



Adelaide Microsoft IT Pro
Community

Power Platform & Dynamics 365 2026 Wave 1 – The Good Stuff

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8 x Microsoft Most Valuable Professional (MVP)
5 x FastTrack Recognised Solutions Architect (FTRSA)

Information in motion.
Intelligence in action.



Andrew Ly

**AI Business Process Capability Lead
@ Information**

Why We're Here



The 2026 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2026 to September 2026.

I'll be providing a walk through of what is new and planned for Power Platform and Dynamics 365. With Notable Deprecations to be across.



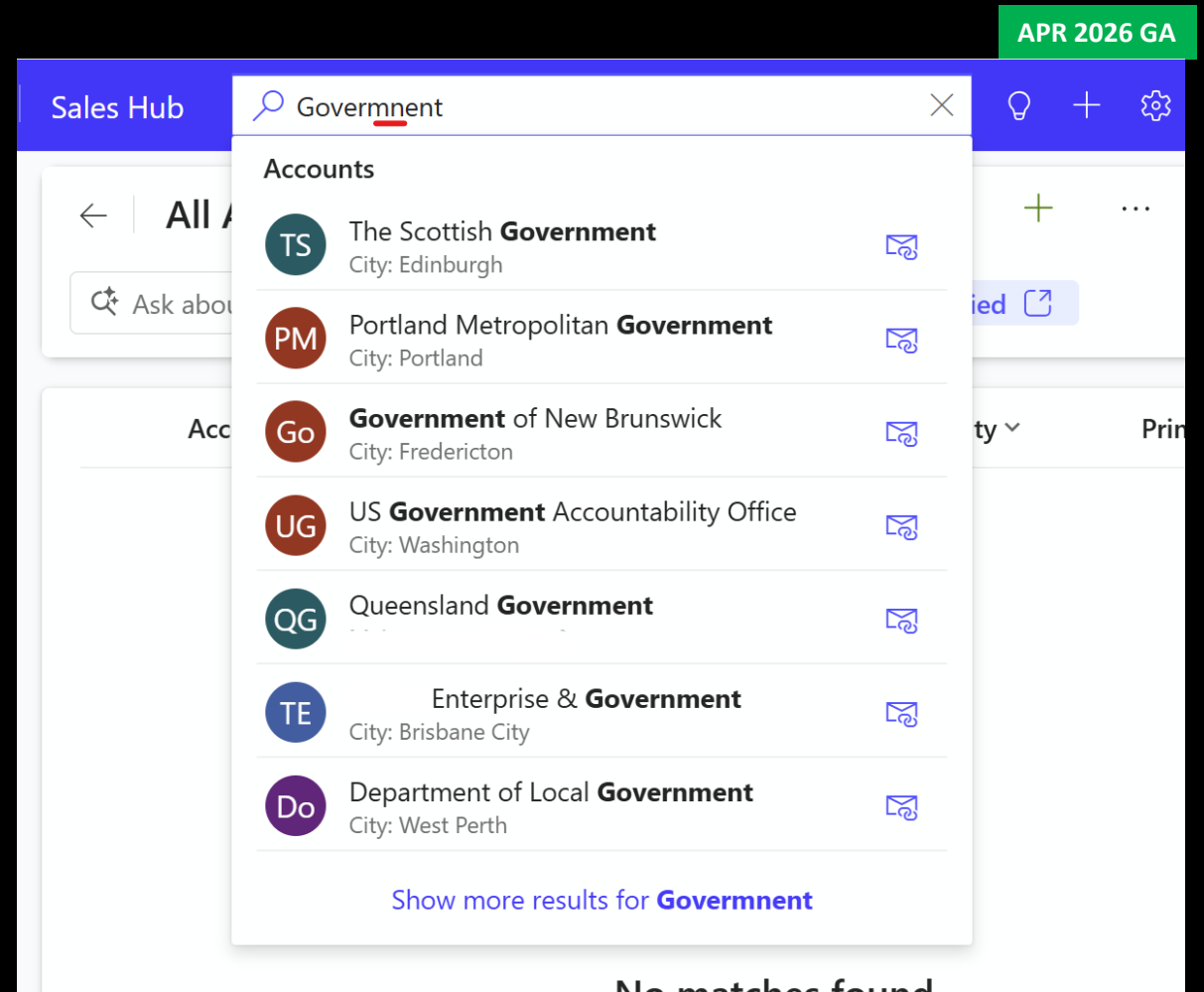
Power Apps

Enhance search in grid filters and lookups

Model Driven Apps – Grids now uses **Dataverse search** rather than Legacy.

This means:

- Contains-based matching (e.g. “austra”)
- Fuzzy Matching (minor typos etc)
- Hit Highlighting (search results)
- Faster performance (Dataverse indexes)
- Consistent search behaviour (across all areas of app e.g. quick search etc)



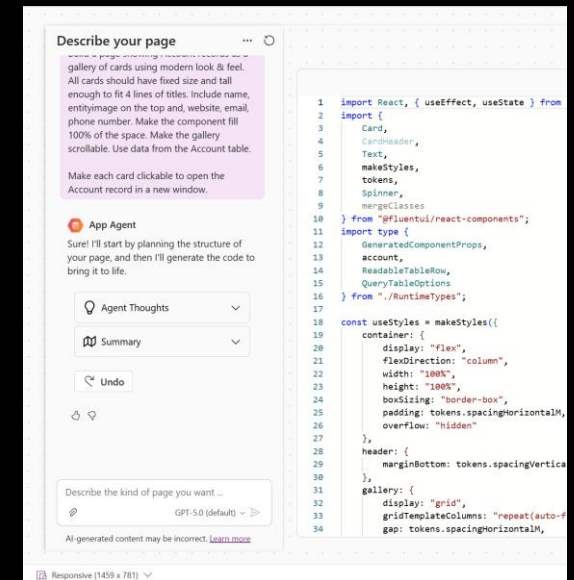
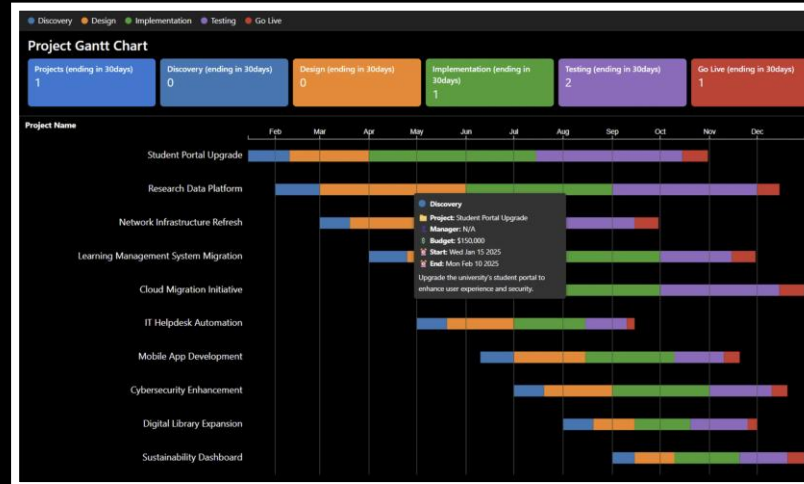
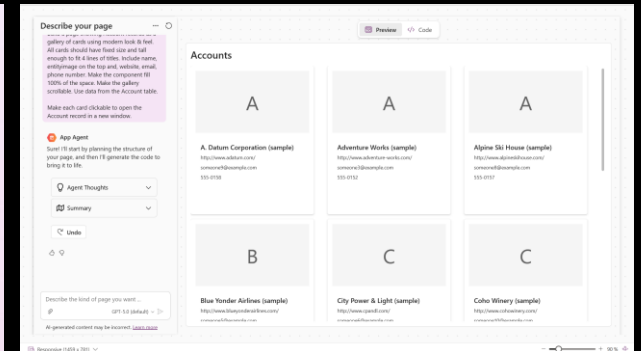
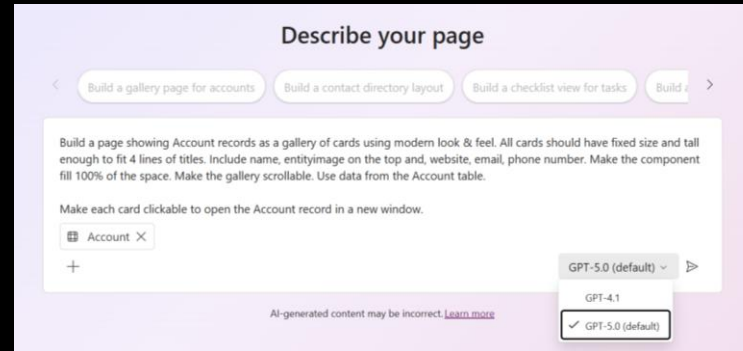
Generative Pages goes GA Globally

APR 2026 GA

Generative Pages for model driven apps allows you to create React/TypeScript pages and is deeply integrated with Dataverse data.

Use either a:

- AI First Approach – develop pages through Copilot conversations
- Code First Approach - Use AI Code generation tools generate TypeScript / React code directly (can use external tools such as Claude Code)



Pages [Close]

🔍 Search

+ New

Navigation

- ☰ My Work
 - 🏠 Membership Dashboard
- ☰ Membership
 - 📄 Member Applications vi... [More]
 - 📄 Member Applications form
 - 👤 Contacts view
 - 📄 Contacts form
 - 📄 Accounts view
 - 📄 Accounts form

All other pages

- 📄 Activity views
- 📄 Activity forms

FITNESS | Membership App | **SANDBOX** [Search] [Add] [Menu] [Settings] [AL]

← + New 🗑 Delete ▾ ↻ Refresh 📊 Visualize this view ⋮ [Share]

Active Member Applications ▾ [Grid] [Filter] [Filter by keyword]

| <input type="checkbox"/> | Applicati... | ↑ ▾ | First Na... ▾ | Last Na... ▾ | Contact Num... ▾ | Birth Date ▾ | Membersl |
|--------------------------|--------------|-----|---------------|--------------|------------------|--------------|----------|
| <input type="checkbox"/> | APP-1000 | | Emily | Johnson | 0423 456 789 | 25/06/1985 | Basic |
| <input type="checkbox"/> | APP-1001 | | Karen | Williams | 0411 567 890 | 12/08/1942 | Basic |
| <input type="checkbox"/> | APP-1002 | | Michael | Brown | 0425 678 901 | 5/11/1970 | Basic |
| <input type="checkbox"/> | APP-1003 | | Sarah | Jones | 0432 789 012 | 20/02/1995 | Basic |
| <input type="checkbox"/> | APP-1004 | | James | Davis | 0410 890 123 | 30/07/1955 | Basic |
| <input type="checkbox"/> | APP-1005 | | Linda | Miller | 0413 901 234 | 15/05/1968 | Basic |
| <input type="checkbox"/> | APP-1006 | | Robert | Wilson | 0414 123 456 | 10/12/1935 | Basic |
| <input type="checkbox"/> | APP-1007 | | Jennifer | Taylor | 0415 234 567 | 25/09/1980 | Basic |
| <input type="checkbox"/> | APP-1008 | | David | Anderson | 0416 345 678 | 5/06/1990 | Basic |
| <input type="checkbox"/> | APP-1009 | | Jessica | Thomas | 0417 456 789 | 12/03/1997 | Basic |
| <input type="checkbox"/> | APP-1010 | | Richard | Jackson | 0418 567 890 | 15/08/1949 | Basic |
| <input type="checkbox"/> | APP-1011 | | Patricia | White | 0419 678 901 | 5/01/1953 | Basic |

Rows: 37

Member Applications

Enhanced AI Row Summaries

JUN 2026 GA

Row summaries give you a peek of important information on the record without having to open or scan the form.

Outputs from AI Summaries can now be secured to specific security roles.

Available in Gov Clouds - Meets stricter compliance and boundary protection to work within gov cloud environments.

Extends this to First Party D365 Apps — e.g. Sales, Customer Service apps

Available from Grid Control for the first time.

The screenshot shows a detailed summary for 'A. Datum Corporation'. The text reads: 'A. Datum Corporation is a mid-sized, innovation-driven enterprise specializing in integrated technology solutions for the logistics and supply chain sector. The company, headquartered in Chicago, has **6,200 employees** and an **annual revenue of \$10,000.00**. The organization serves a diverse portfolio of clients, including retail distributors and government agencies. A follow-up is planned for early next quarter regarding a potential order for the Intelligent Workflow Automation Platform, which will involve confirming interest, validating scope, and initiating procurement discussions.' Below the text are 'Copy', 'Like', and 'Share' icons. At the bottom, a summary card displays: 'A. Datum Corporation - Saved', 'Annual Revenue: \$10,000.00', 'Number of Employees: 6,200', and 'Owner: JG'.

The screenshot shows a data grid titled 'My Active Accounts'. The grid has columns for 'Account Name', 'Main Phone', 'Address 1: City', 'Primary Contact', and 'Email (Primary Contact)'. The first row is selected and highlighted in blue. An AI summary overlay is shown over the first row, displaying the same text as the top screenshot. A blue arrow points from the text 'Available from Grid Control for the first time.' to the summary overlay.

| Account Name | Main Phone | Address 1: City | Primary Contact | Email (Primary Contact) |
|--|------------|-----------------|---------------------------------------|---------------------------------------|
| <input checked="" type="checkbox"/> A. Datum Corporation | 555-0158 | Redmond | Rene Valdes (sample) | someone_i@example.com |
| <input type="checkbox"/> Adventure Works | | | erson (sample) | someone_c@example.com |
| <input type="checkbox"/> Alpine Ski House | | | on (sample) | someone_h@example.com |
| <input type="checkbox"/> Blue Yonder Airlines | | | ja (sample) | someone_e@example.com |
| <input type="checkbox"/> City Power & Light | | | rsmann (sample) | someone_f@example.com |
| <input type="checkbox"/> Coho Winery | | | (sample) | someone_j@example.com |
| <input type="checkbox"/> Contoso Pharmaceuticals | | | n (sample) | someone_g@example.com |
| <input type="checkbox"/> Fabrikam, Inc. | | | pbell (sample) | someone_d@example.com |
| <input type="checkbox"/> Fourth Coffee | | | rville McKay (sample) | someone_a@example.com |

Usage Summaries

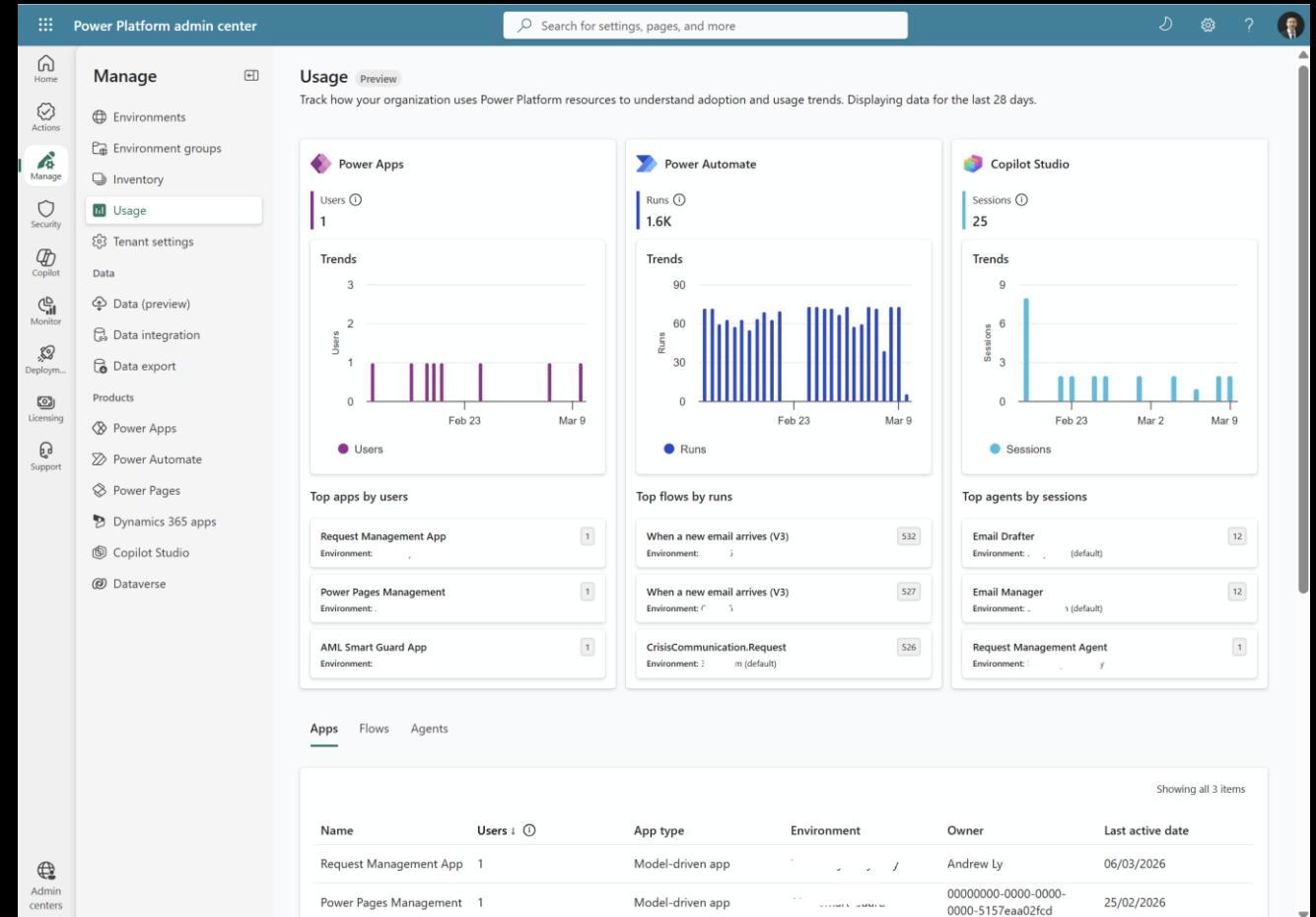
MAY 2026 GA

Usage Dashboards within Power Platform Admin Center.

