

# Known issues in Dynamics 365 Customer Service and Omnichannel for Customer Service

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## Known issues in unified routing

### Omnichannel Ongoing Conversations Dashboard, Intraday Insights available in Customer Service workspace

When you enable unified routing in Customer Service, you might see the Omnichannel Ongoing Conversations Dashboard and Intraday Insights in Customer Service workspace. However, these reports will work as expected only if you have the Chat for Dynamics 365 Customer Service or Digital Messaging for Dynamics 365 Customer Service license.

### Queue form in legacy service management is not accessible

You can no longer open the queue form that was accessible earlier through **Advanced Settings > Settings > Service Management > Queues**, and an error message will be displayed, if you've done one or more of the following:

- Opted for [unified routing in Customer Service](#).
- Installed the latest version of Omnichannel for Customer Service released in April 2021.
- Upgraded existing solutions for Omnichannel for customer service to the version released in April 2021.

As a workaround, we recommend that you use Unified Interface based apps to manage your queues.

### Custom attributes don't appear in the rule builder UI

As an administrator, if you have created custom attributes, you'll need to wait for six hours for them to appear in the UI of the rule builder. As a workaround, you can sign in using the private browsing mode and view the custom attributes.

### Workstream attributes on the UI are not visible

For customers using the Omnichannel Administration app, some attributes related to the workstream routing are greyed and not visible in the new Omnichannel admin center app. This is only a design limitation and does not impact functionality in any way.

When you're routing cases in the Omnichannel Administration app, the "addtoqueue" operation fails. To solve this issue, set up advanced routing for cases in the updated Omnichannel for Customer Service instance. Then select **Save & Route**.

## “AddToQueue” operation is displayed twice on the UI

During case routing, the **AddToQueue** operation is displayed twice on the UI. This doesn't have any functional impact on routing.

## “Assigned by supervisor” tag is not visible

When the supervisor assigns cases to agents, the **assigned by supervisor** tag isn't visible. This doesn't have any functional impact on assignment.

## Agents can't use notifications to reject case or record routing

Case and record routing can't be rejected. Ensure that the **Show Reject Button** toggle is disabled for the template notification. If an agent tries to reject a case or record assignment through notifications, it will remain assigned to that agent. Instead, the agent needs to manually trigger reassignment by rerouting. As a workaround, you can locate and open the assigned record and then select **Save and Route** to trigger reassignment.

## “Assign to me” action is possible even after a queue item has been picked up by another agent

With advanced routing enabled, agents can still see the **assign to me** action even after the case or queue item has been picked up by another agent. As a workaround, you can refresh the dashboard before you perform the pick action.

## Install routing rules solution to use entity records routing

In your entity records channel, if you see an error message like the following: "You must install routing rule solution to use entity records routing. To learn more, see [aka.ms/routingrules](https://aka.ms/routingrules), then perform the following:

- If you use Omnichannel for Customer Service in a production environment, go to your Omnichannel for Customer Service provisioning page and install the latest version. If no upgrades are available, contact Microsoft support.
- If you use the trial version of Omnichannel for Customer Service, contact Microsoft support.

## Cases Work Distribution Flow is not saved successfully

The updates that you make to the out-of-the-box **Cases Work Distribution Flow** for unified routing of case entity records might fail due to authentication issues.

As a workaround, authorize Dataverse native connector in the flow before you save it.

More information: [Update cases work distribution flow.](#)

## Routing rules sub grid in entity records shows an error

In the routing rules sub grid under an entity records channel, sometimes, the following error message might be displayed: **"You do not have permission to access these records. Contact your administrator for help."**

As a workaround, to load the page without errors, refresh the page to load the routing rules sub grid, and proceed with routing rules configuration.

## Intake rule displays "undefined" in the rule definition after it is saved

In the condition, if you use a custom attribute, such as Asset, that points to multiple entities in the system, the rule builder doesn't support the definition and therefore displays as undefined. For a workaround, use the related entity Asset, and then define the conditions. A sample condition can be seen in the screenshot.

1. Add n related entity at the intended level

**Edit intake rule**  
Add conditions and select the basic routing rule set or workstream to direct the records to. [Learn more](#)

Rule Name \*

Test example

**Conditions**

⚠ This rule will run on incoming items, but if conditions aren't set subsequent rules will not run.

