



Dynamics 365

Wave 2 2023



09/28/2023

Agenda

- What are the “waves”
- Deprecations / Replacements (20)
- What's new in Dynamics 365 CE
 - Marketing (18)
 - Sales (20)
 - Sales Copilot (6)
 - Services (17)
 - Field Services (11)
 - ~~• Customer Voice~~
 - Customer Insights (3)
- What's new in Power Platform
 - Power Apps (13)
 - Governance, Administration and Dev (16)
 - Power Pages (9)
 - Dataverse (13)
 - Power Automate / AI Builder (16)
 - Power Virtual Agents (4)
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- What's new in Finance and Operations
 - Finance (29)
 - Supply Chain (17)
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- What's new in Business Central (63)
- What's new in Supply Chain Center (4)

What are the "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.

Timeline



July 18

Release
plan/documentation.



July 31

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



October 01

Automatic update 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.

What are the “waves”

This material considers the releases of:

- Wave 1 2023 from Jul to Sep/2023
- Wave 2 2023 from Oct to Dec/2023

Important: we only consider items already classified by Microsoft as GA - General Availability.

The analysis reflects Microsoft's status on 07/21/2023.

<https://releaseplans.microsoft.com/>

DEPRECATED

Deprecations / Replacements

Item	N / U	Deadline	Benefits / Observations
Transitioning from Outbound to Real-time Marketing		Set/2023	On September 1, 2023, Dynamics 365 Marketing and Dynamics 365 Customer Insights will be combined into a single product offering called Dynamics 365 Customer Insights. For more information, see Dynamics 365 Customer Insights FAQs Additionally, on September 1, 2023, Dynamics 365 Marketing will transition to focus on real-time marketing features only. For more information, see Real-time marketing transition FAQs

Item	N / U	Deadline	Benefits / Observations
Exchange-based cards will be deprecated		Oct/2023	Starting from Sunday, October 1, 2023, the following Exchange-based cards will be deprecated: - Send Content Request Card - Task Due Today Exchange Card - Upcoming Meeting Exchange Card - Recent Meeting Exchange Card - Lead Detection Card - Meeting Today Exchange Card - Missed Email Card - Issue Detection Card - Meeting Request Card - Yes or No Card After the cards are deprecated, they'll no longer be available. You can create your own cards using Power Automate. Learn more.
Rank optimization of insight cards will be deprecated		Oct/2023	Starting from Sunday, October 1, 2023, the rank optimization feature of insights cards will be deprecated. After the feature is deprecated, existing ranking rules will be unavailable and will not apply to insight cards. To optimize and prioritize the cards, turn off those cards that are not in use. Learn more.
Playbooks is deprecated		Jul/2023	Effective July 2023, the playbooks feature is deprecated. You can no longer access, create, or launch playbooks. If you've added playbook entries to your custom app, remove them manually. Playbooks are replaced by sequences. Learn more about sequences.

Item	N / U	Deadline	Benefits / Observations
Intraday insights reports in Omnichannel for Customer Service are deprecated		May/2023	The Omnichannel intraday insights reports are deprecated as of May 1, 2023. Support will continue to be available for the deprecated intraday insights reports until October 31, 2023. However, no new functionalities for intraday insights will be released henceforth. Effective April 30, 2024, Omnichannel intraday insights reports won't be available for existing organizations.
Some administrative apps are deprecated		Apr/2023	These admin experiences will be discontinued and support will end in April 2023: - Service Management Area in the Customer Service Hub application; - Omnichannel administration center; - App Profiler: Will also be removed in April 2023. We recommend that you use the Customer Service Admin Center app to perform tasks such as managing cases and configuring unified routing, channels, and agent experience profiles. More information: Getting Started with the Customer Service Admin Center
The agent-facing Omnichannel app for Customer Service is deprecated		Apr/2023	The Omnichannel app for agent-facing Customer Service will be retired effective April 1, 2023. After the app is retired, support will be available until June 2024. We recommend that you migrate your omnichannel setup to the Customer Service Workspace. More information: Migrate from Omnichannel to Customer Service to Customer Service Workspace
Field Services - schedule board will be replaced		Apr/2023	As of April 1, 2023, the legacy schedule board control is deprecated and replaced with an updated schedule board control (located in the Resource Scheduling Controls solution). You can continue to use the legacy schedule board by enabling it with a solution configuration. However, the control will be completely removed in a future release (not before 4/1/2024)