Across Power Apps, Power Automate and Copilot Studio.

See Engagement/Adoption/Usage Metrics such as:

- Top apps by user activity
- Top flows by run volume
- Top agents by session count





Power Pages

Site Analytics and Server Logging

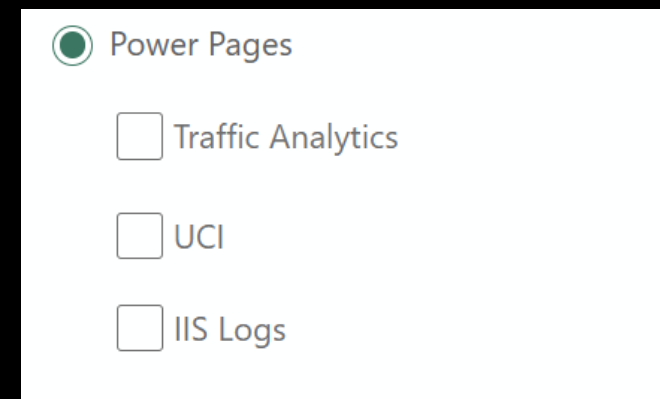
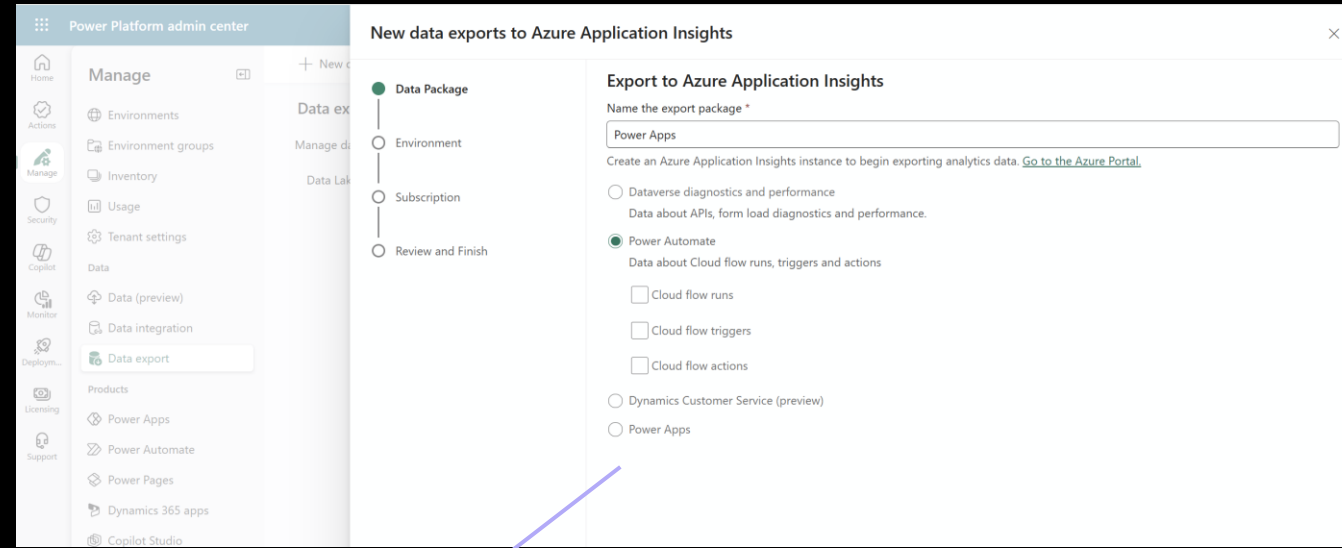
JUN 2026 PP
outside AU initially

Monitor Power Pages Traffic easily.

New Option to Export **Power Pages telemetry to Azure Application Insights** to better help detect issues, debug problems, optimize performance.

Monitor statistics such as:

- Page Views
- Form Interactions
- Session Details (Client Side Analytics)
- Server Side Errors
- Detailed Logs



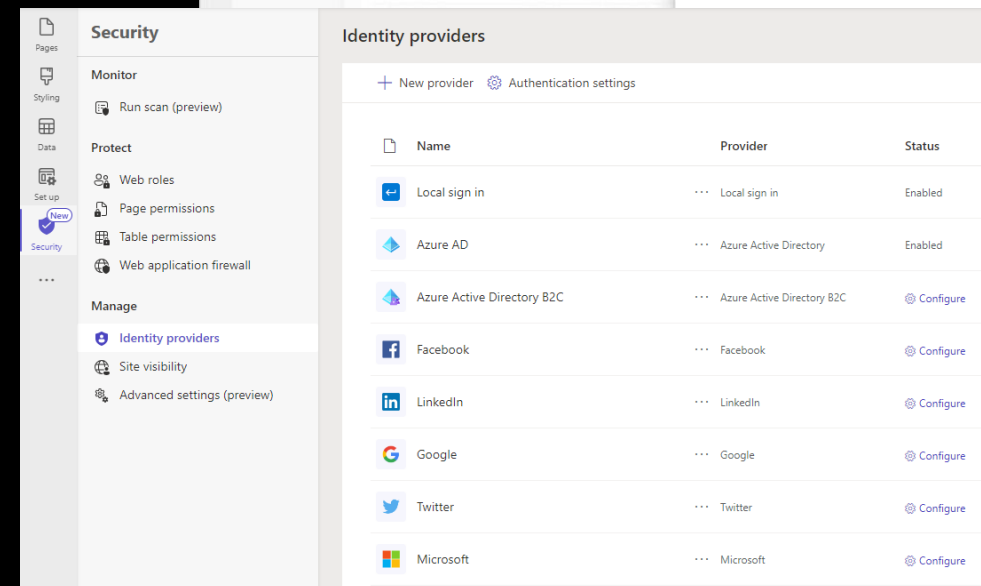
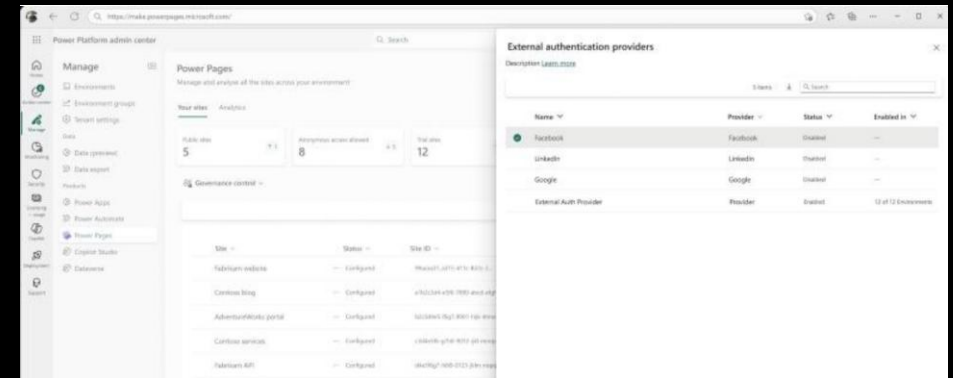
External Identity Provider (IDP) at Environment or Site Level

MAY 2026 PP

Enforce identity providers across all sites, or specific sites, providing flexibility when needed.

Makers of Power Pages sites can only see and choose from approved IDPs when setting up authentication.

This helps with enterprise level governance, whilst providing flexibility to individual teams to manage identities at the same time remaining compliant.



Create and Delete Power Pages through CLI

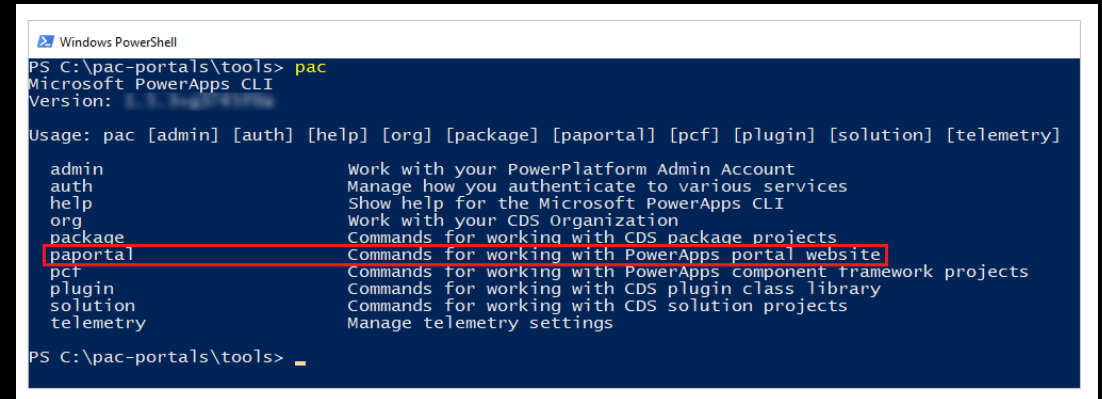
APR 2026 PP

Integrate into your deployment pipelines such as GitHub Actions, Azure DevOps Tasks.

This feature introduces new commands to the *pac pages* CLI for directly managing Power Pages sites.

Key capabilities include:

- Create a new site with *pac pages create-site*. You can also add a website record ID to create a site from an existing configuration.
- Delete a site with *pac pages delete-site*.



```
Windows PowerShell
PS C:\pac-portals\tools> pac
Microsoft PowerApps CLI
Version: 1.1.0 (April 2026)

Usage: pac [admin] [auth] [help] [org] [package] [paportal] [pcf] [plugin] [solution] [telemetry]

admin      Work with your PowerPlatform Admin Account
auth      Manage how you authenticate to various services
help      Show help for the Microsoft PowerApps CLI
org       Work with your CDS Organization
package   Commands for working with CDS package projects
paportal  Commands for working with PowerApps portal website
pcf       Commands for working with PowerApps component framework projects
plugin    Commands for working with CDS plugin class library
solution  Commands for working with CDS solution projects
telemetry Manage telemetry settings

PS C:\pac-portals\tools>
```

Server Side Javascript

APR 2026 GA

Develop secure code, through Server Side Javascript.

Moving logic to the server, reduces client side workarounds, improves security & compliance, and simplifies API based integrations.

- Register Server Side Logic through Set Up > Integrations > Server Side Logic (preview)
- Host executable server side JavaScript to connect to external services or advanced operations, and then secure them to specific Roles.
- This feature is available for makers to write and publish the server code to use as API in the client side



Set up

Server logic (preview)

Securely author your own business functions, hosted on this platform, with built-in security and seamless integration. [Learn more](#)

+ New server logic

| Display Name ↑ | Name | Roles |
|----------------|---------------|-------------------------|
| Capture Order | capture-order | Anonymous Users ... |
| Create Order | create-order | Anonymous Users ... |
| Credit Check | credit-check | Authenticated Users ... |

Client APIs

APR 2026 GA

Build reliable JavaScript on well supported APIs that control UI components and operations rather than relying on fragile Document Object Model (DOM).

The Power Pages Client APIs (Preview) provide a JavaScript interface for controlling UI components and performing operations on your Power Pages site. Key features include:

- **Form API:** Retrieve forms by ID, manage their visibility, and interact with controls.
- **List API:** Access lists, toggle their visibility, and retrieve HTML elements.
- **User API:** Handle authentication actions like sign-in and sign-out.
- **Web API:** Use OData-compliant methods to create, retrieve, and query records.

JavaScript

Copy

```
Microsoft.Dynamic365.Portal.onPagesClientApiReady(($pages) => {  
  const forms = $pages.currentPage.forms.getAll();  
  console.log(`Found ${forms.length} forms on the page.`);  
});
```

JavaScript

Copy

```
let list = $pages.currentPage.lists.getListById('list_#1');  
console.log(`List id: ${list.id}`);  
if (list.getVisible()) {  
  console.log('List is currently visible.');
```

Method

Description

signIn

Redirects the user to the sign-in page.

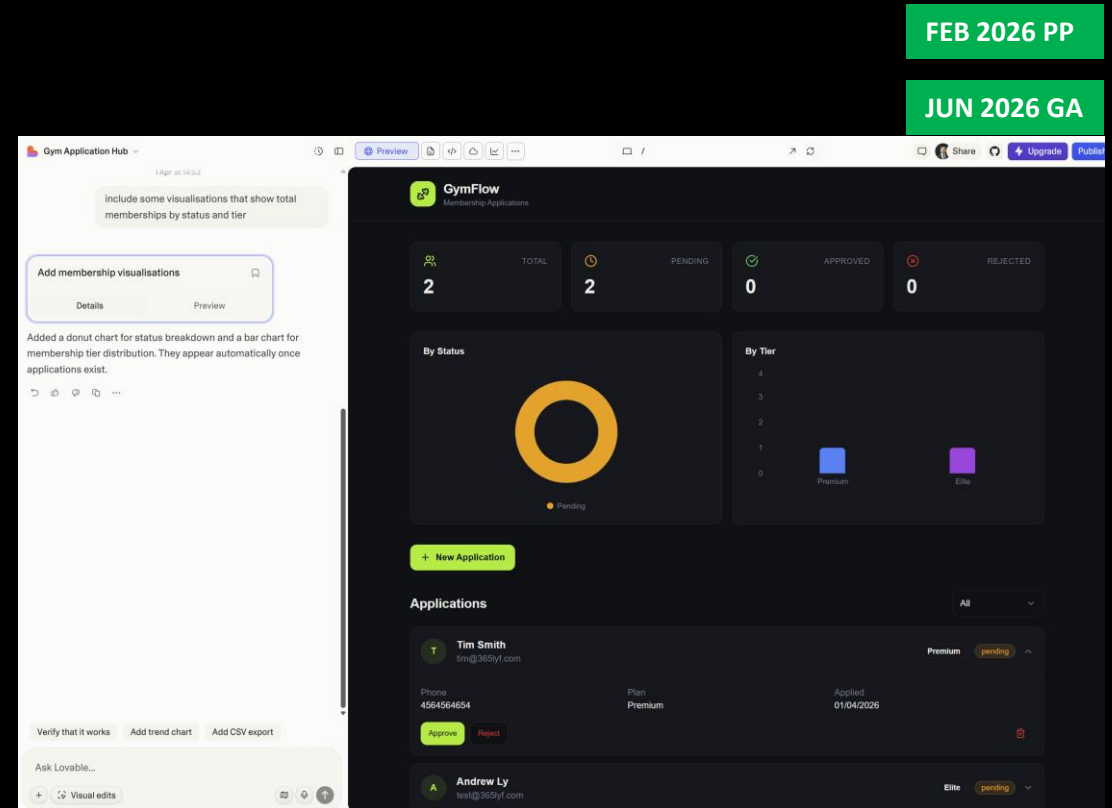
signOut

Signs out the currently signed-in user.

