct customer feedback following a service visit will drive improvements within your field service technician workforce.

Feature details

This business value will be delivered with the following capabilities:

- Automated service schedule reminders and notifications of service time changes are sent to your customers via email and SMS.

- On the day of service, send a notification informing your customer of the technician's estimated arrival time, with ability to track the technician's progress to destination in real time.

- Collect feedback from your customers on their experience to drive improvement and growth within your field technician organization.

NOTE This feature is available in Unified Interface only.

Finance and Operations

Overview of Dynamics 365 Finance 2021 release wave 1

Dynamics 365 Finance continues to lead in bringing in intelligence and automation to our users. This release brings our intelligent cash flow offering to public preview with automation based on predictive results. Users experience out-of-the-box machine learning for their financial operations, including viewing when customers are predicted to pay, forecasting what the budget should be, and viewing forecasted cash positions based on actual accounts payable, accounts receivable and project transactions, and predicted outcomes.

Automation based on predictions around collections enhances a business's strategy to influence positive incoming cash flow even further.

What's new and planned for Dynamics 365 Finance

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

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

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

Core financials

This release in core finance is focused on incorporating capabilities into the cash flow forecast and continuous enhancements across all financial areas.

Feature	Enabled for	Public preview	General availability
Cash flow forecasting – project integration	Users by admins, makers, or analysts	Feb 2021	Apr 2021

Finance Insights

Accelerating digital transformation with AI and automation.

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

Globalization

This release focused on delivering localization for Egypt, general availability of Electronic Invoicing Add-on, public preview of tax service, and other highly requested features.

Feature	Enabled for	Public preview	General availability
Electronic Invoicing Add-on for Dynamics 365 (general availability)	Users by admins, makers, or analysts	-	Apr 2021
Extended Czech Republic localization – acquisition proposals for preacquisition transactions	Users by admins, makers, or analysts	-	Apr 2021
Invoicing – enhanced invoice date control	Users by admins, makers, or analysts	-	Apr 2021

Feature	Enabled for	Public preview	General availability
Invoicing – extending chronological invoice and voucher numbers	Users by admins, makers, or analysts	-	Apr 2021
Regulatory Configuration Service – simplified globalization feature management for globalization services	Users by admins, makers, or analysts	-	Apr 2021
Regulatory Configuration Service expanded regional coverage to Europe	Users by admins, makers, or analysts	-	Apr 2021
Tax – enhanced global withholding tax	Users by admins, makers, or analysts	-	Apr 2021
Tax – using packing slip date as tax calculation date	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Configurable business documents – additional barcode type support	Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021
Configurable business documents – preview support for print management	Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021
Country and region expansion – Egypt	Users, automatically	Feb 2021	Apr 2021
SAF-T for Lithuania	Users by admins, makers, or analysts	Feb 2021	Apr 2021

Feature	Enabled for	Public preview	General availability
Extended Italian localization – payment traceability improvements	Users by admins, makers, or analysts	-	May 2021
Tax service – supporting multiple VAT ID (preview)	Users by admins, makers, or analysts	Apr 2021	To be announced
Tax service – supporting tax in transfer order (preview)	Users by admins, makers, or analysts	Apr 2021	To be announced
Tax service (preview)	Users by admins, makers, or analysts	Apr 2021	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.

Core financials

Overview

This release in core finance is focused on incorporating capabilities into the cash flow forecast and continuous enhancements across all financial areas.

Cash flow forecasting – project integration

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

Business value

Using a project forecast model, costs that were forecasted in project management and accounting now are shown in the cash flow forecast that's available in cash and bank management. This information helps generate a more complete cash flow forecast because predictable project costs and revenues are included.

Feature details

Projects that use a forecast model for cost and revenue estimates can be included in the cash flow forecasting capability in cash and bank management. Once the forecast model is selected in **Cash flow forecast setup**, the forecasted costs and revenues are included when viewing the **Cash overview – current company** workspace or the **Cash overview – all companies** workspace in cash and bank management. The project types and cost transaction types to include can be specified when you set up the cash flow forecast.

Finance Insights

Overview

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

In 2021 release wave 1, Dynamics 365 Finance provides configurable and extensible models to help you accurately and intelligently predict your company's cash flow. Customer payment predictions show which customers you can expect to pay on time or late and what factors are contributing to that prediction. Using your cash in and out, including budget and external data, you can view a forecasted bank balance and cash flow over time.

Customer payment predictions

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

Business value

Knowing when all of a customer's outstanding invoices are likely to be paid, as well as predictions of when specific invoices are likely to be paid, can help business optimize the start of collection activities.

Feature details

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

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

Forecast bank balance

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

Business value

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

Feature details

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

Intelligent budget proposal

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

Business value

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

Feature details

The intelligent budget proposal feature lets you create a draft budget automatically, but with a high degree of confidence from the use of historical data.

External data for cash flow forecasting

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

Business value

External data can be entered or imported into cash flow forecasts, which helps improve the accuracy of forecasts by including a broader data set in the machine learning prediction model.

Feature details

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

Treasurer workspace

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

Business value

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

Feature details

This feature adds a new workspace that includes all necessary elements for completing the analysis and activities that treasurers need to successfully manage their organization's cash.

Globalization

Overview

To run operations globally, businesses must meet complex, country-specific globalization requirements in the areas of tax, e-invoicing, auditing, regulatory reporting, banking, business document layout, and so on. Some of these are legally required in certain countries or regions and some of them are adopted based on local business practices. Local governments or tax authorities frequently change these requirements, often with very tight law enforcement dates.

Our globalization investments for Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Project Operations, and Dynamics 365 Commerce focus on three key areas:

- We constantly monitor legislation changes in the out-of-the-box countries and regions and ship regulatory updates for these changes per government deadlines. Customers and partners can track the upcoming and released regulatory updates in LCS Issue Search. They also can join the LCS Alert Service community to see what legislation change alerts are coming and submit their own alerts.

- We are extending the out-of-the-box country and region coverage and enhance the localization functionality for existing countries and regions. Our globalization ISVs extend our global coverage even further by creating and publishing their localization solutions at AppSource. Currently, we have over 40 ISV localization solutions published at AppSource for Dynamics 365 Finance, Supply Chain Management, Project Operations, and Commerce.

- We are enhancing our low-code configurable globalization tools and services to further reduce the complexity of meeting the constantly changing regulatory and local requirements in multiple countries and regions. Customers and partners used these tools and services to extend out-of-the-box country and region localizations and created more than 13,000 custom features for over 120 countries.

In 2021 release wave 1, we focused on delivering localizations for Egypt. That extended the number of out-of-the-box countries and regions to 43 and the number of languages to 48. We shipped the general availability version of Electronic Invoicing Add-on for Dynamics 365, which is the first configurable globalization microservice that extends the capabilities existing

in Finance, Commerce, Supply Chain Management, and Project Operations and provides better scalability, agility to align with changing legal requirements, and consistent experience across the growing number of countries and regions demanding e-invoicing (60-plus) as well as business-to-business scenarios. We also released several features highly requested at the Ideas Portal in the areas of tax, invoicing, and configurable business documents.

SAF-T for Lithuania

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

Business value

This feature helps you maintain compliance with tax requirements by letting you prepare and export the SAF-T report that's required for the audit procedures by some tax authorities.

Feature details

The new SAF-T report will be delivered according to Lithuanian tax reporting requirements. The report is based on the international OECD standard of SAF-T schema with additional functionality that helps you meet country-specific requirements. The report extracts data from General Ledger, and all system subledgers and modules, in the required format. It also provides summary information for checking consistency in a single file. The report can be required by tax authorities on a random basis, and for random periods of reported transactions. In 2021, the report will be required from each company in Lithuania regardless of the size of the business.

Invoicing – extending chronological invoice and voucher numbers

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

Business value

This feature allows you to meet the legal requirements regarding documents numbers chronology in more countries and regions. This feature also adds more flexibility in numbers sequence configuration for additional modules.

Feature details

You can configure period-effective number sequence groups for available document references and link them to specific number sequences. Then, a proper number sequence

group will be automatically identified when creating related documents depending on documents dates.

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.

Invoicing – enhanced invoice date control

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

Business value

The feature realizes the possibility of additional control of invoice dates before posting to tighten internal audit procedures. Additionally, this feature helps prevent manual mistakes during invoices registration, and correct any mistakes, if made.

Feature details

You can select to block or permit unallowed invoices to be entered, or to enter the invoices anyway when a special reason is defined.

Extended Czech Republic localization – acquisition proposals for preacquisition transactions

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

Business value

This feature makes it easier to handle a high volume of fixed assets with preacquisition transactions.

Feature details

When you create an acquisition proposal, you can specify the date up to which the process will select existing preacquisition transactions. If no date is selected, preacquisition transactions are not filtered and all existing transactions are considered.

Extended Italian localization – payment traceability improvements

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

Business value

The feature provides a better user experience and improves the tracking possibilities of CIG and CUP codes in the system, which are required for audit purposes in public sector contracts.

Feature details

You can define the CIG and CUP codes in project master data and then validate that the mandatory codes are provided for customer and vendor transactions that are related to public sector contracts. Validation ensures end-to-end traceability during the invoicing and payment processing.

Configurable business documents – preview support for print management

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021

Feature details

For configurable business documents, the user can define the destinations for different print management actions. This means that the scenario **Preview/Print** > **Original** can be used for a preview, and **Preview/Print** > **Use print management** can be used for email and printing.

Country and region expansion – Egypt

Enabled for	Public preview	General availability
Users, automatically	Feb 2021	Apr 2021

Business value

Globalization for Egypt is available out of the box as part of Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and Dynamics 365 Project Operations.

Feature details

Globalization functionality for Egypt includes:

- Reverse charge

- Invoice and credit note for Egypt

- Sales and purchase transaction report

- VAT declaration as a Microsoft Excel file

- Withholding tax calculation on the line level

- Withholding tax declaration form 41

- Withholding tax declaration form 11

Electronic Invoicing Add-on for Dynamics 365 (general availability)

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

Business value

Operational complexity and risk continue to intensify as organizations grow globally and expand their footprints across regions. Maintaining compliance and adapting to frequently changing regulations is a growing challenge and is particularly important when it comes to invoicing. Invoicing has traditionally been expensive and prone to errors as companies rely on paper documents and manually intensive processes. However, to reduce costs and speed up the end-to-end process, organizations have begun to move away from paper invoices. Moreover, governments are increasingly turning to electronic invoicing as a key component of tax digitalization.

By requiring organizations to digitally submit real-time tax information to tax authorities, governments are able to minimize tax evasion and manipulation, and reduce fraud. Whether you are in the public or private sector, electronic invoicing is growing in importance, and the world is shifting to paperless document processing. Without implementing electronic invoicing, you risk compliance issues, unnecessary costs, and lagging behind your competitors.

Feature details

You can use the Electronic Invoicing Add-on when you create and send electronic documents. The configurability options available in Dynamics 365 Finance and Dynamics 365 Supply Chain Management are limited to document transformation. The add-on extends these options by adding configurable integrations.

Planned feature highlights

- Out-of-the-box integration with Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Project Operations, and Dynamics 365 Commerce.

- Consistent user experience for the configuration and monitoring of the e-invoice process for all countries and regions.

- Faster, easier, and less expensive adoption of electronic invoicing solutions.

- Configuration of the service through the Regulatory Configuration Service (RCS) and globalization feature setup.

- Transformation of business data into multiple e-invoice formats (XML, JavaScript Object Notation [JSON], TXT, and comma-separated values [CSV]) by using configurations that are defined in RCS:

  o Electronic reporting formats that are available for countries or regions where the configurability for e-invoice transformation wasn't available.

- Configurable submission of e-invoices to external web services, including certification handling through digital signatures:

  o Built-in, easily extendable, and configurable integration with additional content for several countries or regions.

- Handling of responses from web services, including configurable exception message handling.

- Support for electronic signatures (for example, by using the XMLDSig signing algorithm).

- Batch processing of e-invoice messages.

Tax service (preview)

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	To be announced

Business value

Tax service is a configurable globalization microservice that enhances the tax determination and calculation capabilities in Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and Dynamics 365 Project Operations. It provides a flexible tax determination matrix and configurable tax calculation designer to comply with local tax regulations.

Feature details

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

- Configuration of tax service through the Regulatory Configuration Service (RCS), which is an enhanced version of the Electronic Reporting designer available as a standalone service.
- Configurable tax matrix to automatically determine tax codes and rates.
- Configurable tax matrix to automatically determine VAT ID.
- Configurable tax calculation designer to define formulas and conditions.
- Shared tax determination and calculation solution across legal entities.

Tax service – supporting multiple VAT ID (preview)

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	To be announced

Business value

Tax service is a configurable globalization microservice that enhances the tax determination and calculation capabilities in Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and Dynamics 365 Project Operations. It provides a flexible tax determination matrix and configurable tax calculation designer to comply with local tax regulations. This feature is part of the tax service to support multiple VAT ID determination for a single legal entity and its counterparties.

Feature details

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

Thank you for your idea

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

Tax service – supporting tax in transfer order (preview)

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	To be announced

Business value

Tax service is a configurable globalization microservice that enhances the tax determination and calculation capabilities in Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and Dynamics 365 Project Operations. Tax service provides a flexible tax determination matrix and configurable tax calculation designer to comply with local tax regulations.

This feature is part of the tax service to support indirect tax determination, calculation, posting, and settlement on inventory transfer order transaction's leveraging tax service capabilities.

Feature details

- Indirect tax determination, calculation, and posting support for shipping transfer orders.

- Indirect tax determination, calculation, and posting support for receiving transfer orders.

- Indirect tax settlement support for transfer order transactions.

- VAT ID determination support for shipping transfer orders.

- VAT ID determination support for receiving transfer orders.

Thank you for your idea

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

Tax – enhanced global withholding tax

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

Business value

Tax withholding is a requirement in a number of countries. We've enhanced the process for determining the need for withholding tax, and its calculation, posting, and settlement.

Feature details

The global withholding tax enhancements include the following:

- Item withholding tax group (WHT on line level) for accounts payable

- Withholding tax payment

- Withholding tax in accounts receivable

- Threshold on invoice amount

- Withholding tax calculation for miscellaneous charges

- Invoice amount to be paid in withholding currency

- Withholding tax payment against vendor account of tax authority

Tax – using packing slip date as tax calculation date

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Business value

Many countries or regions have frequent tax rate changes, and the tax rate in the system should correctly reflect this change based on when goods were shipped. This feature can help customers get the correct tax rate.

Feature details

Currently, there are three date options to determine tax rate. This feature provides a fourth date option:

- Document date

- Invoice date

- Delivery date

- Packing slip date (new option)

When a packing slip is generated for a sales order line, users can select the packing slip date on the document, and system will use this date to retrieve the tax rate in the tax code value table.

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.

Configurable business documents – additional barcode type support

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021

Feature details

The list of supported barcodes for the barcode data source in configurable business documents was extended with Intelligent Mail Barcode (IMB).

Regulatory Configuration Service – simplified globalization feature management for globalization services

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

Business value

Currently, users of the Electronic Invoicing Add-on and Tax Service need to configure several components to set up these services. To simplify this, we have developed globalization feature functionality that supports packaging related artifacts into a bundle that can be deployed to the Electronic Invoicing Add-on and Tax Service directly from Regulatory Configuration Service (RCS).

Feature details

As part of this 2021 release wave, the globalization feature functionality is generally available and supports the following capabilities for users of Electronic Invoicing Add-on and Tax Service:

- Discover and access Microsoft-produced globalization features.

- Review and configure related feature components including electronic reporting format configurations, processing actions, and corresponding feature setup.

- Centrally store and share globalization features across the organization.

- Deploy the configured globalization feature to use in the globalization services and connected application environments direct from RCS.
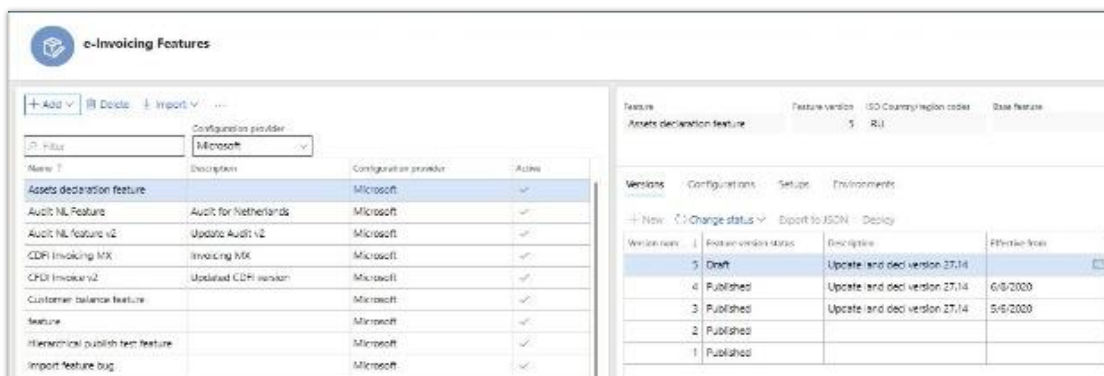
Screenshot of globalization features for Electronic Invoicing Add-on

Regulatory Configuration Service expanded regional coverage to Europe

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

Business value

This regional expansion allows customers in different countries and regions to meet local data residency requirements and use the additional benefits of the Regulatory Configuration Service (RCS), instead of relying on the configuration designers built into Dynamics 365 Finance, which has limited functionality.

Feature details

As part of the ongoing enhancements to RCS, the breadth of regional coverage where RCS environments can be deployed is being expanded. When undertaking the initial service sign-up, the system administrator can select to have the RCS environments deployed in the existing supported regions, or they can select to deploy the instance in the newly supported regions.

RCS environments can be deployed in the following countries or regions:

- United States (already available)
- India (already available)
- France (already available)
- Europe (new)

As part of the RCS provisioning flow, you can select the datacenter that is geographically located where your environment will be provisioned.

Overview of Dynamics 365 Supply Chain Management 2021 release wave 1

Dynamics 365 Supply Chain Management is an end-to-end supply chain solution that enables organizations to gain visibility, resiliency, and efficiency in their supply chain.

2021 release wave 1

The 2021 release wave 1 further empowers Dynamics 365 Supply Chain Management users to:

- Provide a single, organization-wide source of truth for inventory quantity on hand with the Inventory Visibility Add-in.

- Enable visibility of goods in transit and calculate landed cost of shipments using landed cost.

- Increase transparency and efficiency for Asset Management users by enabling those companies to bill their customers for the maintenance performed.

- Reduce training time and cost, and increase productivity of warehouse workers with a fresh, user-friendly mobile application.

- Achieve compliance with international accounting standards with the Global Inventory Accounting Add-in.

- Reduce the administrative time and effort associated with maintaining rebates and deductions programs using rebate management.

- Enable customers to execute mission-critical operations without interruption and at scale, building resilience into manufacturing and warehouse operations by extending to edge scale units.

- Help planners at manufacturing companies control their production schedule and determine delivery lead times, giving more flexibility in controlling both lead time buffers and the planning horizon.

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

This topic lists features that are planned to release from April 2021 through September 2021. 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.

Asset Management

Feature	Enabled for	Public preview	General availability
Apply rules for grouping work orders while running a maintenance plan	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Bill customers for maintenance work	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Plan maintenance based on accumulated asset counter values	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Track asset usage based on IoT signals	Users by admins, makers, or analysts	Jun 2021	Jul 2021

Inventory and logistics

Feature	Enabled for	Public preview	General availability
Landed cost	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Schedule warehouse work creation	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Set default financial dimensions for inventory standard cost revaluation vouchers	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Warehouse execution with scale units in the cloud	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Warehouse management mobile application	Users by admins, makers, or analysts	Feb 2021	Apr 2021

Feature	Enabled for	Public preview	General availability
Approve and save vendor-submitted bank details	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Saved views for inventory and logistics	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Inventory Visibility Add-in for Dynamics 365 Supply Chain Management	Users by admins, makers, or analysts	✔ Nov 30, 2020	Apr 2021
Rebate management	Users by admins, makers, or analysts	Mar 2021	Apr 2021
Global Inventory Accounting Add-in for Dynamics 365 Supply Chain Management	Users by admins, makers, or analysts	Mar 2021	Jun 2021
Incremental enhancements for warehouse execution capabilities with scale units	Users by admins, makers, or analysts	Apr 2021	Jun 2021
Warehouse execution with edge scale units on your custom hardware	Users by admins, makers, or analysts	Apr 2021	Jul 2021

Manufacturing

Feature	Enabled for	Public preview	General availability
Saved views for production control	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Manufacturing execution with scale units in the cloud	Users by admins, makers, or analysts	Feb 2021	Jun 2021

Feature	Enabled for	Public preview	General availability
Worker sign-in with face recognition	Users by admins, makers, or analysts	Apr 2021	Jun 2021
Manufacturing execution with edge scale units on your custom hardware	Users by admins, makers, or analysts	Apr 2021	Jul 2021
Enhanced production floor execution interface for manufacturing	Users by admins, makers, or analysts	Jun 2021	Jul 2021

Planning

Feature	Enabled for	Public preview	General availability
Coverage time fence support for Planning Optimization	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Purchase requisition support for Planning Optimization	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Saved views for planned orders	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Forecast submodel support for Planning Optimization	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Schedule with infinite capacity support for Planning Optimization	Users by admins, makers, or analysts	Apr 2021	Jun 2021
Reorder margin and issue margin support for Planning Optimization	Users by admins, makers, or analysts	Jun 2021	Aug 2021

Product information management

Feature	Enabled for	Public preview	General availability
Enable change management on existing products	Users by admins, makers, or analysts	Feb 2021	Apr 2021
Variant suggestions page improvements	Users by admins, makers, or analysts	Apr 2021	Jun 2021
Product readiness checks	Users by admins, makers, or analysts	May 2021	Jul 2021
Share product information across legal entity boundaries	Users by admins, makers, or analysts	May 2021	Jul 2021

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Product information management

Overview

This release brings incremental improvements to simplify the task of ensuring product master data is complete, to improve the performance of generating product variants, and for adding engineering.

Product readiness checks

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2021	Jul 2021

Business value

In a world of constantly shrinking product lifecycles, increased requirements for quality and reliability, and increased focus on product safety, your company must ensure that all the needed data is fully set up before a product starts to be used in transactions. Readiness checks help ensure that all required fields are set up as needed.

Feature details

Product readiness checks are sets of automatic or manual checks that ensure that each product is set up with all the required data before it is used in transactions. There are three types of checks: system checks, manual checks, and checklists.

- With a *system check*, the system automatically verifies whether there is a value in a specific field. (If user input is needed to define the data and verify its accuracy, then use a manual check or a checklist.)

- A *manual check* is a predefined check where the user is expected to verify that specific information (such as default order settings) is correctly set up for a product. The user is expected to focus on the specific area and define the needed information, which might be a specific field or something else.

- A *checklist* is a set of defined steps or focus areas that the user must follow. Each checklist is a questionnaire that you can define and configure to meet your company's needs.

Readiness checks are grouped into *readiness policies* to help make them easy to manage and assign to specific products. Each readiness policy includes the set of checks that apply for a specific product or set of products. When a readiness policy is assigned to a product, all its checks must be completed before the product can be used in transactions.

In previous versions, product readiness checks were only available for engineering products (which are products governed by engineering change management processes). This feature extends support for product readiness checks to all products.

Enable change management on existing products

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

Business value

Engineering Change Management uses multiple versions to track changes in products as they change throughout their lifecycle. Companies can now convert standard products into engineering products, thereby applying the benefits of versioning and Engineering Change Management to their existing products.

Feature details

Engineering Change Management uses multiple versions to track engineering products as they change throughout their lifecycle. This is beneficial when you need to keep historical change records or to use strong data management. Each time you add a new product, you can choose whether it should be an *engineering product* (which uses versions and change management) or a *standard product* (which doesn't). Previously, this designation was permanent, but now you can convert a standard product to an engineering product at any time. That means that you can leverage Engineering Change Management capabilities and increase the discipline of your change management even for existing products.

Note that, unlike with products created as engineering products, when you convert a standard product to an engineering product, the resulting engineering product is not version tracked in transactions (in other words, the *version* dimension isn't available on converted products).

Variant suggestions page improvements

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	Jun 2021

Business value

The updated Variant suggestions page brings improved performance and usability for companies that have a high number of product dimension combinations. The improved process increases user productivity by making the generated variant suggestions more relevant.

Feature details

This feature improves the performance and usability of the Variant suggestions page when you have a high number of dimension combinations from which to create variants. The following changes are included:

- **Deferred generation of variant suggestions**: The Variant suggestions page no longer shows suggestions when you first open it. Instead, you must explicitly select a button to generate them. This increases user confidence by making the process more visible and interactive.

- **Selection of dimensions values**: When you have many dimension values, you are typically interested in generating variant suggestions that include just a few of them (such as when introducing a new set of colors or styles). With the improved design, you can select the dimension values for which you want to generate product variant suggestions. This greatly increases the relevance of the suggested variants and improves both system performance and user productivity.

Share product information across legal entity boundaries

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2021	Jul 2021

Business value

Companies with many legal entities and a large product portfolio (such as large sales and distribution networks) often experience a high level of duplicated product data. This feature lets you share released-product data across legal entities, thereby reducing the volume of data that must be maintained while simplifying the task of maintaining product master data.

Feature details

You can specify the set of legal entities that will share released-product data. For example, you might share product data between all legal entities that purchase, produce, distribute, or sell the product. Each product can then be released just once to make it visible in all the legal entities that share it. Subsequent updates to the product will also be shared and visible to all those legal entities without duplicating the product-related information.

Planning

Overview

This release focuses on introducing material requirements planning II (MRP II) capabilities in the Planning Optimization Add-in for Dynamics 365 Supply Chain Management, including infinite scheduling. MRP II helps planners at manufacturing companies control their production schedule and determine delivery lead times. This release also brings incremental improvements to Planning Optimization to leverage input from purchase requisitions and tiered demand forecast models, and to give planners more flexibility in controlling both lead time buffers and the planning horizon.

Saved views for planned orders

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

Feature details

This feature provides a collection of simplified views for planned orders. Each view includes only the fields used most often, thereby providing a quicker overview and a streamlined work process. It includes simplified views for the following pages in Supply Chain Management:

- Planned orders list page

- Planned order details page

Schedule with infinite capacity support for Planning Optimization

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	Jun 2021

Business value

Production scheduling enables master planning with the Planning Optimization Add-in for Supply Chain Management to account for the actual lead time derived from route information. The scheduling engine also finds applicable resources based on operation requirements and the available resource capabilities.

Feature details

This feature enables material requirements planning (MRP) based on scheduling from route information. Previously, MRP scheduling with Planning Optimization was done with a static inventory (production) lead time set on the related product. It provides the following benefits:

- Enables planners to view resource load and determine delivery lead time.

- Includes resource and route information.

- Schedules production suggestions with infinite capacity.

This feature is part of the materials resource planning II (MRP II) capabilities for Planning Optimization. MRP II helps planners at manufacturing companies control their production schedule, control resource load, and determine delivery lead times. Because Planning

Optimization runs as a separate service, it's able to facilitate high performance production planning without slowing down the rest of the system.

With Planning Optimization support for production scheduling, manufacturers can benefit from:

- Improved performance with high data volume.

- Improved system performance made possible by moving master planning to its own service.

- Near-real-time insights into requirement changes.

Geographic areas

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

- United States

- Europe

- United Kingdom

- Australia

- Canada

Forecast submodel support for Planning Optimization

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

Business value

Planners can include demand forecast input from multiple submodels linked to the forecast model used during master planning with Planning Optimization. This enables the system to create supply suggestions that cover the aggregated forecast demand from multiple submodels.

Feature details

This feature enables Planning Optimization to incorporate forecast submodels related to the forecast model defined for the master plan.

With Planning Optimization, planners can benefit from:

- Improved performance with high data volume.

- Improved system performance made possible by moving master planning to its own service.

- Near real-time insights into requirement changes.

Geographic areas

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

- United States

- Europe

- United Kingdom

- Australia

- Canada

Purchase requisition support for Planning Optimization

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

Business value

The Planning Optimization Add-in for Dynamics 365 Supply Chain Management accounts for purchase requisitions and automatically creates the required planned purchase orders. This removes the need to create purchase orders manually based on purchase requisitions.

Feature details

This feature enables Planning Optimization to generate planned orders based on purchase requisitions. A purchase requisition is an internal document that authorizes the purchasing department to buy items or services. After a purchase requisition is approved, it can be used to generate a purchase order. This feature enables Planning Optimization to analyze existing purchase requisitions and automatically create the required planned purchase orders.

With Planning Optimization, planners can benefit from:

- Improved performance with high data volume.

- Improved system performance made possible by moving master planning to its own service.

- Near-real-time insights into requirement changes.

Geographic areas

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

- United States

- Europe

- United Kingdom

- Australia

- Canada

Reorder margin and issue margin support for Planning Optimization

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

Business value

With reorder and issue margins, your lead time setup can be simplified for both distribution and production scenarios because the additional buffer margin can be controlled centrally and handled separately from the lead time.

Feature details

This feature enables the Planning Optimization Add-in for Supply Chain Management to include safety margins of types *reorder margin* and *issue margin* during master planning. Safety margins enable a setup that provides some extra buffer time beyond the normal lead time.

Reorder margin – the buffer time for placing the supply order

The system adds the reorder margin before the item lead time for all planned orders during master planning, thereby ensuring adequate time for a supply order to be placed. This margin is typically used as a buffer to allow time for approval processes or other internal processes that are required while creating supply orders. The reorder margin is placed between the supply order date and start date.

Issue margin – the buffer time for handling shipments

The system deducts the issue margin from the demand requirement date during master planning. This helps ensure that you have time to react to and ship incoming demand orders. This margin is typically used as a buffer to allow time for shipment and related outbound warehouse processes.

Planning Optimization benefits

With Planning Optimization, planners can benefit from:

- Improved performance with high data volume.

- Improved system performance made possible by moving master planning to its own service.

- Near-real-time insights into requirement changes.
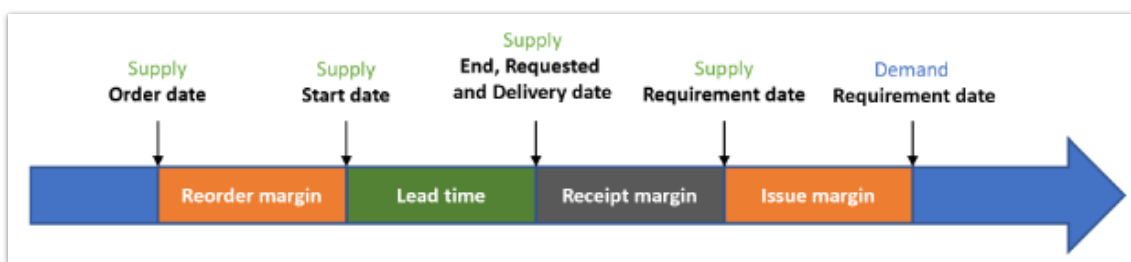
Enable usage of reorder and issue margin

Geographic areas

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

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

Coverage time fence support for Planning Optimization

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

Business value

This feature enables companies to ensure that Planning Optimization only generates planned orders for the longest lead time plus a buffer (for example, for the next 60 days). It helps avoid suggestions that cover a long-term forecast.

