

Welcome to

What's new in Microsoft 2026 Release Wave 1 Dynamics 365 Customer Engagement

Thursday, 7th May 2026

We will kick off shortly

Before we get started...

- We are recording today's webinar and share it afterward.
- We will share the presentation, including relevant links.
- Feel free to ask your questions by writing in the chat.

What are the Release Waves

The two main updates on the Microsoft Dynamics 365 platform are called "waves".

Usually they occur in April (Wave 1) and October (Wave 2) and it is recommended that customers and partners have prior knowledge of the news and possible impacts.



March 18

Release plan/
documentation.



April 1

Possibility of applying the wave in
environments to evaluate the functionalities
or even to anticipate the update of the
production environment.



April 03

Starting with updates in
all environments,
including production.

Important notes:

- The date of the wave update can be brought forward to better suit customers' schedules but cannot be postponed;
- In addition to the waves, Microsoft makes small weekly updates between 9pm on Fridays and 6am on Saturdays;
- The Microsoft telemetry area triggers warnings about code usage, functionality, depreciated license to the Dynamics 365 and/or Power Platform admin email.
- <https://learn.microsoft.com/pdf?url=https://learn.microsoft.com/en-us/dynamics365/release-plan/2025wave2/toc.json>
- <https://learn.microsoft.com/pdf?url=https://learn.microsoft.com/en-us/power-platform/release-plan/2025wave2/toc.json>

Depreciations and Substitutions



[Link to documentation](#)



Item	N/U	Deadline	Benefits / Observations
Add chat message to Dynamics 365 record in Microsoft Teams		January/2026	Effective January 2026, the ability to add chat messages from Microsoft Teams to Dynamics 365 records is deprecated. After the deprecation, you can no longer use the Add to Dynamics 365 option in Microsoft Teams chat messages to save them to Dynamics 365 records.

Customer Service



Item	N/U	Deadline	Benefits / Observations
Dynamics 365 Unified Service Desk to be deprecated in April 2026		April/2026	Beginning April 01, 2026, Unified Service Desk will be deprecated. We recommend that you start using Copilot Service workspace.



What's new in Dynamics 365 CE



[Link to documentation](#)





Sales

 [Link to documentation](#)



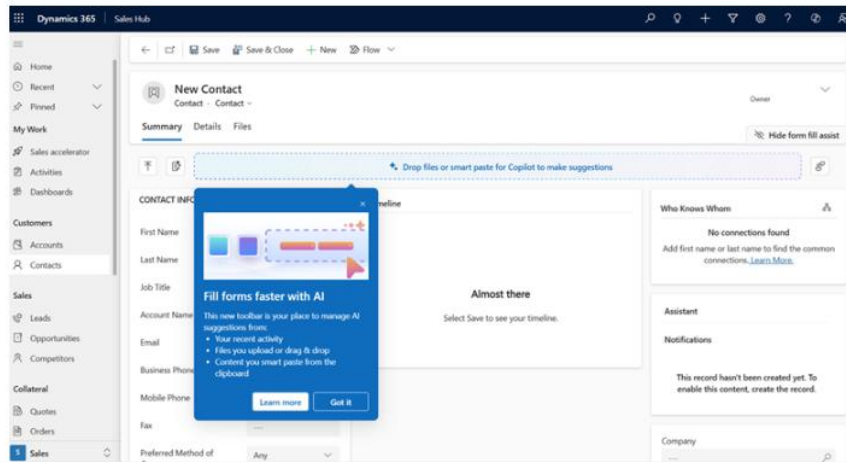
Sales – Business research

Item	N/U	Deadline	Benefits / Observations
Explore complex sales insights with Sales Research Agent	New	March/2026	Sales Research Agent in Dynamics 365 Sales empowers you to explore complex business questions through natural language conversations with your data. It leverages a multimodal, multimodel, and multi-agent architecture to reason over intricate, customized schemas with deep sales domain expertise. The agent delivers novel, decision-ready insights through narrative explanations and rich visualizations tailored to the specific business context.

Sales – Copilot and AI innovation

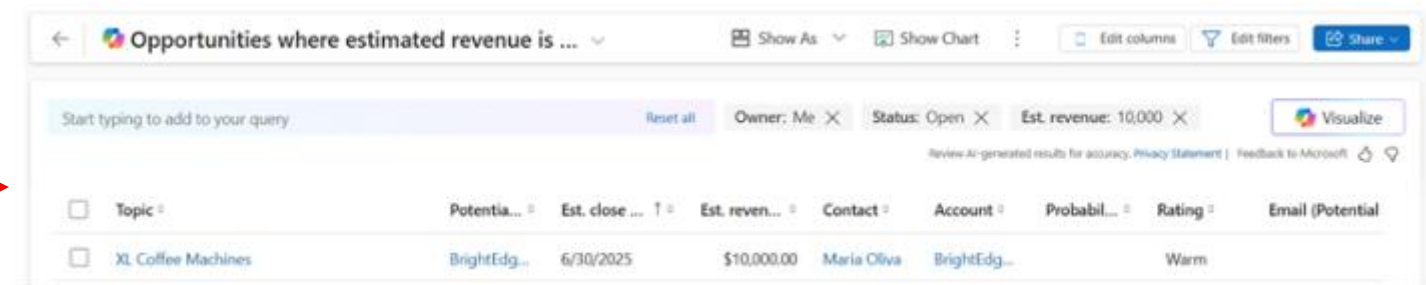
Item	N/U	Deadline	Benefits / Observations
Accelerate data entry using form fill assist toolbar	Updated	April/2026	<p>Sales teams often deal with large volumes of lead and contact data from sources like business cards, web forms, and scanned documents. Manually entering this information into Dynamics 365 Sales is time-consuming, error-prone, and takes away from high-value selling activities like engaging with customers and closing deals.</p> <p>As part of Copilot's form fill assistance initiatives, the form fill assist toolbar supports uploading of files, emails, and images, helping eliminate this manual data entry work.</p>
Streamline data entry with smart paste	Updated	April/2026	<p>Smart paste helps you eliminate that busywork. It uses AI to analyze what you copy to your clipboard, identify key details, and automatically fill them into the right fields. Whether it's content from an email or a business card, smart paste updates the form for you, so all you need to do is review and save the lead or contact.</p>

Form fill toolbar



Sales – Copilot and AI innovation

Item	N/U	Deadline	Benefits / Observations
Connect AI agents to sales workflows using Model Context Protocol Server	Updated	February/2026	Whether you're a developer building an AI agent to automate part of the sales workflow or a seller using AI assistants such as ChatGPT and Claude to get work done, you can now connect Dynamics 365 Sales to your agents and assistants with the new Model Context Protocol (MCP) server.
Boost decision making by using Visualize with Copilot	Updated	April/2026	<p>Sales teams often rely on dashboards, static charts, or external tools like Power BI to make sense of their sales data in Dynamics 365 Sales. Switching between views or analyzing raw data manually can take extra time, disrupt daily workflows, and delay decision-making.</p> <p>As part of Copilot's productivity capabilities, smart charts enable sellers to generate real-time visualizations directly within their workflow. Using AI, these charts help you uncover trends, patterns, and relationships in tabular data, making it easier to interpret data, act on insights faster, and stay focused on closing deals.</p>
Find, filter, and sort using natural language with smart grid	Updated	April/2026	Smart grids, part of Copilot's workflow efficiency toolkit, simplify this process by letting you filter, find, and sort data using natural language. Just type a query in natural language in Copilot Search, and Copilot instantly applies the right filters and updates the grid. You see exactly what criteria are used and can clear them all with one click. With smart grids, you get to insights faster, make smarter decisions, and stay focused on closing deals.



Sales – Lead Management

Item	N/U	Deadline	Benefits / Observations
Deploy multiple Sales Qualification Agents in a single environment	Updated	June/2026	Multi-agent configuration in Sales Qualification Agents enables sales organizations to deploy agents aligned to distinct product lines, regions, or sales teams, each with its own qualification criteria, knowledge sources, and engagement approach. Multi-agent configuration ensures exclusive lead ownership, coordinates handoffs when context shifts, and provides sales managers with visibility across agents. This targeted approach mirrors real-world sales structures, eliminates duplicate outreach, accelerates qualification, and scales coverage without additional seller headcount.

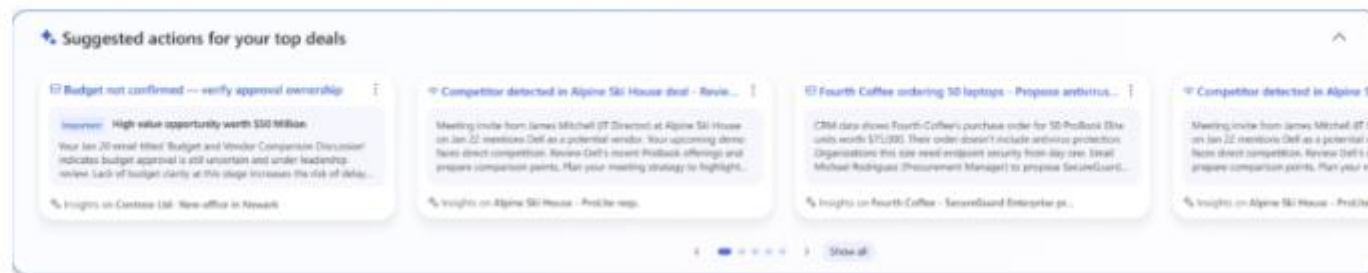
Sales – Opportunity acceleration

Item	N/U	Deadline	Benefits / Observations
Chat with your deal insights using ask-and-refine experience in Sales Close Agent	Updated	June/2026	With an ask-and-refine experience built directly into the opportunity, you get right-sized, action-first insights based on the current opportunity context. You can quickly act on what matters now, then go deeper only when you choose. This reduces time spent hunting for answers, improves seller confidence at critical stages, and helps you scale AI usage efficiently across the organization.
Stay on track at every deal stage with delta-first guidance in Sales Close Agent	Updated	June/2026	As a seller, you juggle many active opportunities, but deal conditions can shift quickly as stakeholders change, buying signals drop, pricing or procurement hurdles appear, or budget and timeline assumptions shift. When you miss what changed, why it matters now, and what to do next for the current stage, deals lose momentum. Building on the existing deal briefing and continuous monitoring, Sales Close Agent - Research aligns guidance to the customer's business process flow (BPF) stage.
Carry out suggested actions faster and more effectively	Updated	May/2026	Next Best Action not only prioritizes the key actions for your team to focus on but also ensures that the execution of the suggested action is seamless, effective, and fast. It provides the necessary context and details that enable your team to execute the action with ease without having to invest time for researching and understanding the context for each action.

Sales – Opportunity acceleration

Item	N/U	Deadline	Benefits / Observations
Identify the most important actions in the flow of work	Updated	May/2026	With Next Best Action, you can ensure that your team focuses on actions that matter most in achieving the target set for each individual member and the team as a whole. These actions will be identified across various experiences, ensuring your team never misses out on any action, wherever they are present.
Improve opportunity context with AI-based data enrichment	Updated	March/2026	When your opportunity data is incomplete or outdated, you may find it challenging to understand deal health and take the right actions. AI-powered data enrichment reduces this friction by analyzing your emails and highlighting gaps in opportunity information and suggesting updates. This feature helps you keep your opportunity data accurate and up to date, increases your confidence in pipeline data, and enables more effective deal reviews and forecasting.
Uncover insights and risks to close more deals with Opportunity Research Agent	Updated	March/2026	Sales Close Agent's Opportunity Research addresses this challenge by providing sellers with a holistic view of every opportunity. By tirelessly researching data from CRM, SharePoint, public web sources, and customer interactions, it delivers a complete picture of the opportunity. It equips sellers with the context they need to ramp up quickly, understand the competitive landscape to make a differentiated pitch, engage key stakeholders, respond to competitive threats, proactively mitigate risks, and ultimately drive more deals to closure.