And ▾

+ Add ▾

+ Add row

+ Add group

+ Add related entity

Map to

Workstream ▾ IoT Alerts Workstream ▾

2. Select the asset (with the required entity)

3. Create a new row (condition) and select any required attribute and check it contains data. Customer can also have a group to check all those entities as needed.

#### Edit intake rule

Add conditions and select the basic routing rule set or workstream to direct the records to. [Learn more](#)

Rule Name \*

Test example

#### Conditions

And ▾

☐ Asset (Path) ▾ Contains data ▾

And ▾

☐ Primary Name ▾ Contains data ▾

+ Add ▾

+ Add ▾

#### Map to

Workstream ▾

IoT Alerts Workstream ▾

## Organization reset or restore operations aren't supported when unified routing is enabled

Currently, when unified routing is enabled, the backend provisioning and solution install happen in the background. If you reset the application, the Omnichannel for Customer Service uninstallation removes the solution but doesn't remove the backend provision. If one of them is not uninstalled, then the environment is not in a good state. As a result, unified routing will not work as expected though it will show as having been enabled.

If you reset the application and are facing issues in unified routing, contact Microsoft Support.

## Check on duplicate context variables prevents use of same pre-conversation questions across multiple chat widgets

When you configure multiple chat widgets for the same workstream and want to create the pre-conversation survey questions with the same name across multiple chat widgets, the system validation prevents the duplication of context variables that are created automatically with the same name. As a workaround, consider using separate workstreams for each chat widget and separate pre-conversation survey questions.



## Old work items are not being processed because of the processing order

The system fetches 100 work items at a time and assign the work items to the matching agents based on attributes such as presence, capacity, and skills. If the more than 100 work items are waiting to be processed in the queue, the system will process the latest work items first. This is a known issue where there is a chance of old work items remaining in the queue until all the new items are processed.

As a workaround, create additional queues based on the requirements of the work items to improve the processing efficiency for the work items.

## Classification rules are not run correctly when machine learning and manual skill classification rules are configured

If you create a manual skill classification rule, a machine learning skill classification rule, and then again create another manual skill classification rule, then the order of the rule is repeated and affects the runtime behavior of the rule. As a workaround, create the rules in the following order only and make sure that no other rule is present after the machine learning rule.

1. Manual skill classification rule
2. Machine learning skill classification rule

## Sentiment prediction-based model (preview) available in English language only

Sentiment prediction-based model for unified routing is available in the English language only. Therefore, if you try to access the admin configuration in any other language-based organizations, you'll be unable to access the page or enable or disable the feature.

## Diagnostics record generation fails for rulesets with more than a million characters

If a case or conversation is routed by using a ruleset that has more than a million characters, the generation of the diagnostics record will fail.

## Overflow management UI is not updated to the latest

If you are seeing old UI for overflow management in advanced queues, follow both the steps to access the new experience:

1. In the overflow conditions pane, the work item limit should be set to 0, if the value is not null or greater than 0.
2. Remove the operating hours using the option available in queue hub under operating hours.

## Data type mismatch in condition builder of custom assignment rule causes issues in routing

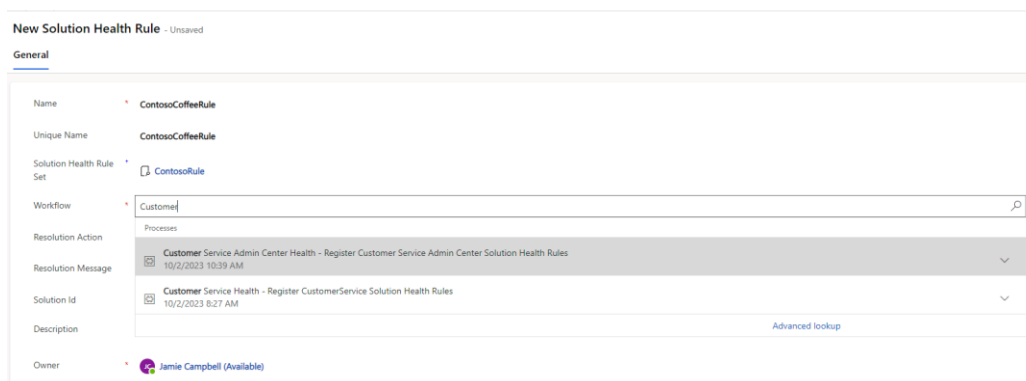
In the custom assignment rule, the data type of the system user attributes must match its corresponding value. For example, if your attribute is of string type, the value on the right of the condition should be a string and not an integer. Let's say you are using "Location" as an attribute of string datatype. So, the value on the right of the condition can be a string of alphanumeric characters, such as "Spain 34056" but not be all integers, such as "34056".