Feature details

This feature enables Planning Optimization users to set a time fence that limits master planning output to a selected period. It helps planners and purchasers to focus on planned orders that need action in the nearest future while avoiding suggestions that cover a long-term forecast. This removes the noise from planned orders that don't need attention as of now, enabling planners and purchasers to focus on relevant supply requirements.

With Planning Optimization, planners can benefit from:

- Improved performance with high data volume.
- Improved system performance made possible by moving master planning to its own service.

- Near real-time insights into requirements changes.

Geographic areas

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

- United States

- Europe

- United Kingdom

- Australia

- Canada

Inventory and logistics

Overview

In this release of Dynamics 365 Supply Chain Management, we have several new inventory and logistics features to help organizations gain visibility, resiliency, and efficiency in their supply chain. First is the Inventory Visibility Add-in that provides a single, organization-wide source of truth for inventory balances. We also are launching landed cost, a new feature designed to provide visibility of goods in transit and calculate the estimated and actual landed cost of shipments. Our redesign warehouse mobile application brings a fresh, user-friendly design to warehouse workers, allowing them to train quickly and be more efficient every day. The new Global Inventory Accounting Add-in allows organizations with international operations flexibility to comply with various accounting standards. Rebate management reduces the administrative effort associated with maintaining rebates and deductions programs.

Set default financial dimensions for inventory standard cost revaluation vouchers

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

Business value

This feature streamlines the standard cost revaluation process. A standard cost revaluation voucher is normally generated when activating a new standard cost. This capability simplifies the process and allows you to choose how the system will assign financial dimensions to inventory standard cost revaluation vouchers.

Feature details

This feature provides options that let you choose how the system will assign financial dimensions to inventory standard cost revaluation vouchers. Once the feature is enabled, you can manage its settings by going to **Cost management** > **Inventory accounting policies setup** > **Parameters**, where you'll find the new **Origin of financial dimension** setting. The new setting provides the following options:

- **None**: No financial dimensions are posted on the revaluation transactions. If your account structure includes a required financial dimension, the revaluation process will still run, but it will create accounting entries that have no financial dimensions. In this case, users will receive a warning message first, so they can cancel the revaluation if necessary.

- **Table**: The financial dimensions of the item are posted on the revaluation transactions. (This is the default setting and is consistent with the original system behavior.)

- **Posting**: The financial dimensions of the transaction being revalued are posted on the revaluation transactions. By default, the financial dimensions from the original transaction's inventory account will be used for both the inventory account and the revaluation account.

Warehouse management mobile application

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

Business value

This feature empowers organizations to improve overall warehouse operating efficiency. The warehouse management mobile application includes a fresh, contemporary design that is intuitive, easy to use, and supported by robust enhancements to core warehouse management logic that streamline processing. The new design concepts are based on extensive usability studies including a broad worker population. The solution is designed to help workers be more efficient, productive, and better able to complete work accurately.

Feature details

The fresh new design of this mobile application is based on extensive usability studies. These studies identified both strengths and pain points experienced when executing end-to-end warehouse processes using a mobile application. The findings guided the new design for the application as well as underlying enhancements in the core warehouse management logic that support it. The new solution provides the following benefits and capabilities:

- Improved worker efficiency:
  - Large input controls to quickly dial in quantities.

- o The most important information made easiest to see and set in a large font.
- o Saved worker preferences and device-specific settings that can be managed centrally.
- Improved ergonomics:
  - o Large touch targets and other features that make the app easy to use with gloves.
  - o A high-contrast design that provides clear text on dirty screens.
  - o Custom button locations to match each worker's grip, device, and handedness.
- Faster ramp-up of new workers:
  - o Clear titles and illustrations for each step.
  - o Full-screen photos to verify product selections.
- Alignment with Fluent Design System guidelines for visual style and interaction.
- Expanded support for B-grade accessibility standards with focus on situational disabilities, as defined by the WCAG guidelines.

Incremental enhancements for warehouse execution capabilities with scale units

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	Jun 2021

Business value

With warehouse execution workloads running on a scale unit, companies can execute mission-critical manufacturing processes without interruption. This feature further enhances the capabilities of these workloads to better fulfill organizations' growing requirements.

Feature details

The warehouse execution workload for this release adds the following capabilities for scale units:

- Warehouse workers in outbound scenarios can perform simple picking and loading work for transfer orders on scale units.
- Label printing will be available on scale units, including support for wave labels.
- Warehouse workers can commence cluster picking and wave processing for shipments.
- Work items allow change of workers, cancelations, location movements, and completion of work to be reported quickly for sales and transfer orders.

Warehouse execution with edge scale units on your custom hardware

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	Jul 2021

Business value

Companies can execute mission-critical warehousing processes without interruption and at scale, including in situations where Internet connections are occasionally unstable.

Feature details

Improve the resilience of your warehouse processes using edge scale units running on physical appliances located on your own shop floor. Edge scale units operate independently from the hub and allow warehouses to remain operational during a connectivity failure. Maintenance can be controlled independently of cloud instances while providing scale using a dedicate processing capacity.

Workers using computers and hand-held devices connected to the edge scale unit will have the same capabilities as when working against a cloud scale unit. This includes the following scenarios:

- Warehouse managers can select the wave-processing methods used for sales orders and transfer orders (including demand replenishment and containerization).
- Warehouse workers can use the warehouse mobile application (warehouse app) to:
  - o Execute sale orders, transfer orders, and demand replenishment for warehouse work.
  - o Register purchase orders and conduct putaway.
  - o Execute inventory movements.
  - o Perform inquiries into on-hand inventory.
  - o Print license plates and process batch-number tracked items.
  - o Handle outbound exceptions when processing sales and transfer orders.
  - o Perform simple picking and loading work for transfer orders in outbound scenarios.
  - o Print labels, including wave labels.
  - o Commence cluster picking and wave processing for shipments.
  - o Adjust work items like change of workers, cancellation, location movement, and completion of work.

Landed cost

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

Business value

This feature enables organizations to increase supply chain visibility and maximize item profitability. Landed cost provides the ability to define shipments of inbound orders and track goods in transit throughout their journey. It also provides the power to calculate item costs associated with procurement and transportation based on a rich set of allocation rules.

Feature details

The landed cost module enables you to define and track each segment of the goods-in-transit journey, beginning at the supplier's warehouse and continuing to the shipping dock, through the freight forwarder, to a landing dock and freight company, and eventually to the destination warehouse. With this visibility, arrivals are predictable, and warehouse planning and efficiency are improved.

Landed cost can streamline the receiving processes. Shipments of inbound orders, such as purchase orders or transfer orders, can be defined and organized into various transportation legs. Legs can be defined by supplier, shipping dock, freight forwarder, landing dock, freight company, and more. Landed cost features can be used to track and trace the containers in the shipment while in transit and receive them upon arrival into the warehouse. This enhances customer service by providing clarity to internal sales, customer service, and logistics stakeholders. It also provides immediate visibility of stock delays that might impact customer deliveries.

Landed cost helps organizations predict item costs, thereby improving pricing decision making. Automatic cost calculations can be configured for various transportation modes, duties, and other fees incurred to get a product to the warehouse. The costs and allocation methods can be further defined on various levels, including overall shipment, by container, for the purchase order, purchase order line, or transfer order line. The estimated costs are defined as landed cost for a collection of inbound orders, planned and received, from a supplier in a single shipment. Based on the estimated cost, purchase accruals can be recorded long before the goods are received. Later, when the actual freight and other handling bills arrive, the estimated costs are adjusted to reflect the actual cost amounts.

Landed cost also reduces administration and costing errors. When using the standard costing method, a reviewed and updated cost can be required in addition to the standard cost for specific items. Landed cost can be used to simulate shipping scenarios to predict a standard cost price for an item. By using the estimated cost definitions, or a cost entered per simulation scenario, the system can predict costs allocated to items within a simulated

shipment. This enhances strategic sourcing capabilities and can help increase item profitability.

Global Inventory Accounting Add-in for Dynamics 365 Supply Chain Management

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2021	Jun 2021

Business value

This feature provides a comprehensive solution that enables organizations (especially international organizations) to perform inventory accounting using multiple costing ledgers, thereby enabling them to comply with multiple accounting standards and internal management accounting at the same time.

Feature details

Organizations, especially those with international operations, often prefer to account for inventory by standard cost as part of their management accounting setup. However, local governments, tax authorities, and International Financial Reporting Standards Foundation (IFRS) typically don't recognize standard cost as an accounting principle and often require average or specific identification. In addition, organizations often want to account inventory using both a local currency and the functional currency.

Collectively, these requirements must be addressed in a comprehensive solution that supports the ability to perform inventory accounting in multiple costing ledgers, where each ledger can be configured with a specific set of accounting policies.

With this new functionality, customers can define as many costing ledgers as required. Inventory accounting in dual currencies and in dual valuations are both supported.

Inventory accounting is performed in individual ledgers. Several costing ledgers can be created for each legal entity in an organization as needed, thereby ensuring that multiple inventory representations can be obtained. All documents (such as purchase orders, sales orders, transfer orders, and so on) posted in a legal entity will be accounted in all the costing ledgers associated with the legal entity.

A costing ledger is defined by:

- Calendar
- Currency
- Exchange rate table
- Convention

A convention is a collection of inventory accounting policies that can be associated to one or more ledgers. This provides the ability to share a common convention in the organization.

The Global Inventory Accounting Add-in supports multiple inventory accounting policies. For each policy, a single rule can be selected, and it applies to all products.

Cost object policy options:

• Product

• Product – Site

• Product – Site – Warehouse

Input measurement basis policy options:

• Normal historical

• Standard

Cost flow assumption policy options:

• Average

• Specific identification (batch)

• Cost element policy

Recording interval:

• Perpetual

Lastly, this solution provides reports and a detailed audit trail that starts from an inventory accounting event or measurement and continues all the way back to the original document posted in Supply Chain Management.

Saved views for inventory and logistics

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

Feature details

This feature provides a collection of simplified views for inventory and logistics. Each view includes only the fields used most often, thereby providing a quicker overview and a streamlined work process. It adds simplified views for the following pages in Supply Chain Management:

• Warehouse management: All waves

• Warehouse management: All loads

• Warehouse management: All shipments

- Warehouse management: Load planning workbench

- Warehouse management: Work details

- Inventory management: Transactions

- Inventory management: On-hand list

- Inventory management: Transfer orders

- Procurement and sourcing: Purchase order details

The following sales views were released in 2020 release wave 2:

- Sales and marketing: Sales quotation

- Sales and marketing: Sales order

- Sales and marketing: Packing slip journal

Inventory Visibility Add-in for Dynamics 365 Supply Chain Management

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 30, 2020	Apr 2021

Business value

This feature enables organizations to maintain a single, global inventory position and easily extend real-time inventory visibility through related applications. The Inventory Visibility Add-in for Dynamics 365 Supply Chain Management is an independent microservice that is highly scalable, empowering high-volume retailers and manufacturers to manage millions of inventory updates every minute and gain real-time visibility to cross-channel inventory position.

Feature details

Inventory Visibility lets organizations manage global, on-hand inventory with minimal setup. This highly scalable microservice can handle simultaneous requests from a variety of endpoints. The feature comes with an easy-to-use RESTful API that enables painless integration with ancillary systems.

The RESTful API supports queries based on standardized inventory dimensions, combined with configurable, calculated quantities. External systems can query Inventory Visibility to retrieve a list of available inventory quantities based on these dimensions.

Inventory Visibility is built on Microsoft Dataverse, which provides extensibility using Power Apps applications and Power BI analytics. These straightforward tools, together with Inventory Visibility, empower organizations to deliver advanced, customized functionality to meet specific business needs.

Rebate management

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2021	Apr 2021

Business value

The rebate management module greatly reduces the complexity and administrative burden associated with rebates and deduction programs. It enables organizations to focus on maximizing the benefits of these programs while retaining flexible and efficient processes and eliminating the need for manual calculations.

Feature details

The rebate management module is an updated offering of the rebates and royalty processing feature for Microsoft Dynamics 365 Supply Chain Management. Use it to create contracts, deals, or agreements between your company and your customers and vendors to facilitate the calculation of rebates, deductions, and royalties. The rebate management module tracks and maintains rebates and deductions transactions in a central location, where all relevant users can create, review, and process them effectively.

Rebates

A rebate returns a portion of a purchase price by a seller or a buyer, typically on the purchase of a specific quantity or value of goods within a specific period. These returns, unlike deductions, are done after the full invoice of the purchase amount.

Deductions

A deduction is a compensation, consideration, or fee paid for a license or privilege to use intellectual property such as a brand, copyright or patent or the usage of a natural resource like with fishing, hunting, or mining. Deductions are usually computed as a percentage of revenue or profit from realized use. The more use, the greater the deduction realized.

Royalties

Customer royalties are payments made by one party to the licensee or franchisee for the right to use the asset. Rebates, royalties, and deductions are all supported by the new rebates and deductions module.

Approve and save vendor-submitted bank details

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

Business value

Improve the accuracy of vendor banking information and reducing internal maintenance overhead with this feature enhancement to vendor collaboration. The feature provides a self-service interface for vendors and suppliers to enter and maintain their own banking information in the vendor-collaboration application.

Feature details

With this feature, your vendors and suppliers can use the vendor-collaboration interface to submit bank account information to update their vendor record. Each submission is sent through an approval process and is only added to the record after it has been approved at your company.

Vendors can request to register a new account or expire an existing one. While doing so, they can add a note to the request. The request also includes an option to indicate whether a new bank account should be the primary account for vendor payments.

When a vendor submits a request, your accounts payable or procurement personnel must review it. On approval, the new bank account details are added to the list of account details registered for that vendor. For requests that specify a new primary bank account, your accounts payable or procurement personnel must manually update the vendor record to identify the new account as the primary account.

Schedule warehouse work creation

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

Business value

This feature enables organizations to optimize their outbound order processing with enhanced warehouse management wave processing.

Feature details

This feature helps to increase wave processing throughput by using parallel processing to create work. It works by replacing the existing *Create work* wave process method with a new method called *Schedule work creation* in wave templates.

Warehouse execution with scale units in the cloud

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

Business value

Companies can execute mission-critical manufacturing processes at scale and build resilience into key warehouse processes.

Feature details

With the Cloud Scale Unit Add-in for Dynamics 365 Supply Chain Management, warehouse resilience is accomplished by placing scale units at, or near, each warehouse. The scale units operate independently and allow the warehouses to remain operational during a connectivity failure, maintenance outage, and other events that might disrupt operations.

The warehouse execution workload for this release provides the following capabilities when running on a scale unit:

- Warehouse managers can select the wave-processing methods used for sale orders and transfer orders (including demand replenishment and containerization).
- Warehouse workers can execute sale orders, transfer orders, and demand replenishment for warehouse work using the warehouse mobile application (warehouse app).
- Warehouse workers can register purchase orders and conduct putaway using the warehouse app.
- Warehouse workers can create and execute inventory movements using the warehouse app.
- Warehouse workers can perform inquiries into on-hand inventory using the warehouse app.
- Warehouse workers can print license plates and process batch-number tracked items using the warehouse app.

See also

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

Manufacturing

Overview

This release focuses on enabling customers to execute mission-critical manufacturing processes without interruption and at scale and on building resilience into key

manufacturing processes by extending your cloud hub with edge scale units on the shop floor. It also brings enhancements and new innovations to the production floor execution interface, including asset management integration.

Enhanced production floor execution interface for manufacturing

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2021	Jul 2021

Business value

This feature enables process industry manufacturers to take advantage of the benefits of a scale unit architecture by adding important capabilities to the production floor execution interface. It ensures the traceability of batch and serial numbers for consumed materials and increases the accuracy of cost and inventory records by recording actual consumption rather than using estimated consumption. It also provides greater insights and predictability on the production floor.

Feature details

This feature enables process manufacturers, and manufacturers requiring explicit registration of material consumption, to take advantage of the production floor execution interface when it is running as a manufacturing workload on a scale unit. With this feature:

- Process manufacturers can use the production floor execution interface to report coproducts and byproducts.

- Workers can pick batch and serial numbers for raw materials and adjust raw material consumption within the production floor execution interface.

- Workers can search for jobs in the jobs list. This feature is optimized for scanning.

- Manufacturers can configure the production floor execution interface to only support clock-in and clock-out registrations.

- Workers can request maintenance from the production floor execution interface as soon as the issue occurs. The close integration with asset management will automatically request maintenance.

- Operators can register machine downtime with a description and reason code. Downtime registrations can be used to calculate the efficiency of a machine.

- Up to four tiles can be configured showing selected asset counter values for a machine in the production floor execution interface. These can be used to monitor the health and state of the machine asset.

- IoT sensor signals and data from other processes can be visualized in the production floor execution interface using embedded Power BI analytics.

See also

[How workers use the production floor execution interface](#) (docs)

Manufacturing execution with scale units in the cloud

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

Business value

Companies can execute mission-critical manufacturing processes without interruption and at scale and build resilience into key manufacturing processes.

Feature details

Improve the resilience of your manufacturing processes by extending your cloud hub with cloud scale units that run manufacturing workloads. Each manufacturing workload takes ownership of certain manufacturing execution-related data and processes at a selected site.

The manufacturing workload for this release provides the following capabilities and benefits:

- Cloud scale units deliver dedicated processing capacity in the regional cloud and provide the scaling capabilities required to support processing without interruption.

- Workers on the shop floor run the execution phase of manufacturing processes in a distributed mode while work planning and finalization is done centrally on the hub.

- Workers can clock in and clock out, select and start multiple jobs at once, start new jobs in parallel, report output and scrap, register breaks and inactive activities, and more.

- The new production floor execution interface for workers is modern, customizable, and optimized for touch interaction.

- Workers can request maintenance from the production floor execution interface as soon as the issue occurs. The close integration with asset management will automatically add a formal maintenance request to the system.

- Operators can register machine downtime with a description and reason code. Downtime registrations can be used to calculate the efficiency of a machine.

- Up to four tiles can be configured to show selected asset counter values for a machine in the production floor execution interface. These can be used to monitor the health and state of the machine asset.

Worker sign-in with face recognition

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	Jun 2021

Business value

Face recognition offers a fast and seamless identification experience. It means that workers don't have to carry badges to sign in and reduces the risk of fraud that could otherwise occur if workers were able to exchange badges.

Feature details

This feature adds face recognition capabilities that enable production floor workers to sign in to the production floor execution interface simply by looking into a camera. This allows companies to eliminate the need to use badges for sign-in and provides workers with a hands-free sign-in experience.

Saved views for production control

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

Feature details

This feature provides a collection of simplified views for manufacturing. Each view includes only the fields used most often, thereby providing a quicker overview and a streamlined work process. It adds simplified views for the following pages in Supply Chain Management:

- Production orders list page
- Production order details page
- Production order BOM page
- Production order picking list page

Manufacturing execution with edge scale units on your custom hardware

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	Jul 2021

Business value

Companies can execute mission-critical manufacturing processes without interruption and at scale, including in situations where Internet connections are occasionally unstable.

Feature details

Improve the resilience of your manufacturing processes using edge scale units running on physical appliances located on your own shop floor. Edge scale units operate independently from the hub and allow production facilities to remain operational even during a connectivity failure. Maintenance can be scheduled independently of cloud instances.

Workers using computers and hand-held devices connected to the edge scale unit will have the same capabilities as when working against a cloud scale unit.

Asset Management

Overview

This release provides efficiencies and transparency for companies that use the capabilities of Asset Management Add-in for Dynamics 365 Supply Chain Management for performing maintenance on assets owned by their customers. It enables those companies to bill their customers for the maintenance performed. It also provides incremental improvements that simplify and improve the efficiency of scheduling and executing planned maintenance work, and to ensure required maintenance work is performed at the right time—for example, based on usage sensor data.

Bill customers for maintenance work

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

Business value

Improve efficiency and transparency in the processes of creating, billing, and processing maintenance work done on your customer's assets.

This feature introduces capabilities that add efficiency and transparency when you create, process, and bill maintenance work, including:

- Create maintenance work orders on assets owned by your customers.

- Register time, material, expenses, and fees when processing work on assets owned by your customers.

- Bill customers for maintenance work done on assets owned by those customers.

Feature details

This feature enables you to create, process, and bill maintenance work done on assets owned by your customers. It lets you do the following:

- Connect customers to the assets they own.

- Choose a customer and view the assets that customer owns when you create a work order.

- Set up a parent project for each customer.

- Automatically copy the project contract from a customer's parent project to the relevant work order project.

- Register hours, items, expenses, and fees against the work order and afterward create an invoice proposal for the customer.

In addition, Asset Management can now use the "fee" project transaction type both on work order forecasts and work order journals.

Apply rules for grouping work orders while running a maintenance plan

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

Business value

Making the maintenance workers more efficient by optimizing the execution plan for maintenance work orders.

Feature details

This enhancement lets you establish rules for grouping work order lines under a single work order when the system is set to generate work orders automatically based on a maintenance plan. Previously, automatically generated work orders could only contain a single line, but now it's possible to group—for example, per asset, per asset type, or per functional location.

Track asset usage based on IoT signals

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2021	Jul 2021

Business value

Increase the productivity, quality, and efficiency of assets on the manufacturing floor.

Feature details

This feature adds new capabilities for tracking the health, state, and usage of assets based on signals arriving from the Internet of Things (IoT). These metrics can be visualized in the production floor execution interface.

Plan maintenance based on accumulated asset counter values

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

Business value

Secure an effective use of equipment by optimizing the plan for required maintenance.

Feature details

This feature makes it possible to plan maintenance based on accumulated asset counter values. This can be especially valuable for processes with fluctuating output. For example, you could set the system to generate a planned maintenance record each time an emergency water pump has run for 1,000 hours since its last maintenance.

The feature works by adding a new interval type for maintenance plan lines called *Accumulated counter value*.

Overview of Dynamics 365 Project Operations 2021 release wave 1

Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams within a single application to win more deals, accelerate delivery, empower employees, and maximize profitability. The application enables project-based organization success by building on our depth of expertise and existing applications across all functional pillars of service-based businesses and teams. Powered by Microsoft Power Platform, customers are provided with an unmatched set of capabilities that enable everyone to analyze, act, and automate across their organization to transform their services business from the ground up. It's everything you need to run your project operations, from deal management to financials, all in one application.

For 2021 release wave 1, we will deliver functionally rich experiences in several areas including:

- Ability to forecast, use, and invoice nonstocked materials on projects.

- Enable the ability to set up contractual commitments like billing methods and chargeability rules by task or a work breakdown schedule element.

- Enhanced and seamless ALM and provisioning experiences.

- Enable customers using the Dynamics 365 Project Service Automation application to upgrade to Project Operations.

What's new and planned for Dynamics 365 Project Operations

This topic lists features that are planned to release from April 2021 through September 2021. 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
Upgrade from Dynamics 365 Project Service Automation to Dynamics 365 Project Operations	Users by admins, makers, or analysts	Sep 2021	-

Feature	Enabled for	Public preview	General availability
Nonstocked materials for projects	Users by admins, makers, or analysts	-	Apr 2021
Seamless provisioning and ALM experiences	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Integrated task-based billing setup for projects	Users by admins, makers, or analysts	Mar 2021	Apr 2021

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Seamless provisioning and ALM experiences

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

The 2021 release wave 1 introduces significant improvements to the deployment experience for resource and nonstocked-based scenario deployments. These improvements include:

- A new onboarding provisioning questionnaire.

- Reduced deployment steps in Dynamics 365 Lifecycle Services, with new support for automatically linked environments as well as enabling dual-write entity maps for both new and existing environments.

- A new trials experience that guides customers to the correct deployment approach based upon their scenarios, and automatically deploys any of the three supported options without any administrative setup.

Nonstocked materials for projects

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

Feature details

Tracking the pricing and use of nonstocked materials is a common need for project-based organizations. In 2021 release wave 1, Dynamics 365 Project Operations provides comprehensive experiences for estimating and tracking the use and consumption of nonstocked materials for project-based work. The key capabilities that will be included are:

- Estimating and pricing nonstocked materials during the sales cycle for a project.
- Tracking the use of nonstocked materials during project delivery.
- Integrating vendor costs from project-based vendor invoices for nonstocked items from Dynamics 365 Finance.
- Invoicing nonstocked material costs from usage and from vendor invoices.
- Accounting for material costs and revenue on projects.

Upgrade from Dynamics 365 Project Service Automation to Dynamics 365 Project Operations

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

Feature details

The 2021 release wave 1 includes investments that allow existing Dynamics 365 Project Service Automation customers to upgrade to the new Dynamics 365 Project Operations offering. We will leverage existing capabilities to provide a frictionless upgrade of data from the old Project Service Automation application to the new offering.

Integrated task-based billing setup for projects

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2021	Apr 2021

Feature details

In project-based organizations, it is common to have different contractual agreements for different phases of work. For example, a company could negotiate a fixed-price billing setup for the prototype phase of a project and a time-and-material type of arrangement for the actual implementation. Certain tasks on the project might be categorized as chargeable while others are nonchargeable or complimentary. With this feature, Project Operations customers can associate project tasks with project contract lines, thereby subjecting them to the same billing method, invoice frequency, and customers as that on the contract line.

This association ensures accurate invoicing, accounting, and revenue estimation and recognition to work in accordance with this setup on project tasks.

The feature allows project managers to mark certain tasks as chargeable, nonchargeable, or complimentary, which will then be enforced when recording sales values and creating invoices for the costs incurred on those project tasks.

Overview of Dynamics 365 Guides 2021 release wave 1

Microsoft Dynamics 365 Guides is a mixed-reality application that displays step-by-step holographic instructions right where the work happens, enabling employees to quickly learn and execute complex tasks.

Dynamics 365 Guides:

- Helps reduce errors and increase safety.

- Closes knowledge gaps and strengthens skills.

- Adapts to your work in real time.

- Improves training and processes.

Dynamics 365 Guides addresses the needs of three key personas: content authors, operators, and managers/analysts.

Authors can easily create guides without 3D or programming skills by using a simple PC app and a HoloLens app. Operators use guides on HoloLens in training and on the job to get guidance while they work in a heads-up, hands-free style. Trainers and managers can analyze usage data to optimize their workflows.

For the 2021 release wave 1 (April 2021 to September 2021), the Dynamics 365 Guides team is focusing on intelligent workflows. By taking further advantage of data captured with HoloLens as well as AI innovations, users can get to work and confirm their results faster and simpler than ever. In addition, new entities for completion time enable customers to build Power Automate flows that support their unique enterprise needs. For example, use the new entities to automatically mark a work order as done when a guide is completed.

Overview of Finance and Operations cross-app capabilities 2021 release wave 1

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

To enable businesses everywhere to accelerate their digital transformation, we are continuously enhancing the platform and services that support Finance and Operations apps with new capabilities. As we add product enhancements at a rapid pace, we deliver frequent updates (eight updates per year) that help customers stay current in a consistent, predictable, and seamless manner. Most capabilities introduced with the 2021 release wave 1 will be persona opt-in enabled, which allows customers to adopt new features at their own cadence. The key driver for all of the new, core capabilities is to increase productivity and return on investment.

This release wave keeps the focus on fundamentals to enhance the user experience, performance, and reliability of the service. It also continues the journey of making Finance and Operations data and business processes seamlessly available to all Dynamics 365 applications (via Microsoft Dataverse), Microsoft Power Platform, and Azure Data Lake Storage.

As Finance and Operations apps continue to integrate with Microsoft Dataverse natively, admin experiences will link Lifecycle Services with the Power Platform admin center. This wave will also enable an improved test and demo environment type that supports end-to-end experiences (including add-ins) for all Finance and Operations apps that can leverage all the new experiences.

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

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

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

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

Cross-app features

Capabilities and features benefiting all Finance and Operations apps.

Feature	Enabled for	Public preview	General availability
[Allow configuration of the publish batch size in the Excel add-in](#)	Users, automatically	Feb 2021	Apr 2021
[Freeze columns in grids](#)	Users by admins, makers, or analysts	Feb 2021	Apr 2021
[Updates to client feature states](#)	Users, automatically	Feb 2021	Apr 2021
[Upgrade to React 17](#)	Users by admins, makers, or analysts	Feb 2021	Apr 2021
[Translation support for organizational saved views](#)	Users by admins, makers, or analysts	Feb 2021	Sep 2021

Data and process integration

Finance and Operations app data and processes are available in Microsoft Dataverse and Azure Data Lake Storage.

Feature	Enabled for	Public preview	General availability
[Finance and Operations data in Microsoft Dataverse – phase 4](#)	Users by admins, makers, or analysts	Feb 2021	Apr 2021

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Data and process integration

Overview

Seamless data exchange between Finance and Operations apps and Microsoft Dataverse

This release wave supports new out-of-the-box scenarios of the dual-write framework. The dual-write framework provides a seamless experience that allows you to converge business processes between Finance and Operations apps and customer engagement apps in Dynamics 365. Administrators configure data entities in Finance and Operations apps to synchronize near real time with Microsoft Dataverse.

Finance and Operations data in Azure Data Lake Storage

Finance and Operations apps integration with Azure Data Lake Storage will be generally available in multiple Microsoft Azure regions.

Finance and Operations data in Microsoft Dataverse – phase 4

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

Feature details

Get your Finance and Operations apps data in Microsoft Dataverse and keep it up to date.

We are making the dual-write framework a seamless experience by harmonizing the converging concepts between Finance and Operations apps and customer engagement apps. This allows businesses to exchange near real-time data in a synchronous, bidirectional fashion beyond application boundaries, giving users a unified experience.

Knowing every business is unique, we have made the dual-write framework extensible. This includes enabling custom entities, as well as extensions to existing entities, to fully use Microsoft Dataverse and surrounding tools for your most important business data.

In 2020 release waves 1 and 2, we delivered features that provide multimastering capabilities for customers, vendors, and products, along with an introduction of the company concept in Microsoft Dataverse. We also covered end-to-end scenarios like on-demand pricing from Finance and Operations apps, integrated quotes, orders, invoices, assets, purchase orders, party and global address book, activities and notes, and project-to-cash scenarios along with

some reference data from finance, tax, accounts receivables, and accounts payables. For more information, see Data in Common Data Service – phases 1 and 2 and Finance and Operations data in Microsoft Dataverse – phase 3.

These scenarios can be further enriched by customers and partners so that they extend across Finance and Operations apps and customer engagement apps.

The 2021 release wave 1 brings in the following capabilities:

Capability name	Status	Minimum requirements
Expose financial dimensions on master data	Not started	Dual-write
Single view for party and its related data	Not started	Dual-write

Once again, these capabilities will be delivered incrementally.

For details, go to Dual-write home page.

Cross-app features

Overview

The 2021 release wave 1 features new capabilities that apply to Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations. The new capabilities include:

- Translation support for organizational saved views.
- Batch size configuration in the Excel add-in.
- Upgrade of the React library used by Finance and Operations applications to React 17.