Prioritized list of actions on NBA carousel

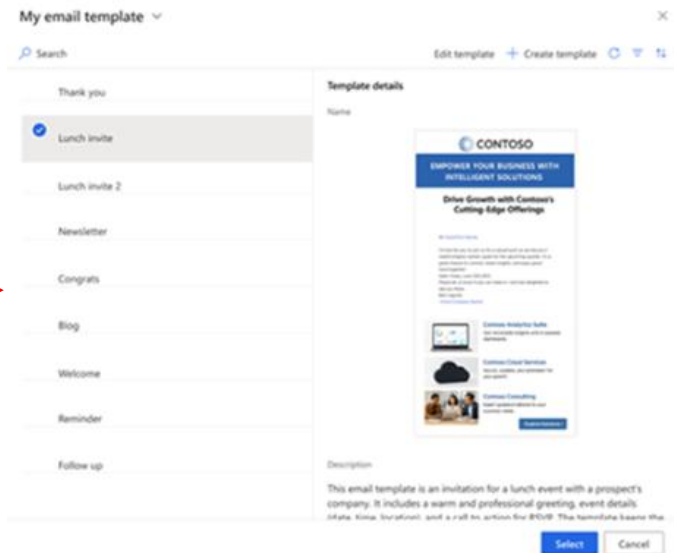


Suggested actions for your top deals

- Budget not confirmed -- verify approval ownership**
Insight: High value opportunity worth \$30 Million.
 Your Jan 20 email titled 'Budget and Vendor Comparison Discussion' indicates budget approval is still uncertain and under leadership review. Lack of budget clarity at this stage increases the risk of delay.
 Insights on Costco Ltd - New office in Newark
- Competitor detected in Alpine Ski House deal - Review...**
 Meeting invite from James Mitchell (IT Director at Alpine Ski House on Jan 22 mentions Dell as a potential vendor. Your upcoming demo faces direct competition. Review Dell's recent ProBook offerings and prepare comparison points. Plan your meeting strategy to highlight...
 Insights on Alpine Ski House - ProBook req.
- Fourth Coffee ordering 30 laptops - Propose antivirus...**
 CRM data shows Fourth Coffee's purchase order for 30 ProBook Elite units worth \$11,500. These units doesn't include antivirus protection. Organizations that use email endpoints security from any new email Michael Rodriguez (Procurement Manager) to propose SecureGuard.
 Insights on Fourth Coffee - SecureGuard Enterprise pt.
- Competitor detected in Alpine Ski...**
 Meeting invite from James Mitchell (IT Director at Alpine Ski House on Jan 22 mentions Dell as a potential vendor. Your upcoming demo faces direct competition. Review Dell's recent ProBook offerings and prepare comparison points. Plan your meeting strategy to highlight...
 Insights on Alpine Ski House - ProBook req.

Sales – Sales engagement and execution

Item	N/U	Deadline	Benefits / Observations
Reduce seller friction in Sequences with in-flow e-mail template picker	Updated	April/2026	The new email template picker in Sequences removes this friction by enabling fast template discovery, in-flow creation and editing, and clearer organization through views. Sellers can stay in the flow while building Sequences, quickly find or adjust the right template for each step, and move from intent to execution faster, while managers and operations benefit from better reuse of shared and approved templates.



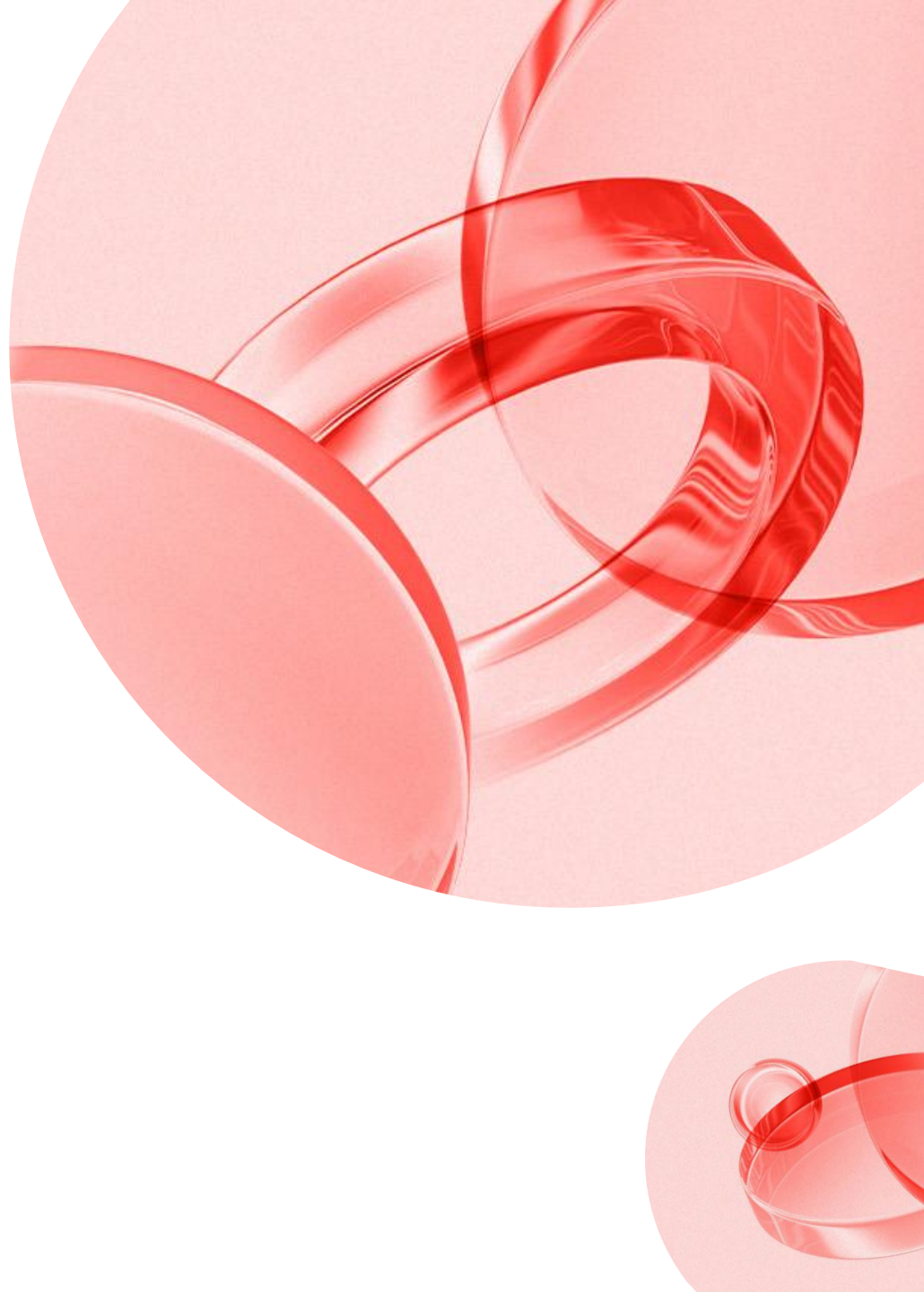
Sales – Seller experiences

Item	N/U	Deadline	Benefits / Observations
Improve opportunity data completeness with AI-powered data enrichment	Updated	July/2026	With AI-powered data enrichment, you automatically receive timely, relevant suggestions to fill data gaps based on real customer interactions, such as emails, meetings, and third-party connectors. You reduce manual updates, gain greater confidence in pipeline health, and run faster, more focused deal reviews that help you move opportunities forward.
Get integrated inbound and outbound calling with sales hub dialer	Updated	May/2026	<p>The new Sales Hub dialer brings a built-in calling experience to Dynamics 365 Sales so you can make, receive, and manage calls with full CRM context and AI insights—all in one place.</p> <p>As a seller, you spend a big part of your day talking to customers, and the experience is smoother when the dialer integrates seamlessly into the Sales app. The new Sales Hub dialer gives you a modern, integrated calling experience directly inside Dynamics 365 Sales. You can place outbound calls, handle incoming calls, see customer history, take notes, and automatically capture conversation intelligence—without switching apps or losing context.</p>



Copilot for Sales

 [Link to documentation](#)



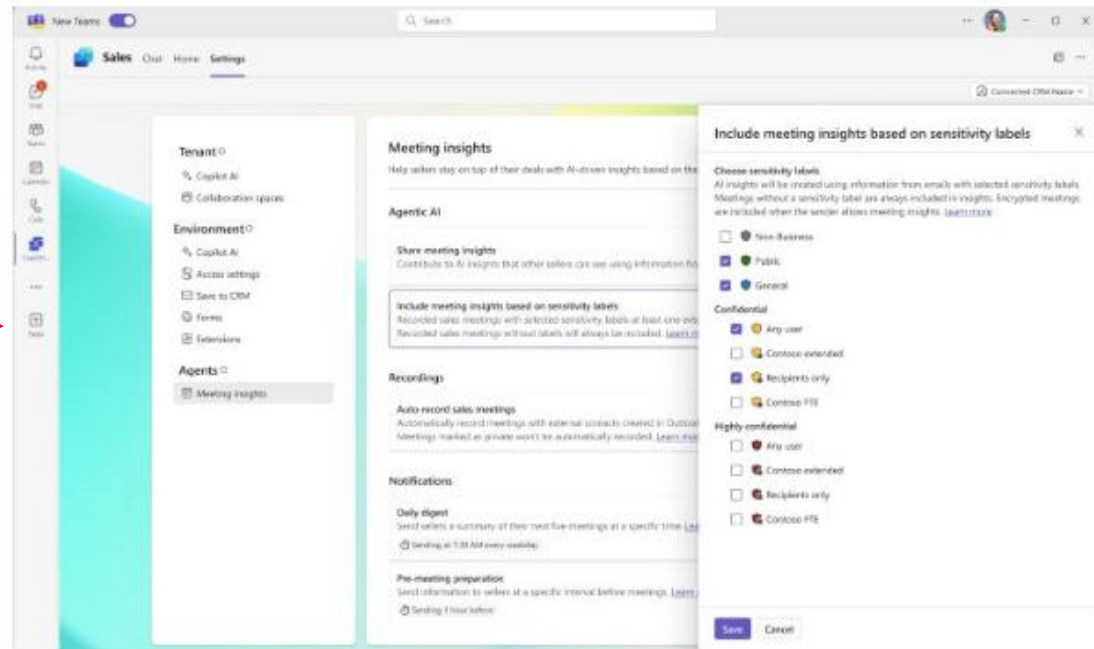
Copilot for Sales – Access and analyze sales data with Sales Chat



Item	N/U	Deadline	Benefits / Observations
Link meetings to CRM records automatically with AI	Updated	June/2026	<p>This feature removes a manual step that slows you down by automatically linking meetings to the right CRM records. You get relevant deal insights while preparing for customer meetings, spend less time managing records, and spend more time selling with stronger context.</p> <p>When you schedule a meeting, AI evaluates meeting details and existing CRM relationships to identify the most relevant open opportunity. If no opportunity meets the confidence threshold, it falls back to an account-level match. The selected record is soft-linked and used to generate meeting prep insights, and you can accept, change, or remove the suggested match at any time.</p>

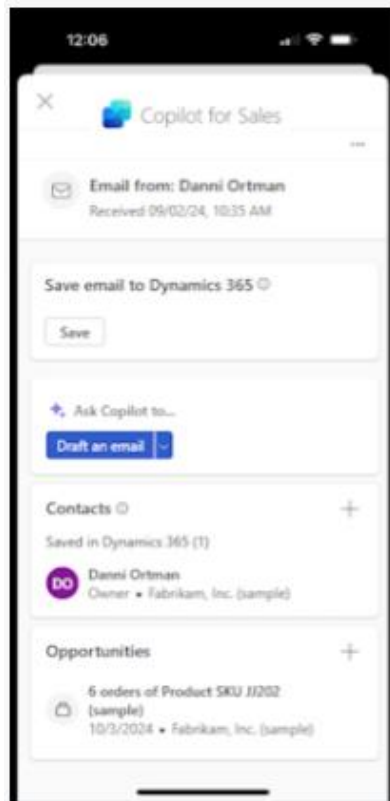
Copilot for Sales - Application experiences