Build Power Pages sites faster with AI coding tools

Power Pages builder agent has specific skills to help with generative AI coding instructions, that help convert site requirements into accurate code aligned to Power Pages architecture and security patterns.

- **Platform-aware code generation:** The generative AI code generation understands Power Pages-specific constructs including web roles, table permissions, web APIs, and site settings.
- **Generate accurate security configurations:** Produce correctly structured table permissions and web role assignments that follow Power Pages best practices.
- **Build with modern frameworks:** Create React and TypeScript-based single-page applications in your favourite coding tool and bring into Power Pages hosting.



Bootstrap 5

JUN 2026 GA

Accelerate your Dynamics 365 portal deployment with an enhanced data model and Bootstrap 5.

Key Bootstrap 3 to 5 differences include:

- Removal of jQuery Entirely (much improved performance)
- Improved Grid Layouts
- Geared for modern Browsers (i.e. IE10 and 11 dropped)
- Better naming conventions and markups for readability

Also supported are the **first party D365 Portals** (e.g. Customer Self Service, Employee Self Service, Partner Portal, and community D365 Site Templates).

A Migration tool is available.

To enable these new features, go to the Environment tab under the Manage section in the Power Platform admin center and turn on the Switch to enhanced data model toggle.

Run the migration tool on the folder

Enter the following command to run the migration tool on the website folder that you downloaded: `pac pages bootstrap-migrate -p "WebsiteFolderPath"`

Example: `pac pages bootstrap-migrate -p "c:\pac-powerpages\downloads\bootstrap-dev-site"`

The command creates a folder with "V5" appended to the folder name.

If you run into issues while upgrading to Bootstrap version 5 or want to revert to Bootstrap version 3, see [How to revert from Bootstrap version 5 to version 3](#).



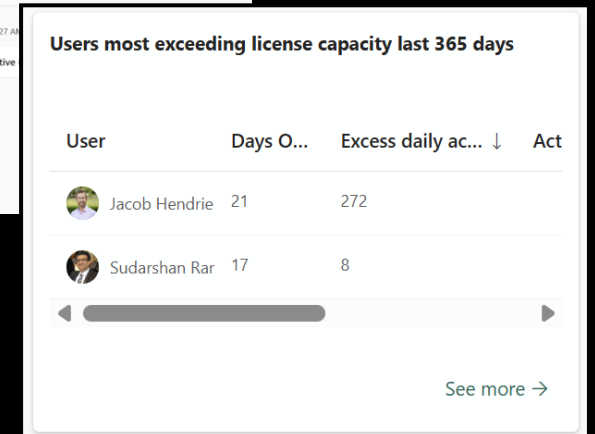
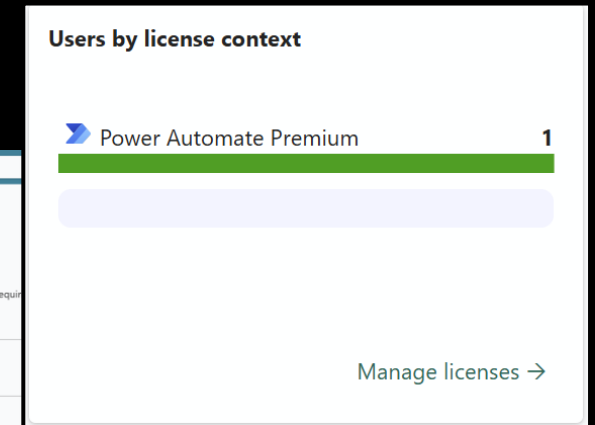
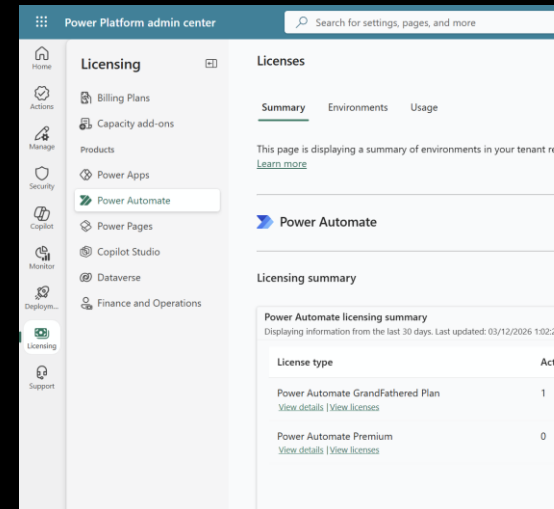
Power Automate

Licensing Page for Power Automate Update

APR 2026 GA

New consolidated layout with additional details on license consumption and other improvements to help admins optimize license costs and usage.

- Top Users, Usage Trends, Daily Flow Capacity
- Management of PA Process, Hosted Process, Process Mining (Add-on) and other add on licenses.
- Insights and recommendations for users missing license or over cap
- Single location for downloadable usage reports

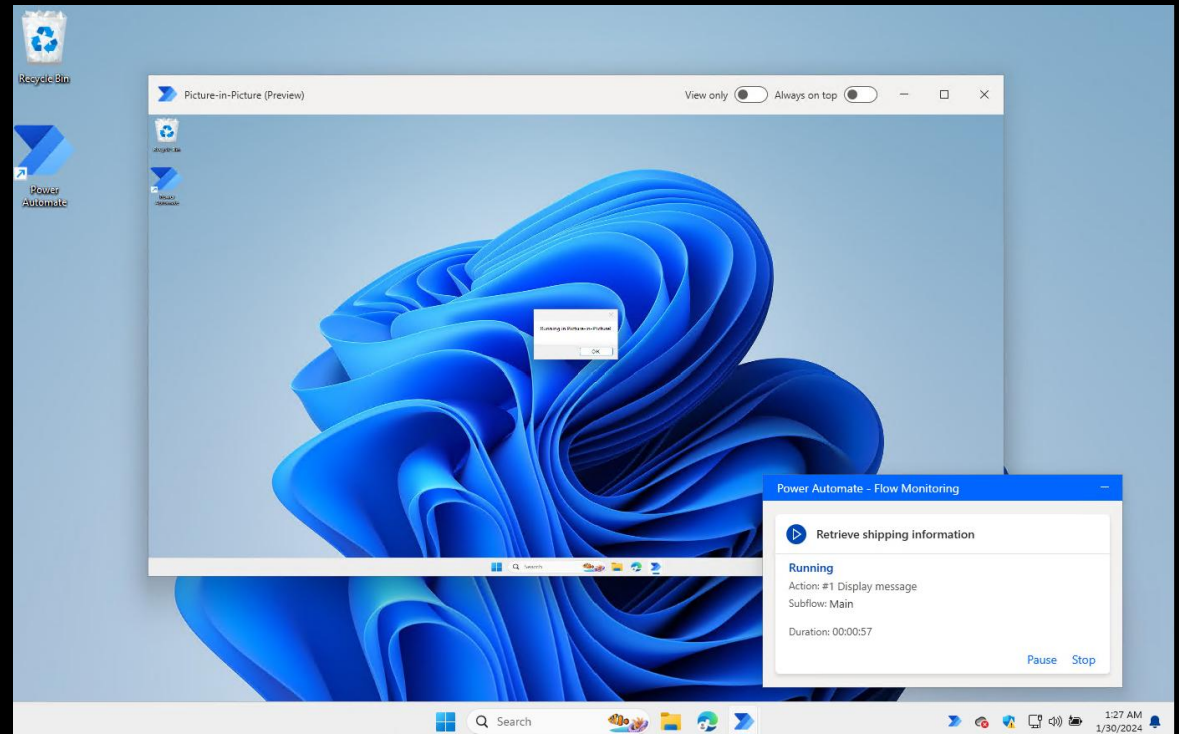


Video Logs for Unattended Desktop Flows

APR 2026 PP

Unattended desktop flows fail without clear visual context making it difficult to determine root cause of failure.

- Records last 60 seconds of machine screen
- Saves to local machine (VideoLogs folder)
- Embeds closed captions with action mapping (overlays action to video)



Invoke Power Apps directly from Desktop Flow (Attended Flows)

Enables multi-step guided forms for attended automation.

Replaces legacy custom forms with Modern Power Apps.

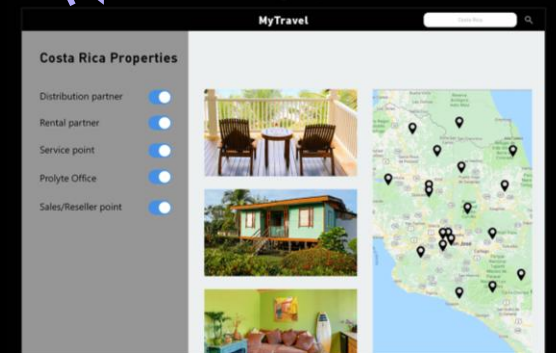
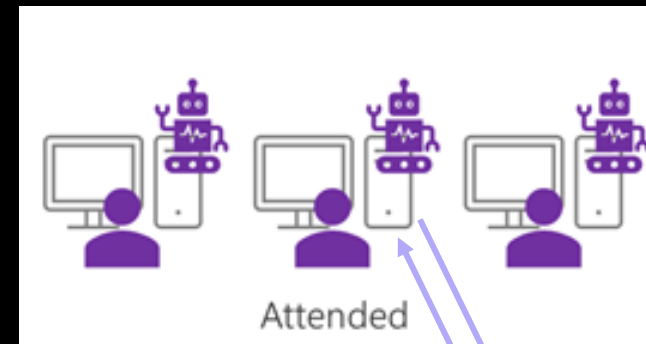
Event Driven Attended Automation

Bridges data from Legacy Systems to Modern Cloud Apps

- Fully customizable UI
- Pass inputs from desktop flow to app
- Captures outputs from app and passes back to flow
- Trigger sub-flows from app events

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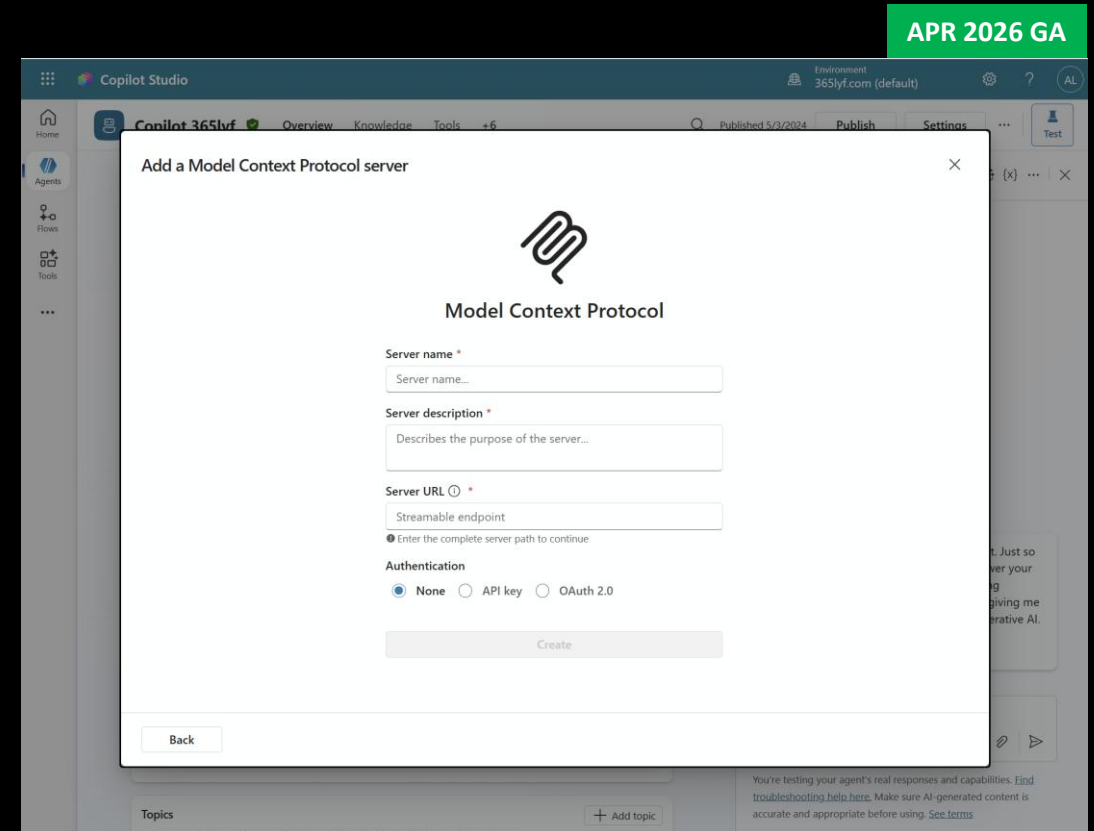


Copilot Studio

Custom MCP Servers go GA

Custom Model Context Protocol (MCP) servers let you connect Microsoft Copilot, VS Code, Git, Claude, and other AI agents to the third-party apps and internal systems your business relies on such as DocuSign, Salesforce, GitHub, or ServiceNow. Makers and developers can create or clone reusable, governed MCP servers that bring together connector actions, tools from other MCPs, and custom APIs, giving agents the ability to take meaningful, secure actions across platforms.

- Build new MCP servers by assembling connector actions, tools from other MCP servers, and custom APIs
- Clone existing Microsoft authored or hosted MCP servers like Dataverse MCP servers, and tailor them for your business by adding, removing, or replacing tools

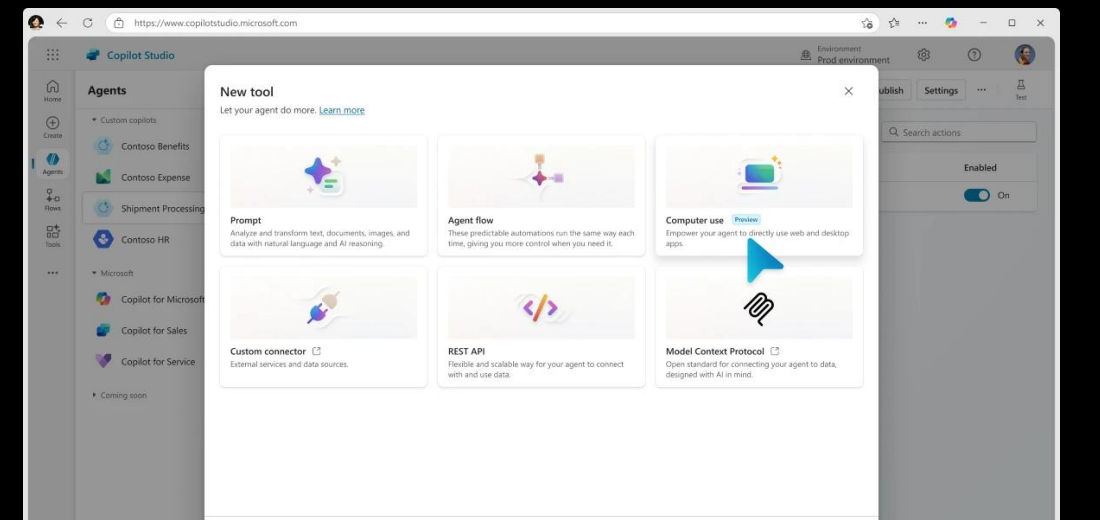
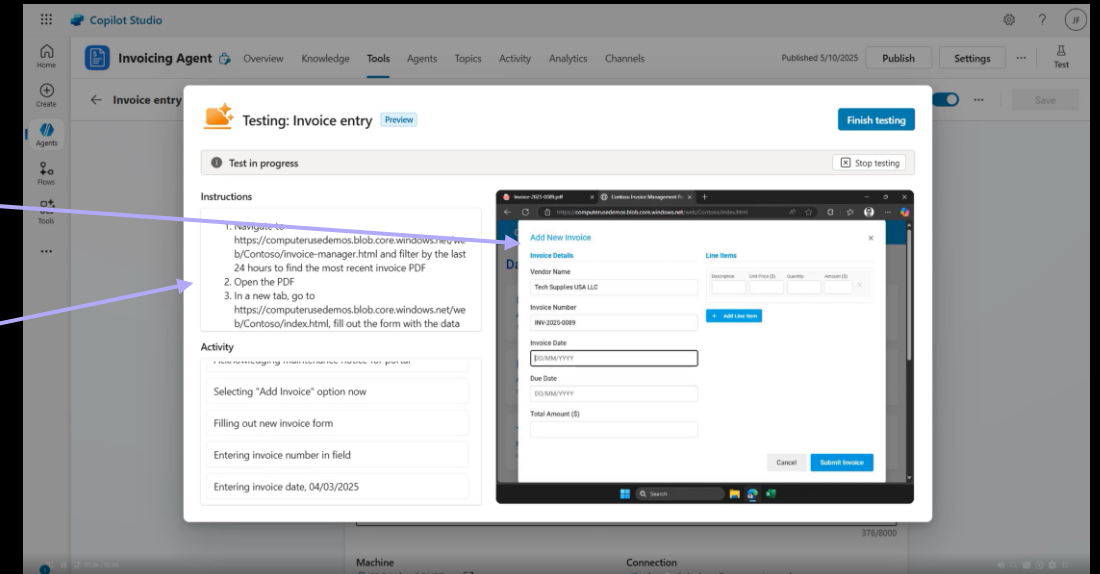


Computer Use Agents (CUA) goes GA

APR 2026 GA

UX Based (RPA) Integration. What makes this different to Desktop Flows?