Allow configuration of the publish batch size in the Excel add-in

Enabled for	Public preview	General availability
Users, automatically	Feb 2021	Apr 2021

Feature details

When users publish changes to data records using the Excel add-in, the updates are split into batches. This feature provides flexibility in the number of rows that are included in each publish batch. System administrators can specify a system-wide limit on the publish batch size for "Open in Excel" workbooks. Excel workbook template authors can also set a default

maximum publish batch size for newly created templates. Individual users have the ability to set a maximum publish batch size for each workbook.

Upgrade to React 17

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

Feature details

The React library used by Finance and Operations applications is being upgraded to React 17 (from version 15). Customers should test any extensible controls or custom JavaScript code, specifically those using React APIs, to ensure there are no issues with the upgrade. This feature is targeted to be required with the 2021 release wave 2, but it is currently optional to allow time for migration of affected APIs.

Translation support for organizational saved views

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

Feature details

This feature, which is dependent on the saved views feature, allows users to specify translations for view names and descriptions so that users see view names in their current language. This capability is only available for organizational views.

Freeze columns in grids

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

Feature details

This feature, which depends on the new grid control feature, allows users to freeze columns in the grid. Frozen columns appear at the front of the grid and don't scroll out of view. If multiple columns are frozen, they can be reordered as desired. These modifications to the grid can be saved through personalization.

Updates to client feature states

Enabled for	Public preview	General availability
Users, automatically	Feb 2021	Apr 2021

Feature details

Mandatory features with the 10.0.17 release:

- Attachment recovery
- Recommended fields
- Upgrade three jQuery components libraries

Enabled-by-default features with the 10.0.17 release: These features will be turned on by default, but can still be manually disabled. These features are all targeted to become mandatory with the 2021 release wave 2.

- Show related document attachments
- Edit basic control values in task recordings
- Allow validation of control state in task recordings

Human Resources

Overview of Dynamics 365 Human Resources 2021 release wave 1

Dynamics 365 Human Resources helps businesses empower and engage their workforce, provide modern benefits packages, and stay compliant. It allows HR professionals to be more strategic, providing the workforce insights they need to build better organization structures, compensation, benefits, leave and absence, compliance, employee and manager self-service, and performance management programs. Human Resources also centralizes people data to build an HR ecosystem, using the Microsoft Power Platform to tailor workflows, improve business intelligence, and connect with third-party best-of-breed HR solutions. Human Resources connects people and operations data to help you optimize workforce costs and take better care of employees.

For the 2021 release wave 1, we will focus on three key areas:

- **Broaden the human capital management (HCM) ecosystem**: Continue broadening our HCM ecosystem through integration APIs and strategic partnerships.

- **Reimagine the employee experience**: Expand our investments in the employee experience and bringing those experiences into the flow of work.

- **App unification**: Deliver app unification through a simplified platform with better application lifecycle management tooling and extensibility.

The next sections provide details about the specific features we're releasing across these areas.

What's new and planned for Dynamics 365 Human Resources

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

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

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

Benefits management

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

Feature	Enabled for	Public preview	General availability
Custom field support in benefits management	Admins, makers, marketers, or analysts, automatically	Mar 2021	Apr 2021
Benefits notifications	Users by admins, makers, or analysts	Mar 2021	Apr 2021
Custom field support for eligibility processing	Admins, makers, marketers, or analysts, automatically	Apr 2021	May 2021
Benefits summary statement	Users by admins, makers, or analysts	Jul 2021	Aug 2021

Integrations and extensibility

A core focus for Dynamics 365 Human Resources is ensuring customers are able to extend and expand application functionality through integrations and customizations. We're making new integrations available and providing new features that streamline custom integrations through Microsoft Dataverse.

Feature	Enabled for	Public preview	General availability
Enable simplified integration with payroll providers	Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021

Leave and absence

The leave and absence workspace provides a flexible framework for creating new leave plans, workflows for managing requests, and an intuitive self-service page for employees to request time off. Analytics help your organization measure and monitor leave balances and usage for your leave plans.

Feature	Enabled for	Public preview	General availability
Enable an absence manager to manage leave	Users by admins, makers, or analysts	May 2021	Jun 2021

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Benefits management

Overview

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

Benefits summary statement

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

Business value

Providing a consolidated view of benefits that an employee is covered for is a key part of helping employees understand their benefits package. This view across different sections of employees or locations gives benefits administrators a perspective of total average spend by employee segment or benefits type, which helps with benefits planning.

Feature details

The benefits summary statement will include:

- Coverage by benefit area and plan type.

- Total employee contribution against the benefit area.

- Total employer spend.

- Flex credit spend (if applicable).

- Dependent coverage.

- Beneficiary details across eligible plan types.

Benefits notifications

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2021	Apr 2021

Business value

Benefits notifications will notify employees about key events and enrollment information. This will be a continuation of the workspace capabilities that will be introduced for benefits management early in the year.

Feature details

Benefits notification enhancements will enable the benefits administrator to :

- Notify employees about open enrollment.

- Notify employees about plan updates due to qualifying events.

- Notify new hires when they're able to select their benefits.

Custom field support in benefits management

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

Business value

Often companies need to track data that is unique to their business. The ability to create custom fields is necessary for supporting their specific business processes. This feature provides the ability to add custom fields to forms in benefits management.

Feature details

Custom field support includes the following tables:

- Plans
- Plan coverage options
- Worker benefit plans
- Eligibility rules
- Programs

Custom field support for eligibility processing

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2021	May 2021

Business value

Human Resources is a highly customizable system aimed at tailoring to the needs of organizations across the world and their respective business processes. Benefits management doesn't currently support custom fields that organizations might have added to track their business process data around benefits management display or transactional purposes.

Typically, organizations would add custom attributes for worker data to classify them from a benefits perspective, and the system must be able to use those attributes to determine and process eligibility. This feature enables that capability in benefits management.

Feature details

The ability to use custom fields in eligibility processing will provide the following features:

- Select custom fields for employees, jobs, and positions to be used in eligibility processing.
- Define eligibility rules based on custom fields to be used on one or more benefits plan.
- View whether the employee meets the eligibility rule in the process results viewer.
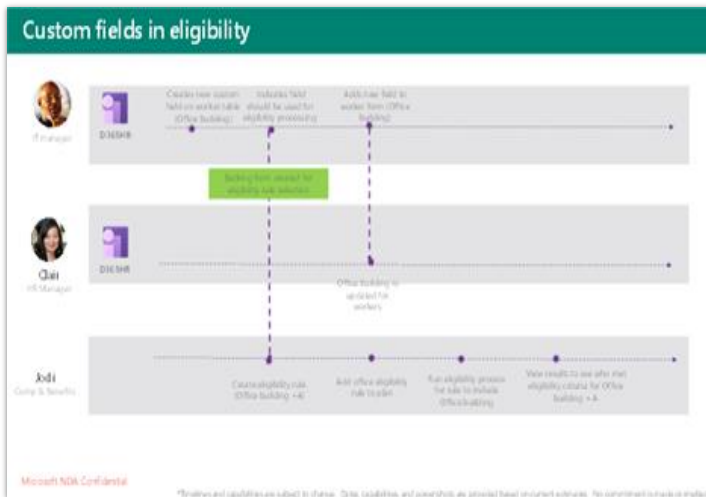
Benefits eligibility custom fields support

Integrations and extensibility

Overview

A core focus for Dynamics 365 Human Resources is ensuring customers are able to extend and expand application functionality through integrations and customizations. We're making new integrations available and providing new features that streamline custom integrations through Microsoft Dataverse.

Enable simplified integration with payroll providers

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021

Business value

Global companies often rely on in-country and other third-party providers to process payroll. Integrating their employee profile, benefit, and compensation data is necessary to effectively process payroll. They also want to provide a single point of entry for their employees to be able to update their data and view earnings statements and tax documents. By providing these in-country providers the ability to integrate with Human Resources, these customers can use any payroll provider that fits their business needs.

Feature details

This feature will enable:

- Partners to use an API to build integration to a third-party payroll system for the following:
  - Employee pay profile
  - Fixed compensation (pay rate)
  - Benefit contributions and deductions:
    - One-time payouts (such as bonus)
    - Leave balances and status
- Employees and HR professionals to view and update payroll-related information in Human Resources through deep linking with single sign-on.
- Employees and HR professionals to use Human Resources to view and update payroll-related information through an embedded experience.

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.

Enable an absence manager to manage leave

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2021	Jun 2021

Feature details

In some organizations, a people manager might not be managing the leave for their team. Instead, an absence manager might handle this process for team members across multiple departments and teams.

Absence managers will be able to manage leave with the following capabilities:

- Review and approve time off based on an alternate hierarchy.
- View team member balances.
- View absence calendar for a team.

Commerce

Overview of Dynamics 365 Commerce 2021 release wave 1

Dynamics 365 Commerce is a complete omnichannel commerce solution that enables organizations to engage with their customers, providing a delightful shopping journey across e-commerce, in-store, call-center, and emerging channels like third-party marketplaces and social platforms. A unified back office streamlines centralized administration activities and facilitates the configuration and management of all touchpoints.

With Dynamics 365 Commerce, organizations can run all their commerce-related operations on Dynamics 365 (or a third-party enterprise resource planning solution) while taking advantage of a powerful suite of applications like Dynamics 365 Fraud Protection for payment and account protection and in-store loss prevention, Dynamics 365 Connected Store (RAP as a Service) providing real-time observational data to improve in-store operations, and native integration with Microsoft Power Platform, enabling creation and execution of thousands of applications, flows, and intelligent agents with a smart, secure, and scalable low-code data platform.

Dynamics 365 Commerce enables organizations to deliver better business outcomes by:

- Establishing stronger brand loyalty through personalized customer engagements.

- Increasing revenue with improved employee productivity and support for emerging retail channels.

- Reducing overall costs by optimizing operations and driving supply chain efficiencies.

2021 release wave 1

The 2021 release wave 1 will further empower Dynamics 365 Commerce users to better understand, serve, and engage with their customers while efficiently running operations across the value chain. With frictionless information flow and in-process insights powered by the Dynamics 365 ecosystem, organizations will be better equipped than ever to realize the vision of digital transformation.

Dynamics 365 Commerce will release new capabilities in the following areas during this wave:

- Integrated B2B and B2C e-commerce offering in a single Commerce solution with unified merchandising and site management capabilities that enable a wide range of business models across industries and verticals.

- The ability to target digital commerce content by device, language, geography, and audience.

- Support for curbside pickup scenarios and task management via Microsoft Teams.

- Unlocking immersive AI-powered intelligent shopping features like *shop similar looks* and *shop similar descriptions*, which enable customers to view product recommendations based off visual cues or rich descriptions, all to drive greater return on investment.

- Intelligent product search through native integration with Bing for Commerce search.

- More robust lifecycle management to unify business processes across prepurchase and post-purchase scenarios through a native integration between Dynamics 365 Commerce, Dynamics 365 Customer Service, and Power Virtual Agents.

- API enhancements and extension points built on a composable set of robust and flexible services.

- Ease of system monitoring with rich diagnostics in-store components and e-commerce services.

- Improved SEO management features for digital commerce pages and support for Openschema.org.

What's new and planned for Dynamics 365 Commerce

This topic lists features that are planned to release from April 2021 through September 2021. 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
B2B e-commerce	Admins, makers, marketers, or analysts, automatically	Jan 2021	Apr 2021
Shop similar looks	Users by admins, makers, or analysts	✔ Oct 5, 2020	Apr 2021
Create discounts that apply after all other periodic discounts are applied	Users by admins, makers, or analysts	✔ Nov 9, 2020	Apr 2021

Feature	Enabled for	Public preview	General availability
Edit partially fulfilled customer orders in POS	Users by admins, makers, or analysts	Jan 2021	Apr 2021
Improved POS ordering and fulfillment experiences for serialized items	Users by admins, makers, or analysts	Jan 2021	Apr 2021
Omnichannel support for incremental payment capture	Users by admins, makers, or analysts	Jan 2021	Apr 2021
Refactored payment processing in storefront checkout	Users by admins, makers, or analysts	Jan 2021	Apr 2021
Email receipt improvements and new features	Users by admins, makers, or analysts	Jan 2021	Apr 2021
Exclusive threshold discounts compete with exclusive non-threshold periodic discounts	Users by admins, makers, or analysts	Jan 2021	Apr 2021
Improved user experience for pickup order processing in point of sale	Users by admins, makers, or analysts	Jan 2021	Apr 2021
Independent deployment and installation packages for MPOS, CPOS, HWS, and CSU extensions	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Simplified Commerce SDK update and developer experience	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Commerce localization for Brazil	Users by admins, makers, or analysts	-	Apr 2021

Feature	Enabled for	Public preview	General availability
Digital signing of retail transactions for France based on the fiscal integration framework	Users by admins, makers, or analysts	-	Apr 2021
Dynamics 365 Commerce and Microsoft Teams integration – add org structure, stores, workers	Users by admins, makers, or analysts	Jan 2021	Apr 2021
Synergize task management between Dynamics 365 Commerce and Microsoft Teams	Users by admins, makers, or analysts	Jan 2021	Apr 2021
Adyen payment connector for Brazil	Users by admins, makers, or analysts	-	Jul 2021
SAT integration for Brazil	Users by admins, makers, or analysts	-	Jul 2021
Highly performant and scalable customer search experience using the new cloud search infrastructure	Users by admins, makers, or analysts	Jan 2021	Jul 2021
Improvements to the POS inventory lookup operation	Users by admins, makers, or analysts	Apr 2021	Jul 2021
Support in-store inventory movement between locations from POS	Users by admins, makers, or analysts	Apr 2021	Jul 2021
Support inventory adjustments from POS	Users by admins, makers, or analysts	Apr 2021	Jul 2021
System monitoring and diagnostics for Commerce in-store components	Admins, makers, marketers, or analysts, automatically	Mar 2021	Jul 2021

Feature	Enabled for	Public preview	General availability
Enhanced search engine results for e-commerce product pages	Users by admins, makers, or analysts	Apr 2021	Jul 2021
System monitoring and diagnostics for e-commerce	Admins, makers, marketers, or analysts, automatically	May 2021	Jul 2021
Enhanced e-commerce product discovery to be inventory-aware	Users by admins, makers, or analysts	May 2021	Jul 2021
Enhancements to the e-commerce inventory availability lookup APIs	Users by admins, makers, or analysts	May 2021	Jul 2021
Chat in Commerce with Power Virtual Agents and Omnichannel for Customer Service	Admins, makers, marketers, or analysts, automatically	Apr 2021	To be announced
Shop by similar description	Users by admins, makers, or analysts	Apr 2021	To be announced
Customer segmentation and targeting	Users by admins, makers, or analysts	Jul 2021	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.

Create discounts that apply after all other periodic discounts are applied

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 9, 2020	Apr 2021

Business value

Very often retailers want to quickly create new promotions on certain items to match prices with their competitors or meet their sales targets. This new feature allows discounts to be applied after all the existing discounts are applied, enabling that scenario.

Feature details

Without this feature, if a retailer wants to create a discount that gets compounded with the existing discounts, the retailer needs to create a new discount with the discount concurrency mode configured as "Compounded." Given that there could be other existing discounts on an item that are marked as "Exclusive" or "Best price," however, there is no guarantee that this new discount will apply on all the items.

With this feature, we enabled a new discount concurrency mode called "Always apply" that will be available for simple discounts and threshold discounts. All the discounts that are created using the "Always apply" mode will get applied on the appropriate items after all the existing periodic discounts are applied. That means they will apply to the exclusive and best price discounts as well. The discounts will apply before manual discounts, though, such as cashier-added discounts.

Enhanced e-commerce product discovery to be inventory-aware

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2021	Jul 2021

Business value

Customers generally expect an e-commerce site to be inventory-aware throughout the browsing experience so that they can make decisions on what to do in case of no and low inventory. Currently, we offer an option to enable a product inventory check for "buy box," "cart," and "store picker" modules, and we only allow products to be purchased if inventory is available. We'll further apply similar checks to the product discovery steps of the e-commerce shopping journey to light up the end-to-end story.

Feature details

This feature will enhance the e-commerce product search service to incorporate inventory data, and provide users the ability to:

- Filter out out-of-stock products from product search results.

- Display inventory level messages on product search results pages and category product list pages.

- Sort product search results by inventory availability.

- Filter products by inventory level on refiners.

SAT integration for Brazil

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

Business value

Registration of electronic fiscal documents for retail sales in an integrated SAT device (Sistema Autenticador e Transmissor de Cupons Fiscais Eletrônicos) is one of the fiscal registration methods available to retailers in the São Paulo state of Brazil. The feature includes the generation of CF-e electronic fiscal documents (Cupom Fiscal eletrônico, model 59) for sales transactions in retail point of sale (POS) and registration of the electronic fiscal documents in the SAT fiscal device.

Feature details

This feature enables fiscal registration of retail sales in a SAT device connected to a hardware station. It takes advantage of the fiscal integration framework, meaning it supports all of the built-in fiscal integration capabilities. It is included in the out-of-the-box solution but must be configured to be used.

The generation of the electronic fiscal document model 59 (CF-e) is based on an Electronic reporting configuration and is done by the electronic reporting runtime engine that is part of the Commerce runtime.

The feature currently does not support customer orders that are picked up in POS. Support for the customer order pickup operation will be added later.

Adyen payment connector for Brazil

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

Business value

The Dynamics 365 Payment Connector for Adyen is an out-of-the-box payment connector that supports various payment instruments globally. This feature extends the payment connector to support payment operations in stores that are located in Brazil.

Feature details

The feature extends the Dynamics 365 Payment Connector for Adyen with the following capabilities that are specific to Brazil:

- Support for double-purpose cards.

- Saving payment-related data, such as cart type and transaction code (NSU), in sales transactions and reporting it in electronic fiscal documents NFC-e/NF-e/CF-e.

Independent deployment and installation packages for MPOS, CPOS, HWS, and CSU extensions

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Business value

The current extension packaging model requires extensions and core application code to be packaged together to apply a hotfix or to upgrade. This requires more effort because merge and repackaging are required each time a hotfix or upgrade is applied. Also, if the Commerce components are customized, the same process must be repeated for every hotfix. This limits the continuous integration and continuous deployment process. New independent deployment and installation packages for Modern POS (MPOS), Cloud POS (CPOS), Cloud Scale Unit (CSU), and Hardware Station (HWS) will eliminate the merging and repackaging effort. The feature also allows users to independently package, manually deploy, and service the extensions and core separately.

Feature details

The new independent packaging feature separates extensions from the core and provides options to create extension-only packages that can be independently installed and serviced.

The core installer framework is completely redesigned to separate the core and extension installer. MPOS, CPOS development, and packaging framework is also enhanced to support this independent package and installation model by inheriting the Windows optional package, Desktop Bridge, and MSIX technologies. To support this new extension framework, the MPOS, CPOS, and packaging models will be updated with a new extension template, UI controls, packaging, and deployment tools.

With this new model, all MPOS extensions will be created as separate APPX files and core POS will load these APPX files as add-ins. The add-ins (extensions APPX) will run under the context core MPOS app identity. Previously, the core POS and extensions were packaged as one APPX, but now there will be one core APPX and one extensions APPX to support independent installation and servicing. The extension APPX will not be able to run by itself. It will be loaded only by the core APPX. To migrate the old MPOS extension to this new model, migrate the code to the new extension template. This might require some code refactoring to support the new UI controls and framework.

The HWS and CSU installer framework is redesigned to create installers that can contain only the extension components. With the new installers, HWS and CSU can be independently serviced for both extensions and out-of-the-box components.

Note This feature includes only the development and creation of an extension package. It doesn't include any Dynamics 365 Lifecycle Services deployment and servicing. Those enhancements will be added in later releases.

Simplified Commerce SDK update and developer experience

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Business value

Dynamics 365 Commerce SDK updates are published in Dynamics 365 Lifecycle Services, and the SDK can be applied to all the dev environment using the Lifecycle Services workflow or through a manual process. The process takes a few hours and needs to be repeated for all monthly updates. With the new approach, all of the SDK updates will be published to a public NuGet and GitHub repository so that updates can be downloaded and applied to the environment in minutes. This approach saves time and effort for developers.

Feature details

- **Extension development**: Commerce SDK development can be done mostly from the developer virtual machine (VM) available in Lifecycle Services. If it's hosted in the cloud, though, additional cost is incurred. To reduce the cost and the Lifecycle Services development VM dependency, the Commerce development experience will be decoupled from the Lifecycle Services developer VM and development will be supported

outside of the developer VM. Development can be done on any development machine that supports the Commerce development environment configurations.

- **Commerce SDK reference to NuGet**: Commerce SDK references will be refactored and published to a new NuGet feed for extensions to consume. Instead of manually referring the binaries in Commerce SDK\Reference folder, the extension can download it from the NuGet package and the package can be easily updated to the latest available version using the NuGet package manager workflow.

- **Commerce SDK samples to GitHub**: All the Commerce SDK samples will be published to a public GitHub repository for extensions to refer and learn how to customize the Dynamics 365 Commerce solution to support custom business processes. Updated samples can be easily download and referenced by cloning to this public repository without the need to download and apply any binary hotfix from Lifecycle Services.

Dynamics 365 Commerce and Microsoft Teams integration – add org structure, stores, workers

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

Business value

Businesses will be able to leverage the well-defined organization structure within Dynamics 365 Commerce and provision Microsoft Teams to help regional managers, store managers, and store workers jumpstart with Microsoft Teams.

Feature details

This feature provides an ability to provision Microsoft Teams and easily reflect organization structure from Dynamics 365 Commerce into Microsoft Teams. A team for each store will be created and employees from the store's worker book will be added as members.

Improved user experience for pickup order processing in point of sale

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

Business value

This feature provides improved user experiences when selecting items for pickup from the point-of-sale (POS) **Recall Order** or **Order Fulfillment** pages.

Feature details

This feature improves upon the user experience in POS when working with customer pickup orders. When users choose the **Pick up** operation from the **Recall Order** or **Order Fulfillment** pages in POS, they will have an improved user experience for choosing the items for pickup.

This is the final feature released in the 2021 release wave 1 that improves the overall buy-online, pickup-in-store (or curbside) experience. Previous released features in 10.0.15 and 10.0.16 that align to this area can also be enabled along with this feature to allow for an overall improved pickup-in-store experience:

- Support for multiple pickup delivery modes (controlled by feature management).

- Optional support for configuring timeslots for store pickup (configured in Commerce HQ).

- Improved recall order operations in POS (controlled by feature management).

- Customize transactional email templates by mode of delivery (controlled by feature management).

- Card-not-present processing for pickup orders without hardware station (configured in Commerce HQ on registers).

Enhancements to the e-commerce inventory availability lookup APIs

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2021	Jul 2021

Business value

Dynamics 365 Commerce has provided GetEstimatedAvailability and GetEstimatedProductWarehouseAvailability APIs to support various e-commerce scenarios that require product inventory check. For example, display inventory-level message on the product description page (PDP) and check inventory availability for "quantity picker" and "store picker" modules. We will continue to invest in improvements to the APIs to support more e-commerce scenarios based on in-market customer feedback, and address the limitations in current APIs to eliminate customizations.

Feature details

This feature will provide the following enhancements to the **GetEstimatedAvailability** and **GetEstimatedProductWarehouseAvailability** APIs:

- Ability to retrieve quantity in Sell unit of measure (UoM) from the APIs. The APIs only return quantity based on Inventory UoM. For retailers who configure products to use

different Inventory UoM and Sell UoM, customization is required to handle unit conversion. This enhancement will provide an option in APIs to retrieve quantity based on Sell UoM.

- Ability to retrieve aggregated inventory data from the APIs. There are a growing number of retailers who set up their e-commerce sites to use multiple warehouses to facilitate product fulfillment. In that scenario, when showing inventory level on the PDP or determining purchase eligibility based on inventory, we should consider the product's on-hand inventory from all relevant warehouses rather than a single warehouse. Today the APIs only return inventory data per individual warehouse. This enhancement will provide users the ability to retrieve aggregated quantity and inventory level from the APIs based on all relevant warehouses, all shipping warehouses, or all pickup locations.

- Factor in point-of-sale (POS)-side unposted inventory changes when calculating estimated inventory. The APIs are using optimized channel-side calculation logic to surface estimated on-hand inventory. Today this calculation only factors in e-commerce transactions that haven't yet been synced to Commerce headquarters. In an omnichannel context, transactions that have occurred in a retail store (such as cash-and-carry sales) might also impact the inventory availability for e-commerce sales. This enhancement will update the calculation logic to include unposted inventory sold through POS, to ensure the same product in the same warehouse shows consistent estimated inventory from the online channel and POS inventory lookup page.

Support in-store inventory movement between locations from POS

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	Jul 2021

Business value

Some retailers are managing multiple locations in a store (for example, backroom and salesfloor locations) and need the ability to move inventory from one location to another. Commerce point of sale (POS) will provide comprehensive in-store inventory management capabilities that are common to a majority of retail customers and eliminate the need for multiple applications in a store.

Feature details

This feature will enable a new operation accessible from Commerce POS that allows users to move inventory of one or more specific products from one location to another within a store warehouse. The feature will leverage the inventory transfer journal concept from Commerce headquarters to drive the inventory movement processing.

Enhanced search engine results for e-commerce product pages

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	Jul 2021

Business value

Dynamics 365 Commerce will enable native support for schema.org/product metadata in e-commerce product pages. This will improve the product page search results experience and drive conversion for consumers using modern search engines. E-commerce product pages will use existing Commerce headquarters product data to simplify and streamline the merchandising workflow.

Feature details

This feature enables native support for schema.org/product metadata in e-commerce product pages. Standard product data authored in Commerce headquarters can automatically flow into product pages through the native Commerce module library. The schema.org/product structure is a standard for modern search engines, and this feature simplifies use of existing product data to drive enhanced e-commerce search engine results.

Customer segmentation and targeting

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2021	To be announced

Business value

Dynamics 365 Commerce will give retailers the ability to target specific customer segments with relevant experiences that promote engagement and drive an increase in overall conversion rates. Segmentation will be enabled for page layouts and content within site builder, leveraging system rules to target content by device type, geolocation, market, or language.

Feature details

This feature will enable the segmentation of customer data such as device type, geolocation, market, or language, gathered from the customer browser instance. Site builder can then be used to generate audience groupings that can be applied to campaigns and experiments across the digital commerce channel.

Content variants can be authored in site builder and associated with targeting rules to ensure easy authoring with powerful results.

Segmented targeting will support page layouts and content-based scenarios within site builder.

Highly performant and scalable customer search experience using the new cloud search infrastructure

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2021	Jul 2021

Business value

Customer data is the lifeblood for businesses and yet almost all businesses run into the problem of duplicate customer records. Data cleanup is very costly yet essential for many business lines to perform effectively, such as marketing departments. Often, duplicate records result from a poor customer search experience in the stores at the point of sale (POS). If a sales associate cannot easily find the customer record, they might end up creating a new record, resulting in data duplication. Therefore, it is crucial to provide a snappy customer search experience for associates that also provides flexibility to search by various customer properties.

Feature details

With this enhancement, retailers will be able to easily switch their current customer search experience from SQL-based search to cloud-powered search. With this switch, retailers will not only see performance improvements but also benefit from rich refinement and improved relevance capabilities. This new search will automatically scale up to meet business needs and perform efficiently even with large customer data sets.

Shop by similar description

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	To be announced

Business value

Enabling more ways to discover products based on key characteristics such as product descriptions creates a more engaging and robust discovery journey for a shopper. Such recommendations enable customers to easily and quickly find the products they need and want (**relevant**), find more than they had originally intended (**cross-sell**, **upsell**), all the while

having an experience that serves them well (**satisfaction**). For retailers, this functionality helps drive conversion opportunities across all customers and products, resulting in more all-up sales revenue and customer satisfaction.

Feature details

Using the power of AI and machine learning, shoppers can find more products with similar descriptions. For retailers that rely heavily on text-based narratives to promote their products, especially where an image doesn't provide enough detail, text-enriched recommendations can bring more relevant choices to the shopper.

Shop similar looks

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 5, 2020	Apr 2021

Business value

Shop similar looks can bring fresh and appealing choices to the forefront of the shopping experience using the power of AI and machine learning. The effect can be transformative and can create additional selling power as shoppers find more of the things they want in an easy-to-use visual experience. This functionality uses images in the existing product catalog and will be available both at the point of sale and in online store experiences.

Feature details

Shop similar looks is a new AI capability for Dynamics 365 Commerce that uses the images of a seed product to discover which other products in the catalog look similar. By making this functionality available for all retail channels in Commerce, retailers can increase customer satisfaction by helping customers feel like they can easily find what they want in a more intuitive way.

See also

Enable "shop similar looks" recommendations (docs)

Synergize task management between Dynamics 365 Commerce and Microsoft Teams

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

Business value

Retailers will be able to notify frontline workers on mobile devices through the Microsoft Teams mobile app. Retailers will also be able to synergize task management between Dynamics 365 Commerce and Microsoft Teams to improve productivity.

Feature details

This integration will provide:

- The ability to sign in with Azure Active Directory (Azure AD) accounts in the point-of-sale (POS) application.

- A connected experience for tasks between Commerce and Microsoft Teams that uses the planner as a repository.

- The ability to notify frontline workers of upcoming or past-due tasks by using the Microsoft Teams mobile app.

Email receipt improvements and new features

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

Business value

Emailed receipts provide retailers with opportunities for customer engagement while serving as a vital component in contactless shopping scenarios. This release provides new flexibility and customizability for emailed receipts that allow retailers to configure and tailor emailed receipt experiences by receipt type.

Feature details

This release provides the following new email receipt capabilities:

- **Ability to email common receipt types**: Receipt types that customers typically receive during checkout, as part of gift card balance inquiries, or through the journal, can now be sent via email. Currently, the format for the sales receipt (receipt type 1) is the only receipt type that can be emailed. This restriction is being removed.

- **Associate a receipt type with a custom email template**: All receipt types can now be mapped to a specific email template.

- **Granular configuration of emailed receipts**: Receipt types can be individually configured to be emailed. The receipt format for each receipt will offer the following options: always email, do not email, and prompt user.

- **Options for emailed gift receipts**: Cashiers will have the option of selecting different products to be included in the emailed gift receipt versus the printed gift receipt.

- **Better email receipt authoring**: HTML can now be uploaded for email receipts without having to remove carriage returns and line feeds.

Improved POS ordering and fulfillment experiences for serialized items

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

Feature details

This feature will improve the user experience for selling and fulfilling order lines within the point-of-sale (POS) application for products that are controlled by serial numbers. New validation logic will check for "active," "active in sales process," "allow blank issue," and "physical negative inventory" configurations on items and warehouses to ensure that users in POS enter accurate and required serial number data when selling or fulfilling POS orders with serialized items.

For items that are configured as "active" on their serial number dimension setup, the POS application will also validate the serial number being sold against inventory availability to prevent or warn users if they are selling serial numbers that do not appear to be in store inventory based on the available channel-side inventory snapshot information.

Edit partially fulfilled customer orders in POS

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

Feature details

In the current in-market application, customer orders created in the store channel or online channel can only be edited through the point-of-sale (POS) application if the order is still fully open with no quantities picked, packed, or invoiced (or canceled). This feature will allow users in POS to edit orders that were originally created in a store or online channel and that are partially fulfilled. Users will be able to add additional lines to partially fulfilled customer orders, edit or void lines where the full quantity is still unprocessed, and in some cases, make limited changes to lines where some of the quantity on the line has already been fulfilled or invoiced.