Item	N/U	Deadline	Benefits / Observations
Control AI insights generation by meeting sensitivity labels	Updated	April/2026	<p>This feature lets you control which meetings can generate AI insights, so you can protect sensitive conversations while still getting value from approved meetings. You can reduce compliance risk without slowing seller productivity.</p> <p>You can also exclude meetings that have specific sensitivity labels, such as Highly confidential, so those meetings are not used for AI insights. This setting is applied consistently across all meeting-based AI experiences.</p>



Copilot for Sales - Microsoft Outlook experiences

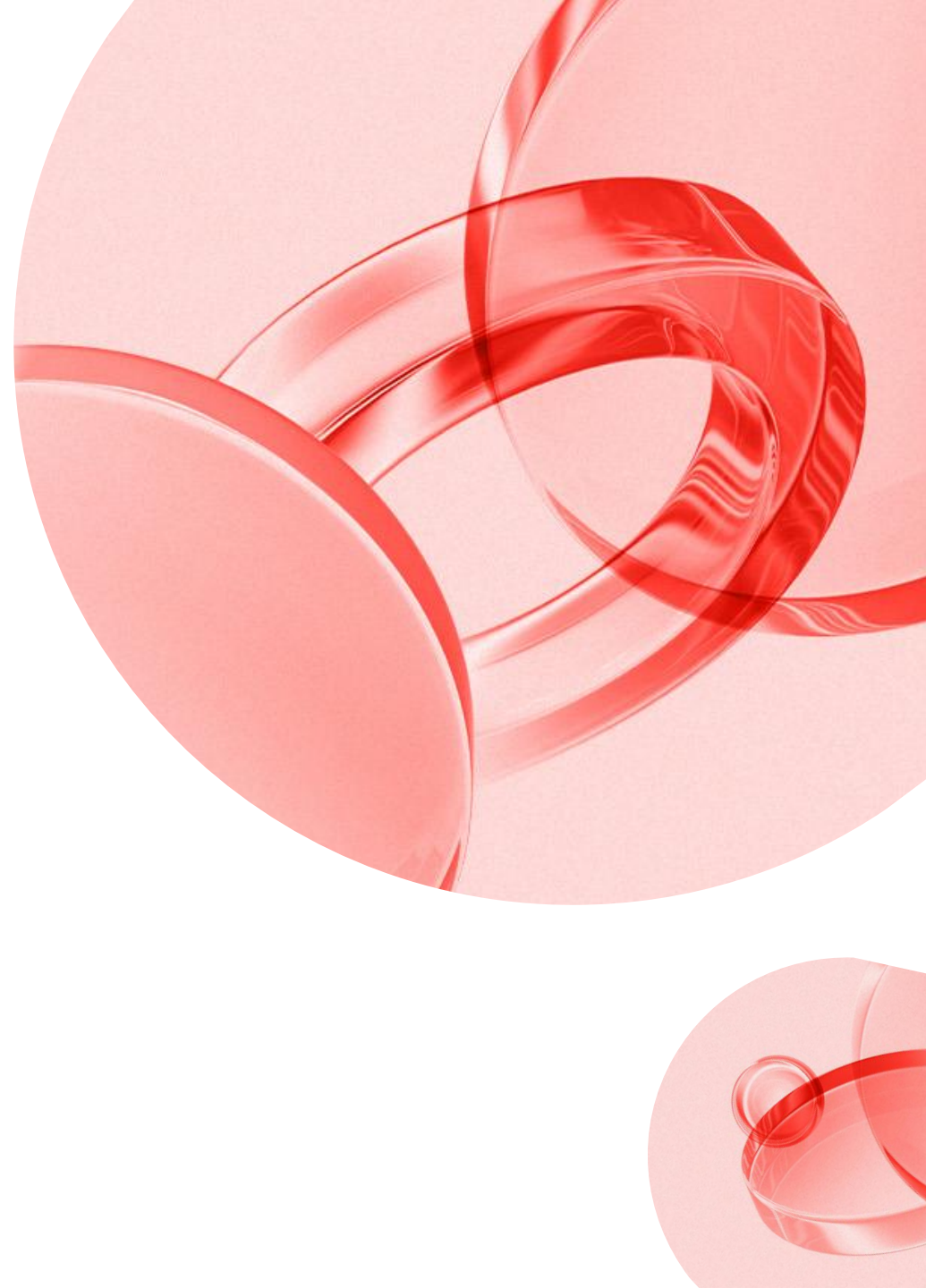
Item	N/U	Deadline	Benefits / Observations
Access Copilot for Sales from Outlook Mobile	New	January/2026	<p>All users of the Microsoft Outlook app on Android and iOS devices automatically get mobile features. As a seller, you can use key features from the mobile app by selecting the ... menu in an email to open the Copilot for Sales app. This app gives you access to features available on the desktop, such as:</p> <ul style="list-style-type: none">• AI-generated email responses• AI-generated email and opportunity summaries• Tracking Outlook activities to CRM• Creating and editing contacts or other CRM objects





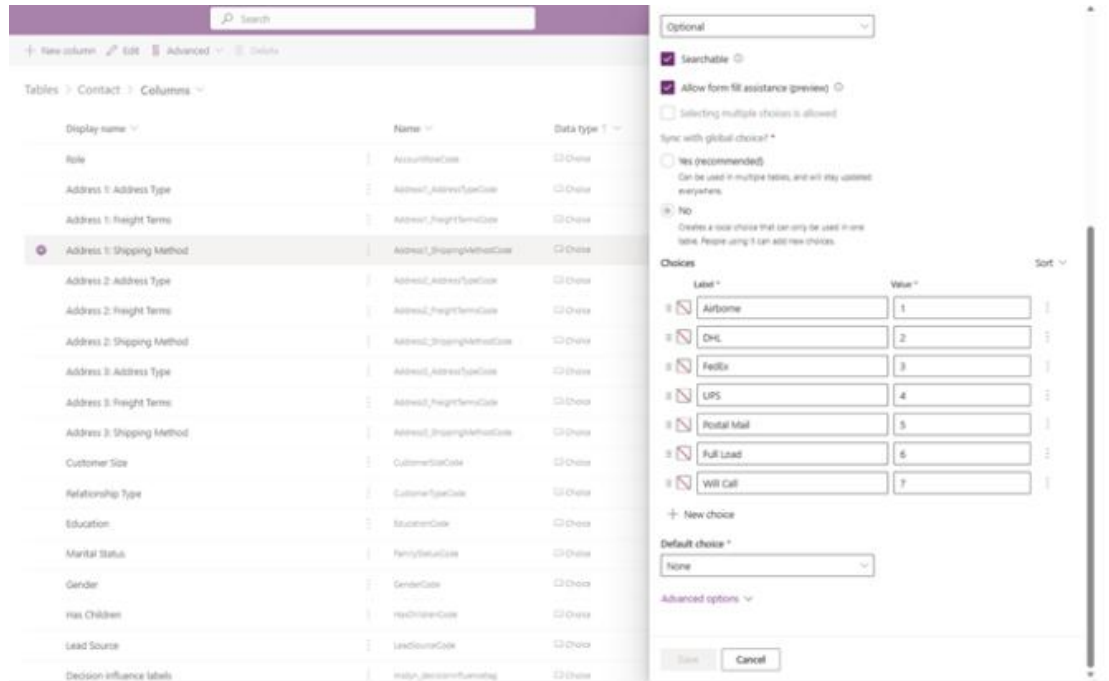
Customer Insights Data

 [Link to documentation](#)



Customer Insights – Elevate customer experiences

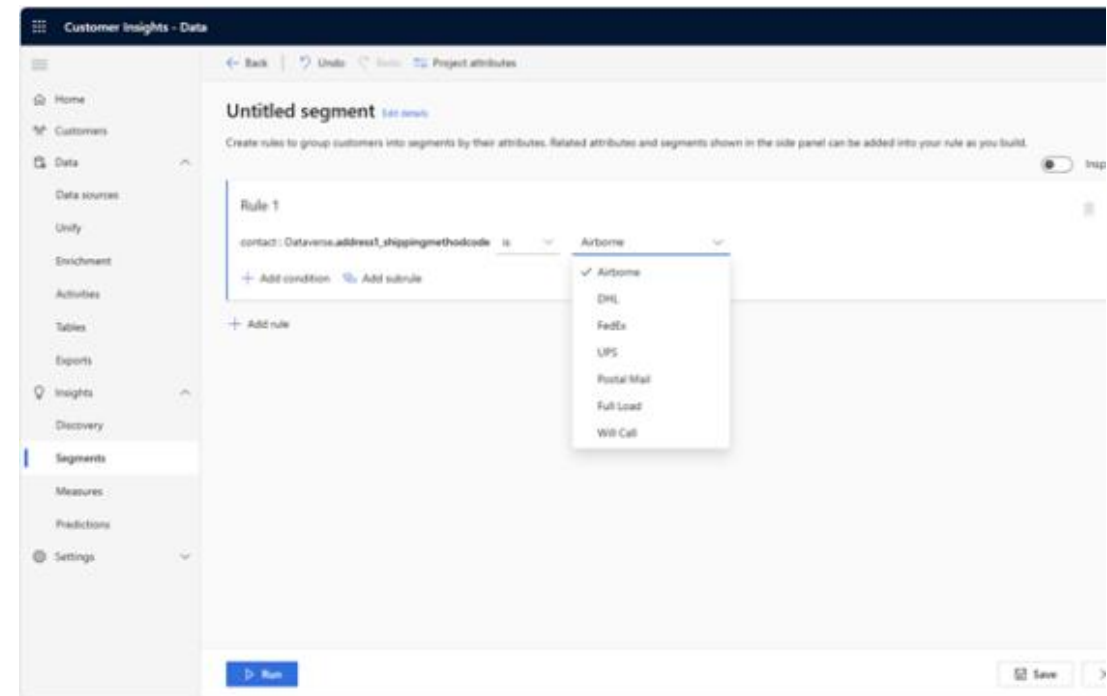
Item	N/U	Deadline	Benefits / Observations
<p>Easily select field values when working with segment conditions</p>	Updated	March/2026	<p>Choice fields are a common data type in Dataverse that are similar to a picklist or enumeration. Dataverse choice fields can generally be identified by the 'code' suffix that Dataverse adds to the display name of the column, such as gendercode.</p> <p>Instead of having to enter a numeric code for fields like Gender or Address1_ShippingMethod, Choice fields are now shown as a list of choice names and their code.</p>



The screenshot shows the 'Columns' configuration page for the 'Contact' table. The 'Address 1: Shipping Method' column is selected. The 'Data type' is 'Choice'. The 'Choices' section is expanded, showing a list of shipping methods with their corresponding codes:

Label	Value
<input type="checkbox"/> Airborne	1
<input type="checkbox"/> DHL	2
<input type="checkbox"/> FedEx	3
<input type="checkbox"/> UPS	4
<input type="checkbox"/> Postal Mail	5
<input type="checkbox"/> Full Load	6
<input type="checkbox"/> Will Call	7

Additional options shown include 'Searchable' (checked), 'Allow form fill assistance (preview)' (checked), and 'Default choice' set to 'None'.



The screenshot shows the 'Customer Insights - Data' interface. A rule is being configured for an 'Untitled segment'. The rule condition is: 'contact : Dataverse.address1_shippingmethodcode is Airborne'. A dropdown menu is open, showing the following options:

- Airborne
- DHL
- FedEx
- UPS
- Postal Mail
- Full Load
- Will Call

The interface includes navigation buttons like 'Back', 'Undo', 'Redo', and 'Project attributes', and a 'Run' button at the bottom.