### Other known issues in Customer Service

## Contact Center health checker doesn't appear in admin center

If the health checker doesn't appear in Customer Service admin center, do the following workaround to create a test rule set that you can delete after the health checker is visible in the app.

1. On the Dynamics 365 apps page, open the **Solution Health Hub** app.
2. In the site map, select **Solution Health Rule Sets**, and select **New**.
3. Enter the details on the **New Solution Health Rule Set** and save.
4. Then select **New Solution Health Rule**, and on the page that appears, fill the details, such as **Name** and **Unique Name**.
5. In **Workflow**, search for **Customer Service Admin Center Health** and select it.



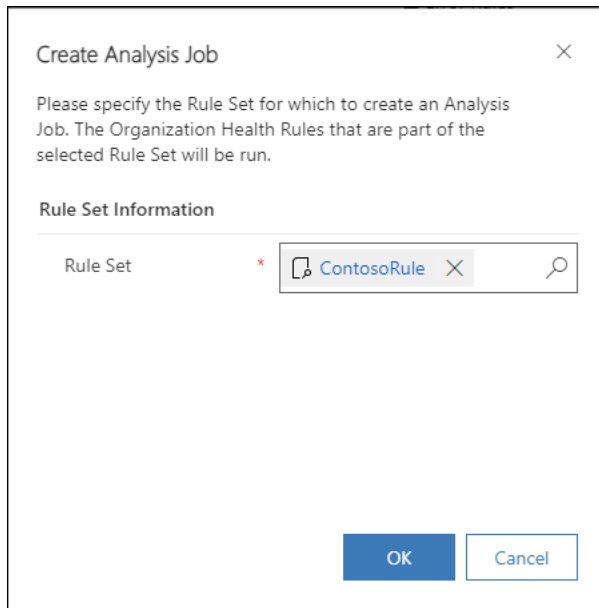
The screenshot shows the 'New Solution Health Rule' form in Dynamics 365. The form is titled 'New Solution Health Rule - Unsaved' and has a 'General' tab selected. The form fields are as follows:

- Name:** ContosoCoffeeRule
- Unique Name:** ContosoCoffeeRule
- Solution Health Rule Set:** ContosoRule
- Workflow:** Customer
- Resolution Action:** Customer Service Admin Center Health - Register Customer Service Admin Center Solution Health Rules
- Resolution Message:** 10/2/2023 10:39 AM
- Solution Id:** 10/2/2023 8:27 AM
- Description:** (empty)
- Owner:** Jamie Campbell (Available)

There is an 'Advanced lookup' link at the bottom right of the form.

6. Save and close.

7. On the site map, select **Analysis Jobs**, and select **New** on the page that appears.
8. In **Create Analysis Job** dialog, select the solution health rule set that you created, and select **OK**.



9. After the rule set runs, exit the Solution Health Hub app.
10. Go to the Customer Service admin center app. **Contact center health** will appear on the home page.

## Entity records aren't distributed to agents

Entity records routing doesn't route and distribute case records to the agents.

The case entity record won't be automatically distributed to the agents when the option **Automatically move records to the owner's default queue when a record is created or assigned** is enabled in the case entity customization page.

As a workaround, clear the checkbox to automatically distribute the case records.

## Value removed for verbatim HTML tags if they're not encoded by email templates from the legacy app

Verbatim HTML tags, such as `href=""`, have their value removed if they aren't encoded in the experience by email templates from the legacy app. This is because the content sanitation library was upgraded to include this safety improvement in Dynamics 365.