This feature will not allow the POS user to edit orders created by the call center channel, regardless of the order's fulfillment state, when the call center order was created with "enable order completion" turned on.

B2B e-commerce

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

Business value

The global e-commerce industry has been experiencing rapid growth during the last two decades, and with growth comes change. The opportunity for business-to-business (B2B) sales has seemingly received significantly less attention, possibly due to the millions of entrepreneurs competing for business in the business-to-consumer (B2C) market.

The data reflects that the tremendous potential for B2B e-commerce can't be ignored for long, though. B2B e-commerce transactions in the United States have grown 40 percent, from $559 billion in 2013 to $780 billion by end of 2015. In 2018 alone, B2B e-commerce sales in the United States were estimated to exceed $1 trillion with continuous forecasted growth, according to Forrester Research.

Furthermore, 74 percent of B2B buyers research online and 30 percent buy at least one-half of their work purchases online. Manufacturers, distributors, and wholesalers alike are investing heavily in next-generation enterprise B2B commerce technology to ensure they are delivering world-class online buying experiences that can scale for anticipated growth. As a result of this wave of investment, manufacturing and wholesale trade firms will spend more on commerce technology by the end of the decade than their peers in B2C retail.

As e-business teams look for solutions in the market, not only are they benchmarking their future-state online buying experience against B2B peers like Grainger, but also against B2C leaders like Amazon and Walmart. They need solutions with a best-in-class foundation of B2C features, such as robust marketing and merchandising and experience management tools. Unique B2B capabilities such as contract pricing, quotes pricing lists, e-procurement, product configuration and customization, guided selling, bulk order entry, and account, contract, and budget management can then be layered on top.

Feature details

As a part of our B2B e-commerce initial offering, the following capabilities will be enabled:

- Business partner onboarding.
- Order templates.
- Quantity thresholds (minimum, maximum, multiple).

- On account payment method.

- Salesperson for business partner.

- Handling of customer deposits.

- Account statement and invoice printing.

- Payment of sales invoice.

- Quick order entry.

- Dynamics 365 Sales integration.

- Return order and return merchandise authorization (RMA).

- Order cancellation.

- Matrix control for order entry.

Chat in Commerce with Power Virtual Agents and Omnichannel for Customer Service

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2021	To be announced

Business value

A first-class customer support experience is of utmost importance if you want to provide a personalized and delightful commerce experience for a consumer. Multiple commerce touch points exist today, such as physical stores, online channels, and social channels, and consumers expect a personalized support experience in all of them. A first-party solution for customer service across all the commerce channels is not just an expectation, but a requirement for our customers.

Feature details

Customer service functionality will be added to Dynamics 365 Commerce by leveraging the capabilities in Dynamics 365 Omnichannel for Customer Service and Power Virtual Agents. New functionality will include chat and Power Virtual Agents chatbot-based support on e-commerce websites. Customer service agents will be enabled to better serve customers by using a unified view of profile and transaction data across the Dynamics 365 apps in the Omnichannel for Customer Service support channel. Agents will act on data from the service channel. Site administrators will be able to configure the chat widget on the e-commerce site with proactive notification capability based on different criteria.

The Power Virtual Agents starter content pack will be made available to enable retailers to jumpstart deployment and make modifications to meet their business needs. Topics in the

content pack will showcase how Power Automate connects to Commerce headquarters and Commerce Server APIs to take action on behalf of the customer via Power Virtual Agents.

Digital signing of retail transactions for France based on the fiscal integration framework

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

Business value

According to local cash register regulations in France, any retail sale must be digitally signed and an excerpt from the signature must be printed in the customer's receipt for the sale. This new functionality extends the fiscal integration framework and covers the digital signing requirements. The functionality enables global and local Dynamics 365 Commerce customers to comply with the local cash register regulations in France.

Feature details

The digital signing of retail transactions for France now takes advantage of the fiscal integration framework, meaning it supports all of the built-in fiscal integration capabilities. It is included in the out-of-the-box solution but must still be configured to be used. The feature enables fiscal registration of sales by means of digital signing in various cash-and-carry sales and customer order scenarios, as well as fiscal registration of audit events of various types.

This update will pass the next annual NF 525 certification audit that is planned for February-March 2021.

Support inventory adjustments from POS

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	Jul 2021

Business value

Many retailers need the ability to adjust inventory in or out to account for standard business processes such as using store inventory for samples or other purposes where they prefer to perform an adjustment manually as opposed to a sale. Commerce point of sale (POS) now provides comprehensive in-store inventory management capabilities that are common to the majority of retail customers to eliminate the need for multiple applications in the store.

Feature details

This feature will provide an operation accessible from POS to allow an authorized user to perform an adjustment of inventory in or out depending on their business scenario. The feature will provide options that allow the use of both the movement journal and the adjustment journal concepts from Commerce headquarters to be leveraged in POS. Users will be able to link a reason code to the adjustment that will determine the journal type that will be used.

Omnichannel support for incremental payment capture

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

Business value

This feature will help with customer satisfaction because orders fulfilled within a reasonable timeframe will no longer be subject to multiple authorizations. In addition, fewer authorizations per order means lower processing fees and fewer cases where the remaining balance on an order cannot be authorized.

Feature details

Incremental capture adds the ability to fulfill an order over time using a single payment authorization. For example, a customer might have an order that is fulfilled over three shipments. Without this feature, each time a shipment is invoiced, payment will be captured for the amount invoiced and a new authorization will be created for the remainder. In this scenario, three authorizations are needed over the course of order fulfillment. This can lead to cases where authorizations exceed the total amount of the order, or declines due to authorizations exceeding open credit available for cardholders.

When this feature is enabled, payments for orders fulfilled from the distribution centers or stores will reference the original authorization as long as it valid. The result will be fewer declines, less customer confusion, and easier reconciliation of payments and invoices.

Refactored payment processing in storefront checkout

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

Business value

This feature reduces the number of authorization requests to the payments processor, resulting in lower payment processing fees. It also adds better support for Strong Customer Authentication (SCA) in the European Union by combining the customer authentication by their bank with the authorization request for the amount due on the order.

Feature details

In Europe, SCA requires that if a customer is paying for an online transaction using a card, the website must support redirecting the customer for authentication as the cardholder directly with their bank. If the customer can be authenticated by their bank prior to the authorization request, the transaction is considered more secure and the liability shifts away from the merchant. Today, that customer authentication is done when the card token is obtained. That card token is then used in a subsequent authorization request. From the merchant's standpoint, that subsequent authorization request does not have a liability shift because it was made using a card token, or card on file. This can cause confusion for merchants using the storefront.

When this feature is enabled, a single request will be made to obtain the card token and authorization. The request will also include SCA redirect. The result is that merchants will see one authorization request that includes the liability shift where SCA is applicable. For merchants subject to SCA requirements and those who are not, this feature will result in fewer authorization requests, which translates into lower processing fees.

Commerce localization for Brazil

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

Business value

Commerce localization for Brazil includes features critical for implementations of Dynamics 365 Commerce in Brazil, such as the calculation of taxes applicable to retail sales, the generation of fiscal documents that describe business operations and are used to build tax and corporate reporting, the generation of electronic fiscal documents and submission of the documents to authorities: Nota Fiscal eletrônica (NF-e) and Nota Fiscal do Consumidor eletrônica (NFC-e), and the integration with local payment providers and support of debit and credit card payments.

Commerce customers with operations in Brazil will be able to move to the modern Dynamics 365 Commerce service and ensure the compliance of their implementation with local regulatory requirements in Brazil (limited to the scope of Brazilian localization published at docs.microsoft.com).

Feature details

This functionality provides the following capabilities:

- Calculation of Brazil-specific taxes and generation of fiscal documents for retail sales.

- Generation of electronic fiscal documents NFC-e/NF-e for retail sales, submission of the electronic fiscal documents via the government's web services, and printing of DANFE NFC-e/NF-e.

- Generation of electronic fiscal documents CF-e (Cupom Fiscal eletrônico) for retail sales and registration of the electronic fiscal documents in the SAT fiscal device.

- Management of Brazil-specific customer registration numbers from point of sale (POS), including entering, viewing, and modifying the numbers, and printing the registration numbers in receipts for retail sales.

- EFT integration for POS, including integration with popular local and global payment providers.

The following capabilities are currently planned to be released after the general availability of the Commerce localization for Brazil:

- Generation of electronic fiscal documents CF-e (Cupom Fiscal eletrônico) and registration of the electronic fiscal documents in the SAT fiscal device. This capability is currently planned for July 2021.

- Extension of the Dynamics 365 Payment Connector for Adyen to support payment operations in Brazil. This capability is currently planned for July 2021.

- Generation and submission of linked NF-e.

- Generation and submission of NFC-e/NF-e for customer orders.

- N-1 support, enabling customers running Dynamics AX 2012 R3 in their stores to work with Dynamics 365 Commerce headquarters after an upgrade.

- Searching customers by registration numbers in POS.

- Support for Brazil-specific fields, such as tax registration numbers, when merging customer master records in a call center.

- E-commerce capabilities for Brazil.

We are not currently planning to include retail fiscal documents into Brazilian fiscal book statements (SPED Fiscal, SPED Contributions, and ICMS-ST compensation and restitution statements for RS, SC, PR, and SP).

Geographic areas

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

- South America

Improvements to the POS inventory lookup operation

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	Jul 2021

Business value

Inventory lookup in Dynamics 365 Commerce point of sale (POS) provides retailers with a holistic view of product on-hand inventory across stores and distribution centers. We will continue to invest new features for this operation based on in-market customer feedback to improve the user experiences and eliminate customization.

Feature details

This feature will add the following enhancements to the POS inventory lookup operation:

- Ability to sort inventory data on the inventory lookup page. The sorting capability will be based on the displayed columns on the page.

- Ability to launch inventory lookup page from the product details page of a **non-variant** product. Today, the quick access to inventory lookup page from product details page is only available for products with variants.

System monitoring and diagnostics for Commerce in-store components

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2021	Jul 2021

Business value

Access to system diagnostic logs allows better visibility for IT administrators and enables improved time to detection, time to mitigation, and time to resolution of live-site incidents. IT administrators are able to determine key contributing factors of incidents, which allows for targeted engagement with Microsoft support teams, or with implementation partners, ISVs, or other stakeholders.

System health visibility also allows IT administrators to provide more informed support to their users. For instance, when fielding a support call from a cashier in a particular store, an IT administrator can easily pinpoint when exactly the issue occurred, whether the issue was caused by an extension, and whether the issue is widespread or limited to specific stores or e-commerce channels. In addition, the IT administrator can determine issue resolution as

soon as the issue is resolved. IT administrators can also configure alerts for specific system health conditions to be proactively notified.

This specific feature enables health diagnostics of in-store components as well as correlation of diagnostic events between in-store and cloud-hosted components, for detailed traceability of issues through the system. In addition, events from in-store components enable centralized access for IT administrators to diagnostic events across hundreds or even thousands of store locations.

Feature details

This feature enables access to diagnostic logs for in-store components, including:

- Point of sale (POS)
- Hardware Station (embedded within POS)
- Hardware Station (standalone)
- Commerce runtime (embedded within POS)

System-generated event details include POS operation invocations, page views, exceptions, Commerce runtime and Hardware Station API executions, success/failure result, API execution latency, publisher (to help attribute issues to Microsoft-authored code paths or to specific extensions), among others. Dependency executions to channel database as well as Commerce headquarters are also available.

IT administrators can author custom queries in Application Insights to filter across a wide range of criteria including activity ID, timestamp, channel ID, POS device ID (if applicable), app session, and user session ID. IT administrators can share these specific identifiers with Microsoft support for improved communication and collaboration, and improved mitigation and resolution times.

For proactive monitoring, IT administrators can configure custom alerts based on specified query result thresholds using Azure Monitor.

System monitoring and diagnostics for e-commerce

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	May 2021	Jul 2021

Business value

Access to system diagnostic logs allows much better visibility for IT administrators and enables improved time to detection, time to mitigation, and time to resolution of live-site incidents. IT administrators are able to determine key contributing factors of incidents, which allows for targeted engagement with Microsoft support teams, or with implementation partners, ISVs, or other stakeholders.

System health visibility also allows IT administrators to provide more informed support to their users. For instance, when fielding a support call from a website visitor, an IT administrator can easily pinpoint when exactly the issue occurred, whether the issue was caused by an extension, and whether the issue is widespread or limited to specific e-commerce channels. In addition, the IT administrator can determine issue resolution as soon as the issue is resolved. IT administrators can also configure alerts for specific system health conditions to be proactively notified.

Feature details

This feature enables IT administrators to access diagnostic logs in Application Insights for e-commerce components. The following event types are included:

- Page views (all page views).

- All dependencies.

- Background calls (modeled as page view dependencies), both from browser and NodeJS.

- User displayed error messages (modeled as exceptions), including 404 pages.

- Multistage cart operations (modeled as page view dependencies).

Using these events, IT administrators can troubleshoot any customer-reported issues or proactively monitor the system for specific error conditions and thresholds.

Exclusive threshold discounts compete with exclusive non-threshold periodic discounts

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

Business value

The most common use case of threshold discounts is to give additional discounts if the customer meets the defined threshold. Dynamics 365 Commerce supports this capability, as the threshold discounts are always evaluated after the simple, quantity, and mix and match discounts have been evaluated. In other words, a threshold discount does not compete with any of the other periodic discounts. However, sometimes retailers want the threshold discount to compete with other discounts so that the best discount gets applied.

Feature details

With this feature, retailers will be able to turn on a configuration that will ensure the exclusive threshold discounts compete with the other exclusive non-threshold discounts to offer the best price.

Overview of Dynamics 365 Connected Store 2021 release wave 1

Dynamics 365 Connected Store is a turnkey software as a service (SaaS) solution that gathers and analyzes observational signals to create insights and automate actions for retailers in their stores. Using computer vision, Dynamics 365 Connected Store gathers observational signals and analyzes them to produce actionable insights. An important goal for Dynamics 365 Connected Store is to offer benefits to retailers that are traditionally available only to online retailers, and to help bridge the physical and digital divide.

Dynamics 365 Connected Store achieves this by using the following hybrid approach:

- **Intelligent edge**: A managed gateway in the store that converts camera streams into observational data sent to the cloud.

- **Intelligent cloud**: A multitenant SaaS solution that correlates observational signals from the edge to provide insights and trigger actions for the retailer.

Stay tuned for more details on new and planned features.

Fraud Protection

Overview of Dynamics 365 Fraud Protection 2021 release wave 1

Today's digitally transformed enterprises conduct significant portions of their business online and in real time. For example, omnichannel customer engagement (seamless customer journey across mobile, web, and in-store portals) is revolutionizing the retail industry. Such innovations are driving higher revenue, reduced operating costs, and improved customer experience.

However, they are also exposing the enterprise to serious threats from those who attempt to take advantage of the online channel's relative anonymity and accessibility to commit fraud. In e-commerce, for example, people might attempt to use compromised accounts and stolen payment instruments to commit payment fraud. Similarly, fraudsters might abuse programs such as "buy online and return in-store" to commit returns or discounts fraud that leads to shrinkage losses for brick-and-mortar stores.

Fraudsters attempt other activities such as creating fake accounts to abuse free trials and new-customer freebies or post fake product reviews. They also try to compromise existing accounts to commit payment, warranty, or refund fraud. All these examples of fraudulent activity impact not just an enterprise's profitability but also its reputation. *It is our mission to help digitally transformed enterprises fight fraud while keeping their doors open for genuine customers and partners.*

Dynamics 365 Fraud Protection brings together account protection, payment protection, and loss prevention providing a 360-degree view of the fraud landscape to merchants and provides tools to finetune the operations that will help to mitigate fraud.

What's new and planned for Dynamics 365 Fraud Protection

This topic lists features that are planned to release from April 2021 through September 2021. 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
Behavioral and mobile fingerprinting	Users, automatically	Aug 2021	
Test and verify rules	Users, automatically	Aug 2021	

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Behavioral and mobile fingerprinting

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

Business value

Behavioral and mobile fingerprinting improves the accuracy of fraud management rules.

Feature details

Fighting fraud is a never-ending challenge and we need to stay one step ahead of fraudsters. A new technology that can be very useful in fraud protection is called behavioral fingerprinting or behavioral biometrics. While device fingerprinting allows us to sense and reason over device characteristics and even uniquely identify devices, behavioral telemetry can allow us to reason over signals about how a user is interacting with the portal. The signals are particularly informative when the user is relying on a mobile device or app to access the portal. Behavioral fingerprinting is closely allied to mobile fingerprinting.

A broad variety of signals belong in this category ranging from typing, swiping, scrolling, and dwelling behaviors, to how a device is held and moved as detected by sensors, to navigation and clicks. The goal with this functionality is not to identify a particular individual uniquely, but rather to have discrimination between normal versus abnormal usage of a device or service.

For example, if a device shows no movement and shows a constant horizontal attitude, it's unlikely that a person is interacting with the device and any activity most likely is coming from a scripted bot working on a rigged device. Similarly, one can learn to discriminate between the true owner of a device and someone else who might be using it illicitly, or we can sense that a device is being used by many different people over a short time, indicating that it's a "pony" device. Behavioral fingerprinting can help improve the accuracy of AI models across all Dynamics 365 Fraud Protection capabilities.

Test and verify rules

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

Business value

The functionality enables customers to test and verify rules before deployment, so there's no inadvertent impact on their production system. Customers can also create tested rules in advance for anticipated scenarios such as holiday season sales.

Feature details

Three clear asks that have come from customers involve testing and verification of rules before deployment to production. This feature enables the following and will help increase customer satisfaction with the Dynamics 365 Fraud Protection rules engine:

- Ability to test rule changes before pushing to production, which could take the form of shadowing, A/B testing, or replay over historical transactions.
- Ability to see performance metrics about each rule.
- Ability to query all transactions based on a variety of attributes and use the results for offline workflows.

SMB

Overview of Dynamics 365 Business Central 2021 release wave 1

Dynamics 365 Business Central provides a comprehensive business application solution, designed and optimized for small and midsized organizations. For 2021 release wave 1, Business Central investments center on helping customers to get to productive usage faster, whether they are new or existing customers, by providing in-app improvements to help them get started. We continue our geographic expansion, and we improve performance, usability, and printing. To help users be productive even if they make a mistake, we make it easy to correct dimensions for general ledger (G/L) entries, for example.

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: The 2021 release wave 1 delivers a set of features designed to simplify and improve the way our partners administer tenants, and the way administrators manage licensing and permissions.

Application: We continue to listen to our customers, and we'll deliver features for some of the most requested areas for improvement, such as banking, payments, and much more.

Better with Microsoft 365: In Business Central 2021 release wave 1, we improve the efficiency of collaborative business processes in Microsoft Teams, and we harden the Excel and Outlook add-ins.

Country and Regional: With Business Central 2021 release wave 1, Business Central is generally available in India, and we expand to Greece, Romania, and Turkey.

Onboarding: With 2021 release wave 1, customers can get to productive usage faster.

Modern development tools: As we have moved entirely to Visual Studio Code, we continue to invest in areas that enhance productivity for developers.

What's new and planned for Dynamics 365 Business Central

This topic lists features that are planned to release from April 2021 through September 2021. 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.

Administration

Business Central 2021 release wave 1 delivers a set of features designed to simplify and improve the way partners administer tenants, and the way administrators manage licensing and permissions.

Feature	Enabled for	Public preview	General availability
Improve the reliability of the database export operation for larger databases with more companies	Admins, makers, marketers, or analysts, automatically	Mar 2021	Apr 2021
Improvements for the Delegated Administrators	Admins, makers, marketers, or analysts, automatically	Mar 2021	Apr 2021
Reassign an environment from one Azure Active Directory organization to another (through Microsoft Support)	Admins, makers, marketers, or analysts, automatically	Mar 2021	Apr 2021

Application

With Business Central 2021 release wave 1, we'll deliver features for some of the most requested areas for improvement, such as banking, payments, and continued improvements to performance.

Feature	Enabled for	Public preview	General availability
Assisted setup helps move the task of adjusting item costs to the background	Users, automatically	Mar 2021	Apr 2021
Automatic creation of lot and serial number information cards	Users, automatically	Mar 2021	Apr 2021
Bank reconciliation improvements	Users, automatically	Mar 2021	Apr 2021

Feature	Enabled for	Public preview	General availability
Changes in synchronization between contact and customer	Users, automatically	Mar 2021	Apr 2021
Define lot sizes for various stages of production	Users, automatically	Mar 2021	Apr 2021
Dimension corrections (for G/L entries)	Users, automatically	Mar 2021	Apr 2021
More control over settings for default dimensions	Users, automatically	Mar 2021	Apr 2021
Payment reconciliation journal improvements	Users, automatically	Mar 2021	Apr 2021
Simplified bank statement file import	Users, automatically	Mar 2021	Apr 2021

Better with Microsoft 365

In Business Central 2021 release wave 1, collaborative business processes in Microsoft Teams are more efficient, we add support for Universal Print, and we harden the Excel and Outlook add-ins.

Feature	Enabled for	Public preview	General availability
Look up Business Central contacts from within Microsoft Teams	Users, automatically	Feb 2021	Apr 2021
Enablement of Word merge in Business Central	Users, automatically	Mar 2021	Apr 2021
Support cloud printing using Microsoft Universal Print	Users, automatically	Mar 2021	Apr 2021

Country and regional

The 2021 release wave 1 brings Dynamics 365 Business Central to more countries with release in India, Greece, Romania, and Turkey.

Feature	Enabled for	Public preview	General availability
Country and regional expansion – Greece	Users, automatically	Mar 2021	Apr 2021
Country and regional expansion – India	Users, automatically	Mar 2021	Apr 2021
Country and regional expansion – Romania	Users, automatically	Mar 2021	Apr 2021
Country and regional expansion – Turkey	Users, automatically	Mar 2021	Apr 2021

Microsoft Power Platform

With Business Central 2021 release wave 1, we improve integration with Microsoft Dataverse and Microsoft Power Platform.

Feature	Enabled for	Public preview	General availability
Virtual tables for Microsoft Dataverse	Admins, makers, marketers, or analysts, automatically	Apr 2021	-
Synchronize item availability from Business Central to Dynamics 365 Sales	Users, automatically	Mar 2021	Apr 2021
Enable Power BI connector to work with Business Central APIs, instead of with web services only	Users, automatically	Apr 2021	May 2021

Modern clients

Business Central 2021 release wave 1 brings improvements to performance, usability, and printing.

Feature	Enabled for	Public preview	General availability
Report API allows passing the layout needed for report execution	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Reports run in the background	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Client performance improvements	Users, automatically	Feb 2021	Apr 2021
Usability enhancements for the Business Central web client	Users, automatically	Feb 2021	Apr 2021
Enable cloud printing on mobile app (phone and tablet) and from Microsoft Teams app	Users, automatically	Mar 2021	Apr 2021
Users can change the assigned printer before printing a report	Users, automatically	Mar 2021	Apr 2021

Modern development tools

As we have moved entirely to Visual Studio Code, we continue to invest in areas that enhance productivity for developers.

Feature	Enabled for	Public preview	General availability
Partners can add keys (indexes) to base tables and table extension tables	Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature	Enabled for	Public preview	General availability
Extension validation on upgrade	Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021
Interface – obsolete support	Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021
Report extensibility	Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021
Return record link instead of name when using lookups	Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021

Onboarding

With the 2021 release wave 1, customers can get to productive usage faster.

Feature	Enabled for	Public preview	General availability
Getting started checklists for guided and faster initial setup	Users, automatically	Mar 2021	Apr 2021
Improve the experience of getting started with Power BI	Users, automatically	Mar 2021	Apr 2021
Improved company setup experience	Users, automatically	Mar 2021	Apr 2021
In-app contextual help improvements	Users, automatically	Mar 2021	Apr 2021

Description of **Enabled for** column values:

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

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

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

Administration

Overview

Dynamics 365 Business Central 2021 release wave 1 delivers a set of features designed to simplify and improve the way partners administer tenants, and the way administrators manage licensing and permissions. The release wave brings improvements to the administration center and to permissions management.

Reassign an environment from one Azure Active Directory organization to another (through Microsoft Support)

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

Business value

Protect business continuity and allow customers keep their Business Central environments running in situations where their Azure Active Directory (Azure AD) organization layout changes.

Feature details

In some cases, the Azure AD organization of a Business Central customer changes after they acquire a Business Central environment. For example, this can occur if business entities merge, or if an acquisition takes place, or if the customer decides to use one Azure AD organization in a specific region and stop using other Azure AD organizations that they created in other regions. It also can happen if the environment was mistakenly created by the reselling partner for the wrong Azure AD organization.

In all such cases, the customers want to preserve the Business Central environments they created for the original Azure AD organizations, and link them to the new ones instead.

In this release wave, we are adding a new capability to Business Central online so that Microsoft Support can reassign an environment from one Azure AD organization to another, based on the partner's support request. When logging such support requests, the partner must provide proof of their delegated admin rights in both Azure AD tenants as well as a confirmation from the customer that the environment move is authorized by them.

Improve the reliability of the database export operation for larger databases with more companies

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

Feature details

Customers with larger databases that include more companies struggle to export data in the .bacpac format for troubleshooting, data analysis, and long-term data retention purposes. In such cases, the database export often times out due to insufficient resources allocated to this operation by Azure. We are working on a more reliable solution for the database export.

Improvements for the Delegated Administrators

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

Business value

Provide partner users, acting as delegated administrators, with additional access and capabilities to help them service their customers better.

Feature details

With this release, we enable delegated administrators to perform more actions in the Business Central environment. These actions used to be only available to licensed customer users. This will enable partners to provide better support for their customers.

Job queues are used in numerous business-critical scenarios in Business Central today, yet our partners were unable to verify that the job queues they configured could actually run. For example, they couldn't tell whether they had the required permissions or license. Setting up and testing Business Central environments before handing them over to the customers is an essential task for partners (delegated administrators).

Regarding job queues, partners acting as delegated administrators can now perform the following activities:

- Pause a job queue, which was scheduled by a licensed user.

- Restart a failed job queue, which was scheduled by a licensed user.

- Run a job queue one time, for one full cycle, to verify that it works. They can call it as many times as needed before handing it over to the customer (licensed user) to start it as a recurrent job. After the job queue completes, it will be put in the on-hold status and can't be rescheduled.

Also with this release, delegated administrators can change the Business Central user experience from **Essential** to **Premium** on the **Company Information** page.

It's common that partner users are also registered as business-to-business (B2B) guest users in the customer's Azure directory—for example, in order to collaborate via Microsoft Teams. In the past, partner users invited as B2B guests would lose their delegated administration access to Business Central environments of the customer. With this release, partner users that have a delegated administration relationship with the customer will keep the same access to Business Central and the Business Central admin center, even if they're added as B2B guests.

Application

Overview

With Business Central 2021 release wave 1, we'll deliver features for some of the most requested areas for improvement, such as banking, payments, and continued improvements to performance. It is simple and easy to add an unlimited number of dimensions, which are used throughout the application. However, until now it has been difficult to correct errors if a user specified the wrong dimension. With this release wave, you can correct dimensions for general ledger (G/L) entries to make sure your financial reporting gives you the insights you want without having to make notes of temporary data entry mistakes.

Changes in synchronization between contact and customer

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Feature details

We are changing the way data is synchronized between customer cards, contacts of type Company, and contacts of type Person.

Business Central continues to keep in sync any customer record and contact record that are linked through the **Business Relations** action. Similarly, we continue to propagate data from

contacts of type Company to linked contacts of type Person, while respecting the settings from the **Marketing Setup** page.

New in this release wave is that the contact selected in **Contact Code** and **Contact Name** on the customer card will no longer be used for sync. These fields contain the default contact of type Person for the specific customer to be used in documents. While you still can add a contact of type Company, there is not much sense in it. We recommend using the **Link to existing** action from the contact card instead to register the connection between a customer and a contact of type Company. For more information, go to To link a contact to an existing customer, vendor, employee, or bank account.

Note that fields on the **Address & Contact** FastTab of the customer card are related to the *customer*, not the *contact person*. They'll no longer be updated when you choose a new contact in the **Contact Code** or **Contact Name** fields.

After all, in most cases, you wouldn't want Business Central to copy private email from the specified contact of type Person to the customer card, and then synch it to the contact of type Company, or to other contacts of type Person that are linked to the same company.

To highlight this new behavior, we reorganized fields on the **Address & Contact** FastTab on the customer card, isolating the **Contact Code** and **Contact Name** in a separate group.
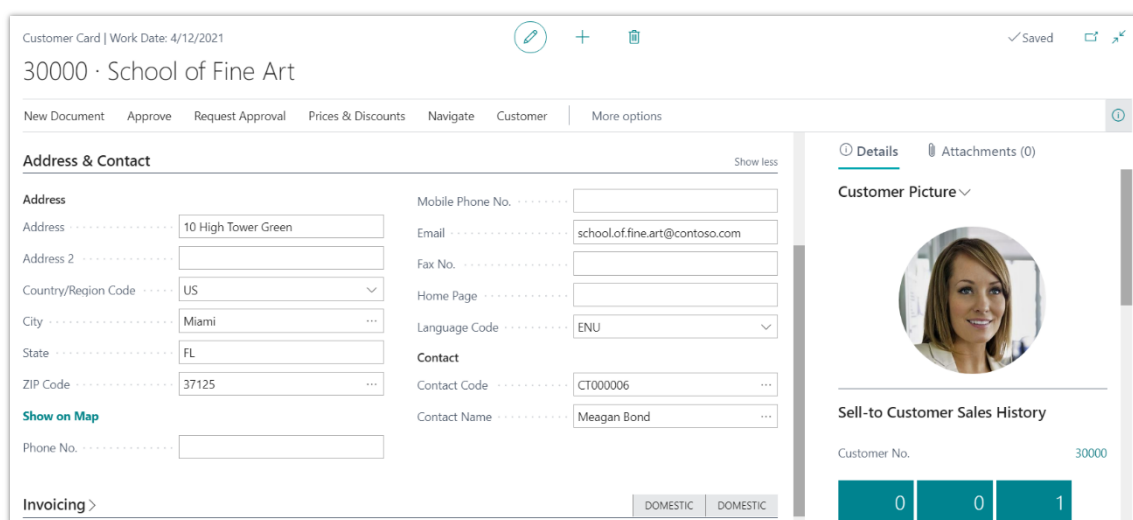
New layout of Address and Contact tab

Automatic creation of lot and serial number information cards

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

Some industries not only need to track lot and serial numbers, they also need additional information about them. To support that, Business Central offers the **Lot No. Information** and **SN Information** pages, where you can add notes, such as information about the quality of a lot, and block the use of numbers if needed. These pages are often extended for specific industries. You can create these pages to add details directly while you create item tracking lines. Alternatively, if you create lot and serial numbers in bulk, you can add details automatically when you post inventory transactions.

Feature details

To create an information card when you post journals or documents, go to the **Item Tracking Code** page and turn on the toggle for **Create SN Info. on posting** or **Create Lot No. Info on posting**. For even more control, go to the **Item Tracking Lines** page and use the **New SN Information Card** or **New Lot Information Card** actions. If you create serial numbers in bulk by using the **Create Customized SN** or **Assign Serial No.** actions, you can enable **Create SN Information** and an information card will be created for each tracking line.