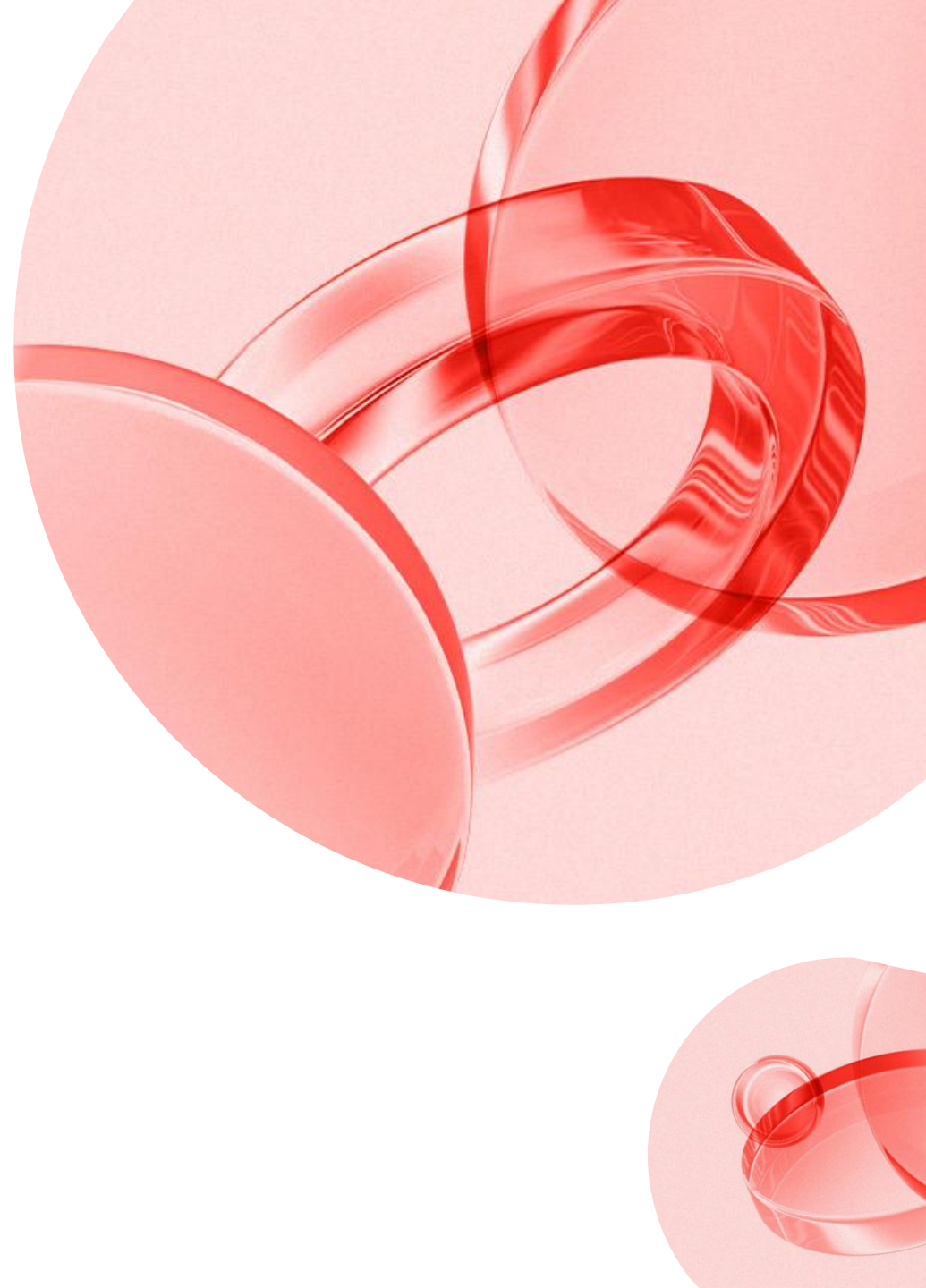
Customer Insights – Turbocharge your pipeline to drive growth

Item	N/U	Deadline	Benefits / Observations
Target right audience based on signals from earlier campaigns	New	June/2026	To refine your engagement strategy, you need to understand how customers respond to your communications efforts. When you create segments in Customer Insights - Data and use them in Customer Insights - Journeys campaigns, the interaction data captured by Customer Insights - Journeys can now be accessed and used in Customer Insights - Data segments to refine your segments based on how customers responded to your campaign. This capability enables customer experience teams to combine the power of unified profiles with insights from Customer Insights - Journeys.



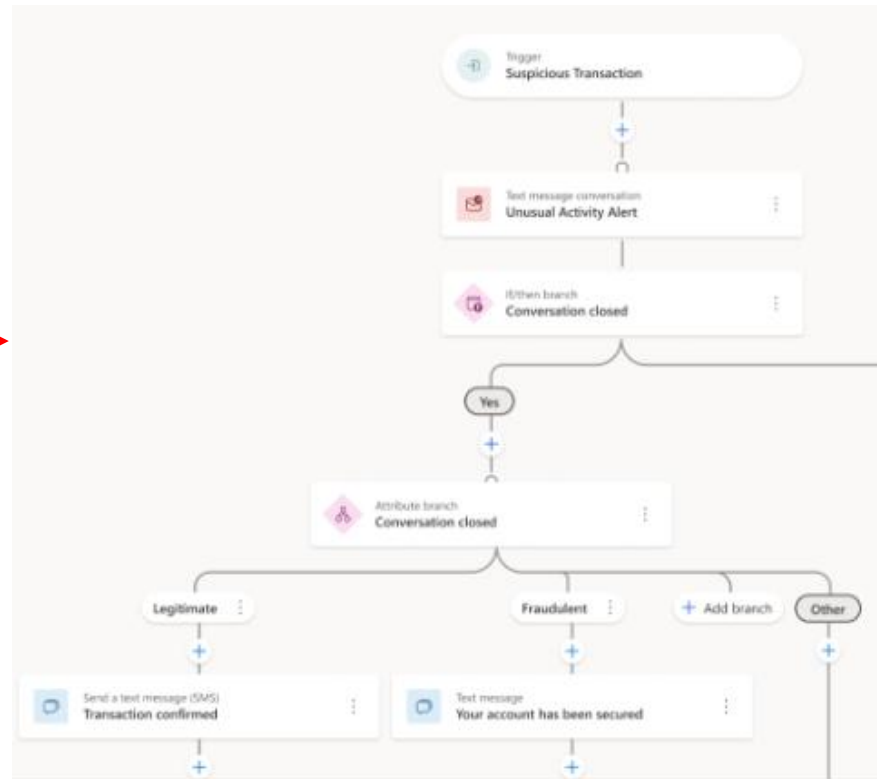
Customer Insights Journey

 [Link to documentation](#)



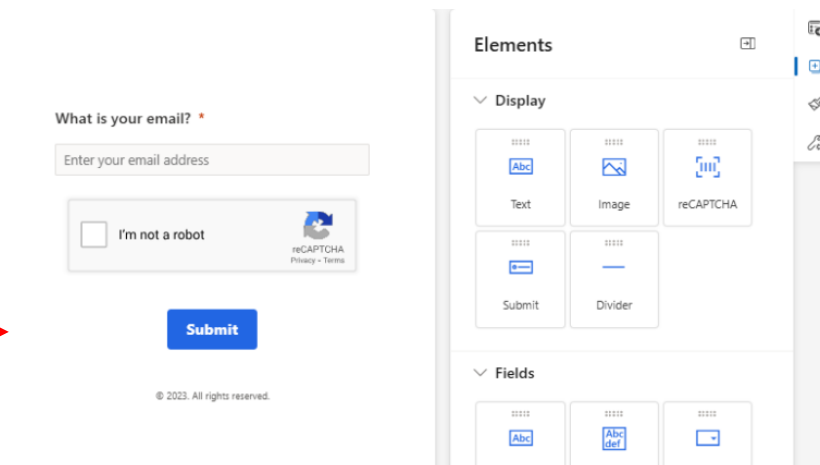
Customer Insights – Agents and Copilot

Item	N/U	Deadline	Benefits / Observations
Boost engagement with Copilot-powered conversational text messages	Updated	April/2026	Incorporating text messaging into your marketing strategy is highly effective thanks to high open and response rates. However, customer response options are often limited to one word. Limiting customers' interactions to single keywords restricts their ability to fully express their needs, preventing you from tailoring the experience to their preferences. With Dynamics 365 Contact Center integration, you can now leverage Copilot Studio agents to deliver rich, personalized SMS conversations with your customers, allowing them to precisely communicate their needs and therefore receive greater customer service.



Customer Insights – Elevate customer experiences

Item	N/U	Deadline	Benefits / Observations
Set message expirations to keep communication relevant	Updated	May/2026	Customers may experience frustration when they receive outdated communications, such as expired coupons and irrelevant reminders. This creates confusion and diminishes their trust in your brand. You can now set expiration dates on your messages, ensuring that only current and relevant information reaches your audience. This keeps your customers engaged and satisfied with relevant communications in moments that matter.
Strengthen form bot protection with reCAPTCHA	Updated	February/2026	With the new built-in reCAPTCHA, you protect your forms from bots while keeping the experience fast and accessible for real customers. You can add strong bot protection in seconds. No coding, no developer support, and no risk of losing data quality. This update boosts confidence in your form submissions, reduces spam, and ensures that every interaction you collect reflects real customer intent.



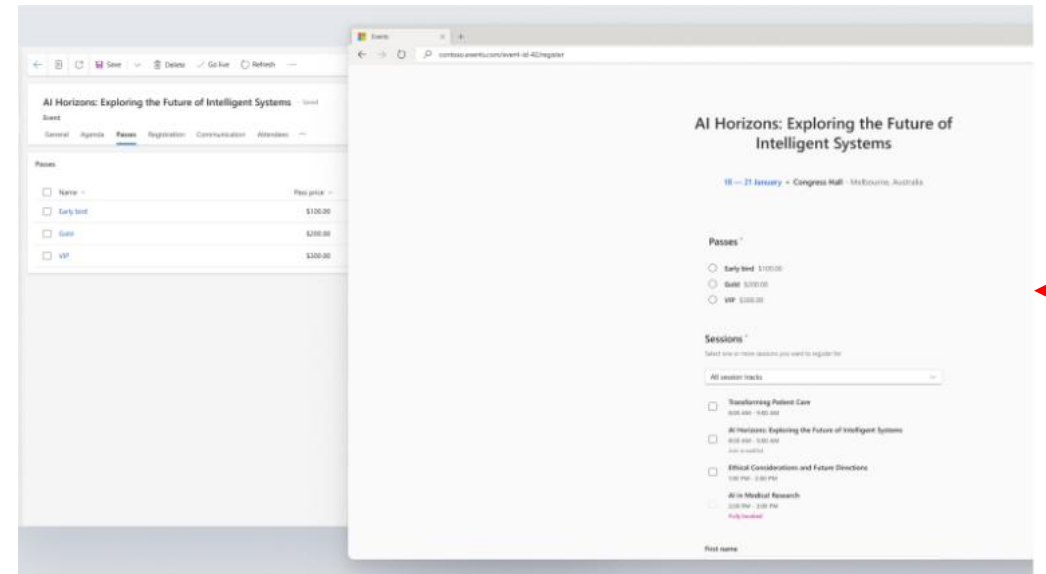
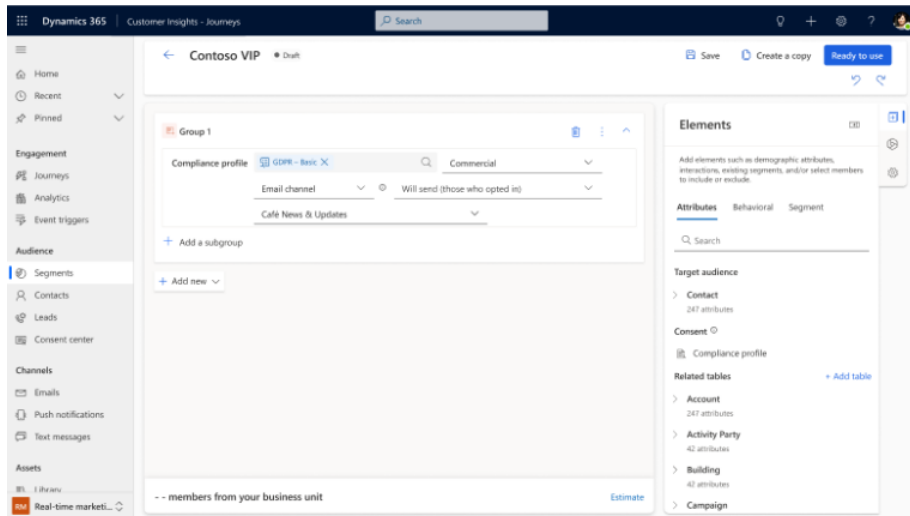
The image shows a form builder interface. On the left is a preview of a form titled "What is your email? *". It contains an input field for "Enter your email address", a checkbox for "I'm not a robot" with a reCAPTCHA logo, and a blue "Submit" button. Below the form is the copyright notice "© 2023. All rights reserved.". On the right is a sidebar titled "Elements" with two sections: "Display" and "Fields". The "Display" section contains icons for Text, Image, reCAPTCHA, Submit, and Divider. The "Fields" section contains icons for text input, a dropdown menu, and a radio button.