- **UIs shift frequently** – Apps and websites are dynamic by nature, with layouts that can vary across versions.
- **It's easy to get started** – Simply describe what you want in natural language, no coding required. You can test and refine with a side-by-side view of the computer and the reasoning chain.
- **Vision matters** – The task depends on what's visible on screen, such as interpreting charts and images.



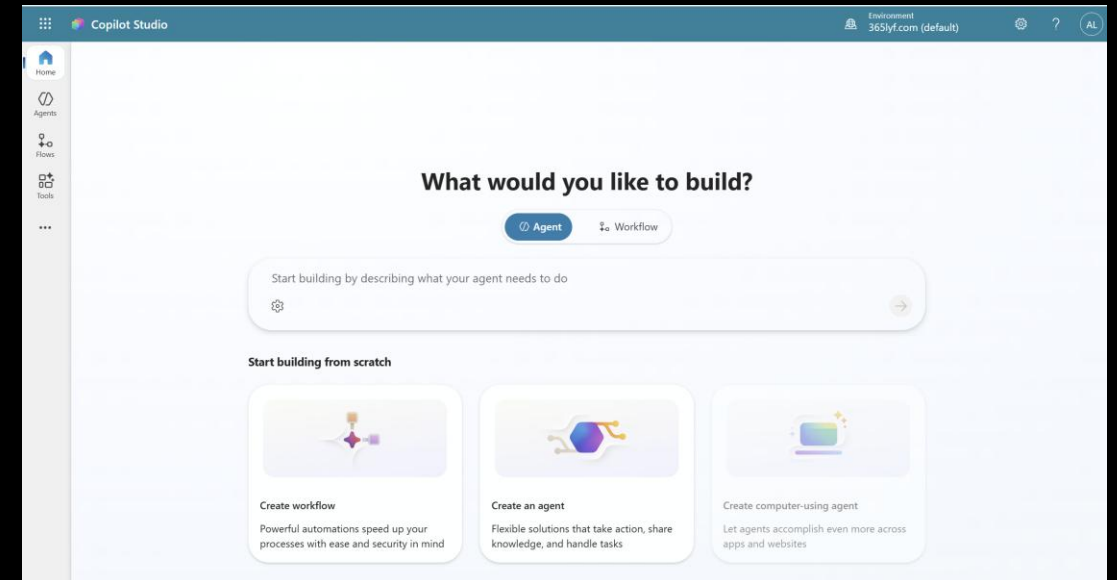
Suggested Agents

How it works:

1. Copilot Studio securely analyses the maker's Microsoft 365 Copilot memory, respecting privacy and compliance boundaries.
2. An offline process periodically generates up to three suggested agents for the maker, ranked by relevance.
3. The maker receives an email notification when new suggested agents are available, when created they act like any other agent built in Copilot Studio.

NO PP

MAY 2026 GA



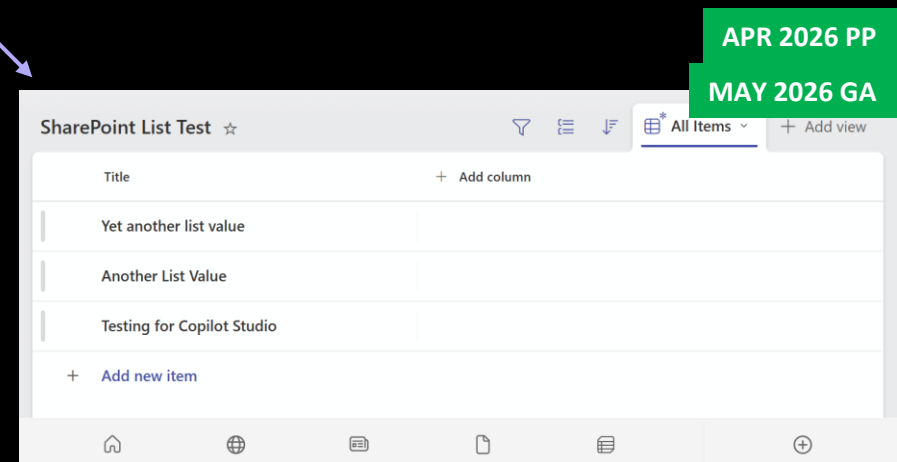
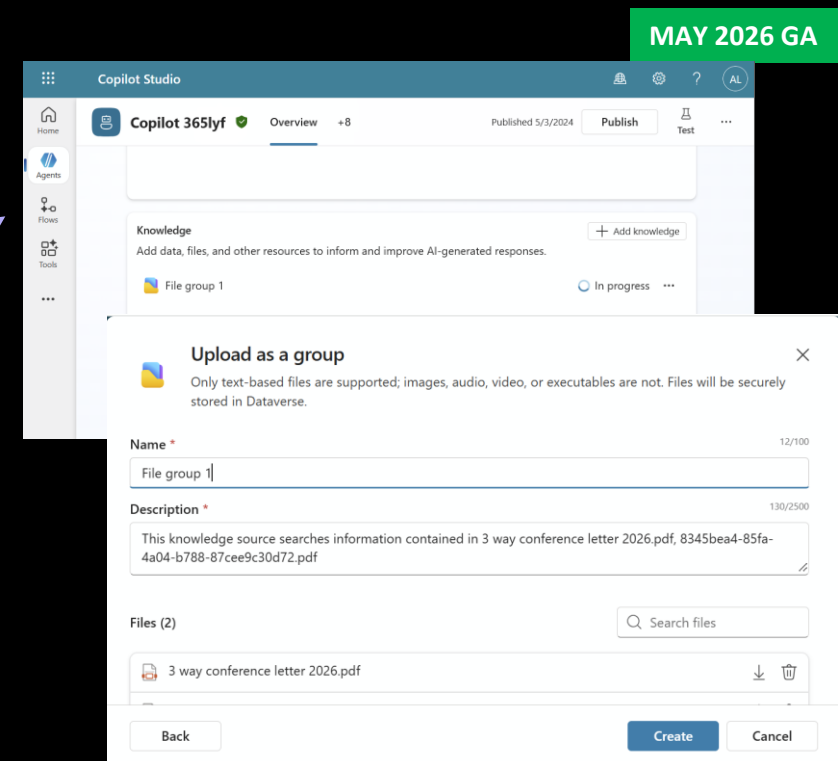
Knowledge Updates (File Groups and SharePoint Lists)

File Groups goes GA - Narrow the scope of search within Copilot Agents with File Groups to have more defined knowledge sources.

- Up to 500 files in a single file group

SharePoint Lists in Public Preview – Use SharePoint Lists rather than just documents as knowledge sources for your agents.

- When you select a specific list, the agent can access all rows and columns. Access follows the access control restrictions you set for the SharePoint List





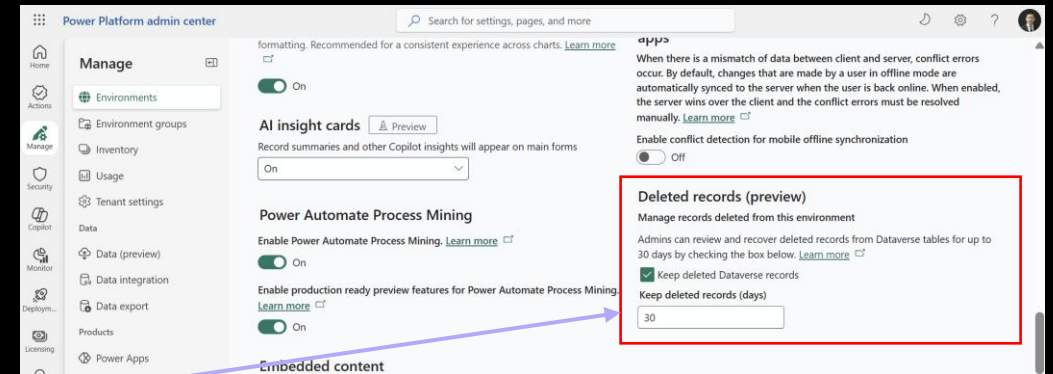
Dataverse

Restore Deleted Records

APR 2026 PP

Review and recover deleted records (from any delete scenario – manual, automated, single, bulk).

- **Comprehensive recovery:** Restore deleted records regardless of how they were removed.
- **Configurable retention:** Define how long deleted records remain available for recovery, up to a maximum of 30 days.
- **Flexible access:** Restore data through both the Dataverse user interface and APIs/SDK.
- **Admin-controlled enablement:** Administrators must enable the feature at the organization level to take advantage of recovery capabilities.



Early bound example

The static `RestoreAccountRecordEarlyBound` method uses the `RestoreRequest<T>` and `Account` classes generated using the `pac modelbuilder`.

```
C# Copy
/// <summary>
/// Restores an account record
/// </summary>
/// </summary>
/// <param name="service">The authenticated IOrganizationService instance.</param>
/// <param name="accountId">The ID of the deleted account record.</param>
/// <param name="originalName">The original name value for the account record.</param>
/// <returns>The ID of the restored account.</returns>
static Guid RestoreAccountRecordEarlyBound(
    IOrganizationService service,
    Guid accountId,
    string originalName)
{
    Account accountToRestore = new()
    {
        Id = accountId,
        // Appending '{Restored}' to the original name
        // to demonstrate overwriting a value.
        Name = originalName + " (Restored)"
    };

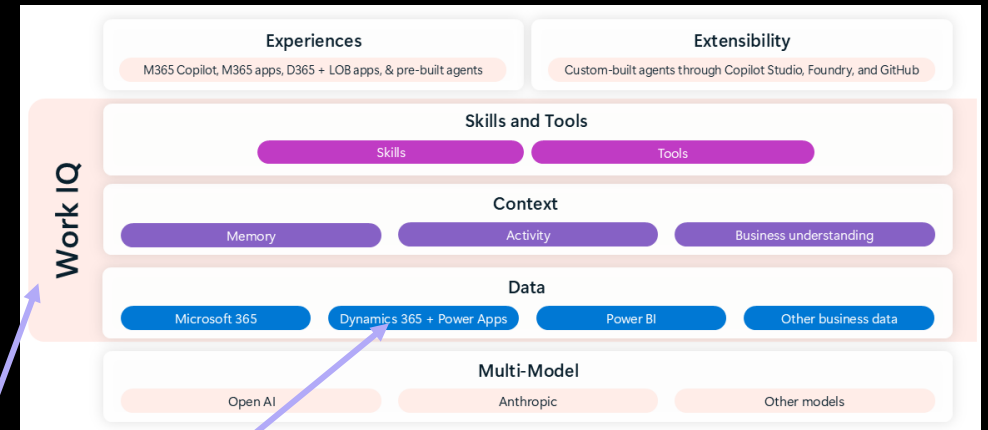
    RestoreRequest<Account> request = new()
    {
        Target = accountToRestore
    };

    var response = (RestoreResponse)service.Execute(request);
    return response.id;
}
```

Dataverse & Work IQ

Work IQ is the Intelligence Layer that sits over M365. Memory plays an extremely important role – who I work with, what meetings I have attended, what files do I access, how often – and Memory changes over time. Based on this context, it can surface more relevant data.

Dataverse intelligence extends Work IQ to bring business data to AI agents and Microsoft Copilot. Think of what forms I use for data entry of new opportunities, showing a view of all leads in my region, show me all invoices for a particular customer – effectively anything you would do natively in a Power App / D365 can be surfaced into M365 Copilot through Dataverse Intelligence.



APR 2026 GA

Dataverse intelligence Preview

Control how Dataverse data is made available to AI experiences and agents. [Learn more](#)

Turn on Dataverse intelligence (Work IQ) for agents and AI experiences

Dataverse Model Context Protocol

Let MCP clients, such as Copilot Studio, GitHub Copilot, and Claude desktop, interact with Dataverse data using natural language and structured queries. [Learn more](#)

Step 1: Decide whether or not you'll allow MCP client access

Allow MCP clients to interact with Dataverse MCP server (GA version)

Allow MCP clients to interact with Dataverse MCP server (Preview version)

Step 2: Add MCP clients to allow list

If you allow MCP clients to interact with the Dataverse MCP server, make sure to add the MCP clients you want to allow to the Allowed MCP Clients list in Advanced Settings. [Learn more](#)

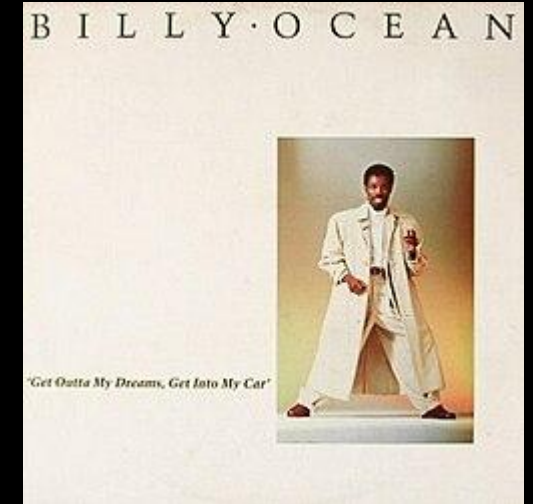
Go to [Advanced Settings](#)

Move Production Apps out of DEFAULT Environment

Reduce clutter inside the Default Environment, avoid Governance Issues and improve your security posture.

- New Recommendations to Move Commonly Used Flows, Agents, and Apps into a designated Managed Environment.
- Guided Wizard-like experience.
- Support for both Manual and Automated Migration based on your organisational need.
- Individual or Bulk Migrations at Scale.

Get Outta My “Default” Environment and into my “PROD”.



JAN 2026 PP

APR 2026 GA

Recommendations

Improve tenant health by taking immediate or automated action later. [LEARN MORE](#)

Active (26) Snoozed (5) Dismissed (7)

| Severity | Recommendation |
|----------|--------------------------------------|
| High | Turn on tenant-wide analytics for... |
| High | Assign valid owners to mitigate t... |
| High | Assign valid owners for agents to... |
| High | Enable Web Application Firewall... |
| High | Enhance your website's security s... |
| High | Improve environment hygiene by... |
| High | Protect high value apps with pre... |
| High | Review and convert expiring tria... |
| High | Review Power Apps license recon... |
| High | Assign licenses to pending Powe... |

Move production apps out of the default environment PREVIEW High

Why is this important?

These apps are actively used by several users from the default environment. To reduce security risks and performance issues, consider moving these apps to a Managed Environment. With a Managed Environment, you can customize security features, set granular DLP policies, receive alerts and best-practice recommendations to ensure all your resources are performing optimally.

What can I do?