Learn more: [Work with Serial and Lot Numbers](#)
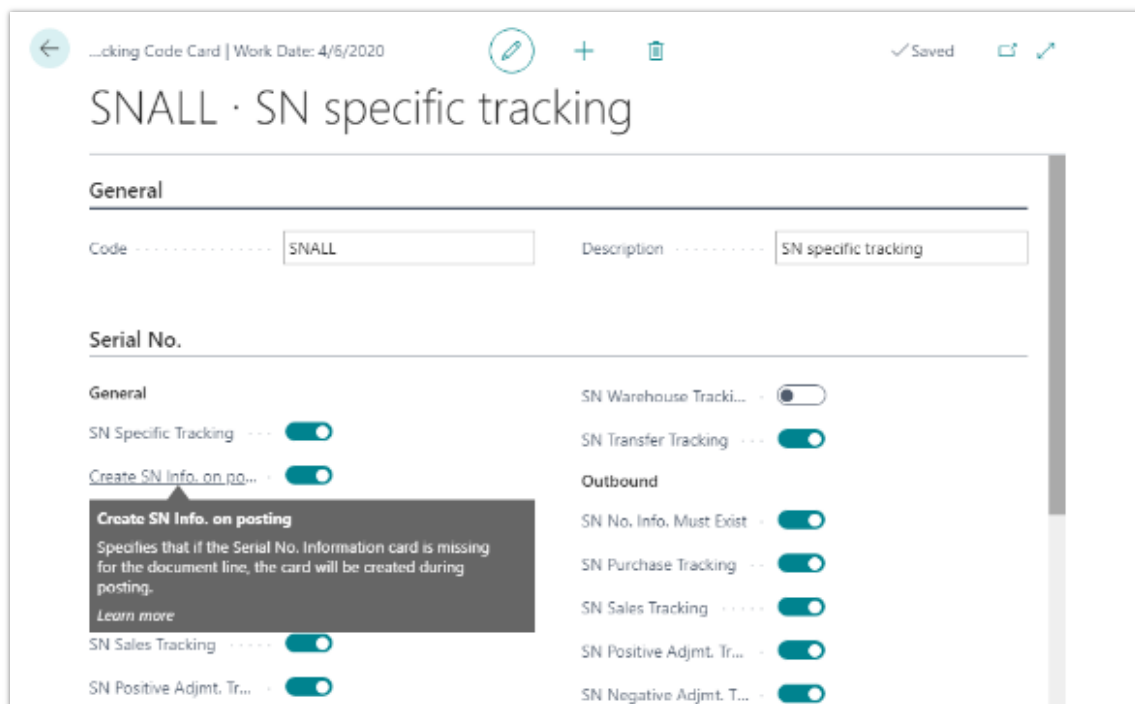
Item tracking code
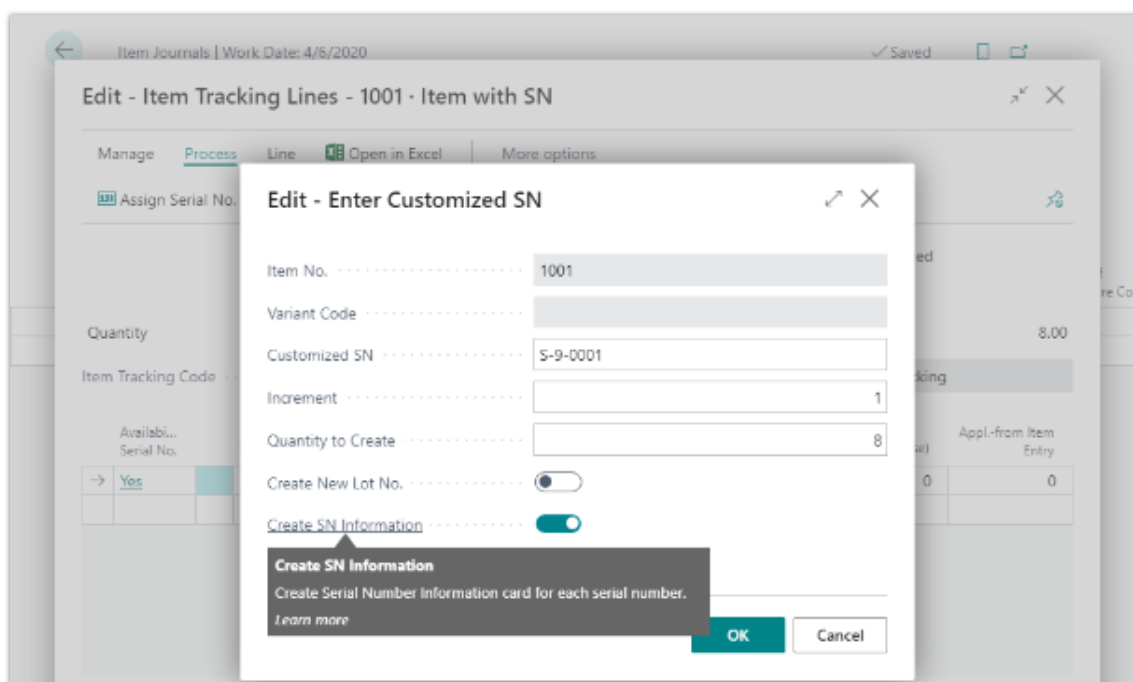
Customized serial number

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

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

See also

Design Details: Item Tracking Lines Page (docs)

Assisted setup helps move the task of adjusting item costs to the background

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Feature details

To optimize the experience, most features in Business Central are turned on by default. However, as data accumulates over time, that might impact performance. To reduce the load

on the application, it's often helpful to use job queue entries to move tasks to run in the background.

However, creating the job queue entries can be tricky, even for an experienced consultant, so we're introducing an assisted setup guide to make the process easier for adjusting item costs. On the **Inventory Setup** page, when you turn off the **Automatic Cost Posting** toggle, or specify **Never** in the **Automatic Cost Adjustment** field, an assisted setup guide becomes available, and can help you on each step of the way.
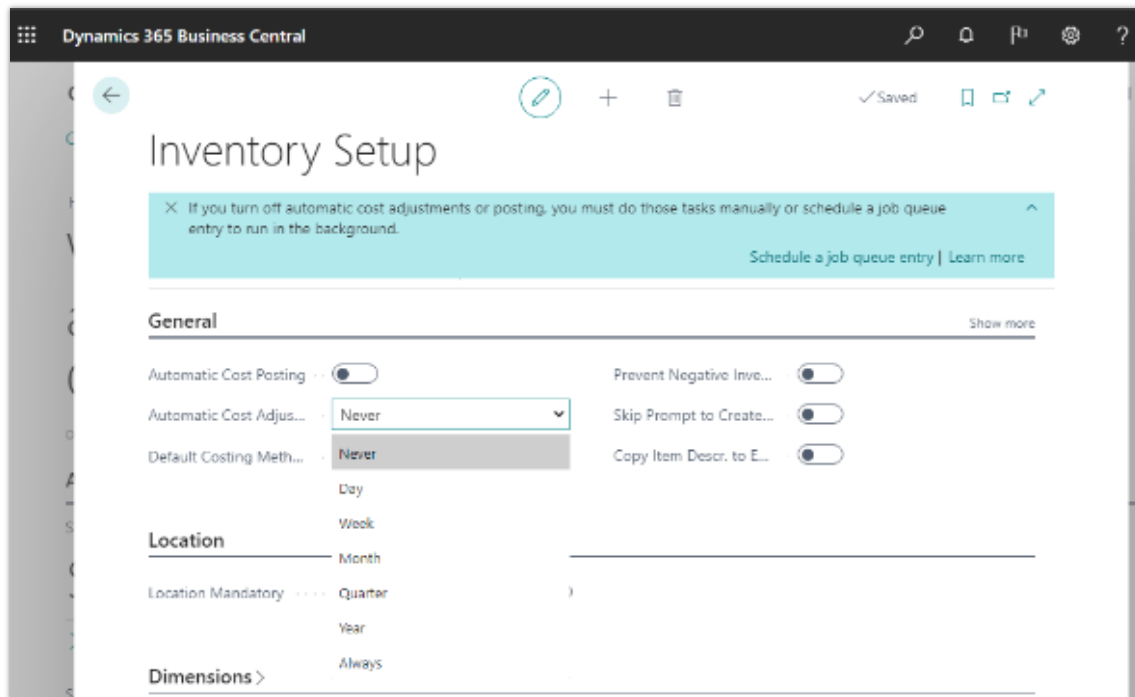
Notification in the Inventory Setup window
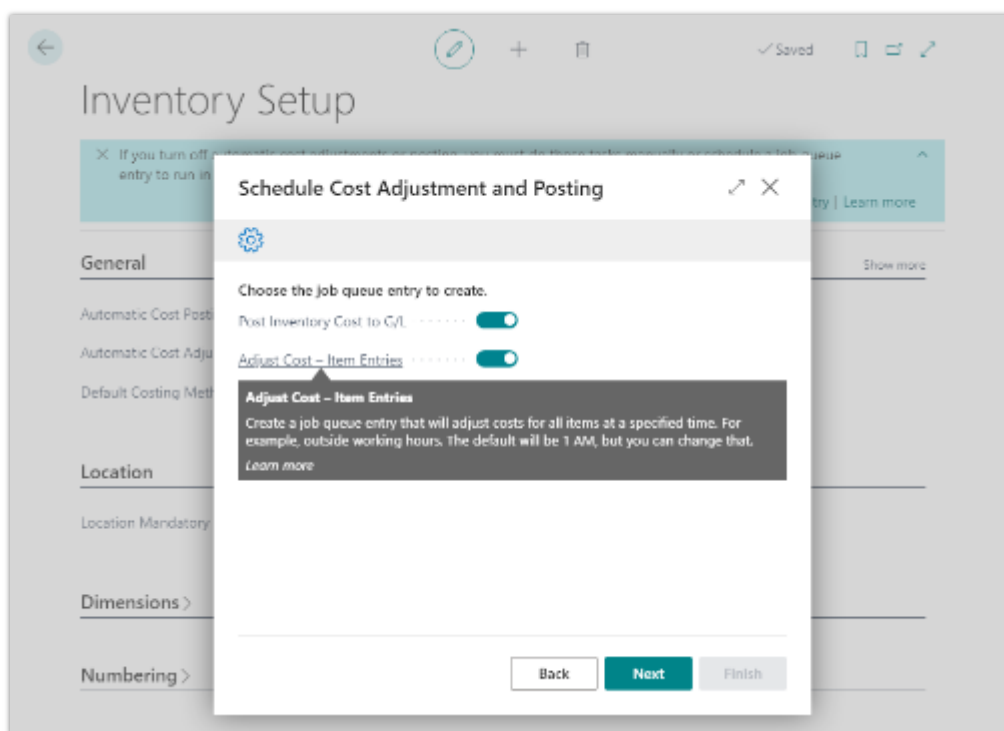
Schedule Cost Adjustment and Posting assisted setup

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Set Up General Inventory Information (docs)

More control over settings for Default Dimensions

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

Consistent and accurate dimension value attributes on operational and financial transactions ensures great insights from business data in Business Central. With this feature, your controllers and finance and accounting users have greater control over prerequisites for recording any transaction that must include dimension value attributes that will later be used in business analysis and reporting.

Feature details

Instead of allowing users to pick just any dimension value, when the dimension **Value Posting** is set to **Code Mandatory**, using **Allowed Dimension Values** in the **Default Dimensions** page, users can now pick from a predefined list of allowed dimension values that controlling, finance, or accounting departments choose as valid for particular master data, documents, or transaction posting in Business Central.

For example, your company wants to track customer revenue by geography using the AREA dimension, as shown in this example in the Business Central documentation. Your finance department sets all customer revenue transactions to include an AREA dimension value by choosing **Code Mandatory** in the AREA dimension's **Value Posting** column in the **Default Dimensions** page.

Continuing the example, you have a customer that has operations both in North and South America, but not in the Pacific area. For such customers, you choose **Code Mandatory** in AREA dimension's **Value Posting** column in the **Default Dimensions** page, and then, in the **Allowed Dimension Values** field, you choose *North America* and *South America* only.

This way, Business Central checks the dimensions values and requires the order processor to specify an AREA dimension value, and that the dimension values that the order processor picks are either *North America* or *South America* when they post sales invoices and other transactions for this customer.

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.

Define lot sizes for various stages of production

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

Companies have more flexibility when they define lot sizes, and can use the sizes when calculating duration times for production orders.

Feature details

In addition to the ability to specify lot sizes on routing lines, you now can also set lot sizes on the following pages:

- Routing version. See Routing Version Lines (page 99000767)

- Planning worksheet. See Planning Routing Line (page 99000830)

- In various production orders directly. See Prod. Order Routing (page 99000817)

By default, the Lot Size field is hidden on these pages. However, you can easily add it by personalizing the pages.

Production Order Routing line with lot size

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

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

See also

Handling Lot Sizes in Production (docs)

Simplified bank statement file import

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

For most businesses, it is important to keep an updated ledger to reflect your business bank account. In this update, we simplify the bank statement import capability, so that users can take a regular flat file (.csv, .txt), and map the file's columns to fields in Business Central.

Feature details

Users can often download various transaction file formats from their bank. With the new capability, users can configure the import of flat file and comma- or semicolon-separated transaction formats, so that they can more easily import files they have produced or manipulated to fit with the mapping that they have configured.

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.

Payment reconciliation journal improvements

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

Users become more efficient in using the payment reconciliation journal due to improvements that make it possible to use posting preview on the journal, define a number series for the journal, and use different document numbers on different lines.

Feature details

The payment reconciliation journal will support applications against employee ledger entries, have preview posting enabled, separate number series, and user-defined document numbers. It will now be possible to select multiple lines to transfer differences to a journal.

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.

Bank reconciliation improvements

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

Bank reconciliation is a critical accounting task for most businesses because it helps ensure that everything is registered and cash positions are correct. The features for bank reconciliation have been improved to make it easier to see how the automatic application rules have been applied. The bank reconciliation report, known as the test report for bank reconciliation, is now also available for posted bank reconciliations (bank statements).

Feature details

From the **Bank Acc. Reconciliation** page you can cancel a bank reconciliation that was posted with mistakes, and then from the **Bank Statements** page you can run a new bank reconciliation report.

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

Reconcile Bank Accounts (docs)

Dimension corrections (for G/L Entries)

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

You can now correct dimensions for general ledger (G/L) entries to ensure your financial reporting gives you accurate insights without having to make notes of temporary data entry mistakes. For one or more G/L entries, you can change the dimension values, add dimensions, or remove them.

Feature details

When a data entry mistake happens, either in journal entries, document posting, or data added through APIs, it distorts the picture of the business you get from financial analyses. Often, the data is used only for financial reporting, and doesn't necessarily need to be corrected on the source document.

On the **General Ledger Entries** page, the **Correct Dimensions** action lets you correct dimensions on posted entries by editing the dimension value, adding new dimensions, or removing them. Administrators can also lock dimensions for corrections, specify that

corrections must respect closed accounting periods, and view a change log for a given G/L entry in order to revert the entry to its original value.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

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

See also

Working with Dimensions (docs)

Better with Microsoft 365

Overview

By adding support for collaborating on Business Central data in the Microsoft Teams app, we are bringing the best tool for collaboration together with the best tool for managing business processes.

On top of that, new support for Universal Print means users can print directly from the Business Central clients.

Support cloud printing using Microsoft Universal Print

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

Universal Print is a Microsoft 365 service that modernizes print management and delivers a simple, straightforward printing experience. With Business Central supporting cloud printing via Universal Print, you can now send documents and reports to any of the printers defined in your Universal Print management page.

Feature details

This feature adds a native extension that enables cloud printing using the newly released Microsoft Universal Print technology. This is in addition to our existing email printing capabilities for supported devices (like HP ePrint and more) and third-party extensions previously built by Business Central partners (including PrintNode support and more).

With Universal Print and Business Central together, you can:

- Enhance Business Central with printing experience powered by Microsoft 365 cloud.

- Unblock the move to the cloud and support printing for Azure Active Directory (Azure AD) users without a complex, hybrid print setup.

- Print only to devices users have access to.

- Eliminate the need to manage print servers or install printer drivers, including existing printers (via a software connector, connector appliance, or directly).

- Print from anywhere when connected to the internet and authenticated to Azure AD.

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.

Look up Business Central contacts from within Microsoft Teams

Enabled for	Public preview	General availability
Users, automatically	Feb 2021	Apr 2021

Business value

Business Central offers a comprehensive business contact management system that is essential for users in sales, operations, or other departmental roles. Users in such roles often need to initiate calls with their vendors, customers, and other contacts in Microsoft Teams. By quickly accessing business contacts from Microsoft Teams, customers don't need to switch applications for a simple lookup, and can view details entirely within Microsoft Teams.

Feature details

- Look up Business Central contacts from the Microsoft Teams search box or from the message compose area.

- Share a contact with your coworkers during conversations in Microsoft Teams.

- View contact information and historical data in the details window in Microsoft Teams, and immediately start a call.

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.

Enablement of Word merge in Business Central

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

You can use the mail merge functionality in Word to use data from Business Central to add a personal touch to bulk communications.

Feature details

When you want to send a document to a lot of recipients—for example, to your customers and contacts as part of a sales campaign—you can use Word's mail merge capability to personalize each document by pulling data about the recipients from Business Central.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

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

See also

Managing Report and Document Layouts (docs)

Country and regional

Overview

With 2021 release wave 1, we expand to India, Greece, Romania, and Turkey. With these releases Business Central will now be available in 52 countries and regions.

Country and regional expansion – Romania

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Romania is done through partner-led localizations that will be available as localization apps in AppSource. Together with the availability of Romanian language, Dynamics 365 Business Central will be available to serve customers in Romania.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Country and regional expansion – Greece

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Greece is done through partner-led localizations that will be available as localization apps in AppSource. Together with the availability of Greek language, Dynamics 365 Business Central will be available to serve customers in Greece.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Country and regional expansion – Turkey

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to Turkey is done through partner-led localizations that will be available as localization apps in AppSource. Together with the availability of Turkish language, Dynamics 365 Business Central will be available to serve customers in Turkey.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Country and regional expansion – India

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

There is a large demand for Dynamics 365 Business Central online. We are increasing the global availability to cover more countries and regions so that small and midsized businesses across the world can achieve more.

Feature details

Expansion to India is done through a new localization delivered by Microsoft and will be included with new Dynamics 365 Business Central environments in India as a first-party app on top of the international base app (W1).

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.

Microsoft Power Platform

Overview

With Business Central 2021 release wave 1, we improve integration with Microsoft Dataverse and Microsoft Power Platform.

Synchronize item availability from Business Central to Dynamics 365 Sales

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

When you engage with customers in Dynamics 365 Sales and prepare sales orders for fulfilment in Business Central, the inventory availability of products on the sales orders is of the utmost importance for sales people to be able to communicate if and when a sales order can be fulfilled.

Feature details

When the admin sets up the connection to Dynamics 365 Sales, either through the **Assisted Setup** or through the **Microsoft Dynamics 365 Connection Setup** page, you can enable inventory availability synchronization by choosing **Automatically Synchronize Item Availability**. This way, when inventory changes in Business Central, the change is automatically reflected in Dynamics 365 Sales.

When users enter sales order lines in Dynamics 365 Sales, the **Quantity on Hand** field on the sales order will contain information about the availably inventory from Business Central.
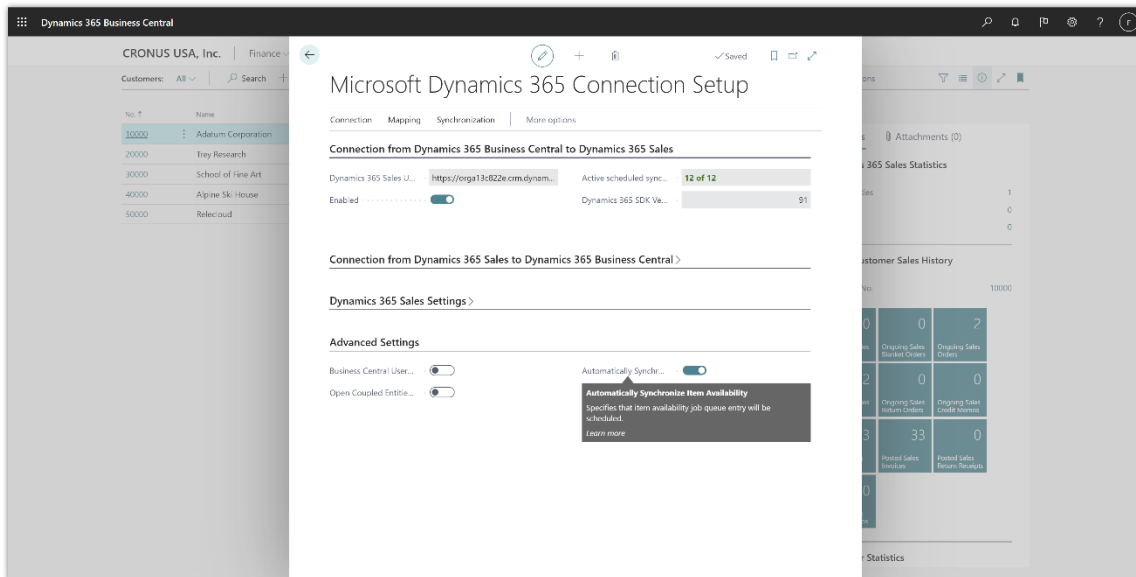
Shows Dynamics 365 Connection Setup page's Automatically Synchronize Item Availability check box
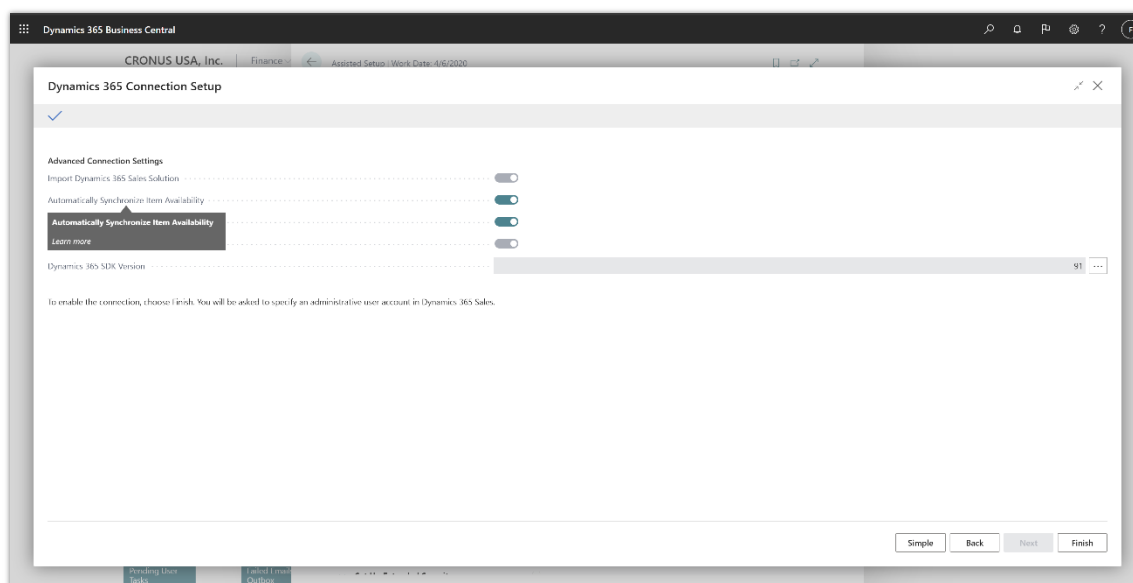
Shows Assisted Setup for Dynamics 365 Sales in advance mode with Automatically Synchronize Item Availability

NOTE This change is introduced as part of the Basic Authentication and Web Service Access Key deprecation effort. You can learn more about this at Deprecated Features in W1.

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.

Enable Power BI connector to work with Business Central APIs, instead of with web services only

Enabled for	Public preview	General availability
Users, automatically	Apr 2021	May 2021

Business value

Faster and more robust data analysis is key for any modern organization. While Business Central already offers tight integration with Power BI, it relies strictly on web services. This feature enables modern and richer data sources for your reports hosted in Power BI.

Feature details

With this feature, instead of having to enable pages as web services, you can now create Power BI reports and dashboards by using the modern Business Central APIs, including both

the built-in and customized APIs. This gives customers and partners access to better and faster data analytics in Power BI.

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.

Virtual tables for Microsoft Dataverse

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2021	-

Business value

With this preview, integration with Microsoft Dataverse becomes even better. Enabling virtual table to native table relations will provide the opportunity to integrate Business Central virtual tables into native Microsoft Dataverse solutions.

Feature details

Additional functionality will be available for the virtual table preview solution for Dynamics 365 Business Central. Functionality includes adding relations between native and virtual tables, supporting the multiline type, and pagination on data from virtual tables.

Modern clients

Overview

Business Central offers an extensive portfolio of clients that empowers users to achieve more at their desks, at home, or on the go. With users across a diverse range of business roles and proficiency levels, and with local and accessibility needs, we are committed to make sure that the user interface is both intuitive to start with and powerful when needed.

Your voice matters: We assess feedback across numerous community channels at a regular cadence, and we run user studies. Based on this research, we have identified client enhancements for 2021 release wave 1 so that users will benefit from improved performance, usability, and printing.

Enable cloud printing on mobile app (phone and tablet) and from Microsoft Teams app

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

The type of a device or experience shouldn't block the user from printing to cloud-enabled printers. With the modern workforce connecting to Business Central via different mobile devices, it was essential to enable the capability of sending document and report printouts to cloud-enabled printers that are supported by Business Central.

Feature details

When cloud-enabled printers are defined in Business Central on the **Printer Management** page, it's now possible to use them to print via the cloud when working with Business Central:

- In Microsoft Teams desktop, tablet, or phone with the Business Central app for Microsoft Teams installed.
- On Windows tablet, Apple iPad, or Android tablet using the Business Central mobile app.
- On Apple iPhone or Android mobile phones using the Business Central mobile app.
- On any Windows 10 device using the Business Central app from Microsoft Store.

To learn more about how to connect Business Central and Microsoft Teams, go to Business Central and Microsoft Teams Integration.

To get the mobile app on your device, go to https://businesscentral.dynamics.com/getapp.

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.

Client performance improvements

Enabled for	Public preview	General availability
Users, automatically	Feb 2021	Apr 2021

Feature details

Based on the success of FactBox performance enhancements in earlier releases, we've applied similar optimizations to Role Center home pages.

Parts load one by one, starting from the top, and only if they are shown on screen. The remaining parts are loaded on demand when you scroll to them, reducing the total time to load the Role Center and allowing you to start interacting with Role Center content quicker.
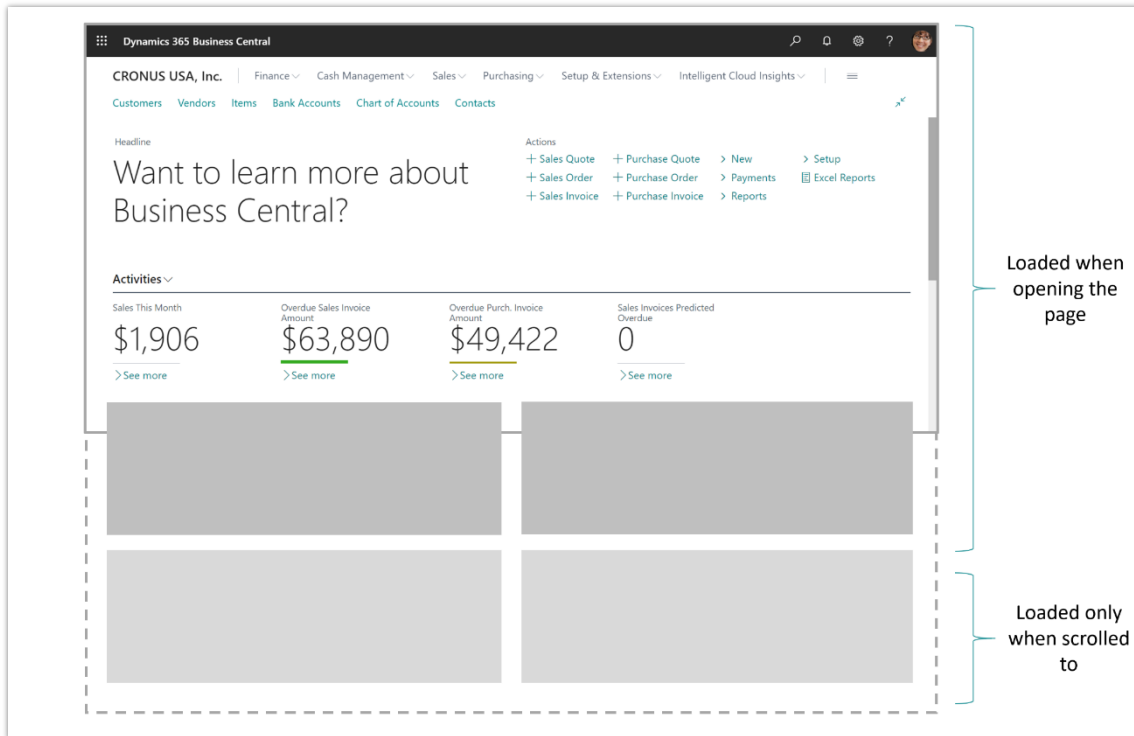
Illustration of a Role Center home page indicating how parts not on screen are not loaded

This improvement applies to desktop and tablet clients.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Usability enhancements for the Business Central web client

Enabled for	Public preview	General availability
Users, automatically	Feb 2021	Apr 2021

Feature details

Double-click a record in a list

Lists of records now accept double-clicking as a quick way to activate a single record. This is consistently available when viewing the list as rows or even as tiles.

Even though you can now double-click in the empty space between record values, you can continue to single-click on any hyperlinked values to activate them, or click repeatedly on nonhyperlinked values to select and then copy the text.

A double-click triggers the default action for the record. For example, on most lists, this would drill down into the details card page for the record. In a lookup dialog, this would instead choose the record and close the dialog.

Consistently select all text when clicking on a field

Today, using the Tab or Enter keys to set focus to a field, or selecting an editable cell in a list, always selects the entire field value. This is convenient for quickly replacing the field value. With this update, we are aligning the remaining cases that didn't select the entire field value with a single-click, so that they now do.

Working at reduced browser width or upscaled screens

We've made the desktop interface more responsive, where it adapts automatically to the available space. This accommodates diverse screen resolutions, low-vision users who are more comfortable working with a scaled-up UI, as well as embedding the Business Central web client into small frames inside other applications. Enhancements include:

- Page inspection pane can be collapsed to the side of the screen.

- Horizontal scrollbar added to fixed layout and grid layout controls to prevent compressing tabular values.

- Action buttons on report request pages and all dialogs are always visible and accessible.

- Report preview stretches to fill the available space, and toolbar buttons remain visible and accessible.

- At reduced width, page margins automatically shrink to display more content.