Customer Insights – Elevate customer experiences

Item	N/U	Deadline	Benefits / Observations
Create static segments with up to 200.000 members	Updated	March/2026	This feature enables marketers to build static segment groups with up to 200,000 members in each static group using data from any source. Marketers can upload CSV files or use the API to create segments as part of a workflow.

Customer Insights – Turbocharge your pipeline to drive growth

Item	N/U	Deadline	Benefits / Observations
<p>Drive confident engagement with enhanced consent-based segmentation</p>	Updated	March/2026	<p>Enhanced consent-based segmentation turns your consent policies into clear, ready-to-use audiences. You can instantly see who qualifies for each purpose and channel, and build segments that stay aligned with your compliance profiles by design. You move faster from consent data to active audiences, so every journey is both relevant and respectful of customer choices.</p>
<p>Maximize event ROI with paid registration, seamless payment integration</p>	Updated	February/2026	<p>With the new paid event registration capability in real-time journeys, you can now offer a seamless and secure ticketing experience. This feature empowers you to offer flexible pricing tiers and increase registration conversion with a frictionless checkout. By embedding ticketing and payments directly into your event flow, not only do you improve attendee satisfaction but you also unlock new revenue streams and reduce operational overhead.</p>





Customer Service

 [Link to documentation](#)



Customer Service – Administrator experiences

Item	N/U	Deadline	Benefits / Observations
Simulate AI case enrichment with Case Management Agent	Updated	March/2026	Simulation enables administrators to assess how the Case Management Agent performs case enrichment, evaluate the quality of those predictions before enabling the feature in production, and streamline the testing process by reducing the time required for manual validation. Administrators can run case enrichment simulations using: <ul style="list-style-type: none">• Historical case records• Uploaded Excel files• Email or conversation transcripts
Protect sensitive information in e-mails with data sensitivity labels	Updated	May/2026	By adding data sensitivity labels to emails, you enhance your data security when service representatives classify and protect sensitive information. This feature enables secure collaboration, reduces the risk of data breaches, and offers customization flexibility for managing different types of sensitive information.

Customer Service – Copilot and AI innovation

Item	N/U	Deadline	Benefits / Observations
Simulate case-resolution flows before production	Updated	April/2026	Safely validate Case Management Agent resolution logic before it impacts customers and catch configuration and instruction issues early. Provide clear, reviewable evidence (accuracy, tone, actions) to speed approvals for pilots and autonomous use. Estimate resolution quality, operational impact, and credit usage upfront to justify scope and investment.
Use shadow mode for Case Management Agent predictions	Uupdated	May/2026	Reduce risk and accelerate AI adoption by validating Case Management Agent performance on real cases without impacting customers or operations. Enable shadow mode in Case Management Agent settings for selected lines of business or case rules. The system generates predicted outcomes only, including: <ul style="list-style-type: none">• Identified customer intent.• Drafted response content.• Proposed field updates.• Recommended follow-up or resolution actions.
Configure custom instructions in Copilot Ask a question	Updated	February/2026	Custom instructions let organizations define persistent preferences that guide how Copilot responds in Ask a question. Instead of providing the same guidance in every prompt, customers can specify upfront how they want Copilot to behave across conversations. Instruction types can include: <ul style="list-style-type: none">• Preferred tone (for example, concise, formal, or conversational)• Level of detail (summary versus in-depth analysis)• Formatting preferences (bulleted lists, tables, or structured sections)• Role or context for Copilot to assume (for example, a customer service representative)

Ask a question: Let representatives chat with AI. [Manage prompt](#)

Custom instructions: Provide custom instructions for copilot to follow when responding to users.

0/5000 maximum characters

Customer Service – Copilot and AI innovation

Item	N/U	Deadline	Benefits / Observations
Use enhanced admin options for Case Management Agent	Updated	January/2026	<p>Case Management Agent can now be configured in minutes, significantly accelerating automation rollout. The streamlined setup experience reduces reliance on specialized admin expertise, minimizes configuration errors through built-in previews and validation checks, and helps organizations deploy AI-driven case management faster and with greater confidence.</p> <p>The key configuration enhancements for setting up Case Management Agent in the Copilot Service admin center are as follows:</p> <ul style="list-style-type: none">• Guided, step-by-step setup flow for creating and configuring Case Management Agent.• Quick-start experience with prebuilt templates for enrichment, follow-up, and closure scenarios.• No code or low code configuration for automation rules and triggers.• Centralized control panel for enrichment, follow-up, and closure settings.
Evaluate cases in bulk with Quality Evaluation Agent	Updated	March/2026	<p>Quality Evaluation Agent bulk cases evaluation lets supervisors create evaluation plans directly on case records and execute them on a defined schedule (for example, daily). Each plan targets a specific subset of cases based on supervisor-defined conditions, ensuring evaluations focus on the most relevant interactions.</p> <p>Supervisors can edit evaluation plans at any time, with updates applied to future runs while past executions remain preserved for reference. Every execution is logged in a run history view, providing full visibility into when evaluations ran, which cases were included, and how quality outcomes evolved over time.</p>

Customer Service – Service representative experiences



Item	N/U	Deadline	Benefits / Observations
<p>Enhanced timeout rules to meet SLAs for conversations</p>	<p>Updated</p>	<p>January/2026</p>	<p>The non-response time of the representative is now derived as follows:</p> <p>After the initial contact between the representative and customer, in which the customer has sent a message and started the chat, the system calculates the time that the customer waits after the representative accepts the conversation.</p> <p>If the representative accepts the notification, the auto-assign notification times out, or a supervisor manually assigns, then:</p> <p>Representative Non-Response Time equals Current Time minus Representative assignment time</p>
<p>Override timeout rules in SLA-based automatic actions</p>	<p>Updated</p>	<p>January/2026</p>	<p>The ability to override ensures that automation doesn't interfere with active or sensitive conversations. It empowers representatives to pause or resume timeout rules based on real customer needs. This flexibility prevents premature conversation closures and builds confidence when working within automated workflows. The override is a critical capability for enterprise customers who require both structured processes and adaptability.</p> <p>Once enabled, this feature empowers representatives to view and control timeout rules applied to their conversations. Here's what they can do:</p> <ul style="list-style-type: none"> • Access the Timeout Rules panel by selecting it in the productivity pane. • See all rules linked to the conversation, along with their status and remaining time through the hourglass tooltip. • Toggle rules on or off: Turning off stops the countdown and prevents execution; turning on resumes the timer when conditions are met.

Customer Service – Supervisor experiences

Item	N/U	Deadline	Benefits / Observations
Enable enhanced screen recording controls for admins	Updated	June/2026	<p>The enhanced version of screen recording provides greater flexibility and control for organizations that require more granular recording behavior. This release expands support for manual start and stop recording in non-voice scenarios such as chat, case-in-focus, and queue-presence workflows allowing agents to control recordings directly from the UI when automatic triggers aren't appropriate. Role-based access is refined so supervisors, auditors, and agents have clearly differentiated permissions to view or download recordings, helping organizations meet internal review and compliance requirements.</p>
Generate AI-driven dynamic forecasts with intelligent method selection	New	May/2026	<p>This feature uses large language models to analyze historical and contextual data, automatically selecting the most accurate forecasting method.</p> <p>The AI engine generates forecasts for the desired time horizon, along with the reasoning behind the selected model and its confidence score in the forecast output.</p>
Configure short abandon and service-level threshold insights	New	February/2026	<p>Enhanced abandon rate reporting in Dynamics 365 Contact Center improves accuracy and operational relevance.</p> <p>Enhancements include the following:</p> <ul style="list-style-type: none"> • Configurable short abandons: Customers can define short-abandon thresholds at the queue level. • Filtering support: Short abandons can be excluded from the overall abandon rate calculations or reported separately. • Service-level alignment: Service-level metrics take into account short-abandon settings to better reflect real customer wait times. • Queue-level control: Each queue can apply its own short-abandon and threshold settings based on operational needs.
Edit schedule bookings using drag and drop	Updated	February/2026	<p>This enhancement streamlines high-volume scheduling tasks and delivers a modern, visual editing experience that aligns with workforce management workflows.</p> <p>Editing schedule bookings using the drag-and-drop functionality provides supervisors with the following benefits:</p> <ul style="list-style-type: none"> • Edit customer service representative bookings directly in the Schedule People view using intuitive drag-and-drop interactions. • Move bookings across time slots without opening edit dialogs or navigating multiple fields, enabling faster and more efficient schedule updates. • Adjust bookings within the same service representative's shift or move them to different service representatives.

Customer Service – Unified routing

Item	N/U	Deadline	Benefits / Observations
Generate audit data for routing configurations	Updated	January/2026	<p>Administrators can enable the audit of routing configurations in the audit settings for the environment in Power Platform admin center. The audit log will be available for the following configurations:</p> <ul style="list-style-type: none">• Assignment rules• Prioritization rules• Classification rules• Route-to-queue rules• Operating hours <p>Intent-based routing</p> <ul style="list-style-type: none">• Line of business• User groups• Intent groups• Intents



Copilot for Service

 [Link to documentation](#)



Title – Verdana – 28pts

Subtitle – Verdana – 14pts

Item	N/U	Deadline	Benefits / Observations
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Contact Center



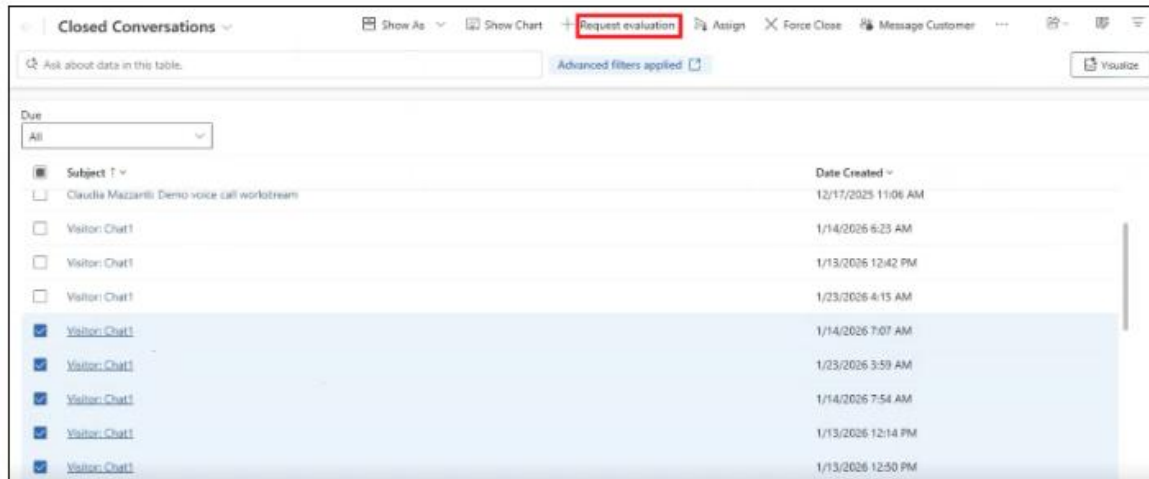
[Link to documentation](#)



Contact Center – Copilot and AI innovation

Item	N/U	Deadline	Benefits / Observations
Evaluate multiple conversations using Quality Evaluation Agent	Updated	April/2026	Supervisors and quality managers can evaluate multiple closed conversations on demand from the Conversation list view to improve operational efficiency. Historical closed conversations can also be evaluated daily using evaluation plans. Key capabilities include: <ul style="list-style-type: none">On-demand evaluations from the conversation list: Users can select multiple closed conversations directly from the conversation list view and run evaluations immediately.Daily evaluation plan runs: Evaluation plans support daily evaluations of closed conversations, enabling automated processing of historical conversations.
Evaluate closed conversations with Quality Evaluation Agent	Updated	January/2026	Supervisors use the Evaluation Framework to define evaluation criteria and create evaluation plans. When these plans run, requests go to the Quality Evaluation Agent to evaluate closed conversations. The Quality Evaluation Agent processes these requests and generates evaluation responses with detailed reasoning for predicted answers. It also produces quality scores and evaluation summaries, including action plans for AI supervisors.