As a workaround, you can resolve this issue by manually encoding the value.

```
"<div><a href="%7b%21User%3anew_field%7d">LINK</a></div>  
"
```

## Migration doesn't support multiple items or conditions that have the same "applicable when" within same SLA

In the web client, multiple items can be defined with the same "applicable when" condition and different success criteria for an SLA. However, the same capability is not supported in Unified Interface. Therefore, during migration, the second or subsequent such SLA item with the same "applicable when" condition will not be created. The following screenshots capture the scenario that is not supported in Unified Interface.

The screenshot shows the configuration for an SLA item named "Ops First Acquired". The "General" tab is active. The "Name" field is "Ops First Acquired", the "SLA KPI" is "First Response By KPI", and the "Applicable When" condition is "Operational Region Equals HP Store EMEA". The "Success Criteria" is "First Acquired By (User) Full Name Contains Data".

Case	Operational Region	Equals	HP Store EMEA
Case	Qualified On	Contains Data	

Case	First Acquired By (User)	Full Name	Contains Data
Case			

The screenshot shows the configuration for an SLA item named "Ops First Response". The "General" tab is active. The "Name" field is "Ops First Response", the "SLA KPI" is "First Response By KPI", and the "Applicable When" condition is "Operational Region Equals HP Store EMEA". The "Success Criteria" is "First Response Sent Equals Yes".

Case	Operational Region	Equals	HP Store EMEA
Case	Qualified On	Contains Data	

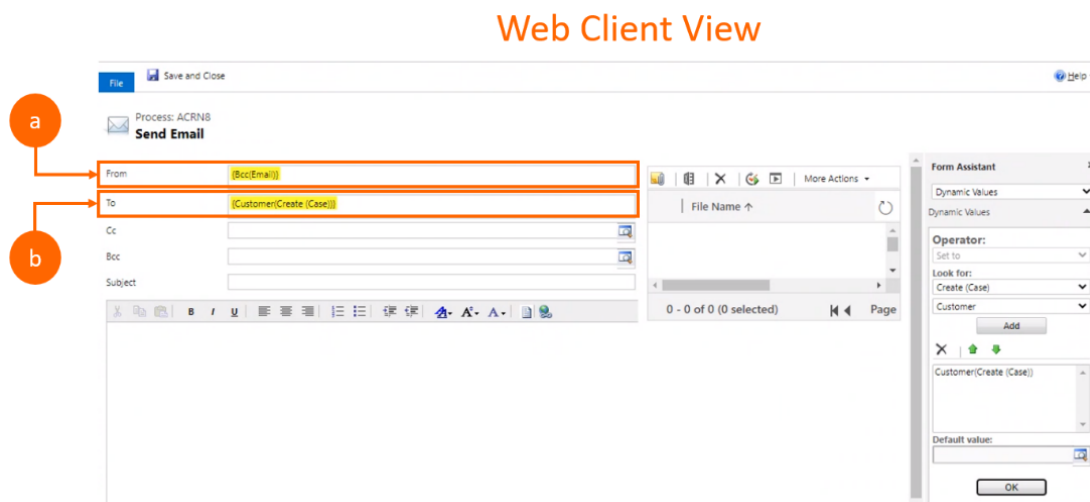
Case	First Response Sent	Equals	Yes
Case			

## Activity party-type attribute issues during workflow-to-flow conversion

Any activity party-type attribute assigned to another activity party-type field (the most impacted fields are: to, from, cc, and bcc, in emails) will not migrate during the workflow-to-flow conversion, as Flow currently doesn't support this scenario. Although the migration of the rule will not fail, the data value for such activity party-type fields that relies on another activity party-type attribute will be empty post-migration.