- Buttons and menus in the Business Central header remain accessible.

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.

Users can change the assigned printer before printing a report

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Feature details

After defining report destinations using the **Printer Selection** page, users can now change the assigned printer before printing a given report. This applies only to cloud-enabled printers available in Business Central, regardless of the cloud technology (like email print, Universal Print, PrintNode, and more).

Report API allows passing the layout needed for report execution

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Business value

Both from AL and in the request page, it is possible to set the report layout that should be used when generating the report.

Feature details

Similar to the report execution timeout parameters, the layout will be a parameter to the report execution.

Reports run in the background

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Business value

Users won't have to wait for reports to complete. They can keep working and take a look at the reports when they have time.

Feature details

When running a report from the request page or from AL code, the report is now scheduled to run. A background task will pick up the request, and then start running and rendering the report. While this is happening, the user can continue working in the system.

When a report is ready, the user will be notified. The report will then be available for download from the report inbox for a period of time—for example, seven days.

Modern development tools

Overview

The latest releases have moved the base application to AL, improved the debugging experience, and delivered significant internal work on stability and how to handle extensions. We also delivered new language capabilities such as interfaces, and we continue investing in developer productivity and asks from the community. This time, we target report extensibility, which is the top-voted idea for Business Central.

The 2021 release wave 1 also brings improvements to performance in VS Code, extension lifecycle telemetry for ISVs, additional interface functionality, and automation and streamlining of the process for submitting apps to AppSource. We make large investments to improve the upgrade process, including validation of per-tenant extensions, reducing unnecessary upgrade failures, and alerting app publishers about extensions that will be impacted by a future upgrade sooner for a more seamless upgrade experience.

Return record link instead of name when using lookups

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021

Business value

A common application scenario when typing in information is to allow a user to pick an entity based on find-as-you-type. This means entering part of the number, name, or description, getting a short list of possible matches, and then making a selection.

Until now, only the full value of the matched field would be returned, requiring the application to find the entity to link to by matching it with the value. If this was not a unique name, it could lead to the wrong entity being selected.

Now, instead of returning only the matched value, it will be possible to get information on the actual, selected record in the trigger, to ensure unique references.

Feature details

When the user selects entries in lookup triggers, it will be possible in AL to retrieve the record link of the chosen entry, instead of just the name.

Report extensibility

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021

Business value

A very common scenario is to customize reports by adding more fields to the dataset and modifying the layout. Until now, you would have to take full ownership of the report dataset (for example, a copy) just to make small changes, thereby forcing partners to maintain a full report and prohibiting multiple ISV contributions to the same report in an extensible way. With report extensibility, a new report extension object can be created, which adds new fields to the dataset or a new layout.

Feature details

Ability to extend an existing report by making additive changes to the report dataset and request page. Report layouts will not have an extensibility model.

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.

Extension validation on upgrade

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021

Business value

Tenant upgrade to new versions can fail for a number of reasons, such as lack of application dependencies, compilation errors, and duplicate object IDs. When these surface at the end of the flow—for example, when the customer is already down for maintenance—failures are

costly both for the customer and for Microsoft. This delays the upgrade process unnecessarily as most of these failures could be found earlier in the flow—for example, when scheduling the update or even when new updates become available.

Feature details

A new per-tenant extension (PTE) validation service will be created that validates applications on different aspects, such as the following:

- Whether all dependencies have been provided.

- That code compiles both up and downstream (for example, checking that both required symbols are available, and that there are no breaking changes downstream).

- That there are no breaking schema changes.

- That there are no duplicate IDs.

Initially, validation will be triggered on scheduling of upgrade.

Interface – obsolete support

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021

Feature details

Interfaces can be obsoleted like other AL object types.

Partners can add keys (indexes) to base tables and table extension tables

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Business value

Index tuning is an important tool for partners to deal with performance issues due to data distributions that are different than the demo company.

Feature details

Partners can add keys to tables and table extensions in an environment.

Onboarding

Overview

With the 2021 release wave 1, customers can get to productive usage faster.

Improve the experience of getting started with Power BI

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

Clear and precise guidance on how to start your journey with Business Central and Power BI and where you are in the process are important for smooth onboarding. Making the necessary steps easy to follow and repeat makes the new employee learning experience smoother and raises the overall product quality.

Feature details

With this edition of Business Central, we have simplified the getting started and onboarding experience with Power BI. The **Getting started with Power BI** feature now runs as a wizard that guides the user through all the necessary steps. Notable features of this new experience include:

- Guidance about how to start with Power BI, with an added link to get a free license.

- Much faster Power BI license check process.

- Controlled deployment of demo reports converted to easy-to-follow steps.

- The whole experience now meets accessibility standards.

- Added guidance about Azure Active Directory registration that's needed for on-premises customers (NEW).

- Additional option to reset the onboarding process and Power BI license information, so you can start from scratch (for troubleshooting) (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.

Getting started checklists for guided and faster initial setup

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

Get up and running with Dynamics 365 Business Central faster.

Feature details

Customers want to get up and running with Dynamics 365 Business Central easier and faster. A new concept of **Getting started checklists** allows partners to bring checklists to the customer that enable the customer to complete the last-mile setup by themselves, not depending on a consultant or partner to assist.

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.

In-app contextual help improvements

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

Get up and running with Dynamics 365 Business Central faster.

Feature details

Customers want to get up and running with Dynamics 365 Business Central easier and faster. New visual aids help call out features and key business process fields and actions in Dynamics 365 Business Central, allowing the customer to self-learn and get educated on how to start using the product. These visual aids can be authored by partners who wish to bring them onto their app offerings.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Improved company setup experience

Enabled for	Public preview	General availability
Users, automatically	Mar 2021	Apr 2021

Business value

Get up and running with Dynamics 365 Business Central faster.

Feature details

This release simplifies the initial company setup wizard.

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.

Dynamics 365 Customer Insights

Overview of audience insights 2021 release wave 1

Audience insights in Dynamics 365 Customer Insights enables every organization to unify and understand their customer data to harness it for intelligent insights and actions.

Eliminate data silos and unify customer data

Use connectors to ingest and unify data, bringing in transactional, observational, and behavioral data from various data sources.

Transform customer data intelligently to build a unified customer profile conforming to Common Data Model.

Enrich customer profiles

Build richer customer profiles by incorporating aggregated audience intelligence from first-party and third-party enrichments.

Enable powerful AI and insights

Derive insights about your business using capabilities like segments and measures that are built on top of unified profiles.

Accelerate business processes with out-of-the-box AI models or custom algorithms using Azure Machine Learning.

Extend business processes and personalize customer experiences

Enable marketing, sales, and service professionals to drive personalized engagements across channels. Work with contextual customer insights and tailored customer profile cards that integrate with Microsoft and non-Microsoft business applications.

Build on existing connectors, a variety of APIs, and Microsoft Power Platform to enable and extend line-of-business experiences. For example, you can gain deeper customer insights with Power BI, build custom apps with Power Apps, and trigger workflows based on insights and signals using Power Automate.

What's new and planned for audience insights

This topic lists features that are planned to release from April 2021 through September 2021. 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.

Customer view

This section lists updates to the customer view in Customer Insights.

Feature	Enabled for	Public preview	General availability
Customization and extension of customer view	Users by admins, makers, or analysts	Apr 2021	

Data ingestion

This section lists updates to the data ingestion capabilities in Customer Insights.

Feature	Enabled for	Public preview	General availability
Additional Power Query connectors	Users by admins, makers, or analysts	Sep 2021	

Data unification

This section lists updates to the data unification scenarios in Customer Insights.

Feature	Enabled for	Public preview	General availability
Improvements to the unification process	Users by admins, makers, or analysts	Sep 2021	
Optimizations to the data unification process	Users by admins, makers, or analysts	Apr 2021	To be announced

Enrichment

This section lists updates to the data enrichment enhancements in Customer Insights.

Feature	Enabled for	Public preview	General availability
Enrich a subset of customer profiles	Users by admins, makers, or analysts	Apr 2021	To be announced

Extensibility

This section lists updates to the extensibility scenarios in Customer Insights.

Feature	Enabled for	Public preview	General availability
Additional integrations into Microsoft and third-party services	Users by admins, makers, or analysts	Apr 2021	
Integrate with Azure Synapse Analytics	Users by admins, makers, or analysts	Apr 2021	
Improvements to the export destination hub	Users by admins, makers, or analysts	Sep 2021	

Measures

This section lists updates to measures in Customer Insights.

Feature	Enabled for	Public preview	General availability
Display distribution of measure values	Users by admins, makers, or analysts	Sep 2021	
Display outliers of measure values	Users by admins, makers, or analysts	Sep 2021	
Display trend of measure values	Users by admins, makers, or analysts	Sep 2021	

Segments

This section lists updates to new and updated capabilities around segments in Customer Insights.

Feature	Enabled for	Public preview	General availability
Segments from enriched profiles	Users by admins, makers, or analysts	Apr 2021	To be announced

System administration

This section lists improvements to administration in Customer Insights.

Feature	Enabled for	Public preview	General availability
Notifications for a process completion or failure	Users by admins, makers, or analysts	Apr 2021	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.

Data ingestion

Overview

Data ingestion enhancements in Customer Insights include:

- In-lake transforms on the source data that is attached to Customer Insights.

- Support for additional Power Query connectors for data ingestion.

Additional Power Query connectors

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

Feature details

More Power Query connectors provide additional options for ingesting data in a variety of formats.

Extensibility

Overview

Updates to the extensibility scenarios in Dynamics 365 Customer Insights audience insights capability.

Improvements to the export destination hub

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

Feature details

The export hub will be redesigned for improved usability.

Integrate with Azure Synapse Analytics

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

Feature details

Integrate with Azure Synapse Analytics to empower your business scenarios with data from Customer Insights.

Additional integrations into Microsoft and third-party services

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

Feature details

Customer Insights provides additional integrations into Microsoft products and third-party services, enabling customers to export segments and use them in other applications to manage and run campaigns and ads.

Enrichment

Overview

Data enrichment capabilities in Customer Insights for this release include:

- Additional first-party enrichments and increased coverage.
- New third-party enrichment providers.

Enrich a subset of customer profiles

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	To be announced

Feature details

You can now enrich only a subset of your customer profiles based on criteria you define. For example, enrich profiles in a specific country or region.

System administration

Overview

Administration enhancements include improvements to admin scenarios.

Notifications for a process completion or failure

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	To be announced

Feature details

Staying on top of the process status helps users efficiently manage their instances—for example, knowing quickly if a match or enrichment run completed or failed. New notifications will give awareness to users about the status of the processes at all times.

Segments

Overview

Segment enhancements for this release include improvement to the segment-creation experience and support for new operators.

Segments from enriched profiles

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	To be announced

Feature details

The enrichment scenario is improved to provide a simple and intuitive user experience for creating segments based on enrichments.

Measures

Overview

Updates and new features for measures include new filters, improvements to the creation experience, and support for additional operators.

Display trend of measure values

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

Feature details

See the trend of values of a measure you created through visualization. In addition, you can see specific insights of your measure's values such as seasonality.

Display outliers of measure values

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

Feature details

See the outliers of a measure's values. For example, if you have a measure of 'Total spend per customer', you can find the high or low spenders for your next best actions.

Display distribution of measure values

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

Feature details

Introducing the distribution of measure values using efficient visualization. For example, if you have a measure for 'Total spend per customer', you can easily see how your customers are distributed based on their spend history.

Data unification

Overview

Updates and improvements in this area include advanced configuration options.

Optimizations to the data unification process

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	To be announced

Feature details

Changes to the core platform lead to improvements that optimize and simplify the data unification process by consuming only updated and new records.

Improvements to the unification process

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

Feature details

Improvements to the unification process include:

- Revisited unification experience and match rules recommendation.
- Flexible merge policies and configuration.
- AI-driven normalization as match input.

Customer view

Overview

Enable users to customize elements of the individual customer profile view in Customer Insights.

Customization and extension of customer view

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

Feature details

Users get a variety of options to customize the customer view. Additionally, the customer view becomes available in other applications and gets optimized to facilitate B2B use cases.

Overview of engagement insights 2021 release wave 1

Engagement insights (preview) in Dynamics 365 Customer Insights enables individual and holistic interactive analytics over web, mobile, and connected products customer journey touchpoints. Engagement insights expands to multichannel analytics over data from other channels for richer customer analytics, downstream actions, and optimizations.

Eliminate data silos and unify customer data

Engagement insights (preview) enables connecting multiple data sources from applications. Data processed and stored in audience insights and behavioral signals collected in engagement insights are unified for analytics.

Enable interactive analytics

Out-of-the-box analytics offers access to data interactively, providing rich insights into customer actions as they happen to help drive better business insights.

Connect analysis to systems of action

Embed the insights and activations based on your data right into your advertisement technology, marketing technology, and other business applications.

Advanced analytics and customer journey analytics

Use digital analytics to understand customer journeys through funnel reports, journey maps, flows, and more to drive the next best actions.

Built-in capabilities enable advanced analytics with custom reports, segments, custom metrics, and predictive analytics.

What's new and planned for engagement insights

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

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

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

Core analytics

This section lists capabilities in the area of core analytics in engagement insights.

Feature	Enabled for	Public preview	General availability
Create segments	Users by admins, makers, or analysts	Mar 2021	Sep 2021
Custom reports	Users by admins, makers, or analysts	Mar 2021	Sep 2021
Filter reports by customer profiles	Users by admins, makers, or analysts	Mar 2021	Sep 2021
Out-of-the-box mobile reports	Users by admins, makers, or analysts	Mar 2021	Sep 2021
Updated app navigation	Users by admins, makers, or analysts	Mar 2021	Sep 2021
Cross-channel reports	Users by admins, makers, or analysts	Apr 2021	To be announced
Export cohorts generated by a segment	Users by admins, makers, or analysts	Apr 2021	To be announced
Out-of-the-box web reports	Users by admins, makers, or analysts	Apr 2021	To be announced
Role-based access control	Users by admins, makers, or analysts	May 2021	To be announced
Information architecture for the admin experience	Users by admins, makers, or analysts	Jun 2021	To be announced
Custom events and dimensions	Users by admins, makers, or analysts	Aug 2021	To be announced

Feature	Enabled for	Public preview	General availability
Metrics builder	Users by admins, makers, or analysts	Aug 2021	To be announced

Fundamentals

This section lists all features of the fundamentals area for engagement insights.

Feature	Enabled for	Public preview	General availability
Fundamentals – regional expansion	Users by admins, makers, or analysts	Mar 2021	Sep 2021
Mobile SDK	Users by admins, makers, or analysts	Mar 2021	Sep 2021
Service infrastructure fundamentals	Users by admins, makers, or analysts	Mar 2021	Sep 2021
Business continuity and disaster recovery	Users by admins, makers, or analysts	Apr 2021	To be announced
Billing options	Users by admins, makers, or analysts	Sep 2021	To be announced

Integration with audience insights

This section lists capabilities in the area of end-to-end integration across engagement insights and audience insights.

Feature	Enabled for	Public preview	General availability
Support custom Azure Data Lake Storage accounts	Users by admins, makers, or analysts	Jan 2021	Sep 2021

Feature	Enabled for	Public preview	General availability
Support Customer Insights-managed data lake	Users by admins, makers, or analysts	Mar 2021	Sep 2021
Unknown-to-known mapping	Users by admins, makers, or analysts	Apr 2021	To be announced
Common Customer Insights experience	Users by admins, makers, or analysts	May 2021	To be announced

Journey analytics

This section lists capabilities in the area of journey analytics in engagement insights.

Feature	Enabled for	Public preview	General availability
Web funnels	Users by admins, makers, or analysts	Feb 2021	Sep 2021
Mobile funnels	Users by admins, makers, or analysts	Mar 2021	Sep 2021
Cross-channel funnels	Users by admins, makers, or analysts	May 2021	To be announced
Multichannel funnels	Users by admins, makers, or analysts	Jul 2021	To be announced
Journey maps	Users by admins, makers, or analysts	Aug 2021	To be announced

Multichannel analytics

This section lists capabilities in the area of multichannel analytics in engagement insights.

Feature	Enabled for	Public preview	General availability
Integrate with audience insights segments	Users by admins, makers, or analysts	May 2021	To be announced
Export cohorts generated from multichannel segments	Users by admins, makers, or analysts	May 2021	To be announced
Create super segments	Users by admins, makers, or analysts	Jun 2021	To be announced
Customer profiles and activities in out-of-the-box reports	Users by admins, makers, or analysts	Jul 2021	To be announced
Multichannel reports	Users by admins, makers, or analysts	Jul 2021	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.

Core analytics

Overview

Key features and improvements include:

- Updated information architecture for the app experience.
- Role-based access control.
- Out-of-the-box web and mobile reports.
- Custom reports.
- Segment builder and export cohorts.
- Metrics builder.
- Custom events and dimensions.
- Report filtering.

Filter reports by customer profiles

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

Feature details

Use customer profiles as a filter dimension to filter reports by profile.

Information architecture for the admin experience

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2021	To be announced

Feature details

Update to the information architecture to integrate the admin center with the app experience.

Updated app navigation

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

Feature details

The information architecture of the navigation area and the overall experience receives an update to ease using engagement insights.

Role-based access control

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2021	To be announced

Feature details

Manage access to the service with role-based access control (RBAC) using fine-grained user roles. Admins can define the roles and access control for users to define how they can use various features in the product, such as viewing reports or creating reports.

Out-of-the-box web reports

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	To be announced

Feature details

Use the out-of-the-box reports to quickly access key site metrics. See the size of the audience, how many visits they make, how many pages they view, and which sites referred traffic to a website. Identify a site's highest performing pages, both in terms of pages viewed and elements clicked. Understand specific site visitor attributes such as the technology preferences (operating systems, browsers, and devices) and geographic locations. See how many visits their site visitors make, as well as how long those visits last.

Out-of-the-box mobile reports

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

Feature details

Customers can use the out-of-the-box reports to quickly access their application's key metrics.

Custom reports

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

Feature details

For custom measurement and analysis scenarios, customers can use the custom report builder to build visualizations based on the necessary metric, dimension, and segment combinations.

Create segments

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

Feature details

Segments let customers filter the behavioral data into data that matters to them. Use segments to see the data needed to answer specific questions about actions on their website or mobile app.

Export cohorts generated by a segment

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	To be announced

Feature details

Customers can export cohorts that are created from simple segments to a .csv file. We're also working on other options and will share more details as we design the feature.

Metrics builder

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Aug 2021	To be announced

Feature details

Create custom metrics from existing metrics such as the average number of events per user session or page views per visitor. These calculated metrics help drive more relevant analysis and even greater actionability.

Custom events and dimensions

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Aug 2021	To be announced

Feature details

Engagement insights will support custom events and dimensions to ingest custom data for analysis. This enables customers to bring in data from their connected products and benefit from the rich analytics foundation and capabilities available for other sources of data such as web or mobile events.

Cross-channel reports

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	To be announced

Feature details

See out-of-the-box reports or custom reports across multiple channels of data including web and mobile. Interactively analyze this multichannel data and report on their composition change over time. This gives insights about customers and their behavioral data.

Fundamentals

Overview

Key features and improvements include:

- Regional expansion
- Mobile SDK
- Service infrastructure
- Business continuity and disaster recovery

Business continuity and disaster recovery

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	To be announced

Feature details

Ensuring support for business continuity and disaster recovery to comply with other services from Azure.

Billing options

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2021	To be announced

Feature details

We introduce options to measure usage and calculate cost based on factors that will be disclosed closer to general availability of the service.

Fundamentals – regional expansion

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

Feature details

We plan to cover all regions that audience insights supports. When audience insights and engagement insights are available in the same regions, we can deliver the full Customer Insights experience to everyone.

Service infrastructure fundamentals

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

Feature details

- Various optimizations (performance, scalability)
- Security and privacy refinements
- Accessibility fixes
- Localization and globalization considerations

Mobile SDK

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

Feature details

Build easy-to-implement instrumentation options with support for JavaScript, Python, C#, iOS, and Android SDKs.

Journey analytics

Overview

Key features and improvements include:

- Journey maps
- Web and mobile funnels
- Cross-channel and multichannel funnels

Journey maps

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Aug 2021	To be announced

Feature details

Journey maps allow customers to understand the path their users take through their websites or mobile apps.

Cross-channel funnels

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2021	To be announced

Feature details

Engagement insights adds support for cross-channel funnels across web and mobile data.

Mobile funnels

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

Feature details

Engagement insights adds support for funnel reports based on mobile data.

Use funnel reports to understand how well the audience progresses through the various steps of a process and to identify drop-off points. Equipped with this data, you can inform site, content, and process owners on potential optimization and process improvements.

Web funnels

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

Feature details

Use funnel reports to understand how well the audience progresses through the various steps of a process and to identify drop-off points. Equipped with this data, you can inform site, content, and process owners of potential optimization and process improvements.

Multichannel funnels

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2021	To be announced

Feature details

Use funnel reports to understand how the website audience progresses through the various steps of their journey across all touchpoints (web, mobile, connected products, and customer activities). Identify the drop-off points and use these insights for optimization and process improvements.

Multichannel analytics

Overview

Key features and improvements include:

- Integrate with audience insights segments
- Get multichannel reports
- Get customer profiles and activities reports
- Export cohorts
- Create super segments

Integrate with audience insights segments

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2021	To be announced

Feature details

Integrate with customer segments from audience insights in engagement insights and filter reports by customer segments.

Multichannel reports

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2021	To be announced

Feature details

Customers can use multichannel report capability to view report data across web, mobile, and connected products as well as transactional and demographic data with customer activities and profiles.

Customer profiles and activities in out-of-the-box reports

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2021	To be announced

Feature details

See out-of-the-box reports showing customer profiles and activities from audience insights. Interactively analyze current composition customer profiles and activities. Review their composition change over time to get insights into customers and their behavioral data in a single pane.

Export cohorts generated from multichannel segments

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2021	To be announced

Feature details

Export cohorts generated from segments that span multiple channels—web, mobile, connected products, customer, and more.

Create super segments

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2021	To be announced

Feature details

Customers can create super segments that combine events from multiple channels like web events and audience insights profiles to answer business questions. This feature allows further refinement of customer segments that then can be used to drive the next best action and personalization.

Integration with audience insights

Overview

Key features and improvements include:

- Common experience for Customer Insights
- Support Customer Insights managed data lake
- Support customer's own Azure Data Lake Storage

Support Customer Insights-managed data lake

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

Feature details

Both engagement insights and audience insights will support Microsoft Dataverse and hence enable audience insights customers using the Customer Insights-managed data lake to integrate with the engagement insights capabilities.

Unknown-to-known mapping

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	To be announced

Feature details

This feature enables mapping an unauthenticated or unknown user to a known customer profile to provide concrete usage analytics.

Support custom Azure Data Lake Storage accounts

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

Feature details

To better support customers using audience insights and engagement insights, we'll provide support for Microsoft Dataverse, allowing customer to use their own Data Lake Storage.

Common Customer Insights experience

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2021	To be announced

Feature details

Features to enable this scenario include:

- Enable single sign-on.
- One URL for engagement insights and audience insights.
- Engagement insights SKU includes data for audience insights.
- Unified trial and sample data experience across both capabilities.
- Unified product support.
- Unified community support.

Customer Voice

Overview of Dynamics 365 Customer Voice 2021 release wave 1

Dynamics 365 Customer Voice is an enterprise feedback management application that enables you to infuse the voice of your customers into your day-to-day business decision-making. With an always-on customer feedback loop, you can easily keep track of the customer metrics that matter most to your business based on survey response data, and respond to the customers in a timely manner. With deep integration with the Dynamics 365 line-of-business applications, Dynamics 365 Customer Voice adds rich insights by feeding real-time survey data into customer records. Dynamics 365 Customer Voice provides an easy and friction-free experience from creating surveys to generating actionable insights based on customer feedback, with minimal setup time. It helps you to keep a pulse on what customers value, and how they view your products and services, and you can rest assured that your data is supported by Microsoft security and compliance policies.

What's new and planned for Dynamics 365 Customer Voice

This topic lists features that are planned to release from April 2021 through September 2021. 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.

Collect feedback

Survey distribution capabilities that enable you to send surveys across multiple customer engagement channels.

Feature	Enabled for	Public preview	General availability
Auto prefill answer	Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature	Enabled for	Public preview	General availability
Partial response	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Pause and resume survey	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Power Automate survey response trigger	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Survey reminder	Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Insights and follow-up

Define standardized customer satisfaction metrics and enable timely follow-up actions for customer issues.

Feature	Enabled for	Public preview	General availability
Text analytics support	Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Simplified survey authoring

Simple-to-use experience to create personalized surveys based on customer information from your business application.

Feature	Enabled for	Public preview	General availability
Cascading question type	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Personalize survey	Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Survey administration

Enable administrators to manage survey usage in the organization.

Feature	Enabled for	Public preview	General availability
Custom email address for survey invitation	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Custom survey header	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Over-survey management	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Support for report-only user access	Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Description of **Enabled for** column values:

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

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

Simplified survey authoring

Overview

Enables business users to create and personalize surveys for each customer to improve survey response rates.

Cascading question type

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

Cascading question enables survey owners to upload a list of related answers (such as country, city, and state) and create questions that automatically filter the answer options based on a survey respondent's previous answer. For example, if you select United States as an answer to a question about country, the next question shows only the list of US states.

Personalize survey

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

Survey authors can upload a .csv file with contact information and use any contact attribute to personalize survey questions and survey invitations. Changes to the contact information can be updated directly in Dynamics 365 Customer Voice.

Collect feedback

Overview

Enables you to send personalized surveys to the right customers at the right time through the right channel.

Auto prefill answer

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

Auto prefill answer enables survey owners to prefill survey answer based on the survey respondent's information from Azure Active Directory (for example, prefill a user's email

address when a question asks for email) or Dynamics 365 (for example, last product purchased by the customer).

Survey reminder

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

Survey authors can review the status of a survey invitation and send email reminders to the recipients who have not responded to the surveys.

Partial response

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

Survey authors can specify whether to accept partial response in which any unsubmitted answers are collected and reported. When survey respondents submit the survey, the partial response is updated with the final response.

Pause and resume survey

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

Survey respondents can partially fill in a long survey, pause it, and then resume later to complete it. This functionality allows respondents to take their own time and complete the survey at their own pace.

Power Automate survey response trigger

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

Dynamics 365 Customer Voice provides out-of-the-box survey response trigger for custom follow-up workflow actions. This will trigger Power Automate flows whenever a survey response is received. Users can use the survey response values in the follow-up actions in a flow.

Insights and follow-up

Overview

Enables businesses to define standardized customer satisfaction metrics and get insights including trends and specific follow-up actions to ensure that customer issues are addressed in a timely manner.

Text analytics support

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

Dynamics 365 Customer Voice automatically categorizes text responses into different categories, which helps a user to quickly determine the key areas customers are talking about and the distribution of sentiments based on these areas.

Survey administration

Overview

Tenant administrators can set up policies for how frequently a customer can receive a survey as well as customize a sender's email address according to the organization's communication policies.

Custom survey header

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

Designing the look and feel of your survey to match your organization's branding is not only important to make your survey look professional but also to provide trust to your survey recipients. Your customers are more likely to open and respond to the survey if it looks familiar. Dynamics 365 Customer Voice makes it easy for survey authors to configure the survey look and feel by customizing the survey header.

Over-survey management

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

Dynamics 365 Customer Voice supports a built-in over-survey management policy to prevent customers from getting too many surveys. As an administrator, you can specify the time between sending surveys. Any surveys sent during the specified time are stopped and the survey owner is warned for over-surveying risks. Administrators can specify whether a survey owner can proceed with sending the survey after the warning.

Support for report-only user access

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

Dynamics 365 Customer Voice enables a project owner to share survey results and dashboards to business users without giving them edit access to the survey.

Custom email address for survey invitation

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

Dynamics 365 Customer Voice supports an organization's administrators to configure a sender's email address to use the organization's email address instead of the default Dynamics 365 Customer Voice email address.

Industry solutions

Overview of Microsoft Cloud for Healthcare 2021 release wave 1

The Microsoft Cloud for Healthcare encompasses industry-specific data models, cross-cloud connectors, workflows, APIs, and built-in healthcare solution templates leveraging Microsoft's best horizontal cloud apps and services. More details will follow. Please stay tuned!

Industry accelerators

Overview of Dynamics 365 financial services accelerator 2021 release wave 1

The Dynamics 365 financial services accelerator focused on retail and commercial banking to optimize customer experience, improve collaboration within a bank, and gain customer insights. The accelerator includes sample apps, dashboards, and customer journeys that showcase popular scenarios in the financial services industry. In 2020 release wave 1, new capabilities were released in preview to support popular insurance scenarios including claims, policies, and agencies.

Overview of Dynamics 365 education accelerator 2021 release wave 1

The initial release of the education accelerator in November 2018 centered around improving student and faculty engagement and enhancing institutional effectiveness for higher education institutions. The data model supports common entities related to students, faculty, courses, test scores, and more. In January 2020 we added new scenarios around business partner management in the areas of internships, scholarships, and grants for higher education.

We launched a new scenario for K-12 in June 2020 that enabled partners and customers to create a holistic student profile, automate attendance, track student behaviors, and apply a skills-based learning framework based on learning experiences and assessments. Additionally, we added entities to the model to help track alumni and engage them via fundraising. We also added a scenario to improve communication between schools and families, making it easier to schedule conferences and offer volunteer opportunities at school for parents and guardians.

During the pandemic, the need for students to stay connected to advisors to ensure on-time graduation is stronger than ever. In response to feedback from partners and customers, we released additional features in January 2021 to support student success through tele-advising for higher education institutions.

For 2021 release wave 1, we will return to the K-12 component of the education accelerator and release a marketing/communication feature that allows districts and ministries of education to effectively take a proactive communication approach with various stakeholders such as educators, community members, and parents.

What's new and planned for Dynamics 365 education accelerator

This topic lists features that are planned to release from April 2021 through September 2021. 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
[Marketing and communication capability](#)	Users by admins, makers, or analysts	Apr 2021	Jun 2021

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Marketing and communication capability

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 2021	Jun 2021

Business value

Communication and outreach in education often can be reactive. With this feature we bring the power of enterprise marketing tools to the world of education, empowering organizations to be proactive in their communication. Also, as more students, educators, and parents expect more personalized communication from educators and are used to receiving targeted marketing, this feature can make this a reality and a standard practice for education organizations. In addition, this feature can also add value to the existing fundraising scenario in the education accelerator and help target donors more effectively.

Feature details

- New data entities to support newsletters, marketing, and targeted communications.
- New sample application to enable easier audience targeting for administrators.
- New Power BI dashboards to report on effectiveness of campaigns and communications.
- Leverage out-of-the-box capabilities of Dynamics 365 Marketing.

Overview of Dynamics 365 nonprofit accelerator 2021 release wave 1

The nonprofit accelerator enables you to develop nonprofit solutions based on entities and attributes that nonprofit organizations commonly leverage for constituent management, fundraising, awards, program delivery, and impact tracking. These entities include donor commitments, designations, transactions, awards, disbursements, delivery frameworks, results, indicators, and benefit recipients. The accelerator includes Common Data Model for Nonprofits, sample apps, sample data, dashboards, and documentation.