Conversation list view



Contact Center – Extensibility

Item	N/U	Deadline	Benefits / Observations
Use messaging APIs to manage customer chat conversations	Updated	February/2026	Dynamics 365 Contact Center messaging APIs support service-to-service integrations, so you have full control over your customer experience. The APIs are especially useful for business scenarios that traditional integration methods can't solve. When you use messaging APIs, you don't need client-side libraries, SDKs, or connections from client-side devices. This approach works well when you want to bring your own managed communication channel.

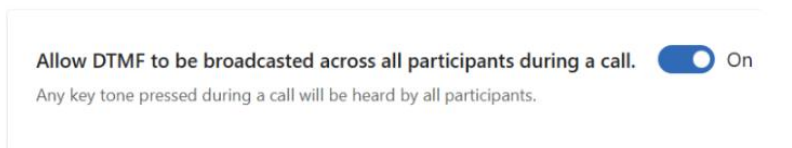
Contact Center – IVR capabilities

Item	N/U	Deadline	Benefits / Observations
Equip voice agents with custom voice	Updated	April/2026	Brand identity extends beyond visuals like logo, color, and typography, into voice. Custom neural voice enables enterprises to create a distinctive, natural sounding synthetic voice for contact centers. By training on approved human speech samples, organizations can deliver a natural sounding, one-of-a-kind brand voice that preserves brand continuity, strengthens customer recognition, and elevates voice-based experiences across AI-powered agents and telephony interactions.
Enable selective hold with music and exit prompts	Updated	March/2026	Voice agents use selective hold periods when callers need time to retrieve information, just like human agents. By playing music or promotional prompts during these pauses, the system prevents awkward silences that might suggest disconnection or audio problems caused by background noise. This approach gracefully pauses the conversation while playing music or promotional prompts. This approach ensures a smooth and professional caller experience, reduces escalations, and increases containment.
Enable SIP X header support for context transfer	Updated	February/2026	SIP X header support extends in-call context transfer beyond the existing 128-character User-to-User (UUI) limit. Organizations can now pass up to five custom SIP X headers per call, and each header supports up to 256 characters. This feature enables more detailed context, such as call ID, language preference, or handling instructions to flow between external systems and voice agents (IVR). The result is faster resolutions, reduced repetition, and improved customer experiences.

Contact Center – Omnichannel customer experiences

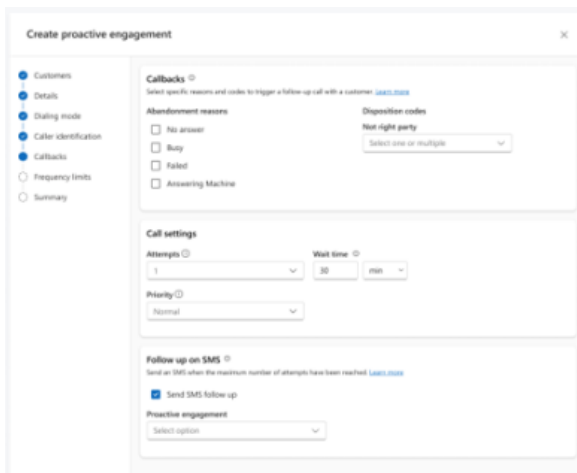
Item	N/U	Deadline	Benefits / Observations
Use representatives for commercial proactive engagement	Updated	June/2026	<p>Organizations using proactive engagement for commercial calling like cross-sell or upsell scenarios must comply with regulations like the Telephone Consumer Protection Act (TCPA). With this feature, organizations can turn their contact centers into value centers that perform functions beyond reactionary support.</p> <p>Journey authors can indicate whether a proactive engagement is part of a commercial journey, such as cross-sell or upsell outreach. When this option is selected, the system ensures that a service representative is available to speak with the customer within two seconds of the customer accepting the call. All call data is captured in Dynamics 365 Contact Center and can be used in compliance reporting.</p>
Split recording speaker-wise in closed conversation view	Updated	June/2026	<p>The speaker-wise splitting of call recordings transforms the review process from a linear, time-consuming playback into a targeted, navigable experience. Supervisors can go directly to specific speaker sections, such as the customer or service representative, without going through the entire audio. This reduces review time and improves focus on key moments.</p>
Use consent-based recording of voice calls	Updated	April/2026	<p>This feature enables organizations to explicitly capture customer consent for call recording and transcription at the start of a voice interaction with a voice agent and honor that consent seamlessly if the call is escalated to a service representative. The voice agent proactively prompts the caller for consent, records the response, and makes sure recording and transcription are enabled only when consent is granted. If the customer declines consent, the interaction continues without being recorded or transcribed, and this preference is preserved if the call is transferred to a service representative, preventing them from starting, pausing, or accessing transcripts. This delivers a consistent, compliant, and privacy-respecting recording experience across the entire voice journey.</p>
Use enhanced dial pad for DTMF tones	Updated	April/2026	<p>The dialer is enhanced to ensure a better experience for representatives, one that's intuitive and easy to use by removing extra dialers from the UI, saving time. Keypad inputs are sent faster and more reliably from representatives to all parties on the call, and extra keypad inputs from customers are sent to external participants when the call is transferred.</p>

Screenshot of the DTMF Broadcast toggle on Voice Call Experiences page



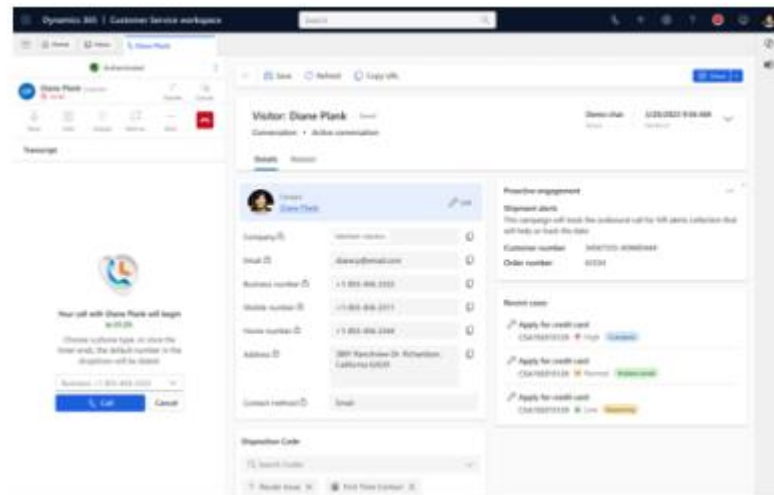
Contact Center – Omnichannel customer experiences

Item	N/U	Deadline	Benefits / Observations
Use Infobip as an SMS channel	New	April/2026	You can use your Infobip SMS account directly in Dynamics 365 Contact Center to streamline how you connect with customers. This gives you more flexibility in selecting the provider that best fits your communication needs. By using an existing Infobip relationship, you reduce operational overhead, simplify channel management, and adapt your SMS strategy as your business grows.
Use SMS channel to engage with customers proactively	Updated	April/2026	Proactive engagement using SMS enables organizations to reach customers at scale with timely, personalized outreach that accelerates transactions and speeds case resolution. By orchestrating AI agents and service representatives over the SMS channel, teams can deliver seamless, meaningful conversations that improve customer satisfaction while reducing manual effort. Integrated with Copilot Studio agents, this capability streamlines workflows, boosts operational efficiency, and helps businesses engage customers effectively on the channel they use most.
Run voice outbound campaigns with proactive engagement	Updated	March/2026	Proactive engagement delivers significant business value by enabling organizations to reach more customers efficiently and compliantly, while optimizing operational resources. With intelligent contact chaining, outcome-based retries, and flexible configuration through file upload or API, businesses can maximize connect rates and reduce missed opportunities. Automated consent management and robust communication preferences ensure regulatory compliance and a respectful customer experience. Real-time analytics, scalable performance, and localized caller ID options further empower teams to drive engagement, improve satisfaction, and operate at enterprise scale.



Contact Center – Omnichannel customer experiences

Item	N/U	Deadline	Benefits / Observations
Use preview dial for high-value proactive engagements	Updated	March/2026	A preview timer gives service representatives a configurable window to review customer history before the call begins. This timer enables more personalized, informed, and effective conversations that drive better outcomes.
Consult, transfer securely for PSTN numbers, and IVR	Updated	June/2026	The secure consult, transfer calls to PSTN numbers, and IVR feature enable customer service representatives to securely route calls to non-Microsoft systems while maintaining customer privacy and data protection. When representatives initiate consultations or transfers to external endpoints such as payment processors or verification systems, the platform automatically suspends recording and transcription to keep sensitive interactions secure.
Handle duplicate callback requests in overflowing queues	Updated	March/2026	This feature delivers significant benefits by enhancing customer experience, operational efficiency, and administrative control. It prevents redundant callback requests from the same phone number, reducing unnecessary loads on representatives and systems. Administrators gain flexibility to configure deduplication logic and tailor the caller experience, including custom messaging when duplicates are detected.



Contact Center – Omnichannel customer experiences

Item	N/U	Deadline	Benefits / Observations
View previously closed persistent conversations	Updated	February/2026	By enabling your site's visitors to review their previously closed conversations, you can improve the customer experience.
Use custom reporting variables for Historical Bot dashboard	Updated	February/2026	<p>Enhance troubleshooting and optimization with granular visibility into each question node's performance and its impact on KPIs such as deflection and escalation. This capability helps identify bottlenecks and streamline conversation flows, resulting in a better user experience and reduced escalation rates.</p> <p>Leverage business-context segmentation to define and report on variables like line of business, department, or campaign type. This enables tailored insights aligned with organizational goals and minimizes reliance on customers to process raw conversation information, allowing them to focus on building custom reports.</p>
Tailor proactive engagements with configuration options	Updated	January/2026	Customer expectations are higher than ever. Today's customers want brands they can trust to anticipate their needs, deliver personalized engagement, and provide effortless, seamless support. At the same time, businesses want to reduce time-intensive tasks through automation, foster loyalty with tailored experiences, and be the dependable choice in the market.

Contact Center – Omnichannel customer experiences

Item	N/U	Deadline	Benefits / Observations
Understand outcomes of proactive engagements	Updated	January/2026	Organizations can set up predefined actions for scenarios where the calling party is unreachable or busy during proactive engagement campaigns. For example, a journey author can create a rule to automatically retry calling a customer two hours later if the call goes to voicemail or schedule another call for the next day if the customer isn't reachable. This flexibility ensures more effective customer outreach, improves the chances of successful contact, and maximizes campaign value.
Leverage rich media messaging across channels	Updated	March/2026	Rich media messaging helps customers, agents, and customer service representatives engage in support conversations effortlessly, without the need for extensive typing. Agent-driven rich media messages help agents quickly gather more information from customers, facilitating better self-service. Additionally, rich media messaging helps enhance customer service representative productivity by enabling representatives to swiftly collect information from customers in the expected format.