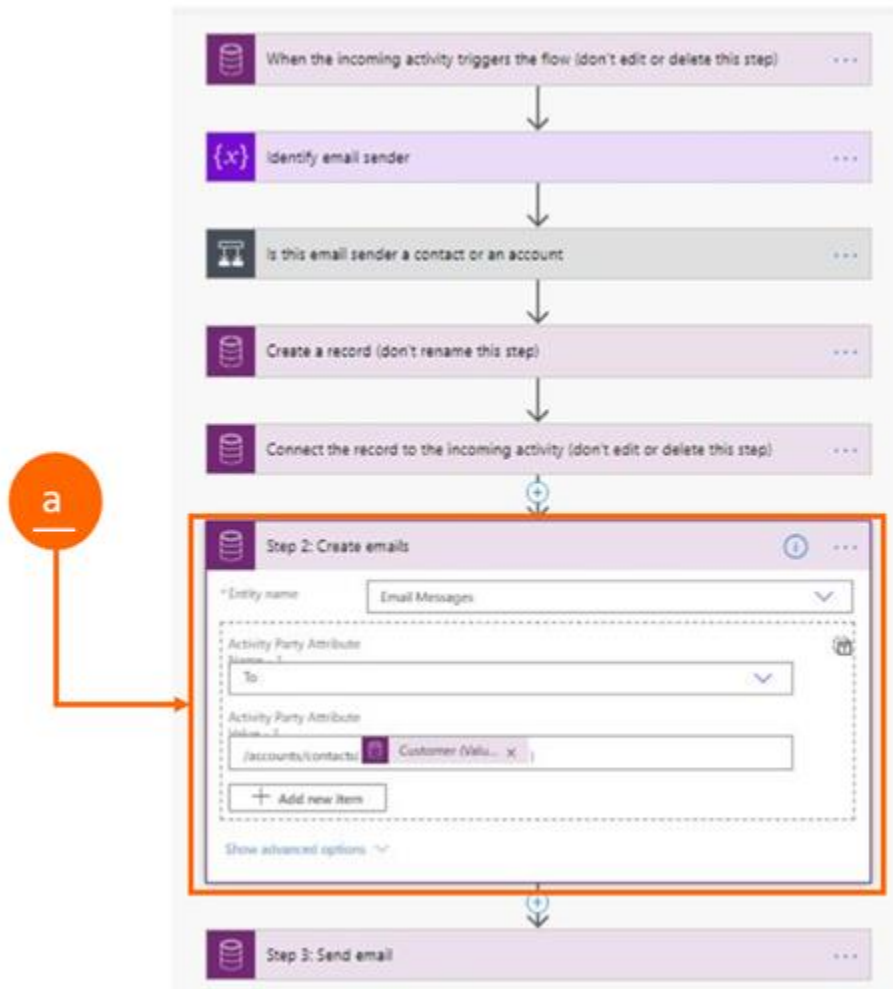
Example: Premigration view

- a.** The From field, which is an activity party-type field that is assigned another activity party-type attribute {Bcc(Email)} will be empty post-migration.
- b.** The To field will migrate.



Example: Post-migration Unified Interface view

**b.** The To field post-migration.



## First not null checks in expressions within legacy workflow during workflow-to-flow conversion is not supported

In legacy workflows, a lookup field can be mapped with multiple expressions where you check and assign the **First Not Null** expression, as shown in the web client example below. Currently, this is not supported as part of workflow-to-flow conversion, as this is a known limitation from the legacy workflow designer. Therefore, the workflow converter assigns the first expression (without performing the null check) and removes the rest of the expressions, irrespective of whether they have **non-null** values. In the sample snapshot that follows, the flow will only have **Regarding(Email)** in the **Customer** field within this step.

Example: Premigration view

- a. Unified Interface view: In Flow, the Customer field will only have: **Regarding(Email)** regardless of whether it is null.
- b. Web client view: In the workflow, the Customer field has: **{Regarding(Email); Contact(Create (Case)); Customer(Create (Case))}**

### Web Client View

The screenshot displays the Dynamics 365 web client interface for configuring a 'Create Case' workflow. On the left, the 'CASE DETAILS' section shows the 'Customer' field with the expression 'Regarding(Email); Contact(Create (Case)); Customer(Create (Case))' entered. An orange circle with the letter 'b' is positioned next to this field, with an orange arrow pointing to it. On the right, the 'Form Assistant' pane is open, showing the 'Dynamic Values' section. A list of expressions is displayed: 'Regarding(Email)', 'Contact(Create (Case))', and 'Customer(Create (Case))'. The first expression, 'Regarding(Email)', is highlighted with an orange box. An orange arrow points from this highlighted expression to the 'Customer' field in the 'CASE DETAILS' section.