Move this app out of the default environment into a managed environment for enhanced application lifecycle management, granular security control, and advanced governance. [Learn more](#)

Source: Admin, Last refreshed: 1/12/26

→ Move Download as CSV Share in Teams View Details 0 selected

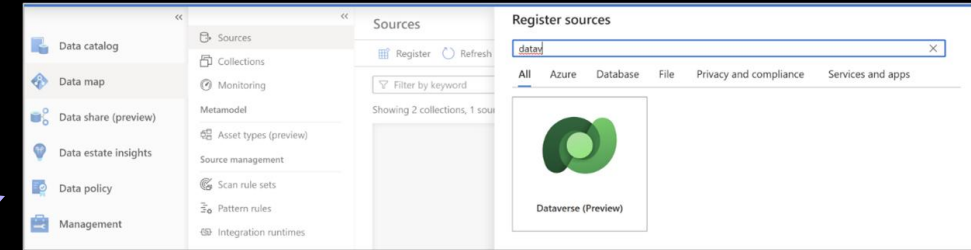
| App name | App type | Owner | Monthly active users | Last modified |
|-------------------|---------------------|----------------------|----------------------|---------------|
| Sharepoint List 1 | SharePoint form app | F 449243d7-a7f0-4... | 123 | 12/12/23 |
| Sharepoint List 2 | SharePoint form app | E edfb66f7-0a0c-4... | 119 | 12/12/23 |
| Canvas App - 1 | App | S 5b8f6e09-0e2a-... | 6 | 12/12/23 |
| Canvas App - 2 | App | S 5ba9885c-3d63-... | 135 | 12/12/23 |

Dataverse + Sensitive Labels

Microsoft Purview provides the ability to auto label sensitive information across M365 including Dataverse.

Copilot Studio agent responses will now display sensitivity labels in the citation when you select a Dataverse knowledge source in Copilot Studio.

For example, the feature scans data such as social security numbers or credit card numbers and applies a label at the column level in Purview. The labels appear across maker and user experiences in Copilot Studio.



JUN 2026 GA

Copilot Studio is available as both a standalone web app and as a discrete app within Teams. Most of the functionality between the two versions is the same, but there might be different reasons to choose one version over the other based on how you want to use Copilot Studio. To use Granular Controls, you need to ensure that Copilot Studio follows AI rules and adheres to the "Chain of Protection," such as Sensitivity label. When AI uses existing data specific to an individual user to deliver a new capability, it must maintain a sensitivity label and protection set of the highest labeled and protected source. Around 700+ customers have turned off generative AI copilot publish in their tenants [1] [2] [3].

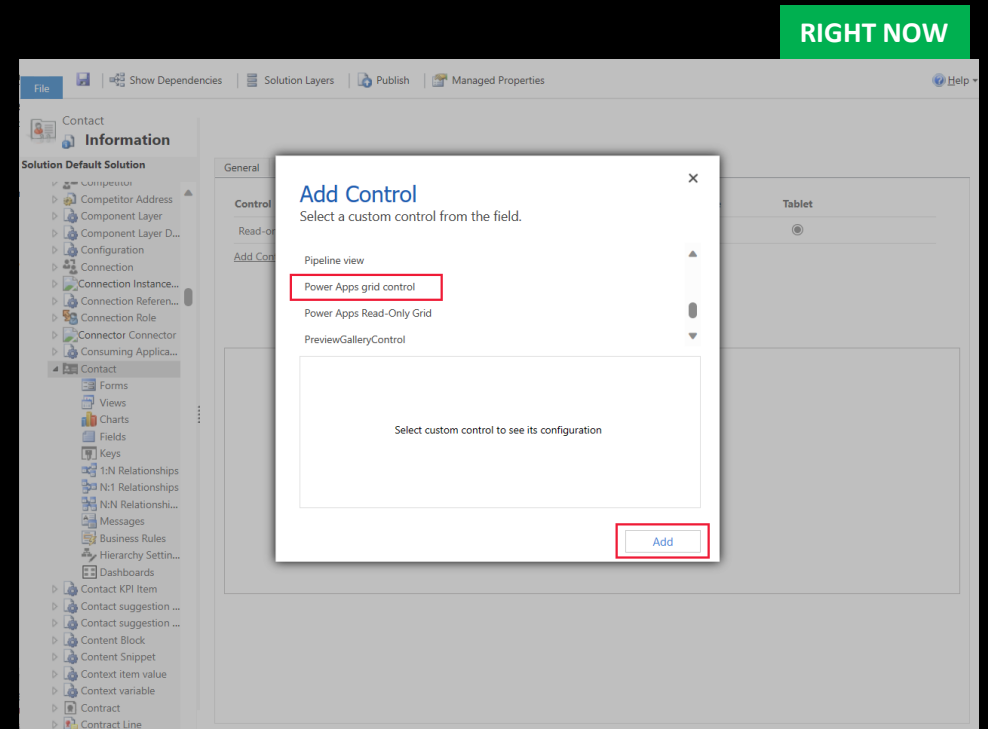
- 2 references
- 1 [Copilot Studio.docx](#)
General
 - 2 [Secure Generative Answers Share...](#)
Confidential\Any User



Deprecations

Going away....

- **OG Editable Grids** – March 2026 – OOS
-> Power Apps Grid Control
- **Power Apps Read-Only Grid Control** – March 2026 – OOS
-> Power Apps Grid Control
- **Power Automate for Excel Add In (appsource)** -> Native Automate tab in Excel
- **Audit Before and After Field Changes** no longer send to Purview (to hide sensitive data from analytics)
- **Copilot Chat in Model Driven Apps (Jan 2026)** -> M365 Copilot Chat (unifying chat interfaces)
- **Classic Look for Model Drive App (April 2026)** – hard no now
- **Figma Creation (Oct 2025)** from an image/figma file – Figma is dead now, replaced with Generative Pages and Plans.
- **Contact Tracking (D365 App for Outlook)** – Oct 2025 OOS -> Use D365 Sales app now.





D365 Sales

Sales Research Agent

- The Sales Research Agent connects to your Dynamics 365 Sales data by default. You can also connect it to other data sources on Dataverse or upload Excel, CSV, or PDF files to further enrich the basis of your explorations.
 - The planner agent creates a **research plan** and orchestrates a multitude of specialized agents to gather, analyze, and transform data into meaningful research outputs.
- These outputs are **tailored to your context, business domain**, and deep understanding of the business data.
- The research insights are delivered to you as comprehensive, **AI-generated research blueprints**.

APR 2026 GA



Sales Qualification Agent (Updated)

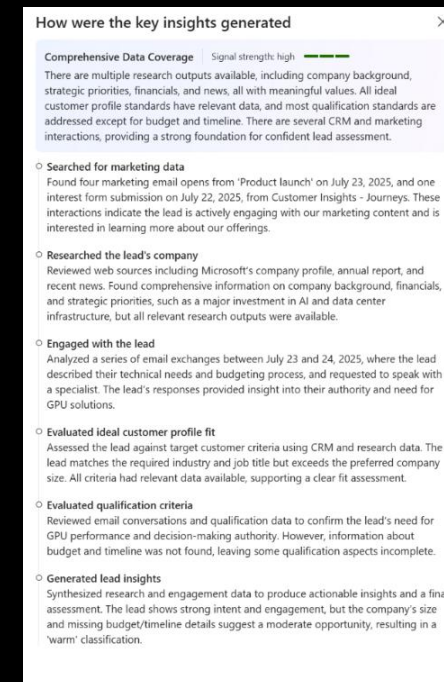
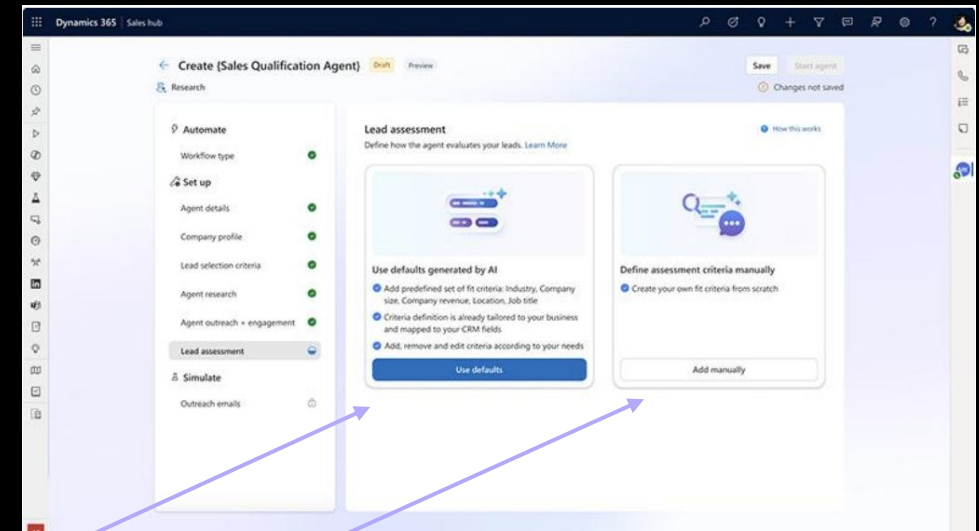
APR 2026 PP

Sales Qualification Agent already helps you qualify leads by checking whether they meet your **handover criteria**, ensuring sellers focus only on high-quality opportunities

First-time users

- When you configure the agent for the first time, you get a simplified setup flow:
- Start with Copilot-generated assessment criteria for one-click configuration.
- Optionally add or modify criteria manually to match your exact qualification logic.
- View a flyout explaining the lead assessment process and how it works within the agentic workflow.

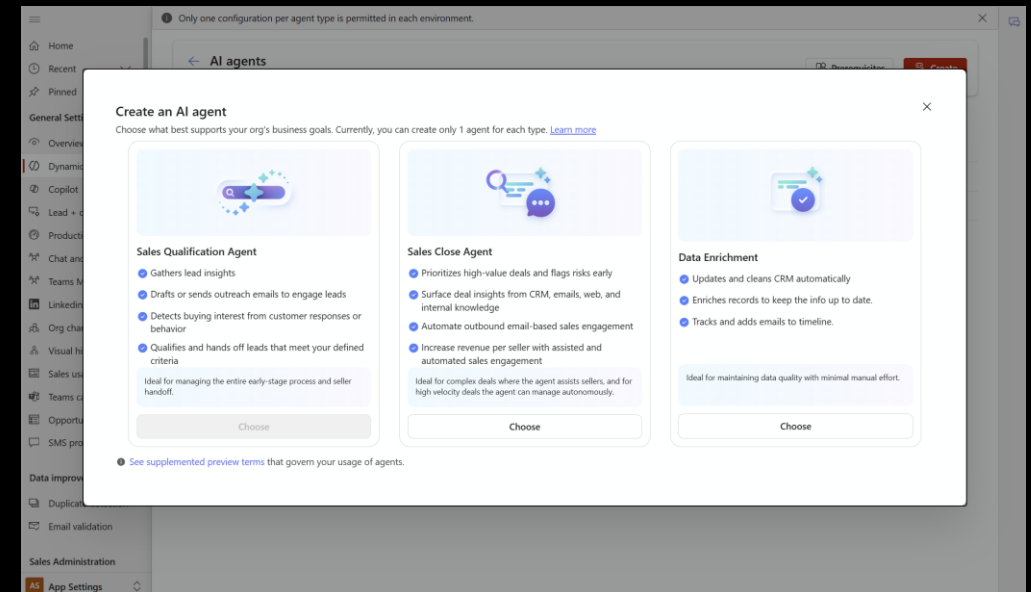
Existing users (no disruption)



Multiple Sales Qualification Agents

MAY 2026 PP

- **Segment-specific qualification:** Each agent operates with its own ideal customer profile, knowledge sources, templates, and consent settings, ensuring qualification conversations reflect the nuances of each product, region, or team.
- **Intelligent lead routing:** The system evaluates incoming leads against agent selection criteria and assigns ownership based on configured priority, ensuring predictable and conflict-free lead management. A fallback agent handles leads that don't match any specialized criteria, ensuring no lead goes unprocessed.
- **Exclusive engagement with coordinated handoff:** Only one agent engages a lead at any time. When a lead's interest shifts to another product or segment, the system hands off with full context to the appropriate agent.
- **Shared knowledge foundation:** Agents can leverage common company-level knowledge while maintaining their own specialized sources, ensuring consistent answers across the organization.
- **Supervisor oversight and governance:** A centralized dashboard enables supervisors to monitor agent activity, reassign leads, and track the full qualification journey across all agents.



Outreach - Personalised Engagement

APR 2026 PP

JUL 2026 GA

Further extend options to Sales agents.

- Define **outreach scenario/goal in natural language**.
- Choose **desired call-to-action** to drive next steps.
- Provide **subject line guidance**: fixed suggestion or **style** recommendation.
- Set **message length and brevity targets**
- Specify **tone rules**, including name-usage limits and preferred terminology.
- Configure **brand language and voice guardrails**: approved phrases and banned words.
- Set **formatting preferences**: bullets, paragraph length, and maximum bullet count.

The screenshot shows the 'Email instructions' configuration page in the Outreach interface. The left sidebar contains a navigation menu with categories: Workflow, General, Guidance, and Knowledge. Under 'General', 'Email instructions' is selected and marked with a green checkmark. Other items include Automation, Agent profile, Company info, Products, Selection criteria, Email address validation, Handoff criteria, Assignment rules, Research, and Agent emails. The main content area is titled 'Email instructions' and includes a sub-header 'Manage how the agent personalizes and drafts emails. [Learn more](#)'. Below this, there is a section 'Personalize email based on key fields from Lead' with a description and a 'Learn more' link. A table with two columns, 'Field Name' and 'Agent Instruction', is shown. The first row has 'First Name' in the first column and 'Enter description' in the second, with a trash icon to the right. A '+ New field' button is below the table. The 'Outreach emails' section has a description and a 'Learn more' link. Two radio button options are present: 'AI-generated personalization' (selected) and 'Fixed template'. The 'Fixed template' option has a 'Choose template' button below it. The top right corner of the interface shows 'Last saved by Andrew Ly on 16 Jan 2026, 04:46 pm'.

Data Enrichment Agent

FEB 2026 PP

APR 2026 GA

Avoid outdated or incomplete opportunity information. Leading to poor forecasting and deal health.

Analyses emails and suggested updates to opportunity.

As an admin, you can:

- Specify the criteria for selecting opportunity records that should be enriched.
- Specify whether you want the records to be automatically updated or manually reviewed and approved.

As a seller, you can:

- Review the suggested changes for your opportunity records. The suggestions are generated based on your recent email interactions with customers.
- Read the context behind each suggestion to understand why the update is recommended.
- Choose to accept or reject the suggested updates (in the case of manual process) or revert changes made by the agent (in the case of automated process).

The image shows two overlapping screenshots of a software interface for configuring a Data Enrichment Agent.

The top screenshot is a "Setup Summary" page titled "Start your Data Enrichment with recommended defaults". It includes a sub-header "The agent runs automatically once a day and enriches active opportunities created in the last 30 days." Below this, there are five sections:

- Data Enrichment**: Target records: Active Opportunities created in the last 30 days.
- Action**: Enrich all fields within the Opportunity record.
- Schedule** (Read-only): Runs everyday.
- Behavior**: Auto-updates fields when data is missing (no confirmation required).
- Data sources** (Read-only): Email.

At the bottom of this screen are buttons for "Edit in settings" and "Start agent".

The bottom screenshot is the "Edit Data Enrichment" configuration page. It has a sidebar with a menu containing "General", "Agent profile", "Record selection", and "Agent behavior" (which is currently selected). The main content area is divided into several sections:

- Agent behavior**: Configure how Data Enrichment behaves and enriches your records. [Learn more](#)
- Field scope**: Choose the fields you want the agent to skip. It also skips field types it can't enrich. Includes a "Pick fields to exclude" dropdown.
- Field update behavior**: Choose whether the agent should update fields automatically or wait for seller approval. Includes a toggle for "Automatically update fields" which is currently turned off.
- Enrichment frequency**: Shows how often data enrichment runs. This field is read-only. Includes a dropdown set to "Daily (Default)".
- Data sources**: Shows the sources the agent uses to process information. This field is read-only. Includes a link to "Email".

At the top right of the configuration page are buttons for "Apply changes" and "Stop agent". At the bottom right, it says "Last saved by Andrew Ly on 20 Mar 2026, 02:59 pm".