Contact Center – Service representative experiences



Item	N/U	Deadline	Benefits / Observations
Cancel voice consult with external number	Updated	April/2026	Representatives can cancel consult and transfer attempts while the call is still in the connecting or ringing state. Previously, cancel was supported for consult-to-queue scenarios only, forcing representatives to wait for a timeout when consulting with other representatives or external PSTN numbers.
Enable deep noise suppression	Updated	February/2026	The noise suppression feature automatically detects and suppresses unwanted audio elements in voice calls, while preserving clear voice transmission. Admins can turn on this feature for the entire organization.
Support desktop companion app in embedded mode	Updated	February/2026	Introducing the desktop companion app for embedded mode that enables organizations to deliver faster, more reliable voice interactions across non-Microsoft CRM systems. By optimizing call latency, improving connection reliability, and supporting certified headset integrations, the solution enhances agent productivity and ensures consistent, high-quality customer experiences.
Customize transfers and consults for queues, representative	Updated	January/2026	<p>Dynamics 365 Contact Center will now allow administrators to configure the queues and representatives that should be displayed for consult and transfer scenarios based on their business needs. This capability reduces misrouted interactions and minimizes resolution time.</p> <p>his flexible consult-and-transfer configuration model allows organizations to precisely manage the queues or service representatives who are available during a consult or transfer action.</p>
Consult with workgroup, queue using intent	Updated	January/2026	The intent-based consult capability powered by Copilot streamlines customer service workflows by intelligently recommending the most appropriate workgroup or queue. This enhancement delivers significant business value by minimizing customer consultations between departments and decreasing average handling time. Service representatives benefit from AI-assisted routing recommendations that leverage the intent knowledge base to make accurate consult decisions. This intelligent routing capability drives operational efficiency while ensuring that customers receive timely assistance from the most qualified lines of business.

Contact Center – Service representative experiences

Item	N/U	Deadline	Benefits / Observations
Transfer conversation to workgroup, queue using intent	Updated	January/2026	Customer service representatives can now use Copilot-powered intent suggestions to transfer conversations to the right workgroup or queue. By using the intent's knowledge base, Copilot routes conversations to the correct line of business. If the suggested intent or user group is incorrect, representatives can override the selection and manually transfer the conversation to a workgroup or queue they choose.
Use intent to consult with a user	Updated	January/2026	The intent-based consult capability powered by Copilot streamlines customer service workflows by intelligently recommending the most appropriate user for conversation consults. This enhancement delivers significant business value by reducing customer consults to the wrong user and decreasing average handling time. Service representatives benefit from AI-assisted routing recommendations that leverage the intent knowledge base to make accurate consult decisions. This intelligent routing capability drives operational efficiency while ensuring customers receive timely assistance from the most qualified representatives.
Use intent to select representatives to transfer conversations	Updated	January/2026	Customer service representatives use Copilot-powered intent suggestions to transfer conversations to the most appropriate representative. Service representatives can select from both queues and user groups when they start the transfer process. Using intent's knowledge base, Copilot effectively routes conversations to the right user.

Contact Center – Unified routing

Item	N/U	Deadline	Benefits / Observations
Get queue availability data from representative availability APIs	New	April/2026	By improving visibility into service rep availability and wait-time signals across queues, representative availability APIs help organizations route customers more effectively and resolve issues faster. This enables teams to proactively manage demand, set accurate expectations across digital and voice channels, and reduce both perceived and actual wait times. As a result, businesses can increase customer satisfaction, lower abandonment rates, and make better use of service representative capacity, driving more consistent, efficient support experiences at scale.
Set least active assignment as default in messaging queues	Updated	February/2026	The least active assignment strategy assigns conversations to the least active service representatives across messaging and voice channels. While least active is the default assignment strategy for the voice queues, we plan to make the same experience available for the queues for messaging channels.
Block capacity for consulted conversations	Updated	January/2026	By blocking capacity for consulted conversations, businesses can improve resource management and avoid overburdening their service representatives. This enhances overall efficiency and customer satisfaction.
Debug issues in automatic assignment with enhanced logs	Updated	January/2026	Administrators can now better understand how the routing engine makes the automatic assignment decisions. This enhanced visibility helps administrators quickly diagnose assignment issues and understand why work items are assigned to specific representatives or remain unassigned.

Contact Center – Unified routing

Item	N/U	Deadline	Benefits / Observations
Debug routing issues with Application insights dashboard	Updated	January/2026	The Diagnose dashboard delivers the complete conversation lifecycle telemetry and assignment event details, doing away with the need for custom queries. This end-to-end visibility helps teams quickly identify issues, implement mitigations, and enhance SLA compliance to drive operational efficiency for high-volume contact centers.
Generate audit data for conversation routing configuration	Updated	January/2026	The audit capability for routing configurations enhances transparency, accountability, and compliance. It allows organizations to track changes, investigate issues efficiently, and meet regulatory requirements with confidence.
Select a representative automatically in consult to queue	Updated	January/2026	When service representatives select a queue during the consult process, this feature automatically connects them to the best representative for consultation. This feature is helpful when service representatives aren't sure how to find the appropriate representative to consult. The system finds the right subject matter expert (SME) based on the conversation context.
Monitor real-time conversations with Quality Evaluation Agent	Updated	February/2026	When a quality score falls below defined thresholds, the Quality Evaluation Agent instantly triggers notifications, enabling supervisors to intervene promptly, either by joining the conversation or coaching the representative in session. This proactive approach helps prevent escalations and drives continuous improvement by identifying actionable insights during live interactions. By combining real-time monitoring with configurable evaluation plans, the real-time Quality Evaluation Agent empowers organizations to enhance customer satisfaction, improve agent performance, and maintain compliance standards across diverse scenarios.

Contact Center – Workforce engagement management



Item	N/U	Deadline	Benefits / Observations
Analyze adherence history to optimize workforce planning	Updated	April/2026	The Adherence History Report provides a complete view of customer service representatives' historical adherence to scheduled tasks and activities. It helps supervisors analyze patterns, identify gaps, and improve workforce efficiency.



Field Service

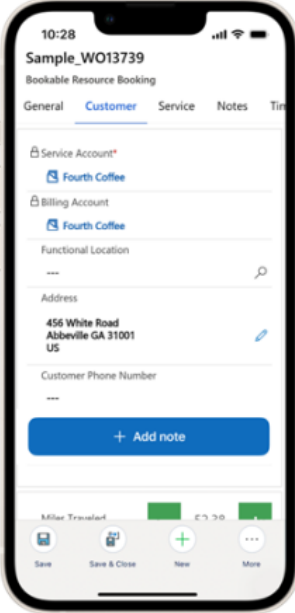
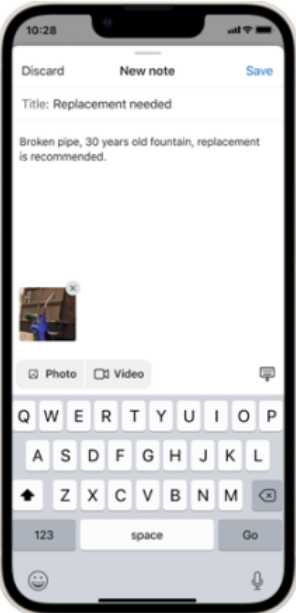
 [Link to documentation](#)



Boost technician productivity

Field Service

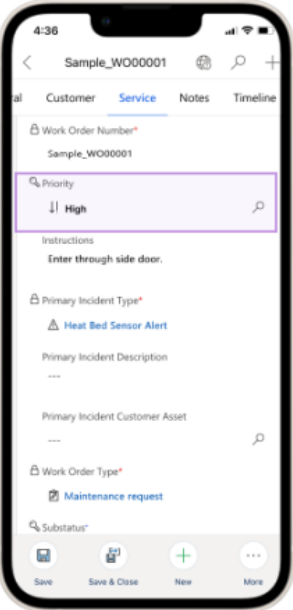
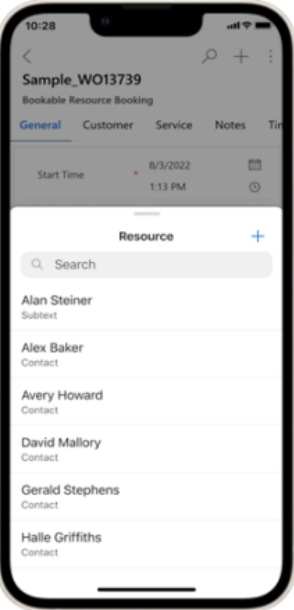
Item	N/U	Deadline	Benefits / Observations
Review notes with mobile note consumption control	NEW	June/2026	The Note Consumption control introduces an optimized, mobile-first layout for reading notes on entity forms. When you add this control to a form, it replaces the default note-viewing experience with a clean, intuitive design that displays text, images, and videos with rich previews, improved touch targets, and a layout built for fast on-site interpretation. The control renders note-type activities only; other activity types don't appear in this view. If you use custom note scripts or embedded viewers, test compatibility to make sure Timeline content loads as expected. The control is available for mobile use only and doesn't change the web experience. Make sure your form design provides enough vertical space so images and videos render cleanly.
Add notes with the simplified mobile note-taking control	UPDATED	March/2026	Keep your team in the flow of work by enabling them to capture rich notes (text, images, video) directly on the record. Faster documentation reduces task interruptions, improves context for follow-ups, and increases data quality in the timeline.



Boost technician productivity

Field Service

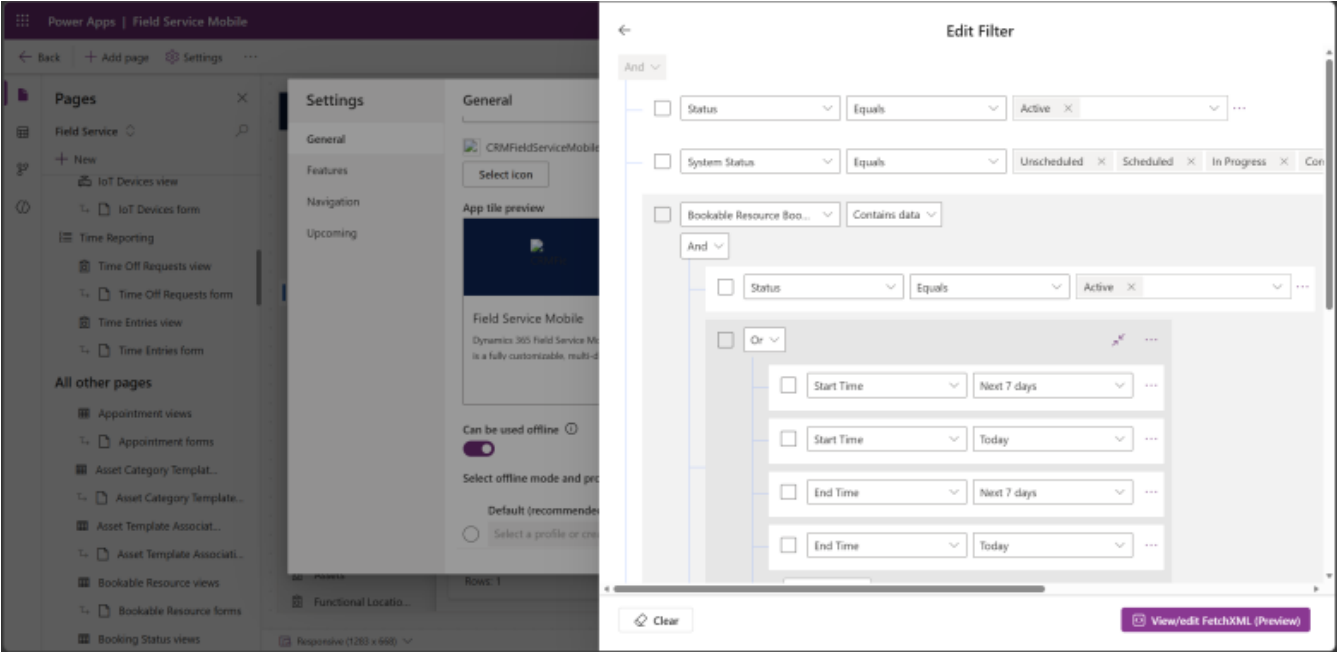
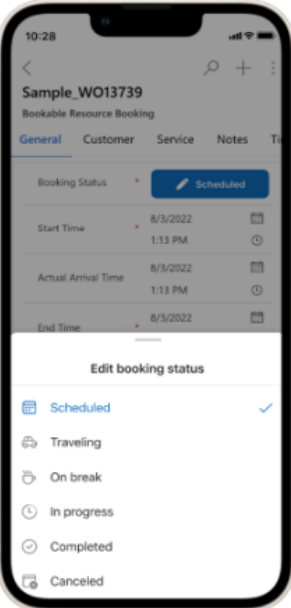
Item	N/U	Deadline	Benefits / Observations
Add simplified lookup control	UPDATED	March/2026	You'll speed up mobile tasks and reduce friction by replacing the standard lookup with a simplified control designed for small screens. This control decreases clicks, lowers cognitive load, and helps your team complete work faster in the field. A new Power Apps Component Framework (PCF) control, Simple Lookup, is now available for lookup fields on forms.
Disable clickthrough on lookup values in forms	UPDATED	March/2026	You'll reduce accidental taps and simplify forms by removing clickable lookup links. This helps frontline workers stay focused, lowers cognitive load, and cuts unnecessary navigation, saving time and improving task flow. A new option in the lookup control lets you disable clickthrough on the displayed lookup value. When disabled, the lookup value renders as plain text (not a hyperlink)