### Publish quick view form not appearing in knowledge article business process flow

When knowledge author selects the **Publish** button in the knowledge article business process flow, the quick view form for publishing is not displayed. The issue is due to the presence of older web resource **KnowledgeArticle\_main\_system\_library.js** instead of using the **KnowledgeArticleMainSystemLibrary.js** web resource.

To work around the issue, you need to update use the latest web resource to **KnowledgeArticleMainSystemLibrary.js**. Perform the following steps to update the web resource:

1. [Create](#) a new unmanaged solution in your test or development instance.
2. [Import](#) knowledge article entity into the unmanaged solution that you created.
3. [Export](#) the solution with the knowledge article entity.
4. From the exported **customizations.xml**, edit formXML with formid - **f7502aaf-4874-49fc-868d-cc201c6c4453**.
5. Replace all references of **KnowledgeArticle\_main\_system\_library.js** to **msdyncrm\_/KnowledgeManagement/KnowledgeArticle/KnowledgeArticleMainSystemLibrary.js**.
6. [Update](#) version in solution.xml. Increment the version number when you export the solution as a managed solution.
7. Import the managed solution to your production instance.



## Known issues in Omnichannel for Customer Service

### Agents can see the conversation dashboard in the drop down but can't open it

Agents using Omnichannel for Customer Service can see the conversation dashboard, that is meant for the supervisors on the UI. The agents can't open the dashboard since they do not have the required permissions.

### Adaptive card Limitations

Animation and receipt card elements for adaptive cards are unsupported across both live and asynchronous social channels.

Markdown element for adaptive cards is currently unsupported in live chat channels.

For more information on adaptive card elements that are fully or partially supported, see [Asynchronous channel support](#).

### Agent script state is reset

When you refresh the browser or close the session, agent script changes to initial state rather than retaining the states.

For example, you've completed running two agent scripts and three steps in the third agent script. Now, when you refresh the browser or close and open the session again, you will lose existing state and the agent script state is reset to first script or default script.

### Third-party application tab refreshes when focus is changed

When you host first- or third-party URLs in Omnichannel for Customer Service using the application tab, and when an agent switches from the current application tab to another application tab within the session or switches to another session, the application that is hosted in the tab will be refreshed to the initial state.

For example, your session has two application tabs, **Knowledge Search** and **Bing Search** (<https://www.bing.com>). You select the **Bing Search** tab and see the Bing search page. Now, you'll search for a keyword - **Latest Surface laptop**, and the search results are displayed. When you switch from **Bing Search** to **Knowledge Search**, and again switch to **Bing Search**, the search page is refreshed, and you'll see the Bing search page.

# Closed conversations don't appear in the Closed work items stream and Closed conversations view

After you upgrade Omnichannel for Customer Service to the latest version in the sandbox or trial environment, conversations that agent closes may not appear in the **Closed work items** stream of the agent dashboard and closed conversations view.

Use the following steps as a workaround to activate the SDK Message Processing Steps:

1. Sign in to the Dynamics 365 instance.
2. Go to **Settings > Customizations**.
3. Select **Customize the System**.
4. Select all the Omnichannel associated plugins. See the image to select the Omnichannel associated plugins.