Sales Hub Dialer

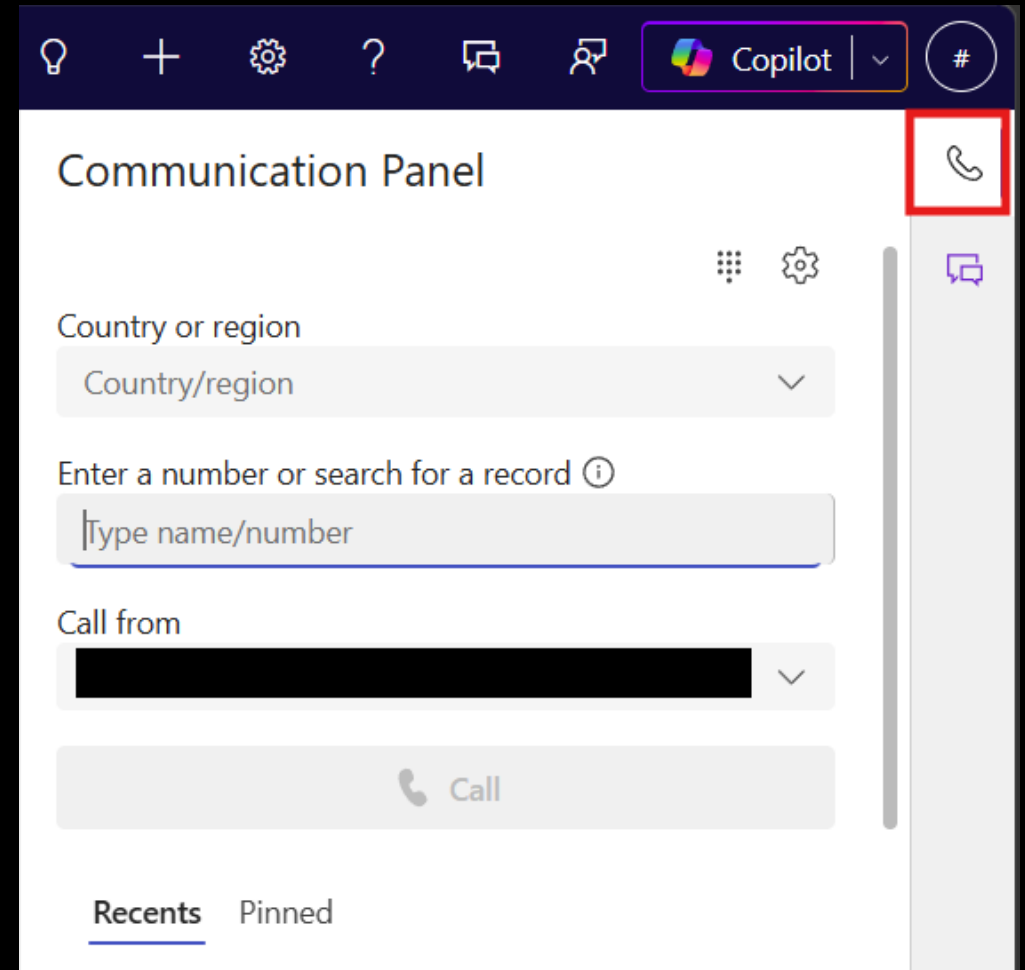
MAR 2026 PP

MAY 2026 GA

The new Sales Hub Dialer tightly integrates with Dynamics 365. It logs CRM call activities directly into D365.

Key capabilities include:

- **Built on existing telephony infrastructure:** Leverages the same platform as Dynamics 365 Contact Center for reliable and scalable voice communication.
- **Enterprise-grade reliability and quality:** Calls are routed through Azure's globally distributed services, ensuring high uptime and consistent audio quality.
- **AI-driven insights:** Real-time transcription, live sentiment monitoring, and AI-generated call summaries help you focus on conversations and capture important information.
- **Rich call controls:** Options to mute, hold, resume, and transfer calls (both warm and cold transfers), and add participants for consultation.
- **Seamless CRM integration:** Calls can be initiated from any lead or contact record, and all call activities are automatically logged on timelines.
- **Security and compliance:** Calls are encrypted, and sensitive data in transcripts can be automatically masked to meet privacy requirements.
- **Spam protection:** Built-in spam detection and blocking help you avoid unwanted calls.





D365 Customer Service

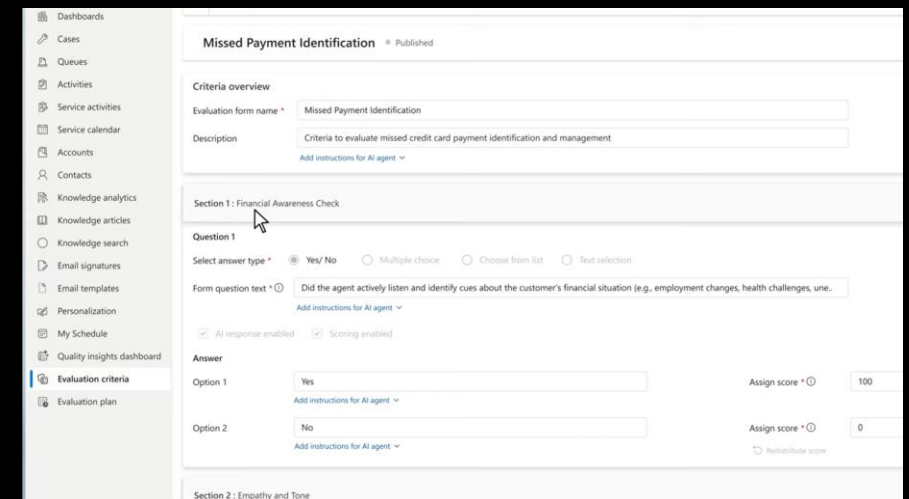
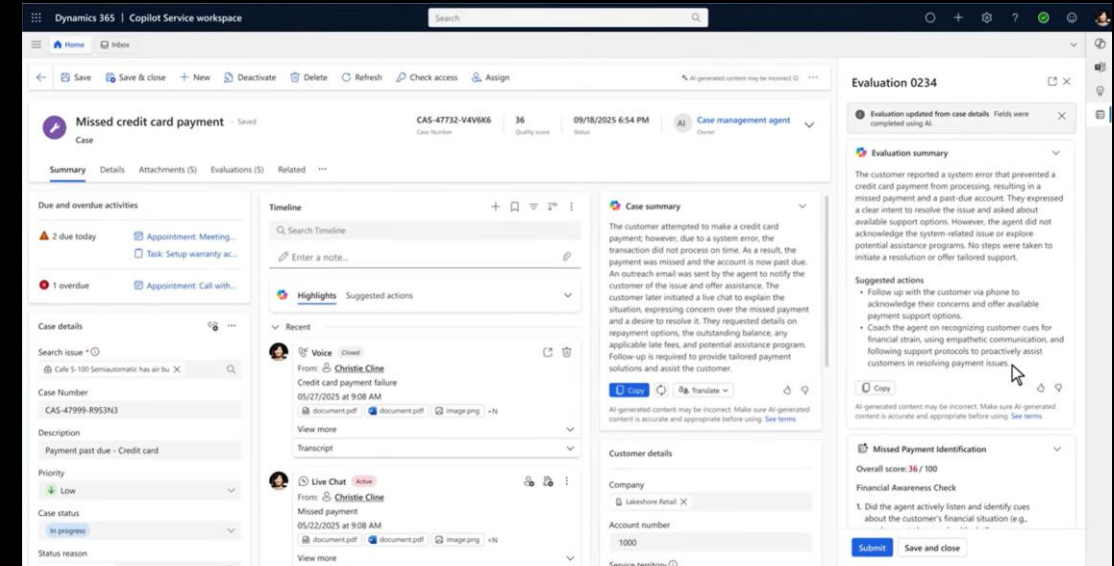
Quality Evaluation Agent

APR 2026 GA

Supervisions can define **when Quality Evaluations for service improvement** take place. Quality evaluations are very focused and follow a specific plan, to help deliver reliable quality insights.

Sampling options include:

- **Percentage-based sampling** to evaluate a defined number of qualifying interactions.
- **Absolute count sampling** to cap the total number of interactions evaluated per schedule.
- **Define Critical Questions** – that cannot be skipped and are business critical (i.e. if they fail these questions it fails the entire evaluation)
- **Knowledge Improvements** – compare representative’s responses against knowledge sources for grading answers.



Customer Sentiment on Case

MAR 2026 PP

APR 2026 GA

Analyses signals to determine the customer sentiment and prominently displayed on the Case form, Active Cases grid or Agent Inbox Card, and is updated automatically when a new email arrives or conversation closes.

- Weights can be configured by an administrator (e.g. Channel, recency etc)

Re: Request for Support – Filter Jam Issue in Coffee Machine
CRM:0100001 - Saved
Normal Priority --- Due

Customer sentiment: 😊 Positive ⓘ
AI-generated content may be incorrect. See terms

From: Puja.Pandey
To: user01.aurora
Cc:
Bcc:
Subject:

| Metric | Email | Chat | Total |
|---|-------------------------|----------------------|--------------------|
| Interaction weight (channel weight/number of days since the last interaction) | $0.5/3 = 0.1667$ | $0.2/2 = 0.1$ | 0.2667 |
| Sentiment score × interaction weight | $0.1667 \times 9 = 1.5$ | $0.1 \times 8 = 0.8$ | 2.3 |
| Case sentiment = Total sentiment score / total interaction weight | | | $2.3/0.2667 = 8.6$ |

The case sentiment score is 8.6, based on a range of 7 to 14, where 7 is very negative and 14 is very positive. This score indicates that the overall sentiment for the case is slightly negative.

Shadow Mode for Case Management Agent

Enable shadow mode in Case Management Agent settings for selected lines of business or case rules.

MAR 2026 PP

MAY 2026 GA

The system generates predicted outcomes only, including:

- Identified customer intent.
- Drafted response content.
- Proposed field updates.
- Recommended follow-up or resolution actions.

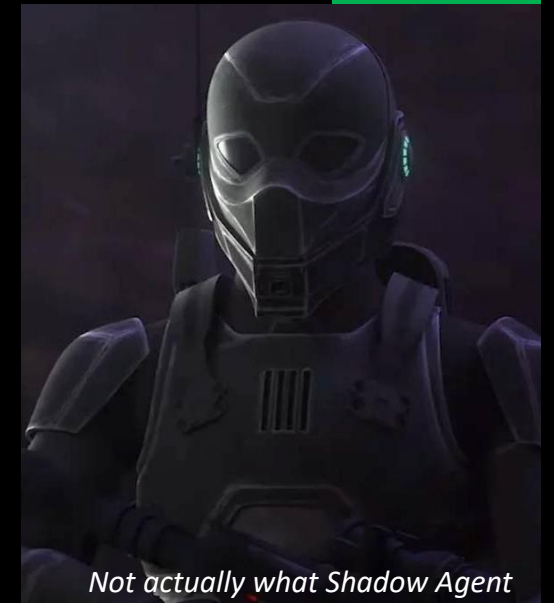
No customer-facing communication is sent and no case data is modified.

A dedicated shadow results view per case shows:

- Predicted intent and response by Case Management Agent.
- Suggested field changes.
- Rationale behind recommendations.

Administrators review shadow runs to:

- Compare Case Management Agent recommendations with actual human actions.
- Identify mismatches, gaps, or improvement opportunities.
- Assess readiness for partial or full automation.



Not actually what Shadow Agent looks like



D365 Field Service

New 'Simple Lookup' Control for Mobile

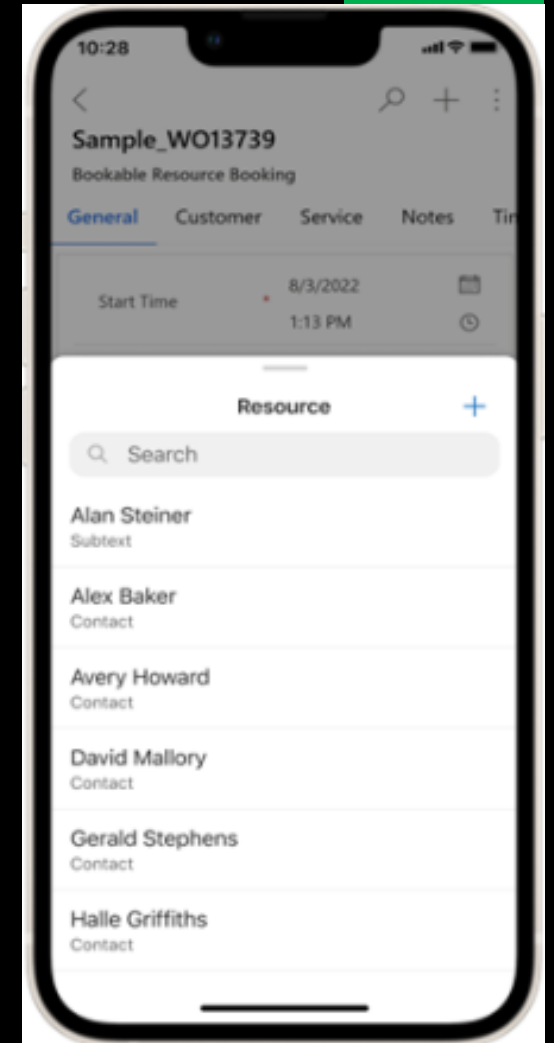
APR 2026 GA

First up, we have a new Power Apps Component Framework (PCF) control for lookup fields.

Simple Lookup reduces clutter when using Lookup controls and acts more akin to a choice control. Currently it is only available in mobile mode only.

Enablement:

- This can be enabled like any other control, added through form customisation and republish the form. Ensuring mobile is selected for the Simple Lookup control and the regular control for Web modes.
- This does not require feature-enablement as it is enabled at the form level.



New 'Mobile Notes' Control for Mobile

APR 2026 GA

Another new PCF control, is **Mobile Notes**.

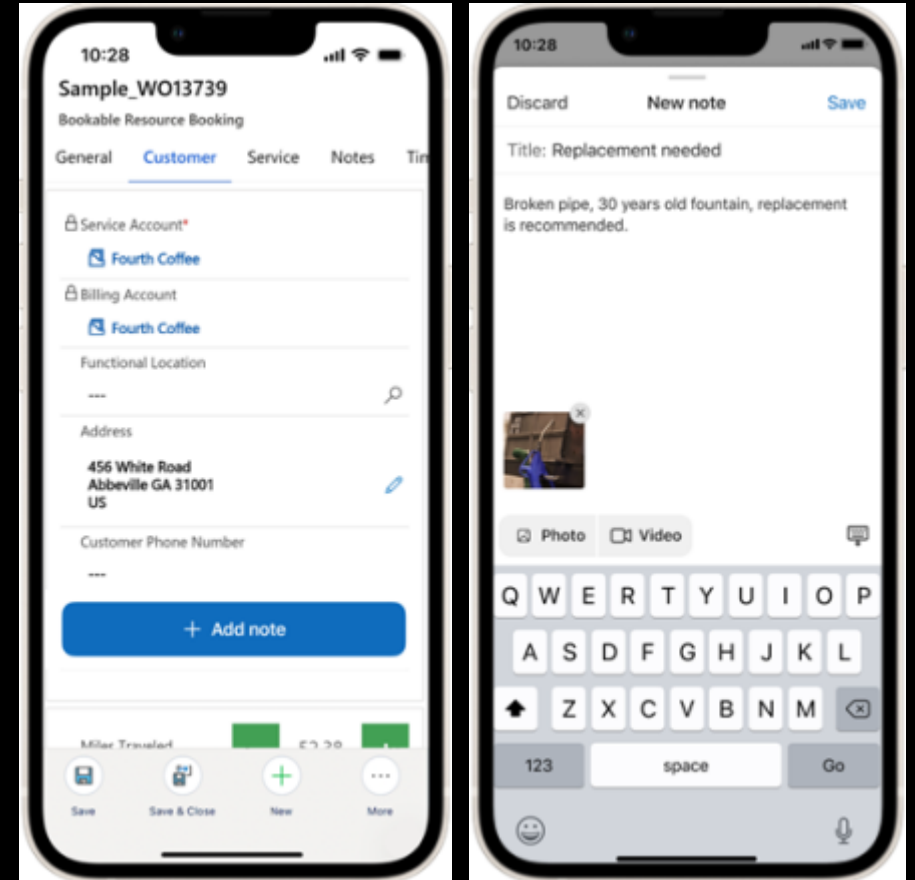
This enables a mobile first experience, with a **compact pop out** note control that supports text, images and videos.

This adds records to the **timeline** rather than a specific field, so in essence it's a **cleaner timeline add button**.

Again, this control is available **exclusively for mobile experiences**.