Boost technician productivity

Field Service

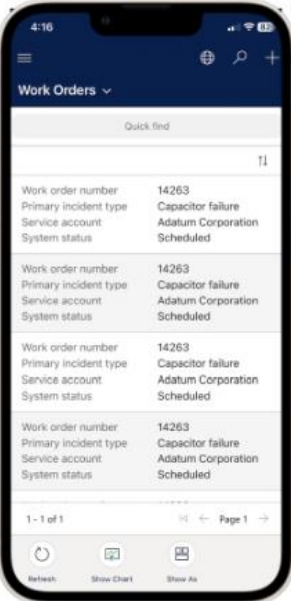
Item	N/U	Deadline	Benefits / Observations
Use enhanced Field Service Booking Status control	UPDATED	April/2026	The Booking Status control is adapted for mobile patterns: it presents a prominent button and opens a drawer-based selector for values, providing larger touch targets and a more consistent mobile experience. This control replaces the current Booking Status control automatically for organizations already using it—no admin action required.
Configure offline profiles with FetchXML editor	NEW	April/2026	Accelerate offline sync and reduce data usage by creating precise FetchXML filters. Advanced optimization options help you avoid timeouts on large datasets, so your frontline teams stay productive in the field.



Boost technician productivity

Field Service

Item	N/U	Deadline	Benefits / Observations
Show column labels before values in mobile lists	UPDATED	February/2026	The Booking Status control is adapted for mobile patterns: it presents a prominent button and opens a drawer-based selector for values, providing larger touch targets and a more consistent mobile experience. This control replaces the current Booking Status control automatically for organizations already using it—no admin action required.
Improve Android form loads by at least 25%	UPDATED	April/2026	When forms open faster, technicians start work sooner and finish more jobs per shift. We've introduced a client/runtime optimization to reduce form load times on Android devices.



Optimize resource scheduling

Field Service

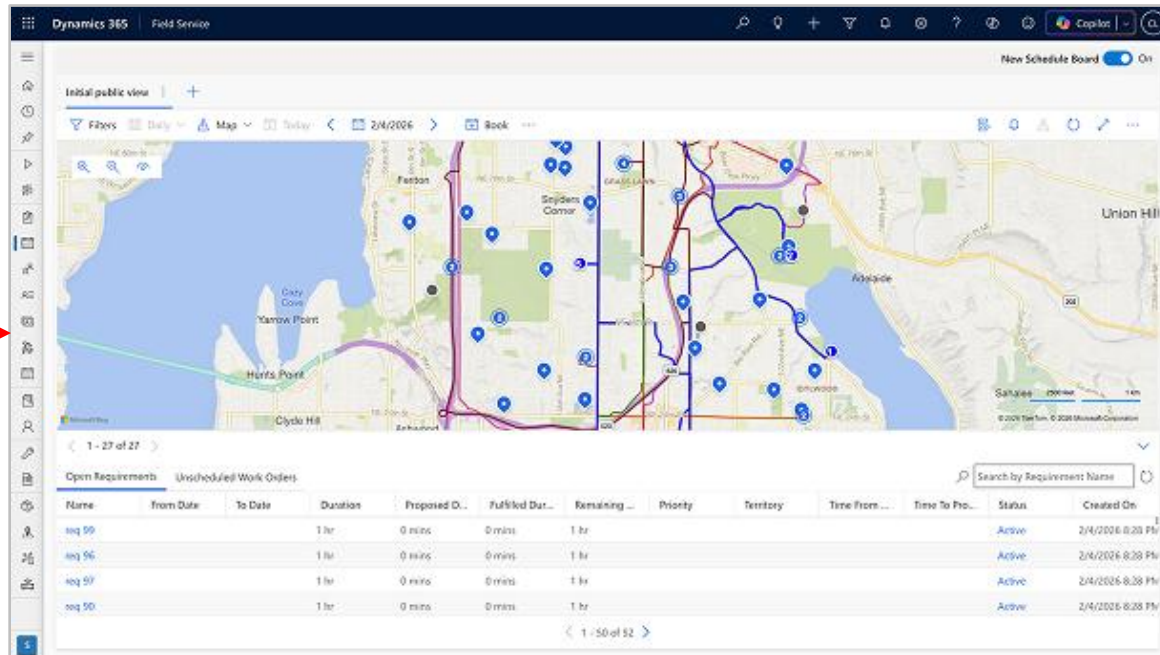
Item	N/U	Deadline	Benefits / Observations
Cancel segments of a booking in aggregate views	UPDATED	June/2026	Cancel booking actions in aggregate views give schedulers precise control over long-running or multi-day bookings directly within their current view. Users can cancel bookings with the same time granularity as the selected view. For example, cancelling a week in a weekly view, cancelling a day in a daily view. To cancel a segment, open the Edit Details panel and set the desired interval's duration to 0 minutes.
Move multiple bookings at once by a set offset	UPDATED	June/2026	Bulk move enables schedulers to shift multiple bookings forward or backward by a consistent time offset in a single action. Instead of adjusting each booking manually, users can select bookings across one or more resources and apply changes, such as moving all affected work by a day or a week. This feature is especially valuable when plans change due to factors like weather delays, customer reschedules, or operational disruptions. It is automatically enabled for users.

The screenshot displays a resource scheduling interface with a Gantt chart. The chart shows various tasks such as 'Inspection 45352', 'Maintenance 95981', 'Disconnect 66612', 'Disconnect 61131', 'Install 13561', 'Reconnect 35189', and 'Install 86402'. A context menu is open over the 'Disconnect 61131' task, showing options like 'Delete', 'Edit', 'Reassign to', and 'Move by'. The 'Move by' dialog box is open, showing 'Move by 1 days' and 'Move direction Forward - move to a later time'. The dialog also indicates 'Move 2 bookings forward by 1 day' and has an 'Update' button. At the bottom, there is a table with columns: Duration, Proposed ..., Fulfilled D..., Remainin..., Priority, To P..., Status, and Created On.

Optimize resource scheduling

Field Service

Item	N/U	Deadline	Benefits / Observations
View full screen map mode on schedule board	UPDATED	June/2026	Full screen map mode allows dispatchers to expand the schedule board map to fill the entire workspace, removing visual constraints that limit situational awareness. With more space, users can easily analyze resource locations, view booking distribution, and evaluate geographic coverage without distractions from other panels.
Book and edit requirement groups faster	NEW	April/2026	<p>An upgraded plugin architecture provides a more responsive interface when you create and edit bookings with requirement groups. You experience improved load times on the web app, making schedule management faster and smoother.</p> <p>This improvement is automatically enabled in release 8.8.143.233 with no configuration required. No action is needed to enable or disable it.</p>



Optimize resource scheduling

Field Service

Item	N/U	Deadline	Benefits / Observations
Show week numbers on schedule board	UPDATED	April/2026	Week numbers on the schedule board provide a consistent and familiar time reference for schedulers who plan and communicate in weekly cycles. Many organizations discuss, forecast, and coordinate work using week numbers instead of calendar dates. Displaying week numbers directly on the timeline improves orientation when navigating long date ranges, reduces ambiguity during planning discussions, and aligns the schedule board with established business calendars.



Streamline work order management

Field Service

Item	N/U	Deadline	Benefits / Observations
Approve field time entries using project rules	UPDATED	July/2026	Time entries recorded in Dynamics 365 Field Service flow directly into Dynamics 365 Project Operations projects, allowing field labor to contribute to both project cost and unbilled sales, not just cost tracking. Technicians submit time entries using the existing Field Service experience for field and non-field work, with or without a work order, with no changes to their daily workflow.
Create work orders from project tasks	UPDATED	July/2026	This feature enhances the Dynamics 365 Field Service and Dynamics 365 Project Operations integration by enabling your project and field teams to create Field Service work orders directly from project tasks or linking existing work orders to specific project tasks.
Show project task context for field scheduling	UPDATED	July/2026	<p>When the Field Service and Project Operations integration is enabled and a work order is linked to a project task, the following project-driven signals surface on the work order:</p> <ul style="list-style-type: none"> • Project-driven time Windows • View project task dependencies on work orders • Advisory scheduling warnings
Connect Field Service to finance and operations	UPDATED	January/2026	<p>Field Service now integrates with finance and operations through Project Operations, creating a seamless connection between service delivery, project management, and financial operations.</p> <p>With this integration, products and services captured on work orders in Field Service automatically flow into Project Operations as estimates, material usage lines, and actuals, including both cost and pricing information. This automation ensures financial data remains accurate, consistent, and readily available in finance and operations, reducing manual entry and improving visibility into project profitability.</p>

Streamline work order management

Field Service

Item	N/U	Deadline	Benefits / Observations
Enable serialized inventory tracking between Field Service and finance and operations	UPDATED	January/2026	This feature enhances the Field Service to finance and operations integration by leveraging Project Operations support for stocked products to enable tracking dimensions. When stocked products are used on work orders in Field Service, users can now specify detailed inventory attributes such as site, warehouse, inventory location, and, where applicable, serial or batch numbers. These values flow through Project Operations into finance and operations, enabling full traceability of materials from field activity to financial reporting.
Link work orders to projects for unified financials	UPDATED	January/2026	Link work orders and agreements in Field Service directly to projects in Project Operations. This connection creates a shared financial framework that ties service work to project billing and cost tracking. When you link a work order to a project, estimates and actuals captured in the field automatically flow into Project Operations.

INVENTORY INFORMATION

- Site * 🔍
Seattle Repair Depot
- Allocated * 🔴 No
- Warehouse * 🔍
Main
- Inventory location * 🔍
123 Aisle 3, Bin 7
- Batch number * 📄

- Serial number * 📄
6970163081991

00002 - Unsaved
Work Order - Work Order -

6/11/2025 4:20 PM Contoso Entertainment System - West Coast Division
Created on Service account

General Products and services Tasks Reference Timeline Related

Show form fill assist

Status: Scheduled

Priority: High

Service account: Contoso Entertainment System - West Coast Division

Work order type: Installation & Commissioning

Incident type: Installion HVAC

Agreement: ---

Summary: Routine Install

Account instructions: N/A

Contacts: Reported by Abraham McCormick

Assets: Primary asset

Dynamics 365 Field Service

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Active Work Orders (Legacy)

Work Order Number	Project	Incident type	Service account	System status	Created on	Functional Location
<input type="checkbox"/> 11084	Arizona Hotel Project	HVAC full system diagn.	Contoso Ltd.	Scheduled	6/3/2025 5:28 PM	
<input type="checkbox"/> 24332	Arizona Hotel Project	HVAC annual service	Relecloud	Scheduled	6/3/2025 2:28 PM	
<input type="checkbox"/> 24332	Contoso Properties Project	heat pump diagnosis	Relecloud	Scheduled	6/2/2025 5:25 PM	
<input type="checkbox"/> 32019	Ventura Project	Ductwork repair	First Up-Consultants	In progress	6/10/2025 4:32 PM	
<input type="checkbox"/> 33401	Contoso Hotel Project	Full system diagnosis a	Woodland Bank	Scheduled	6/5/2025 2:22 PM	

Questions



Thank you!



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