Microsoft.Dynamics.OmnichannelBase.Plugins.PreOperationGeoLocationProviderPlugin: Create of msdyn_oc_geolocationprovider
Microsoft.Dynamics.OmnichannelBase.Plugins.PreOperationGeoLocationProviderPlugin: Update of msdyn_oc_geolocationprovider
Microsoft.Dynamics.OmnichannelBotEnabler.Plugins.PreOperationBOTUserUpdatePlugin: Create of systemuser
Microsoft.Dynamics.OmnichannelBotEnabler.Plugins.PreOperationBOTUserUpdatePlugin: Update of systemuser
Microsoft.Dynamics.OmnichannelSMS.Plugins.PreOperationLiveWorkStreamCreatePlugin
Microsoft.Dynamics.OmnichannelSMS.Plugins.PreOperationLiveWorkStreamPlugin: Create of msdyn_liveworkstream
Microsoft.Dynamics.OmnichannelSMS.Plugins.PreOperationLiveWorkStreamPlugin: Update of msdyn_liveworkstream
Microsoft.Dynamics.OmnichannelSMS.Plugins.PreOperationSMSNumberValidationPlugin: Validate and format SMS Number settings on Create
Microsoft.Dynamics.OmnichannelSMS.Plugins.PreOperationSMSNumberValidationPlugin: Validate and format SMS Number settings on Update
Omnichannel.Plugins.PostOperationLiveWorkItemUpdatePlugin: Update of msdyn_ocliveworkitem
OmniChannel.Plugins.PostOperationSessionUpdatePlugin
OmniChannel.Plugins.PreOperationAnalyticsConfigPlugin: Create of msdyn_analytics
OmniChannel.Plugins.PreOperationLiveChatConfigCreatePlugin: Create of msdyn_livechatconfig
Omnichannel.Plugins.PreOperationLiveWorkStreamCreatePlugin
OmniChannel.Plugins.PreOperationOCQueueDeletePlugin
OmniChannel.Plugins.PreOperationOCQueueUpdatePlugin
OmniChannel.Plugins.PreOperationPresenceDeletePlugin: Delete of msdyn_presence
OmniChannel.Plugins.PreOperationQueueDeletePlugin
OmniChannel.Plugins.PreOperationQueueUpdatePlugin
OmniChannel.Plugins.PreOperationSentimentAnalysisPlugin: msdyn_sentimentanalysis Create
OmniChannel.Plugins.PreOperationSentimentAnalysisPlugin: msdyn_sentimentanalysis Delete
OmniChannel.Plugins.PreOperationSentimentAnalysisPlugin: msdyn_sentimentanalysis Update
OmniChannel.Plugins.PreValidationContextVariableCreatePlugin: Create of msdyn_ocliveworkstreamcontextvariable
Omnichannel.Plugins.PreValidationLiveWorkItemCreatePlugin: Create of msdyn_ocliveworkitem
Omnichannel.Plugins.PreValidationMaskingRuleLimitPlugin: Create of msdyn_maskingrule

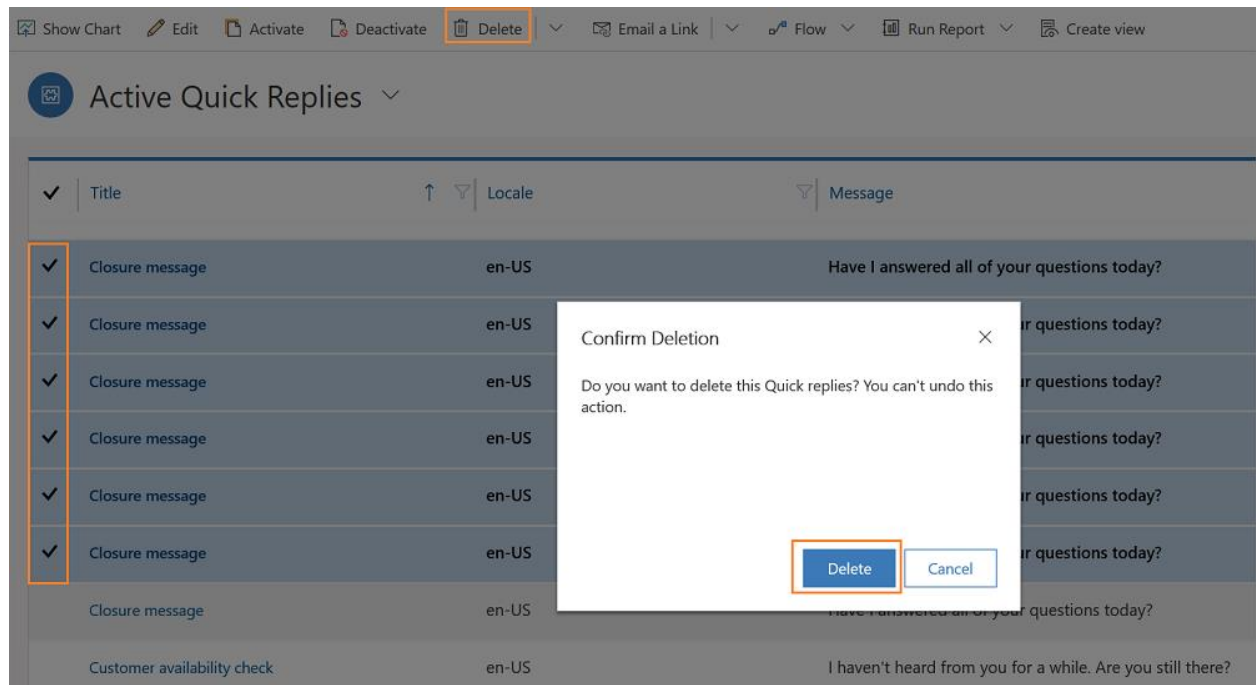
5. Select **Activate** from the command bar. The **Confirm Sdk Message Processing Step Activation** dialog appears.
6. Select **Activate** to enable the plugins.