Steps to add in Power Apps, open the table form where you want to add notes.

- Add the **Mobile Notes** control to the desired section of the form.
- **Save** and publish the form.



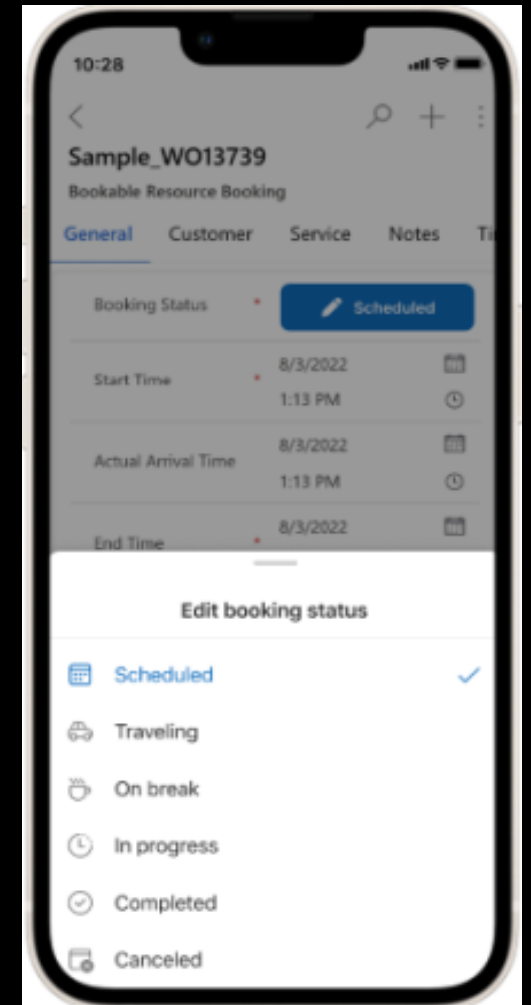
New 'Booking Status' Control

APR 2026 GA

Another PCF control that is being introduced is the **new Booking Status control**.

Most probably the **most heavily used control** for Mobile Field Service, this control provides a more prominent button for selection and a bottom **opening drawer** to allow easy selection of values that include icons.

This control replaces the **current Booking Status control** automatically for organizations already using it—no admin action required.



Disable Clickthrough on Lookup Fields

APR 2026 GA

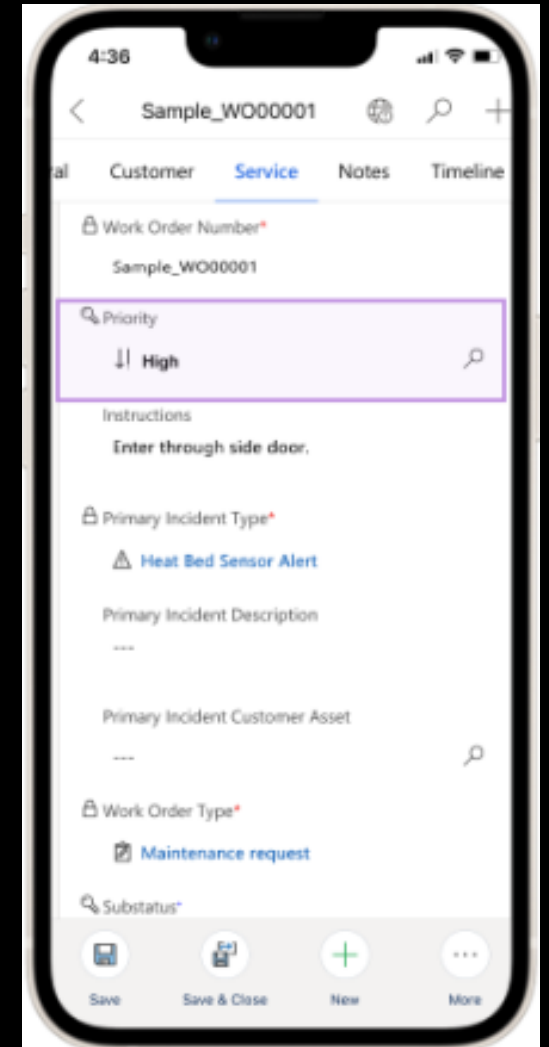
Even the native Lookup Control gets an enhancement, to **disable clickthrough**.

This prevents users unintentionally navigating into records.

Great news is this works on both web and mobile.

To use:

1. In Power Apps, edit the table form containing the lookup.
2. Select the lookup field, and then select Disable click-through of lookup value.
3. Select Save and publish the form. The mobile app reflects the change after the next sync.



Improved Android Performance of > 25%

APR 2026 GA

The latest Unified Interface (UCI) version 9.2.25122.00162 and above, introduces several improvements to [form loading times on Android Devices](#).

This is completely backwards compatibility and does not affect existing forms.

Microsoft notes on measuring impact:

- Use your existing UCI performance telemetry to track form load improvements.
- Export data to Application Insights to compare before/after load times across form load percentiles.



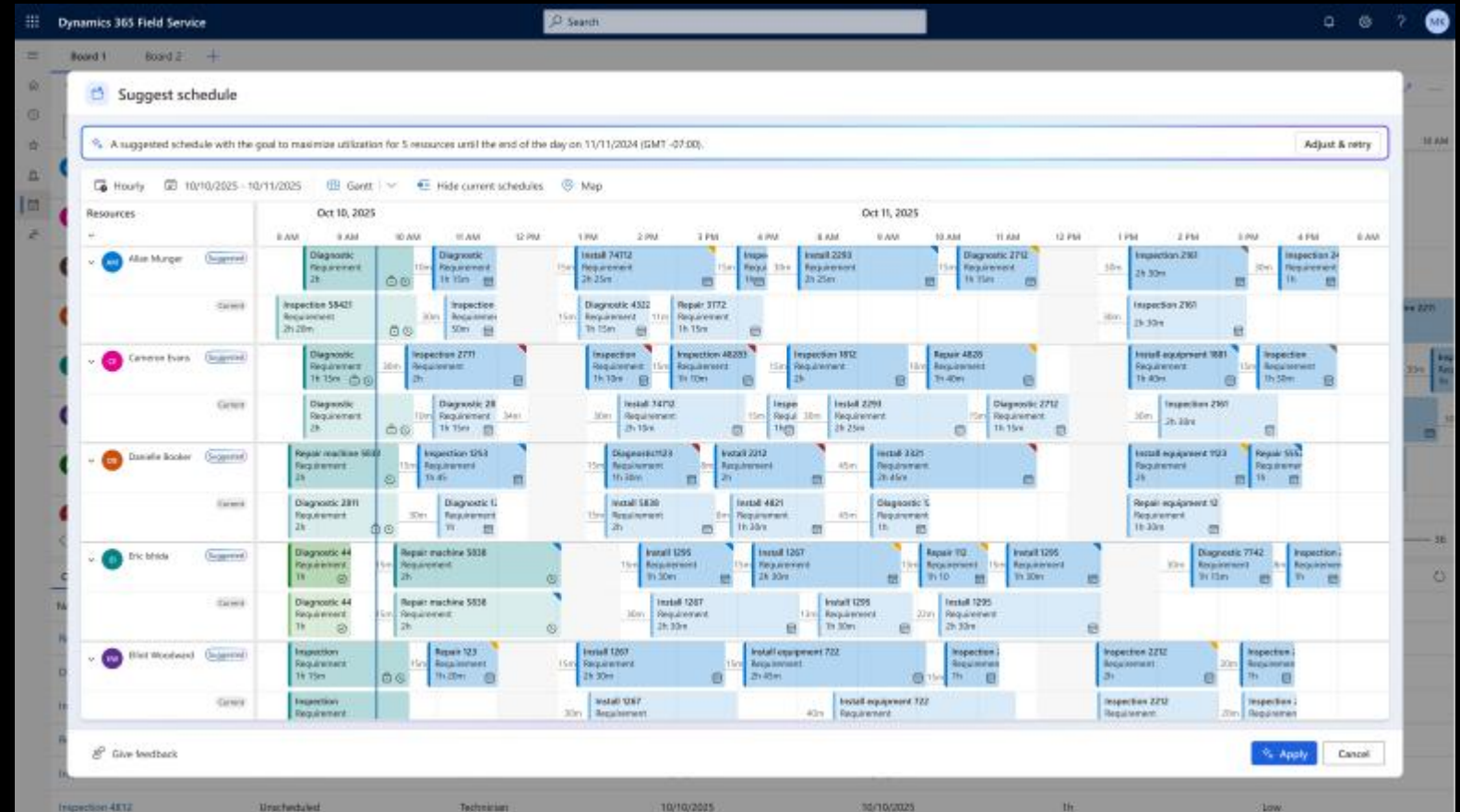
New Scheduling Operations Agent Capabilities

JUN 2026 PP

The schedule board is receiving a number of upgrades.

The new Scheduling Operations Agent now provides the ability to:

- Optimize schedules for up to 5 resources directly from the schedule board.
- Optimize schedules for up to 30 resources using an optimization plan.
- Create custom goals and weight objectives.
- Create custom optimization scopes to use with your optimization plans.



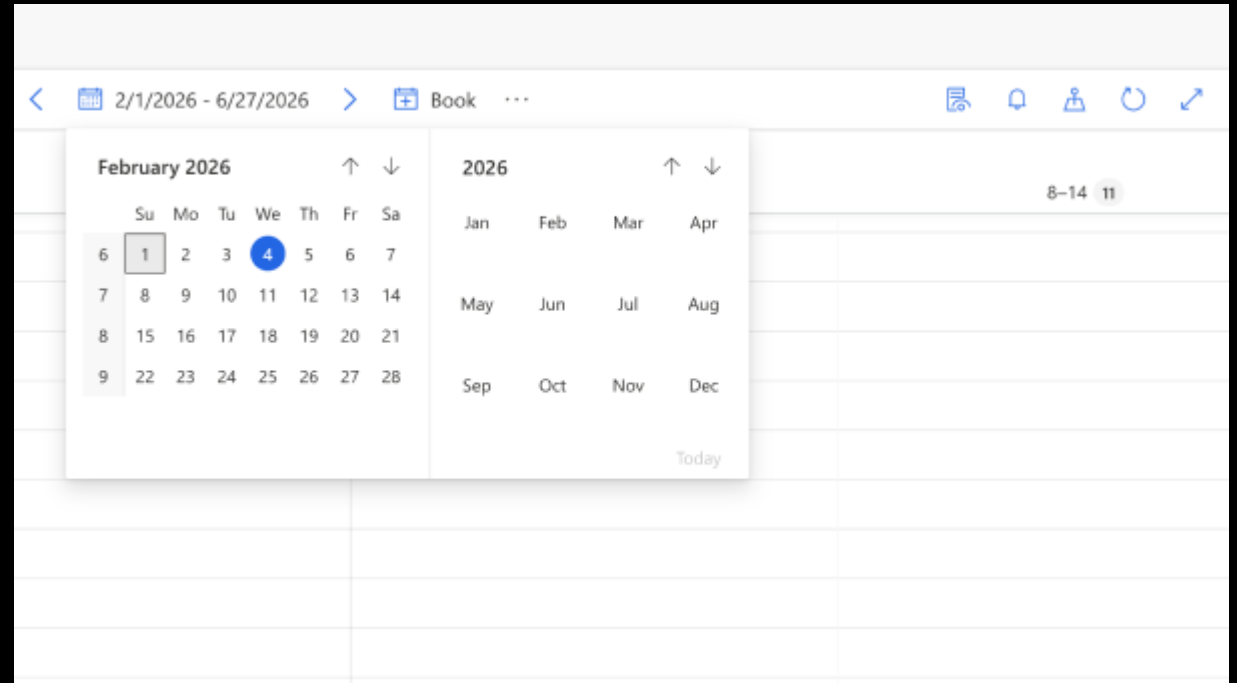
Show Week Numbers of Schedule Board

APR 2026 GA

A very practical and useful enhancement to the Schedule Board includes the ability to **show Week Numbers**.

This **helps planners who to communicate in week cycles** (i.e. Week 6, 7, 8, 9).

Useful in scenarios with long running planning requirements, and helps align with business calendars.



Move Multiple Bookings at a Time on Schedule Board

APR 2026 GA

Bulk move enables schedulers to shift multiple bookings forward or backward by a consistent time offset in a single action (e.g. by a day or a week, due to unfavourable weather etc.)

Or Bulk move reassign to another resource.

Preserves each booking duration and details.

A screenshot of a scheduling board interface. The board displays a timeline from 9:00 AM to 2:00 PM with various booking blocks. A context menu is open over a booking, with the 'Move by' option selected. A sub-dialog box is displayed, showing 'Move by' set to '1 days' and 'Move direction' set to 'Forward - move to a later time'. The dialog also indicates 'Move 2 bookings forward by 1 day' and includes an 'Update' button. Below the board, a table shows booking details:

| Duration | Proposed ... | Fulfilled D... | Remainin... | Priority |
|----------|--------------|----------------|-------------|----------|
| 1 hr | 0 mins | 0 mins | 1 hr | |
| 1 hr | 0 mins | 0 mins | 1 hr | |

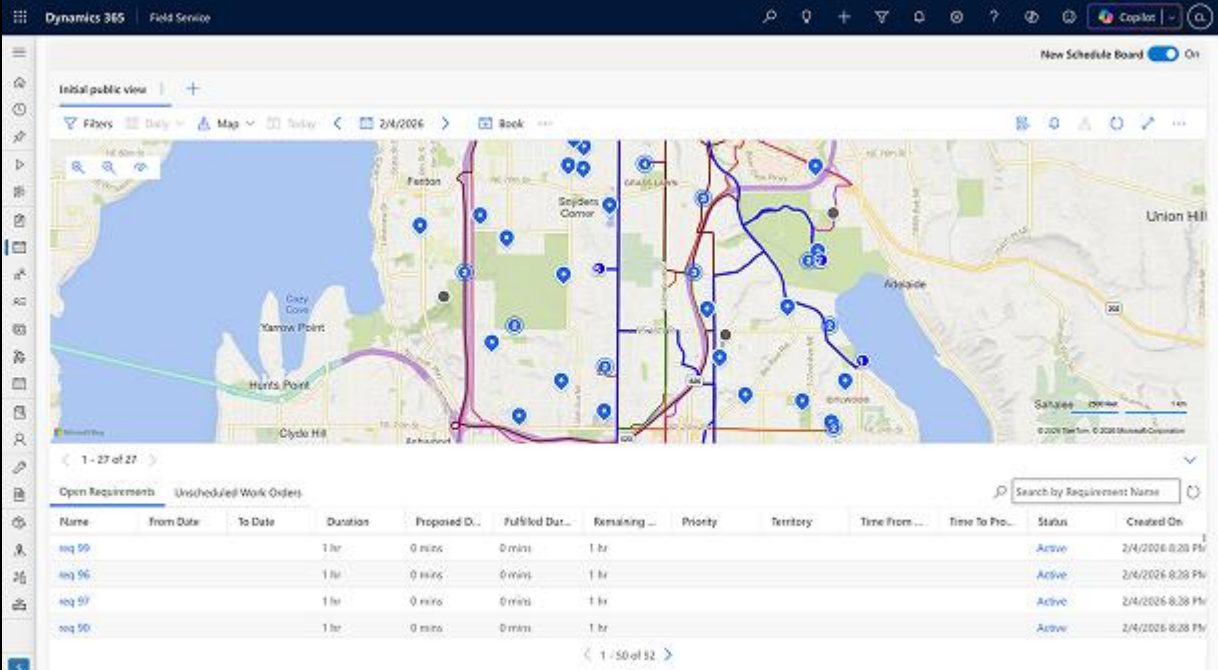
A screenshot of the same scheduling board interface. The 'Reassign to' option from the context menu is selected. A sub-dialog box is displayed, showing 'Resource' set to 'Allison Dickson' and 'Reassign 2 bookings'. The dialog also includes a search filter icon and an 'Update' button.

Full Screen Map view on Schedule Board

APR 2026 GA

Full Screen Map view allows dispatchers who prefer to use the spatial map view to have this fill the entire main form view.

Helps schedulers to identify where there are gaps in scheduling from a location perspective, and improves route planning.