In the previous release wave, we continued to evolve our offering at a rapid pace and include the most comprehensive and interoperable nonprofit data model available, allowing nonprofits to manage program delivery, beneficiary management, fundraising, volunteer management, and finance and operations while building to included standards like the global International Aid Transparency Initiative (IATI) and the United Nations Sustainable Development Goals. In December 2020, we released features focused on assessment management, volunteer management, and frontline humanitarian logistics.

For 2021 release wave 1, we continue to expand capabilities across constituent, donor and grant management, program delivery, finance and operations, collaboration, and measurement and learning to deliver nonprofit back-office and frontline workers and volunteers with mission-critical technology that measures impact and builds transparency between organizations and their funders.

Overview of Dynamics 365 media and entertainment accelerator 2021 release wave 1

The initial release of the media and entertainment accelerator that launched in July 2020—then called media and communications accelerator—allowed you to easily build solutions around a variety of use cases supporting intelligent audience measurement and fan engagement. The first release of the accelerator came with out-of-the-box data entity mappings focused on driving popular scenarios used by advertising agencies, sports teams, sports leagues and clubs, event venues, stadiums, and large brand advertisers. They used this to better understand their audience, how to best target them, how to drive better responses, and to extend overall reach to their customer base.

Following up on the successful initial launch, this release will offer new features in two areas:

- **Media and entertainment**: We further expand on the fan engagement theme by adding additional support for virtual events and health and hygiene at physical venues in response to feedback from partners and customers due to the global pandemic. This release will also include features to aid in registering and participating in virtual sessions and Microsoft Teams-based events as well as additions for importing content metadata that enables search personalization, and other key enhancements.

- **Telecommunications**: We are pleased to include our first release in telecommunications, which will enable mobile operators, internet service and data providers, and other players and participants across the Telecom sector to more quickly develop Power Apps for their unique business needs and workflows.

These features will allow us to more easily respond to partner and customer feedback, given the global pandemic, to attract new customers and retain and delight existing customers in the media and entertainment space.

What's new and planned for Dynamics 365 media and entertainment accelerator

This topic lists features that are planned to release from April 2021 through September 2021. 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
Enhanced fan engagement	Users by admins, makers, or analysts	-	Apr 2021
Subscriber lead and place management	Users by admins, makers, or analysts	✔Dec 15, 2020	Apr 2021

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Enhanced fan engagement

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

Business value

The media and entertainment, tourism, hospitality, and sports industries have been hit by the global pandemic and are in need of additional digital tools to help operate and optimize their business. This feature enables customers in the media and entertainment industry to expand on customer loyalty programs and rewards systems to retain customers and personalize their experience. Customers can more easily schedule and host digital virtual events and showcase their content as well as optimize new operational demands for health, safety, and hygiene tracking at their physical venues. This will also enable building connections between media content and media consumers to help with better targeting, personalization, advertisement, and sponsorship.

Feature details

- New data entities for virtual event content, content metadata, and other extensions.

- New sample portal app focusing on health and hygiene operations.

- New sample portal and canvas app for customer loyalty management and rewards.

- Enhancements to the existing event and venue management model-driven app for better support of virtual and all-digital events.

- New Power BI-driven dashboards.

- Integration with Dynamics 365 Customer Insights.

Subscriber lead and place management

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 15, 2020	Apr 2021

Business value

Telecom industry businesses are uniquely challenged by heavy competition to attract and retain customers. With so many network, information and data service providers, messaging, home security, and other rival players competing for the same consumer audiences, there's a tremendous need for modern digital transformative solutions that will help them stand out and attract and retain customers.

This feature facilitates the ability to analyze customer trends, predict customer churn, and help make recommendations to internal staff and to their external customers that grow subscriptions, maximize customer satisfaction, and prevent customer loss. Assist with customer care operations through self-service tools for initial provisioning and support, call center tools and optimized call routing, and field service tools for better plant and network management.

Feature details

- A Telco-specific extension to Common Data Model that includes a set of standard Telco data entities based on the [TM Forum's Open Digital Framework](#).

- Geographic and localized place management.

- Customer/service area/address qualification.

- Lead management and follow-up.

- Connecting locations with locally available product and price lists.

- Better inventory control, asset and network, and resource management.

- Customer Insight and trend analysis and report to highlight potential churn.
- Automated map lookup and normalization of street addresses.
- Integrations with Dynamics 365 Sales and Bing Maps.

Overview of Dynamics 365 healthcare accelerator 2021 release wave 1

The Dynamics 365 healthcare accelerator is a sample solution for ISVs, partners, and developers to rapidly build healthcare applications. It introduces a data model that is based on the FHIR HL7 3.0 specification and provides sample experiences highlighting the data model.

2021 release wave 1 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning **February 1, 2021**. Features from the following apps are available as part of early access:

- Power Apps

The features from these apps update the existing user experiences. You can opt in early to enable these features in your environment. This will allow you to test these features and then adopt them across your environments. For information on how to enable these features, see Opt in to 2021 release wave 1 updates.

IMPORTANT If you are using Dynamics 365 apps, such as Sales, Service, Marketing, Finance, Supply Chain Management, Business Central, and Commerce, there are early access features that could impact your users. For Dynamics 365 early access features, see 2021 release wave 1 features available for early access.

Power Apps

For a complete list of the Power Apps features, see What's new and planned for Power Apps.

Feature	Enabled for	Early access	General availability
Duplicate detection Unified Interface experience	Users, automatically	Feb 1, 2021	Apr 2021
Improved accessibility for business process flows in mobile	Users, automatically	Feb 1, 2021	Apr 2021
Improved apps discovery and selection in Power Apps mobile	Users, automatically	Feb 1, 2021	Apr 2021
Improved global relevance search experience in model-driven apps	Users, automatically	Feb 1, 2021	Apr 2021
Improved navigation in model-driven apps	Users, automatically	Feb 1, 2021	Apr 2021

Feature	Enabled for	Early access	General availability
Merging records has been updated and improved in Unified Interface	Users, automatically	Feb 1, 2021	Apr 2021
Multi-line text controls expand in Quick View forms	Users, automatically	Feb 1, 2021	Apr 2021
Search quick actions	Users, automatically	Feb 5, 2021	Apr 2021
UX improvements to sub grids and form tabs in Dynamics 365 mobile app	Users, automatically	Feb 1, 2021	Apr 2021

Power Apps

Overview of Power Apps 2021 release wave 1

Microsoft Power Apps is the industry-leading low-code application development platform that underpins Dynamics 365 extensibility, Microsoft 365 customization, and standalone custom line of business applications for customers around the world. Power Apps dramatically lowers the cost, complexity, and time of software development through a range of powerful low-code development tools, a deep data platform in Microsoft Dataverse, and hundreds of connectors to common business data sources.

Use Power Apps documentation to get expert information and answers to address your needs, regardless of how you use Power Apps.

What's new and planned for Power Apps

This topic lists features that are planned to release from April 2021 through September 2021. 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.

Sophisticated apps on a unified platform

Sophisticated apps on a unified platform.

Feature	Enabled for	Public preview	Early access*	General availability
Improved debugging capabilities with canvas app Monitor	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2021
Async OnSave events	Admins, makers, marketers, or analysts, automatically	Feb 2021	-	Apr 2021

Feature	Enabled for	Public preview	Early access*	General availability
Duplicate detection Unified Interface experience	Users, automatically	-	Feb 2021	Apr 2021
Improved accessibility for business process flows in mobile	Users, automatically	-	Feb 2021	Apr 2021
Improved apps discovery and selection in Power Apps mobile	Users, automatically	-	Feb 2021	Apr 2021
Improved global relevance search experience in model-driven apps	Users, automatically	-	Feb 2021	Apr 2021
Improved navigation in model-driven apps	Users, automatically	-	Feb 2021	Apr 2021
Merging records has been updated and improved in Unified Interface	Users, automatically	-	Feb 2021	Apr 2021
Multi-line text controls expand in Quick View forms	Users, automatically	-	Feb 2021	Apr 2021
UX improvements to sub grids and form tabs in Dynamics 365 mobile app	Users, automatically	-	Feb 2021	Apr 2021
Search quick actions	Users, automatically	-	Feb 2021	Apr 2021

Feature	Enabled for	Public preview	Early access*	General availability
Export documents to PDF from a canvas app	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	-
Model-driven app adds in-app notifications	Users by admins, makers, or analysts	Apr 2021	-	Jun 2021

* You are able to opt in to some features as part of early access on February 1, 2021, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Sophisticated apps on a unified platform

Overview

Power Apps combines the flexibility of a blank canvas that can connect to any data source with the power of rich forms, views, and dashboards modeled over data in Microsoft Dataverse.

Improved apps discovery and selection in Power Apps mobile

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

Power Apps mobile apps list experience is modern and intuitive. The discovery of apps is easier, allowing users to quickly access their apps. Further, inline swipe gestures on the apps list make adding to favorites or pinning the apps much easier and faster for future use.

Feature details

Power Apps mobile has an enhanced apps list experience so that users can always get to their most relevant apps quickly and easily.

- Apps are neatly organized in relevant categories, such as favorites and recents. They are presented in a single view for higher discovery.
- More relevant apps, such as favorites, are presented front and center for quick selection.
- Newly introduced swipe gestures allow you to quickly pin an app to your home screen or add an app to your favorites without multiple clicks.
- The overall experience is intuitive.

Model-driven app adds in-app notifications

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

Business value

Users can be alerted to key items to address, which makes them more likely to be successful.

Feature details

Model-driven app in-app notifications are shown to users as a notification toast or notification center. Notifications are directed to a specific user and can be sent through external systems, Power Automate, or from within the system. An app maker needs to opt-in to this feature to make the notifications appear for users within the model-driven app.
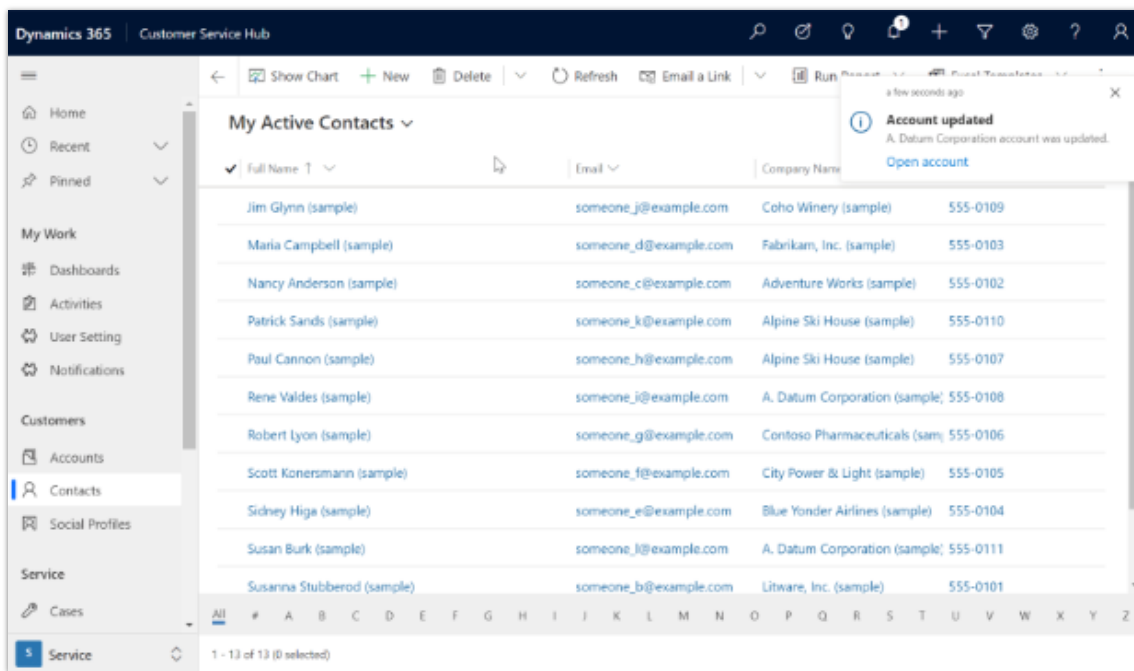
Model-driven app in-app notification toast
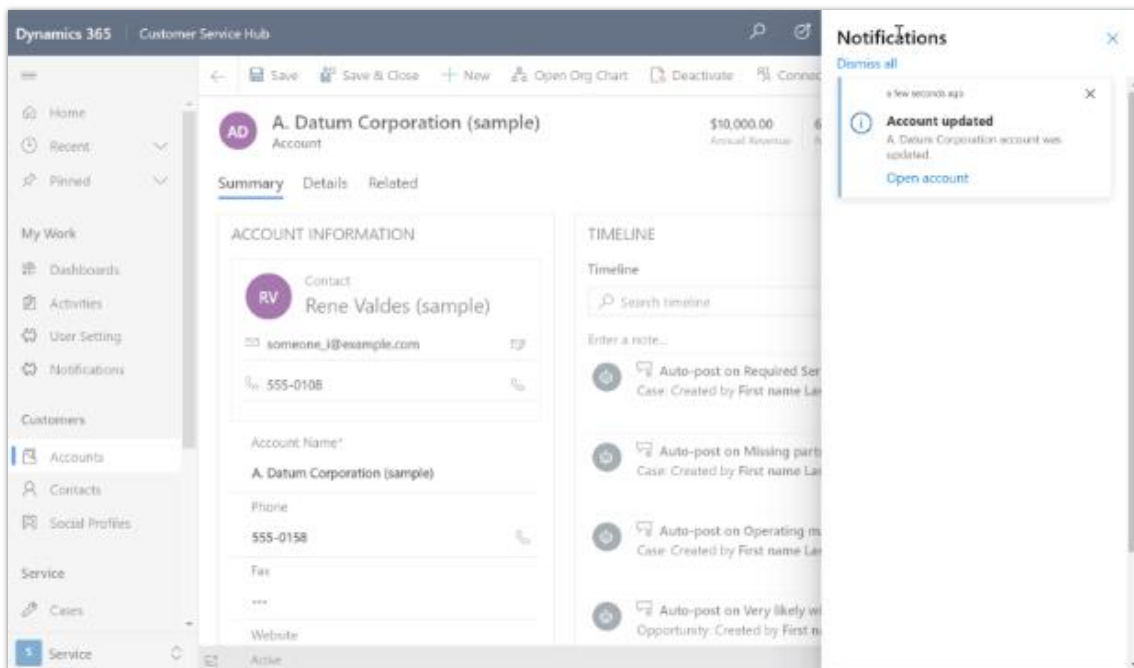
Model-driven app in-app notification center

Async OnSave events

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

Business value

This provides additional save validation processes for promises and improves user experiences with standard timeout processing.

Feature details

This provides the ability to create Async OnSave events. Async OnSave events will now wait when they provide a promise, and there is also a new timeout if the promise does not resolve within 10 seconds. If it does not resolve within 10 seconds, the save operation will be blocked.

Multi-line text controls expand in Quick View forms

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

Users no longer have to click and scroll to see all of the information in a multi-line text field in Quick View forms, which reduces clicks and improves productivity.

Feature details

Users no longer have to click and scroll to view all of the content in a multi-line text field in a Quick View form. The fields will now automatically expand to show the full content when the Quick View form is loaded on a page. You no longer have to take additional steps to view and read information when using a Quick View form on a parent or main form.
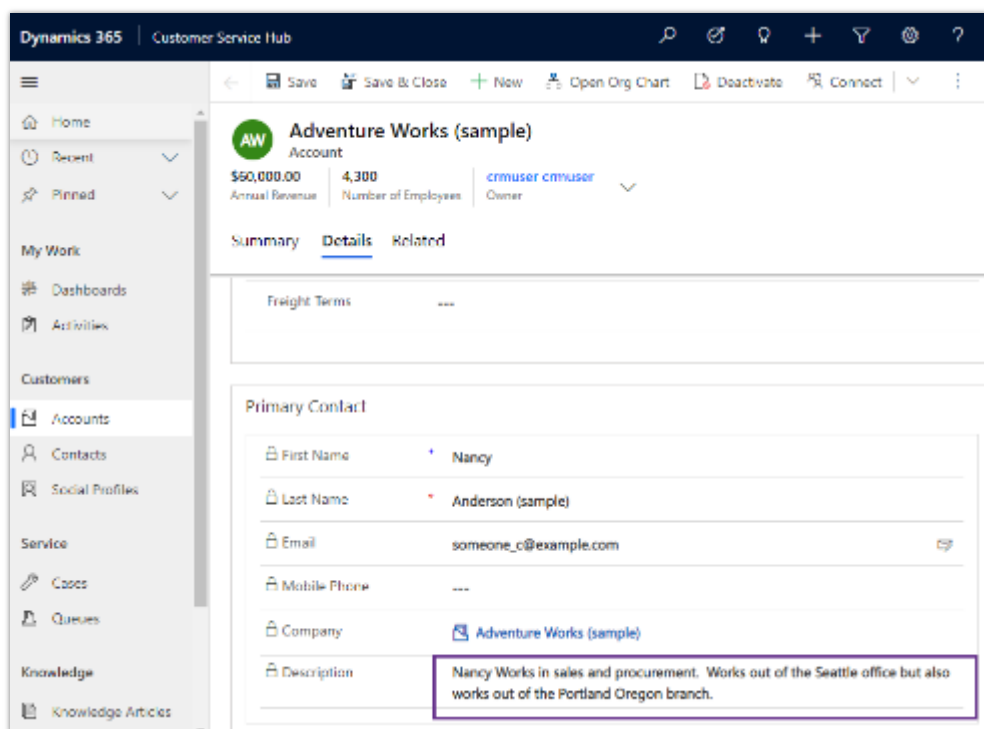
Quick View form with multi-line text field

Improved accessibility for business process flows in mobile

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

This change aligns with Microsoft's accessibility standards.

Feature details

You will now be able to view important information about your business process flow on mobile, including the name and time active. This change aligns with Microsoft's accessibility standards. Similar to the business process flows that your see on your desktop, this new design creates a seamless experience across devices and ensures you know which business process flow you are working with if you switch processes.
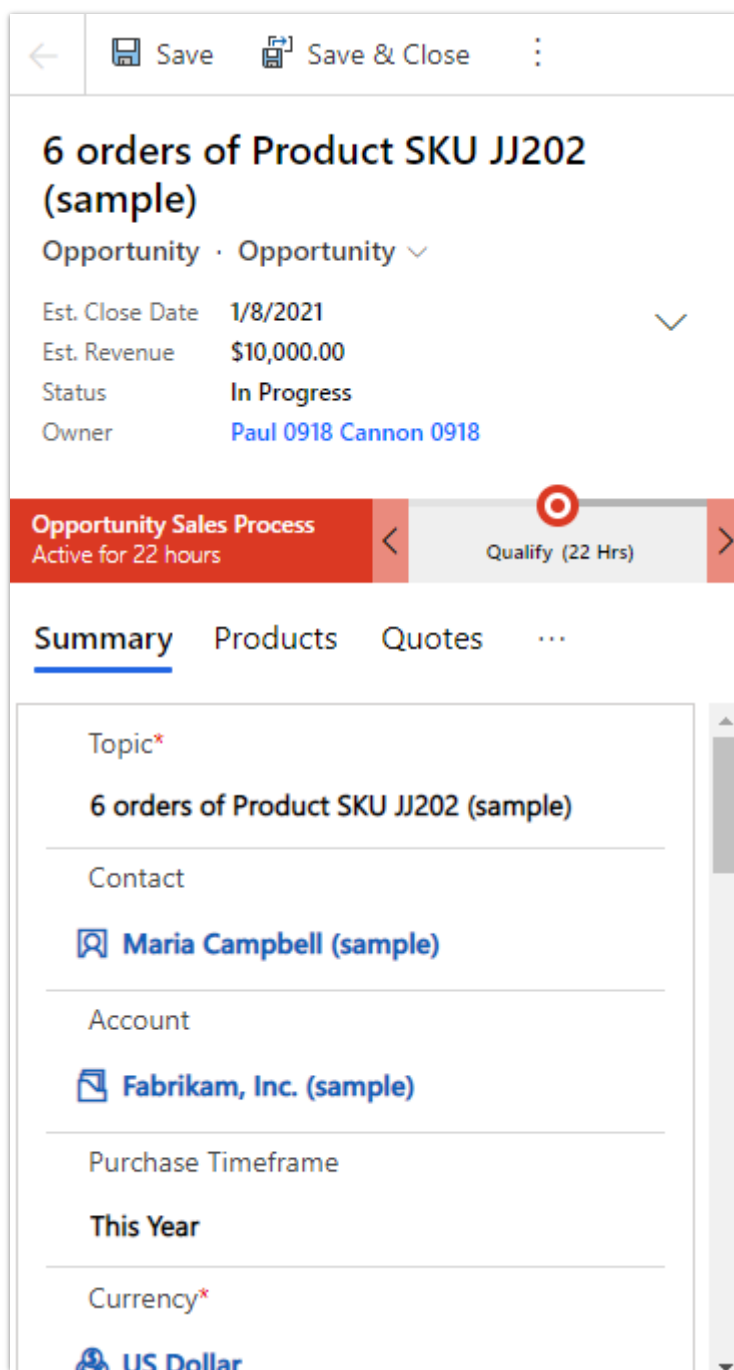
Business process flow information including its name and time active will now be displayed in mobile

Search quick actions

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Feature details

With improved search experience showing search results as you type, you can be more productive with quick actions available next to the result. Quick actions will give you one-click access to frequently used actions from the suggested results for your typed query. Call, assign, or share a contact quickly without a single click and without losing your context.

UX improvements to sub grids and form tabs in Dynamics 365 mobile app

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Feature details

We've made improvements to the usability of how data is presented on a form for model-driven apps on Dynamics 365 mobile app running on iOS and Android.

- Sub grids have a prominent header that separates them from the rest of the sections on the form.

- Form tabs are more discoverable because you can scroll and span horizontally across the screen. When you select a tab, it adjusts the header just enough to reveal the next few tabs.

- Empty sub grids display the option to add a new record inline reducing the number of taps needed to add a record.

- The jump bar (ABC) has been removed from grids, and you can now have the option to **Search this View** at the top of the grid instead of a command.

- Commands on the sub grid are also updated to show up in a drawer from the bottom of the screen, consistent with the page-level commands.

Improved global relevance search experience in model-driven apps

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Feature details

Enhancements to search include:

- Prominent and easily discoverable search bar in the header on all pages of a model-driven Power Apps.

- Personalized zero query experience that contains a user's recent searches and recently accessed records.

- Put Microsoft Dataverse at your fingertips. Suggested results displayed as you type including quick actions pertinent to each result.

- Intelligent results for all English-language environments in public cloud, with synonym understanding, semantic parsing, abbreviations support and common world knowledge support.

- Redesigned results page with improved ranking and grouping for better readability.

When relevance search is turned on all of these enhancements will be enabled by default to all users in their environment on mobile and web.

Export documents to PDF from a canvas app

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

Business value

This feature addresses a long-time top ask from our community ideas forum. Users asked to allow apps to "print" custom-formatted reports and other outputs using a full set of information available to the app at the time a user is using it.

Feature details

Power Apps makers will now be able to use the Power Apps Studio to add documents to the layout of the app. Then, they'll be able to leverage the new commands to allow users to export those documents to PDF on demand from an app.

Improved debugging capabilities with canvas app Monitor

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

Business value

Monitor allows makers greater collaboration and user published app debugging capabilities, which allows users to diagnose and troubleshoot applications more quickly.

Feature details

With improved capabilities to import/export log files, share diagnostic sessions, debugging user sessions on the published app, and inspecting the app state in real-time, makers can easily identify problem areas and fix them in their apps.

Improved navigation in model-driven apps

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

Enable users to be more productive in both single and multi-session model-driven apps.

Feature details

In 2021 release wave 1, navigation will be improved with the following capabilities:

- The page side pane will allow a page to be opened to the far side of the current page and stay open while the current page is open. This will allow an edit experience for the related data.

- App makers are able to override multi-session app navigation to allow click to open to a side pane, multi-session new session, or multi-session new page tab.

Duplicate detection Unified Interface experience

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

This new experience was introduced in October 2020, but it required admins to enable it. In April 2021, this will be the default user experience.

Feature details

Duplicates can happen when users create or edit records or when data is imported. Microsoft Dataverse helps you address potential issues by detecting duplicates for active records like accounts and contacts. The updated experience is designed as a Unified Interface dialog and is integrated seamlessly with merging records to help you manage your data integrity when duplicate records are found. With this new duplicate detection experience you can quickly find and manage records with easier access to merge the duplicates and keep the record you want. When you merge a record, any related or child records are also merged.
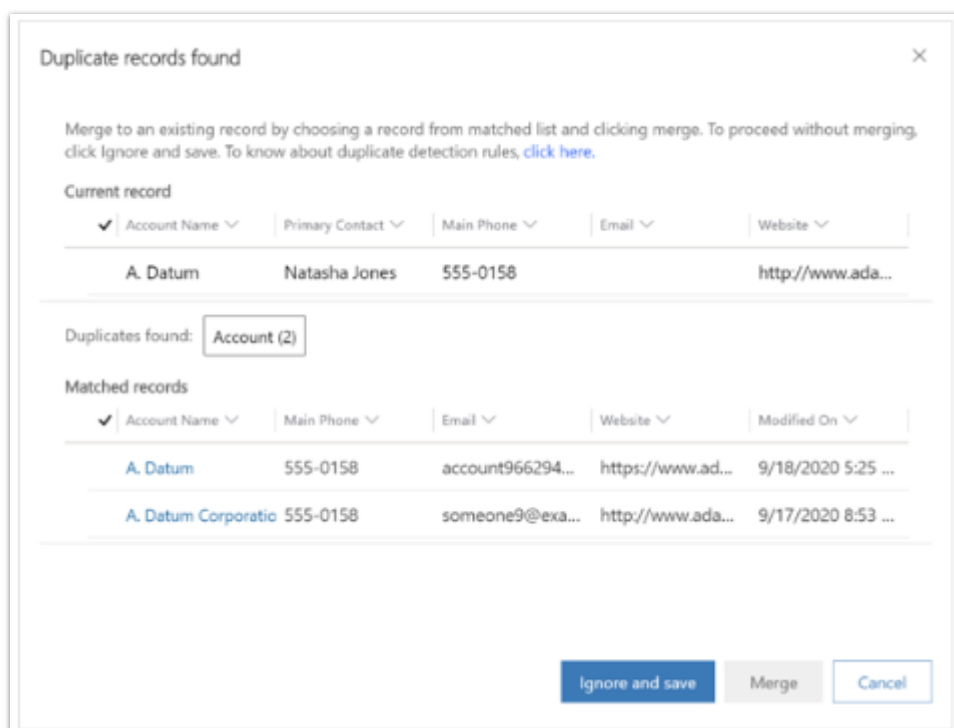
Duplicate detection dialog

Merging records has been updated and improved in Unified Interface

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2021	Apr 2021

Business value

This new experience was introduced in October 2020, but it required admins to enable it. Coming in the April 2021 release, this feature will be the default user experience.

Feature details

Duplicate records can happen in your data when users create or edit records manually or import data in bulk. Now, when a duplicate record is detected, you can easily merge data and retain the record you want. You can also choose up to two records to merge from the view or list page and merge the data into a single record with the new Unified Interface merge record dialog experience. When you merge a record, any related or child records are also merged.

Merge records

Power Automate

Overview of Power Automate 2021 release wave 1

Microsoft Power Automate makes it possible to grow your business productivity by automating repetitive, time-consuming tasks. Power Automate provides a better way to get things done across your organization through digital and robotic process automation (RPA).

There are many areas that are being invested in for Power Automate as a part of 2021 release wave 1. First, Microsoft Teams, with more than 100 Million daily active users, is central to Microsoft's remote work strategy, and Power Automate is key to the Microsoft Teams extensibility strategy by providing automation for your collaboration scenarios. We will build more and easier entry points across the Microsoft Teams experience, such as in meetings/calendars and other types of conversations. It will also be possible for administrators to push solutions that contain flows across the teams in their organization.

We will continue our deeper integrations Dynamics 365, Power Apps, Power BI, and Microsoft Dataverse, and we're making it easier for profession developers and users to collaborate and deploy solutions on Microsoft Power Platform.

Power Automate Desktop was released to general availability in December 2020, and it enables makers to automate the diversity of applications on their desktops. Going forward, we will provide migration for existing Softomotive and UI flows customers, secure credential management, and much more.

Beyond Power Automate Desktop itself, we're building enterprise trust by providing what centers of excellence need in the cloud: centralized management, monitoring, and reporting that allows users to scale beyond the per-flow experience in the portal. These experiences will provide security, governance, and administration so administrators can extend their control over desktop flow artifacts in the Power Platform admin center and Center of Excellence toolkit.

Effective automation in any organization also relies heavily on AI to be reliable and scalable, so we are further investing in content intelligence – specifically, in forms understanding where we'll be adding better support for multiple layouts, extracting content from tables, working with checkboxes and radio buttons on forms and more languages.

Finally, there is a new component in Power Automate: process advisor. We'll provide users with the insights into their tasks, with a process map showing variations across different instances and analytics. With this knowledge customers will make more informed business decisions including optimizing their processes and receive recommendations on areas of automation.

What's new and planned for Power Automate

This topic lists features that are planned to release from April 2021 through September 2021. 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

Features for Power Automate cloud flows.

Feature	Enabled for	Public preview	Early access*	General availability
Use connection references to simplify application lifecycle management	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2021
Trigger flows when a Microsoft Dataverse action is called	Admins, makers, marketers, or analysts, automatically	-	Jan 2021	Apr 2021
Improved onboarding experiences for new users	Admins, makers, marketers, or analysts, automatically	Mar 2021	-	Apr 2021
Search records in Microsoft Dataverse using relevance search	Admins, makers, marketers, or analysts, automatically	-	Feb 2021	Apr 2021
Improved licensing and usage visibility for Power Automate environments and tenants	Admins, makers, marketers, or analysts, automatically	Mar 2021	-	Apr 2021

Feature	Enabled for	Public preview	Early access*	General availability
Admin reports to show API usage for users and flows	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	-
Create Finance and Operations workflows from cloud flows	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	-
Governance capabilities to prevent data loss	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	-
Manage solution-based flows	Admins, makers, marketers, or analysts, automatically	Apr 2021	-	-

Desktop flows

Features for desktop flows (RPA).

Feature	Enabled for	Public preview	Early access*	General availability
Support UI automation with Citrix	Admins, makers, marketers, or analysts, automatically	-	-	Sep 2021
Web automation to access cross-domain iFrames	Admins, makers, marketers, or analysts, automatically	-	-	Sep 2021

Process advisor

Process advisor is a process mining capability in Power Automate.

Feature	Enabled for	Public preview	Early access*	General availability
Edit and annotate process recordings	Admins, makers, marketers, or analysts, automatically	✔️Dec 10, 2020	-	May 2021
Invite colleagues to process recordings	Admins, makers, marketers, or analysts, automatically	✔️Dec 10, 2020	-	May 2021
Record repetitive, manual processes with Power Automate Desktop	Admins, makers, marketers, or analysts, automatically	✔️Dec 10, 2020	-	May 2021
View process maps and analytics for your processes	Admins, makers, marketers, or analysts, automatically	✔️Dec 10, 2020	-	May 2021

* You are able to opt in to some features as part of early access on February 1, 2021, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Desktop flows

Overview

In 2021 release wave 1, there will be a number of different new capabilities for users of desktop flows (the flows that you build as part of the *Robotic Process Automation (RPA)* offering). Broadly, these cover increased support for applications and websites as well as working in heterogenous environments.