## Messages repeated in the quick replies menu

When you open the quick replies menu in the communication panel (Chat and SMS), you see the messages are repeated multiple times.

Use the following steps as a workaround:

1. Sign in to Omnichannel Administration app.
2. Select **Quick Replies** in the site map.
3. Select the messages that are repeated several times from the **Active Quick Replies** view.
4. Select **Delete**. A confirmation dialog appears asking you to confirm.
5. Select **Delete** to delete the records.



6. Select **Save** to save the changes.

### Note

The changes you make might take up to 15 mins to reflect in the system.

Now, sign in to Omnichannel for Customer Service app and verify if the messages are repeated in the quick replies menu.

## Customer Summary page shows default icons

If your organization is using earlier releases of chat for Dynamics 365 Customer Service, and after you upgrade to the latest version, the Customer summary page shows the default icon instead of the conversation icon.

## Send Link button in the KB Search Page is not localized

If you are using Omnichannel for Customer Service app, then the **Send Link** button in the **KB Search Page** control appears in English for other locales and is not localized.

## Upgrade doesn't start if the organization name is changed

If you change the organization name, the upgrade process doesn't start, and an internal server error is displayed. To begin the upgrade, rename the organization to its original name.

## Context variable duplication and delete dependency check

While creating a context variable, the system does not perform duplication detection in the work stream. Also, while deleting a context variable, the system does not perform dependency check.

## Refresh queue configuration to reflect the addition of new user

When you add a user to a queue, the sub grid doesn't reflect the new member automatically. You are required to refresh the sub grid by selecting the **Refresh** button to see the new user in the list of queue members.

## Support for automatic record linking to conversation

While working on a session, after an agent creates a customer (contact/account) or case record using the quick create (+) option in the nav bar, it is not auto linked to the conversation. As a workaround, the agent can perform an inline search for the newly created record and link it to the conversation.

## Support for Notes when customer is not linked to a conversation

You as an agent, cannot launch and capture notes for a session where customer is not linked to the conversation. As a workaround, link the conversation to a customer (contact) and then try launching the notes control for capturing the notes.

## Queue support for notifications

The agent is shown one notification at a time. If a new notification arrives before the agent either accepts or rejects the conversation (work item), the incoming conversation will not be assigned to the agent.

## Site map entry for Entity Records is not localized for other languages

In the Omnichannel Administration app, in the site map, Entity Records under the Channels area is not localized for other languages. The string appears only in English language for all language environments.

## Omnichannel solutions visible in environment though Omnichannel isn't provisioned

Because of some recent updates, you'll see some Omnichannel solutions in your environment even if you haven't provisioned Omnichannel for Customer Service. You can safely ignore the following Omnichannel solutions:

- msdynce\_AnyEntityRoutingRule
- msdynce\_AnyEntityRoutingRulePatch202001
- msdyn\_UnifiedRoutingForEntity
- UnifiedRouting
- MLDecisionEngine
- msdyn\_OmnichannelSharedBase
- msdyn\_OmnichannelBase
- msdyn\_OmnichannelBaseApp
- OCBaseURBase
- msdyn\_OmnichannelSBR
- msdyn\_OmnichannelSBRPatch
- OCISBR
- OCIER
- OCSR
- msdyn\_CCASentimentRoutingAI

## Support for blocking .txt file extension in file attachments

Blocking of .txt file extensions isn't supported currently in the file attachments feature. If you block .txt extensions, transcripts won't be visible for closed conversations.