The screenshot displays the Dynamics 365 Field Service interface in a full-screen map view. The top navigation bar shows 'Dynamics 365' and 'Field Service'. The main area is dominated by a map with a route overlaid in various colors (blue, purple, red, green). The route starts near Farnon and ends near Union Hill. Below the map, there is a table of 'Open Requirements' and 'Unscheduled Work Orders'. The table has columns for Name, From Date, To Date, Duration, Proposed D., Fulfilled Dur., Remaining, Priority, Territory, Time From..., Time To Pro..., Status, and Created On. The table shows four rows of data, all with a status of 'Active'.

| Name | From Date | To Date | Duration | Proposed D. | Fulfilled Dur. | Remaining | Priority | Territory | Time From... | Time To Pro... | Status | Created On |
|--------|-----------|---------|----------|-------------|----------------|-----------|----------|-----------|--------------|----------------|--------|------------------|
| req 99 | | | 1 hr | 0 mins | 0 mins | 1 hr | | | | | Active | 2/4/2026 8:28 PM |
| req 96 | | | 1 hr | 0 mins | 0 mins | 1 hr | | | | | Active | 2/4/2026 8:28 PM |
| req 97 | | | 1 hr | 0 mins | 0 mins | 1 hr | | | | | Active | 2/4/2026 8:28 PM |
| req 90 | | | 1 hr | 0 mins | 0 mins | 1 hr | | | | | Active | 2/4/2026 8:28 PM |



D365 Customer Insights - Journeys

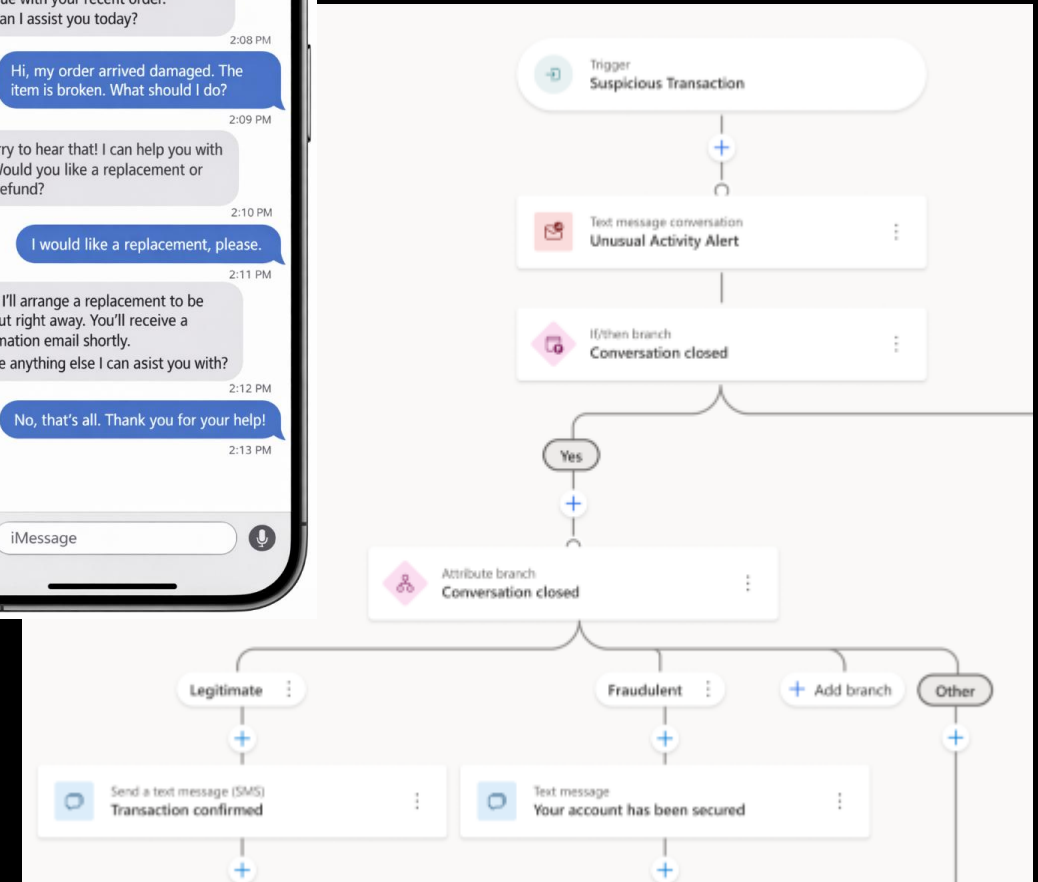
Conversational SMS

APR 2026 GA

Enable conversational SMS. E.g. “Did you just log into system? Yes / No”, “Follow Up: Can you provide a case ID please”, etc.

Features include:

- Seamless integration with Dynamics 365 Contact Center
- Respects Quiet Times configured in system
- View detailed engagement metrics, such as the number of attempts, outcomes, and specific results for each conversation interaction in the out-of-the-box journey reporting.
- Access all text conversations and engagement interaction data in storage and build custom reports using Microsoft Fabric integration.



Auto Update with Latest Content

APR 2026 PP

JUL 2026 GA

By automatically updating emails with latest content, you can:

- Easily create **dynamic content blocks** in Content gallery with new content or select existing content in email and save it as a dynamic content block.
- Have content only so it uses the layout of the email when inserted or have content with its layout preserved. You can mark the content block as “protected” to prevent content from being modified in the email.
- Allow personalized content (for example, dynamic text or conditional content).
- Easily see which emails will be updated when you update such content blocks.

Save content block

Name *

Weekly Promotion CTA

Type

Static
Updating this block does not update emails using it

Dynamic
Updating this block will update emails using it

Tags

CTA X AI X

Ready to send

Yes

Protected

Yes

Search Filters Sort

Header light

Header dark

Footer

Save Cancel

Vanity URLs in GA

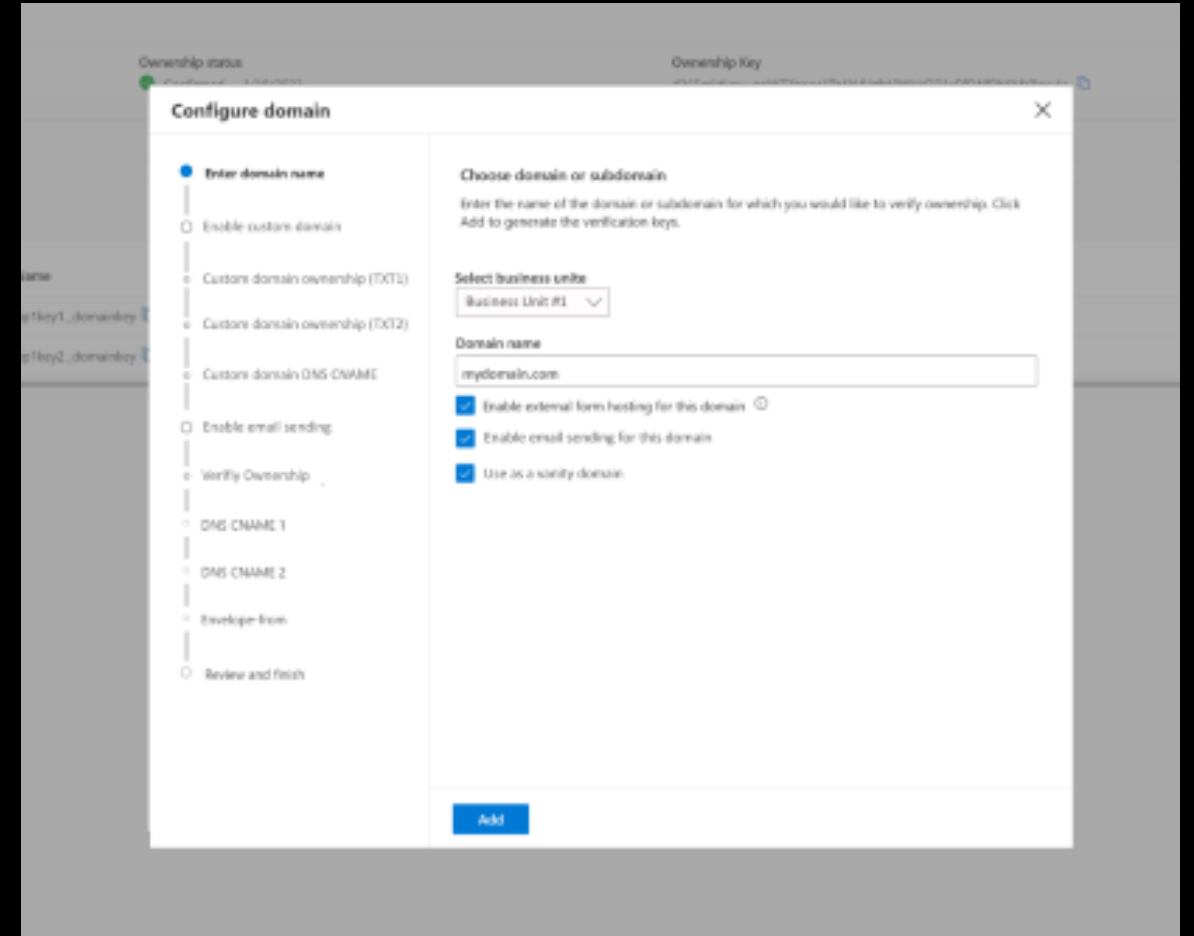
DEC 2026 GA

Stop looking suss with automatically generated URLs that look unprofessional and lower your click rates and conversions.

Vanity URLs show your company domain.

Once setup and authenticated, your vanity domain will be visible in:

- All links in your emails.
- Hosted digital assets, forms, event registration pages, and your preference center.



Message Expiry Dates

- Set an expiration date on any message in your journeys (emails, text messages, push notifications, or custom).
- Choose from different expiration options (no expiry, expiration based on a date and time, or a trigger).
- Review analytics to understand which customers didn't receive messages due to expiration dates.

Useful if you have a time expiry on important messages (such as 4 month early bird promo for instance)

MAR 2026 PP

MAY 2026 GA

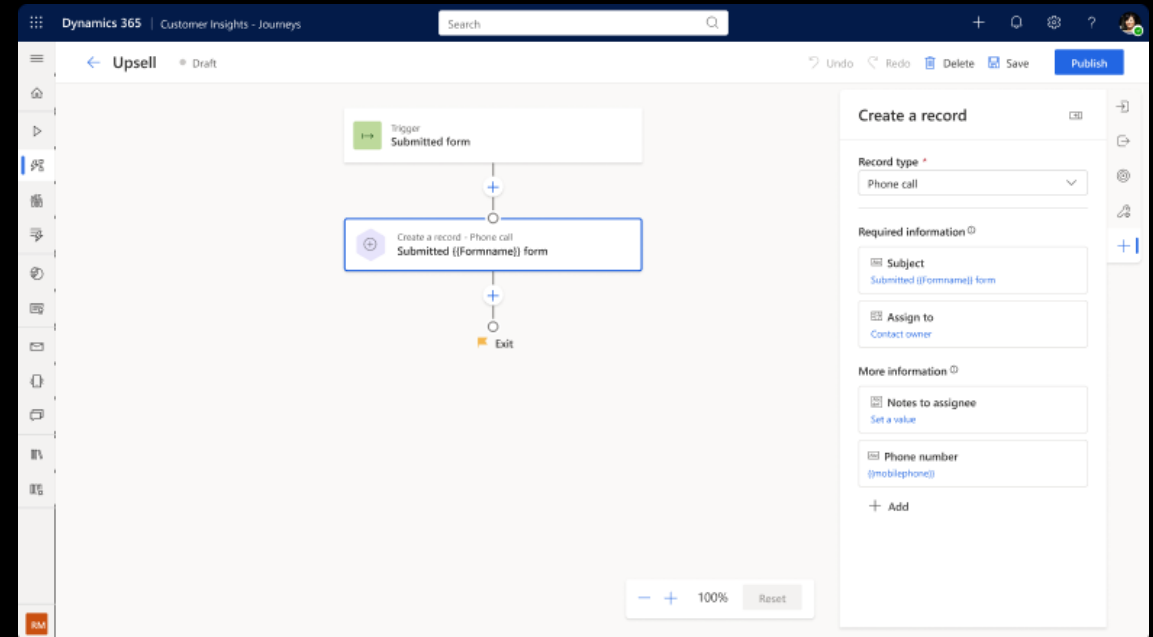
The screenshot shows a marketing automation journey editor for a campaign titled "Pet-friendly yacht charters" in a "Draft" state. The journey flow consists of three main steps: 1. A "Trigger" step labeled "Yacht charter guests". 2. An "Action" step labeled "Send an email" with the subject line "Cruise the open seas with your furry friend". This step is highlighted with a blue border. 3. An "Exit" step. The right-hand sidebar is open to the "Email" configuration panel. It includes a search bar for "Add CC recipients" with a dropdown menu showing "Contact" and "Contact (Check in)". Below this is a "Message expiry" section with a dropdown menu set to "Expire on a specific date and time". The "Expiry date" field is set to "12:00 AM" with a calendar icon. At the bottom of the sidebar, the time zone is specified as "(GMT+01:00) Belgrade, Bratislava, Budapest, Ljubljana, Prague".

Easy Creation of Downstream Records

This feature gives you a *single, flexible way to create downstream records* and activities directly inside the journey builder.

APR 2026 PP

- Create any record or activity from a single tile, including tasks, phone calls, leads, opportunities, or custom entity records.
- Use all required and optional fields, including custom attributes, to match your exact process requirements.
- Add dynamic content to any field, using real-time attributes from contacts or leads.
- Apply the feature across both contact- and lead-based journeys, ensuring consistency across teams and processes.
- Eliminate the need for complex workflows or custom code, making automation more accessible and easier to maintain.



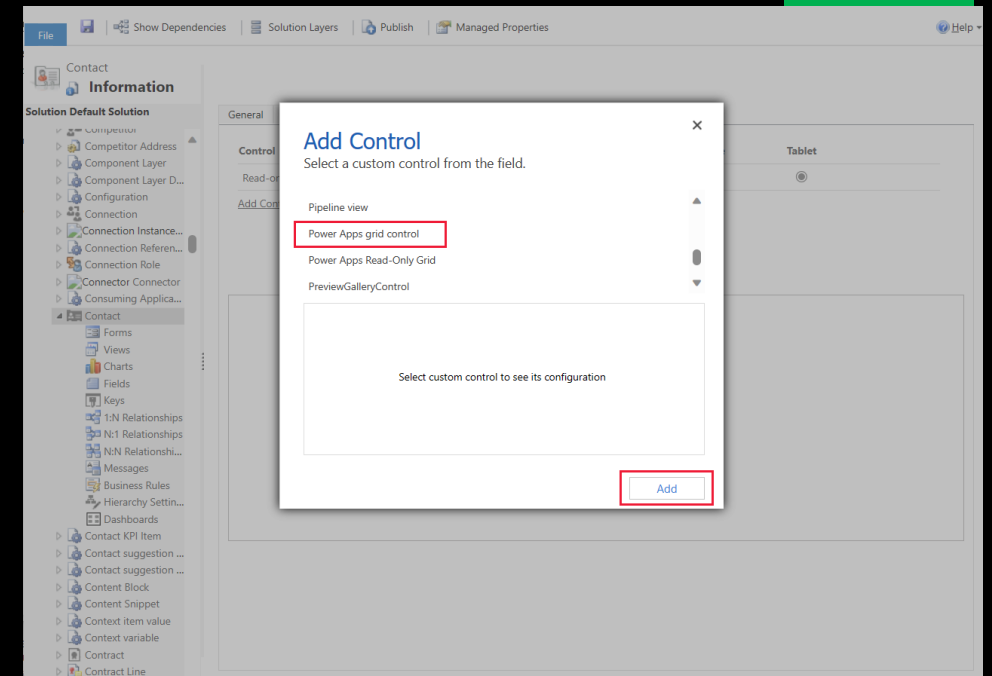


Dynamics Deprecations

Going away....

- D365 Service MCP Server was replaced by [Dynamics 365 Customer Service MCP Server](#) (in Nov 2025) – *which will probably be replaced by Dataverse MCP*
- D365 Guides and Remote Assist no longer available from Dec 31 2026. 😞
- Sales usage reports from Dec 2025 gone, replaced with Power BI Reports

RIGHT NOW



Microsoft Build

June 2-3 2026, San Francisco and
Online

<https://build.microsoft.com>

Thank You