Web automation to access cross-domain iFrames

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

Feature details

Currently, desktop flows cannot capture iFrames. With this feature, you will be able to capture iFrame elements, unblocking the scenario where your automation needs to work with iFrames on a webpage.

Support UI automation with Citrix

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

Feature details

Today, you can automate Citrix systems using image recognition with desktop flows. Although image recognition is flexible and can work for any system, it is not as reliable as UI automation which leverages the UI elements using accessibility APIs.

In this release, we will improve our support for UI automation on Citrix environments by having a runtime inside the target Citrix environment. This runtime will be able to communicate with the Citrix session and thus directly access UI elements.

Cloud flows

Overview

In 2021 release wave 1, there are a number of different new capabilities for users of cloud flows (the flows that you build in the Power Automate portal which connect to 400+ services through connectors). This is our *Digital Process Automation* offering and covers:

- Flow creation

- Acquisition and retention

- Administration

- Lifecycle

- Integrations (Microsoft Dataverse, Dynamics 365, Azure, Microsoft 365, Microsoft Teams)

Improved onboarding experiences for new users

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

Feature details

This feature provides new experiences that make it easier for customers to onboard and get started creating flows in Power Automate.

Improved licensing and usage visibility for Power Automate environments and tenants

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

Feature details

Power Automate will provide additional reporting and analytics to help customers better understand their usage against entitlement limits in their license. Visibility will be provided in the Power Platform admin center as well as within the flow analytics page.

Trigger flows when a Microsoft Dataverse action is called

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

Feature details

With this feature, you will be able to create flows that trigger when an action is performed in Microsoft Dataverse. This feature improves working with the common events model and even provides better integration with Dynamics 365 Finance and Operations.
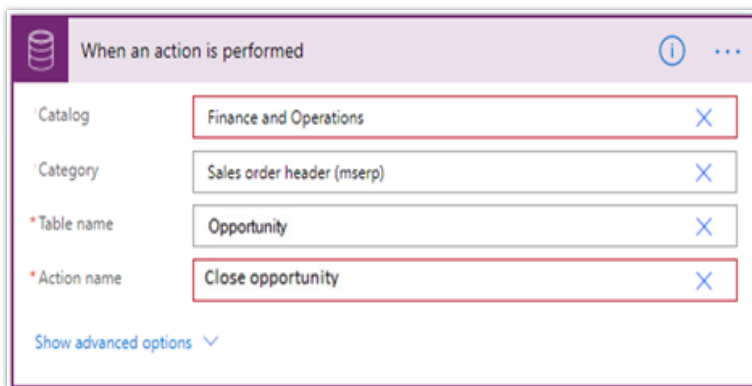
An action related to an entity is performed

Search records in Microsoft Dataverse using relevance search

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

Feature details

With this feature, you can create cloud flows that include a Microsoft Dataverse action to search records using relevance search, which is an AI-based fuzzy search that's built on Azure Cognitive Search.

Apart from basic cross-entity search, this action provides support for matches based on Lucene query syntax. This gives you capabilities like Boolean operators, wildcards, fuzzy search, proximity search, term boosting and regex matching.

Search records action with standard options

Create Finance and Operations workflows from cloud flows

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

Feature details

Makers can create cloud flows that run Finance and Operations workflows, passing on the context of a Finance and Operations record. This feature allows makers to combine cloud flows with Finance and Operations workflows to leverage the strengths of each.

Governance capabilities to prevent data loss

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

Feature details

Admins will have more governance capabilities for preventing data loss, including connector restrictions, connector action restrictions, endpoint filtering, and restrictions for sharing connections.

Use connection references to simplify application lifecycle management

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

Feature details

Makers can use connection references in flows to share connections between flows. When a solution is imported, there will be a guided experience for providing new connections within the connection references, allowing the flows to run successfully after importation. The use of connection references will simplify application lifecycle management.

Admin reports to show API usage for users and flows

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

Feature details

Administrators can use Power Platform admin center license reports to view the API usage of their flows and users. This feature helps administrators to determine when their flows and users are approaching usage limits. Admins can then use this information to allocate licenses.

Manage solution-based flows

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

Feature details

Makers can create and manage solution-based flows in the **My flows** experience, along with flows that are not in solutions. Here, makers can quickly add any flow into a solution.

Process advisor

Overview

Process advisor is a process mining capability in Power Automate that reveals insights into how people work by providing rich visualizations where users can identify repetitive, time-consuming processes best suited for automation.

Record repetitive, manual processes with Power Automate Desktop

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✅ Dec 10, 2020	-	May 2021

Feature details

With process advisor, users will be able to create a process and add a recording they make of that process on their desktop. They will ultimately be able to see this in the process-based process map with the associated analytics. Specifically, users will be able to:

- Create a new process.
- Create a recording to add to that process.
- Analyze that process to view the process map and analytics.

Invite colleagues to process recordings

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✅ Dec 10, 2020	-	May 2021

Feature details

Users who create processes in process advisor can invite others to record their experiences running the task. This way, the process owner will be able to see different variations of the process.

Edit and annotate process recordings

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Dec 10, 2020	-	May 2021

Feature details

With this feature, users who create processes and those who record them can edit and annotate their recordings so that they can be normalized to a common set of steps to improve viewability on the process map. They will also be able to remove sensitive personal data in the edit experience.

View process maps and analytics for your processes

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Dec 10, 2020	-	May 2021

Feature details

With this feature, users can view a map of their processes and also view a default set of analytics that are based on the recording and steps for that process.

Power Virtual Agents

Overview of Power Virtual Agents 2021 release wave 1

Power Virtual Agents enables anyone in your organization to create AI-powered bots that can chat with users about specific topics. They can answer routine questions, resolve common issues, or automate tasks that take up valuable customer or employee time.

The 2021 release wave 1 brings improvements in the authoring experience with list variables, topic suggestions from bot sessions, Adaptive Cards, and more. We're also building on our Power Automate integration with better error handling and new topic trigger management to improve your bot's triggering capabilities. Finally, we will acquire PCI and HITRUST certifications, and support for the government cloud.

Creating a bot is typically a complex and time-intensive process, requiring long content update cycles and a team of experts. Power Virtual Agents gives anyone in your organization the ability to create powerful custom bots using an easy, code-free graphical interface, without the need for AI experts, data scientists, or teams of developers. A bot can interact with users, ask for clarifying information, and ultimately answer a user's questions.

With deep integration with Power Automate and the Microsoft Bot Framework, authors can extend their bots to integrate with API back ends, which will enable the bots to handle additional topics, limited only by the author's imagination. You can deploy bots to many channels including websites, Microsoft Teams, and Facebook. As users interact with a bot, the author can see which topics are performing well, and which need improvement.

Use Power Virtual Agents documentation to get detailed information and answers to address your needs, from basic authoring tips all the way to complex bot configuration topics.

What's new and planned for Power Virtual Agents

This topic lists features that are planned to release from April 2021 through September 2021. 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 the bot to suit business needs.

Feature	Enabled for	Public preview	General availability
Acquire PCI and HITRUST certifications for Power Virtual Agents	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Better together with Portals	Users by admins, makers, or analysts	-	Apr 2021
Sharing bots with a security group	Users by admins, makers, or analysts	-	Apr 2021
Support for Government Cloud	Users by admins, makers, or analysts	-	Apr 2021

Core authoring

Use the Power Virtual Agents conversational editor to construct your dialogs, add variables or synonyms, and incorporate Power Automate flows that let connect to other systems.

Feature	Enabled for	Public preview	General availability
Add variable assignments and formula expressions in topic nodes	Users by admins, makers, or analysts	-	Apr 2021
Insert Adaptive Cards	Users by admins, makers, or analysts	-	Apr 2021
Understand and handle Power Automate flow integration	Admins, makers, marketers, or analysts, automatically	-	Apr 2021
Use list variables	Users by admins, makers, or analysts	-	Apr 2021

Feature	Enabled for	Public preview	General availability
Get guidance on topic trigger management	Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021
Use and see different versions of a topic	Admins, makers, marketers, or analysts, automatically	Mar 2021	May 2021

Enhanced natural language capabilities

AI and natural language capabilities enable the system to understand and parse complex user language.

Feature	Enabled for	Public preview	General availability
Intent triggering improvement from live traffic	Users by admins, makers, or analysts	Apr 2021	-
Get multi-turn topic suggestions from webpages	Users by admins, makers, or analysts	-	Apr 2021

Description of **Enabled for** column values:

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

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

Bot configuration

Overview

The bot 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 and Facebook channels, and more.

Sharing bots with a security group

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

Feature details

In addition to being able to set the bot access rules for bot managers or everyone in the tenant, bot managers will be able to set a security group to control the access to their bot.

Support for Government Cloud

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

Feature details

Use Power Virtual Agents to create chatbots that securely handle information for your government organization.

Acquire PCI and HITRUST certifications for Power Virtual Agents

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

Use Power Virtual Agents to create chatbots that comply with Payment Card Industry (PCI) and Health Information Trust Alliance (HITRUST) standards and securely handle your organization's information.

Better together with Portals

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

Feature details

In 2021 release wave 1, you can include Power Virtual Agents in templates, seamlessly create bots in Portals, and remove friction when transitioning to Power Virtual Agents to edit. Users will also get access to SSO and context sharing business model updates.

Core authoring

Overview

Creating a bot with Power Virtual Agents is easy to do with the no-code authoring canvas, and there are a number of ways you can manage how topics interact, how you want the conversation to flow, and what it should feel like.

It's also easy to test the bot without having to fully deploy the bot whenever you make a small change. There are also lesson topics that guide you through topic authoring from simple to complex scenarios, as well as default system topics, and you can choose what language you want your bot to use.

Insert Adaptive Cards

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

Feature details

Easily author rich content without needing to write code by using Microsoft Adaptive Cards directly from within the authoring experience. Adaptive Cards will be displayed consistently wherever your customers are and tailored to their screen size and device capability, including images and videos.

Use list variables

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

Feature details

Bot authors can use a list variable to take array outputs from Power Automate and Bot Framework Skills and present them as a list of choices in a bot question.

Understand and handle Power Automate flow integration

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2021

Feature details

Use the **Call an action** node to refresh and replace Power Automate flows directly in a conversation without removing or replacing the flow, and see changes made in Power Automate directly in the Power Virtual Agents authoring canvas.

For example, if you change the variable names, input, and output of a flow, the changes will be reflected directly in the authoring canvas. You'll also receive notifications about these changes from within Power Virtual Agents.

Get guidance on topic trigger management

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2021	Apr 2021

Feature details

Power Virtual Agents will proactively help and guide bot authors to identify problematic trigger phrases and adjust them. This will help to reduce cases where multiple topics may serve the similar (or the same) intent.

Use and see different versions of a topic

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2021	May 2021

Feature details

Power Virtual Agents will enable the bot author to go back to an earlier version of a topic, test that version of the topic, and publish it.

Add variable assignments and formula expressions in topic nodes

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

Feature details

Directly assign static values to variables, and make string, date, and number operations on top of variables directly within Power Virtual Agents without needing to call an external Power Automate flow.

Enhanced natural language capabilities

Overview

You can go beyond basic authoring in Power Virtual Agents by taking advantage of a number of advanced features. These features enhance and improve upon the authoring experience by letting you:

- Expand the types of information the bot understands and can parse back.

- Use existing support content from webpages, such as FAQs, to quickly create a robust set of topics that can be used in a bot.

Get multi-turn topic suggestions from webpages

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

Feature details

Today, you can point Power Virtual Agents at an FAQ webpage, and it will crawl the site and extract question and answer pairs to bring suggestions into the bot to help "seed" it with content quickly. So far, those suggestions have been single turn as a question and answer.

In 2021 release wave 1, Power Virtual Agents will add the ability to extract multi-turn topic suggestions, automatically generating more elaborate dialogs that are valuable for troubleshooting and other scenarios.

Intent triggering improvement from live traffic

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

Feature details

Every time a bot can't determine intent from the user utterance, it can ask the user which topic it meant to trigger. As users repeat this process, the bot automatically learns from the answers and improves its triggering performance.

Microsoft Dataverse

Overview of Microsoft Dataverse 2021 release wave 1

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.

Governance and administration

Overview of Microsoft Power Platform governance and administration 2021 release wave 1

Microsoft Power Platform offers a range of governance and administration capabilities that span the Microsoft Power Platform product offerings like Microsoft Power Apps, Microsoft Power Automate, and Microsoft Dataverse as well as Microsoft Dynamics 365 Sales, Service, and Marketing. These admin and governance capabilities are designed to help the administrators and IT professionals in the organization to help setup, secure, manage, govern, and monitor the use and adoption of Microsoft Power Platform and its components across the enterprise.

What's new and planned for Microsoft Power Platform governance and administration

This topic lists features that are planned to release from April 2021 through September 2021. 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.

Automation and tooling for administrators

Rich tooling experiences such as PowerShell cmdlets and management connectors are available for administrators and IT professionals managing the Power Platform.

Feature	Enabled for	Public preview	General availability
[Custom reporting with Bring Your Own Azure Data Lake for Power Apps and Power Automate](#)	Admins, makers, marketers, or analysts, automatically	Apr 2021	

Feature	Enabled for	Public preview	General availability
Microsoft Power Platform tenant isolation support along with the ability to specify allow list of tenants	Admins, makers, marketers, or analysts, automatically	Apr 2021	-
User security configuration experiences in the Power Platform admin center	Admins, makers, marketers, or analysts, automatically	Apr 2021	
Tenant scope admin report for Power Apps usage	Admins, makers, marketers, or analysts, automatically	Apr 2021	
Tenant-level admin reports for flow usage	Admins, makers, marketers, or analysts, automatically	Apr 2021	
Email exfiltration blocking using SMTP headers for Microsoft 365 mail connectors	Admins, makers, marketers, or analysts, automatically	✔Aug 1, 2020	Apr 2021

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Automation and tooling for administrators

Overview

Rich tooling experiences like PowerShell cmdlets and management connectors are available for administrators and IT professionals managing Microsoft Power Platform. This tooling is designed to provide additional management capabilities for use outside the out-of-the-box portal experiences and to allow for a fully automatable management experience.

Custom reporting with Bring Your Own Azure Data Lake for Power Apps and Power Automate

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2021	-

Business value

Bring Your Own Azure Data Lake allows you to slice and dice the data based on your unique requirements. You can build custom reports with Power BI, including views at the individual business unit level and detailed app level reports at the tenant and environment level. Having the data in your own lake also means the data can be stored for durations as required by your organization's data retention policies.

Feature details

You can opt in to export all your tenant data into your own Azure Data Lake Storage instance without having to write any code. You'll need to have the Azure Data Lake Storage set up prior to setting up a daily data export via the Power Platform admin center. Once set up, the data will be made available in a Common Data Model schema. The Common Data Model based metadata makes it possible for data and its meaning to be shared across applications and business processes, such as Microsoft Power Apps, Power BI, Dynamics 365, and Azure. The data will include the full inventory for all apps, connectors, and associated metadata that exist in the tenant as well as the usage telemetry, which will be comprised of data from the day the export starts.

After the first data export, there will be incremental daily updates. Once the data is in your data lake, you can, for example, leverage Power BI dataflow to connect to Azure Data Lake Storage and start building reports and dashboards.

Here are some sample scenarios that will light up in your own lake:

- Tenant-level metrics across apps and flows for different business units.
- Environment with the most apps and flows with app and flow names ranked in order of usage.

- Custom and standard connectors creation and usage trend with filters for location, and business units.

- Business unit specific trends. (For example, a report that lists all marketing department employees using a specific app or flow and a list of all apps or flows used by specific users.)

- Business units with the most apps and flows along with details of the app and flow.

- Trends and details per business unit on connector usage.

- App and flow usage based on business units to answer questions like: How many users in the eastern zone marketing are using a particular app or flow?

- List of users per business unit with the most apps and flows filtered by sessions or runs.

- List of app and flows with owners who no longer work in any of the business units.

Microsoft Power Platform tenant isolation support along with the ability to specify allow list of tenants

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2021	-

Business value

Admins can manage data exfiltration or infiltration risks for Azure AD based connectors in their tenant by turning on tenant isolation for Microsoft Power Platform connections. This would disallow connections from your tenant to external tenants and also block other tenants to establish Microsoft Power Platform connections to your tenant. For legitimate business use cases where such cross-tenant connections are required to be enabled through Microsoft Power Platform, admins can specify an explicit allow list of tenants along with specifying the direction of allowing cross-tenant connections (inbound from external tenant, outbound from your tenant, or both).

Feature details

Enable/disable tenant isolation using self-serve capability through the Power Platform admin center: When tenant isolation is turned on, all Azure AD based connectors can no longer be used to create cross-tenant connections from/to your tenant. Previously, customers had to create a support ticket to enable tenant isolation. Now, we're allowing you to manage your tenant's tenant isolation settings directly through the Power Platform admin center.

Choose an allowed list of tenants that are exempt from tenant isolation: This is a new capability within tenant isolation to allow legitimate business scenarios to continue connecting to explicitly identified tenants, even as everything else is disallowed. Wildcard *

also is supported if all tenants need to be enabled in an inbound or outbound direction instead of identifying specific tenants.

User security configuration experiences in the Power Platform admin center

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2021	-

Business value

Admins will be able to scale their security management by managing roles for groups of users in environments with a Microsoft Dataverse database using modern and intuitive experiences in the Power Platform admin center.

Feature details

The following environment and user security configuration experiences will be lit up in the Power Platform admin center through a modern and intuitive UI for environments with a Microsoft Dataverse database:

- Admins can create and manage Dataverse Group Teams end-to-end, through a modern, simple, and coherent experience in the Power Platform admin center.

- Extending today's ability to associate an Azure Active Directory Group to an environment, admins can also assign roles to the Group they associate to an environment, so that as users in the group get provisioned to the environment, they will automatically inherit their group's roles and have instant access to the environment's resources and data based on the roles assigned. Admins no longer need to wait for users to first get provisioned and then assign roles for one user at a time. To add users to an environment, admins no longer need to add them one at a time. Now, they can add an entire group in one go through a Dataverse Group Team creation experience.

- Extending today's security roles management experience, admins can not only assign individual users/owner teams/access teams to a role, but they can also assign Azure AD Groups (wrapped by Dataverse Group Teams) to a role.

- When managing roles for a user, admins can easily differentiate between roles they directly assigned to a user versus roles they inherited through a Dataverse Group Team membership.

- Admins can access an entry point from the Power Platform admin center to create and manage application users and their roles in an environment.

Tenant scope admin report for Power Apps usage

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2021	-

Business value

Microsoft Power Platform service admins will be able to understand usage with metrics like Monthly Active Users (MAU), the kind of engagement with return users, and also the list of apps in use and not in use at the tenant level to drive the right investments. For example, by making it possible to quickly gain insights into usage and inventory metrics, you could direct more resources into heavily used apps.

Feature details

Microsoft Power Platform service admins, Dynamics 365 admins, and Microsoft 365 global admins will be able to opt-in to out of the box tenant level reports for Power Apps with options to drilldown to the environment level.

Usage reports will provide insights into MAU, sessions, new and return users, and a list of apps in use with filters for app type, connector tier, country, device platform, and player version.

Maker Activity/Inventory reports will provide details like total apps, active apps, apps created the last 30 days, environments with apps, total makers, app creation trend, maker trend and inventory list of all apps with the owner, published dates, environment it belongs to, last launched date, and the type of app (canvas or model-driven). There will be filters for app type, connector tier, and country.

Tenant Hygiene reports will allow you to determine the list of apps not in use with the ability to filter by flow type, connector tier, and country.

Tenant-level admin reports for flow usage

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2021	-

Business value

Microsoft Power Platform service admins will be able to understand the usage of flows in use to drive the right investments. For example, by making it possible to quickly gain insights into usage and inventory metrics, you could direct more resources into important or heavily-used flows.

Feature details

Microsoft Power Platform service admins, Dynamics 365 admins, and Microsoft 365 global admins will be able to opt into the default tenant-level reports for cloud and desktop flows. There will also be an option to view data at the environment level.

Usage reports for cloud flows will provide insights into total runs and trends, successful and failed runs and trends, the number of makers, a list of all flows with type, owner, successful and failed runs, total actions, last run date, and the flow environment. You will be able to filter this through attributes like flow type, flow state, and connector tier.

Maker activity/inventory reports will provide details like total flows, number of flows created in the last 30 days, number of actions in the last 30 days, total environments with flows, total makers, flow creation trends, list of flows with flow name, type, owner, and published date. You will be able to filter this with specific flow types, flow state, and connector tier.

Tenant Hygiene reports will allow you to determine the list of cloud flows that are not in use, with the ability to filter by flow type, connector tier, and country/region.

Email exfiltration blocking using SMTP headers for Microsoft 365 mail connectors

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 1, 2020	Apr 2021

Business value

Admins can safely allow Microsoft 365 mail connectors to be used within Microsoft Power Platform and ensure that these cannot be leverage to exfiltrate emails to external domains by setting up Exchange mail rules.

Feature details

Admins can set up Exchange mail flow rules to monitor or block emails sent by Power Automate and/or Power Apps using the Microsoft 365 Outlook connector. The SMTP header sent by Microsoft Power Platform will include *Microsoft Power Automate* or *Microsoft Power Apps* with the header type: "*x-ms-mail-application*".

Further, in order to identify the operation ID, a reserved word *Forward* or *Reply* or *Send* is inserted with the header type: "*x-ms-mail-operation-type*".

In addition, for admins to exempt specific apps or flows or environments from exfiltration blocking rules where they facilitate legitimate business use cases, admins can leverage the app or flow ID and environment ID value that will be added to the SMTP headers published by Microsoft Power Platform.

See also

[Email exfiltration controls for connectors](#) (docs)

Data integration

Overview of data integration 2021 release wave 1

The data integration team's vision is to democratize data for business users so it is seamless to extract, transform, and load data into Microsoft Dataverse and Azure Data Lake Storage from any data source and to allow other Microsoft products to leverage this data.

We are investing in a few key pillars:

- Microsoft Power Platform dataflows. Power Query is the industry leading smart data prep tool and evolves by infusing AI/ML into data transformations and by extending dataflows to all of Microsoft Power Platform. In 2021 release wave 1, we are enabling the dataflows experience in Dataverse in Teams so that customers can easily populate data and build better applications.

- Gateway and Azure Virtual Network connectivity in Microsoft Power Platform will allow enterprises to scale out their cloud to cloud integrations without leveraging the Gateway, removing complexity and administration effort in building a true, democratized data platform.

- Enhanced data integration by enabling analytics on Dataverse data through Export to Data Lake in Common Data Model form, Office data integration to enable new insights, new and enhanced connectors, improvements in connectivity platform, extending dual-write for more entities, improving Data Export Service, and enhancing Gateway for enterprises and Robotics Process Automation (RPA).

- End-to-end diagnostics so that customers can better diagnose and fix issues in queries or Gateway.

- Common Data Model establishes industry wide structure and semantics of underlying data so that customers can then reason about that data through various business application solutions, analytics, and machine learning (ML) algorithms.

What's new and planned for data integration

This topic lists features that are planned to release from April 2021 through September 2021. 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
Automation for adding a gateway member to a cluster	Admins, makers, marketers, or analysts, automatically	Sep 2021	-
Enrichment through integration with Azure Maps	Admins, makers, marketers, or analysts, automatically	Sep 2021	
Export gateway and data source details to Excel	Admins, makers, marketers, or analysts, automatically	Sep 2021	
Export output data to multiple formats and destinations	Admins, makers, marketers, or analysts, automatically	Sep 2021	-
Gateway diagnostics	Admins, makers, marketers, or analysts, automatically	Sep 2021	
Improved error management	Admins, makers, marketers, or analysts, automatically	Sep 2021	-
Personal custom function library	Admins, makers, marketers, or analysts, automatically	Sep 2021	-
Reuse and share queries across Power Query clients with templates	Admins, makers, marketers, or analysts, automatically	Sep 2021	
Security improvements for gateway and data source management	Admins, makers, marketers, or analysts, automatically	Sep 2021	

Feature	Enabled for	Public preview	General availability
Visual data prep (Diagram view) for authoring within Power Query Desktop	Admins, makers, marketers, or analysts, automatically	Sep 2021	-
Data source management enhancements	Admins, makers, marketers, or analysts, automatically	-	Sep 2021
Email alerts	Admins, makers, marketers, or analysts, automatically	-	Sep 2021
Help tab in Power Query ribbon in Power Query Desktop	Users, automatically	-	Sep 2021
Improved error messages	Admins, makers, marketers, or analysts, automatically	-	Sep 2021
In-product links to documentation in Power Query Desktop	Users, automatically	-	Sep 2021

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Automation for adding a gateway member to a cluster

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	-

Feature details

We released a command prompt install of a gateway, which helps automate installation of a gateway cluster with one gateway member. (Adding a gateway member to an existing cluster is still manual.) With this new feature, customers will be able to automate addition of gateway members to an existing gateway cluster.

Enrichment through integration with Azure Maps

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	-

Feature details

We'll simplify the experience for citizen data analysts to perform geo-based enrichments (for example, geocoding and reverse geocoding) in the Power Query Editor through a tighter integration with Azure Maps APIs.

Export gateway and data source details to Excel

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	-

Feature details

With these features, customers will be able to export gateway and data source properties to Excel for further analysis or auditing purposes.

Export output data to multiple formats and destinations

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	-

Feature details

Today, we provide the ability for citizen data analysts to push prepared data to Microsoft Dataverse or Azure Data Lake Storage. This feature will allow customers to export the prepared output data from their queries and dataflows into multiple formats (for example, Excel and CSV) and destinations beyond Microsoft Dataverse and Azure Data Lake Storage so that they can be easily consumed to make business decisions.

Gateway diagnostics

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	-

Feature details

We've been working on centralizing gateway diagnostics on the admin center by providing visibility into system and query diagnostics. In 2021 release wave 1, we'll enhance this experience along with providing proactive recommendations and email alerts.

Improved error management

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	-

Feature details

We want makers to be more successful when authoring and running dataflows, so we're improving the experience for surfacing errors to increase awareness. This includes quick ways to navigate to the query and automatically fix the issue when possible.

Personal custom function library

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	-

Feature details

We'll give makers the ability to tailor their Power Query experience by always having easy access to relevant custom functions directly in the UI rather than having to copy and paste from other sources.

Reuse and share queries across Power Query clients with templates

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	-

Feature details

In previous waves, we'd added support to create Power Query templates from queries in Microsoft Excel and Microsoft Power Platform dataflows. Building on top of that paradigm, we're supporting full template mobility across web and desktop Power Query clients so queries created in any client can easily be exported, shared, and imported seamlessly.

Security improvements for gateway and data source management

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	-

Feature details

We plan to add additional security roles to gateways and data sources that will provide you flexibility and control. For instance, these roles will help differentiate users having access to who can create data sources from users who can administer (recover, update, and so on) the gateway.

Visual data prep (Diagram view) for authoring within Power Query Desktop

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Sep 2021	-

Feature details

We'll enable **Visual data prep (Diagram View)** within Power Query Desktop. This will provide a fully interactive interface to easily create your queries and visualize your data preparation process. We want to simplify the experience for citizen data analysts to get started, speed up the data preparation process, and help quickly understand the queries, both the "big picture view" on how the queries are related and the "detailed view" around specific data preparation steps in a query.
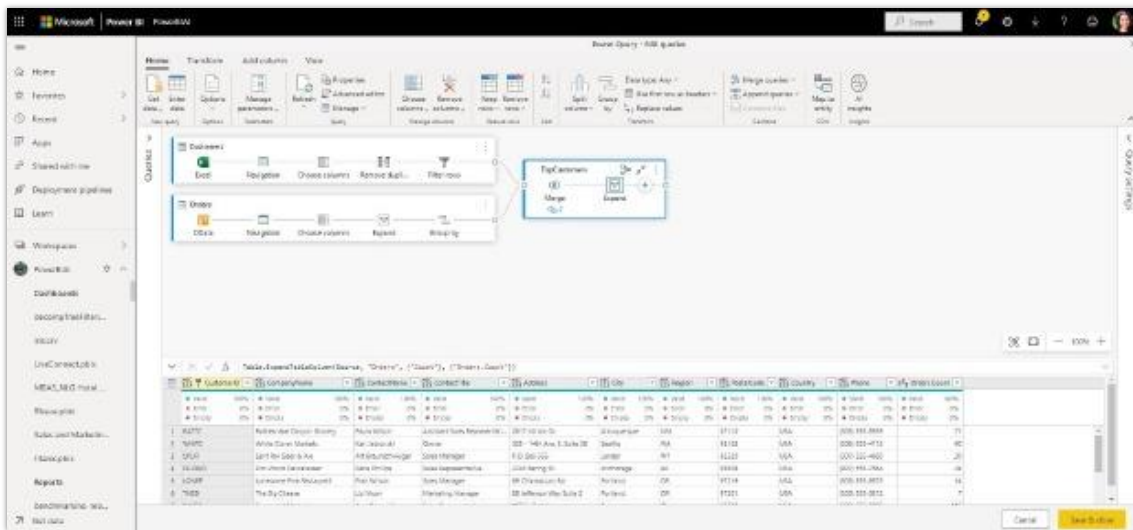
Diagram view

Data source management enhancements

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2021

Feature details

We've been working on centralizing gateway and data source management in the admin center. In 2021 release wave 1, We'll continue this effort by enhancing data source management for Power BI and embedding this experience in Power BI. In addition, we'll support the following:

- Visibility of the username for the data source so customers don't have to maintain this information offline for updating passwords, and so on.

- Visibility of service principal as gateway/data source users and installers in the management experience.

- New data source field called **Data source description**.

- Ability to export gateway and data source information to Excel.

- Support for groups for gateway installers.

- New gateway fields like **Installed date** and **Last used date**.

Email Alerts

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2021

Feature details

These enhancements will provide an option to let gateway admins set up email alerts to notify for various criteria, such as updating to a newer version of the gateway, performance bottlenecks, and so on.

Help tab in Power Query ribbon in Power Query Desktop

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

Feature details

Similar to many other Microsoft experiences, we're adding a **Help** tab to the Power Query ribbon with three main sections:

- **Help** to access product help and to send feedback.
- **Community** to access the blog and forums or to submit an idea.
- **Resources** to access templates and other references.

Improved error messages

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2021

Feature details

We'll continue to improve error messages for gateways to make them more actionable, so you can self diagnose and get to the root of most issues.

In-product links to documentation in Power Query Desktop

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

Feature details

To assist users in various areas of the product experience, we're adding **Learn more** links to key areas of the Power Query user interface to direct users to relevant public documentation so they may benefit from easily accessible help.

Got feedback?

Share your feedback on a community forum for Dynamics 365 or Power Platform. We'll use your feedback to make improvements. To find out about updates to these release notes, follow us on Twitter @MSFTDynamics365.

Microsoft