Finance and Operations



Item	N / U	Deadline	Benefits / Observations
Finance - "FTA VAT Audit File (AE)" Electronic reporting (ER) format using the "Standard Audit File model mapping" and "FAF declaration" menu item		Jul/2024	Emirates 10.0.36 release - Deprecated: By July 1, 2024, we will no longer support the FTA VAT Audit File (AE) ER format that uses the Standard Audit File model mapping and the FAF declaration menu item (Tax > Declarations > FAF declaration). A new FTA Tax Audit File - FAF in TXT (AE) ER format has been introduced that uses the SAF-T General model mapping and can be used with the Standard Audit File for Tax (SAF-T) electronic report feature. For more information, see FTA Tax Audit File (FAF) in TXT format for the United Arab Emirates .
Finance - Revenue recognition		Apr/2023	10.0.30 release - Deprecated: After April 2023, the Revenue recognition functionality in Dynamics 365 Finance will no longer receive support with bug fixes. Customers will be asked to use the improved functionality, Subscription billing. In October 2023, the Revenue recognition feature will no longer be available. Customers will be asked to move to the improved Subscription billing functionality. The bundle feature, which is part of revenue recognition, is planned to be replaced and released as a separate feature available in preview Summer 2023.
Finance / Supply Chain - Stock transfer orders that have tax on the transfer price		Apr/2023	India 10.0.29 release - Deprecated: After April 2023, the Stock transfer orders that have tax on the transfer price functionality will no longer receive support with bug fixes and security fixes. Customers will be asked to use the improved functionality, Stock transfer orders for India . After October 2023, the Stock transfer orders that have tax on the transfer price functionality will be no longer available, and customers will be asked to move to the improved functionality.
Supply Chain - Integration with Outlook for contacts, appointments, and tasks removed		Dec/2023	Deprecated. As of December 1, 2023, Microsoft will discontinue support for synchronizing contacts, appointments, and tasks between Supply Chain Management and Outlook. In addition, security updates will no longer be provided for these features. As of May 1, 2024, it will no longer be possible to synchronize the following types of records between Supply Chain Management and Outlook. No replacement is planned. We recommend that customers integrate with Dynamics 365 Sales.

Item	N / U	Deadline	Benefits / Observations
FO Apps - Non-Azure AD external user sign-in		Jul/2023	We're deprecating access for external users who aren't present in the Microsoft Azure Active Directory (Azure AD) tenant that's used for your finance and operations environment. Microsoft has identified this type of access as a security issue. For more information, see Security alert: common or tenanted passthrough tokens alert. End of support date is targeted for October 2023.

Item	N / U	Deadline	Benefits / Observations
Dynamics 365 for phones and tablets will be deprecated for online users and replaced by Power Apps		Jan/2024	Effective January 2024, Dynamics 365 for phones and tablets (iOS and Android) will be deprecated for online users. Online users must migrate to the Power Apps mobile app . The Power Apps mobile app provides updated capabilities, a modern user experience, and fast load times.
jQuery 2.1.1 to be removed in model-driven apps		Oct/2023	As part of a service update designed to improve security within Microsoft Power Apps we're removing jQuery version 2.1.1 from model-driven applications. In October 2023 we're removing the library located here: <code>/_static/_common/scripts/jquery-2.1.1.min.js</code>. If custom code in web resources has a dependency on this library it will stop working when this library is removed. We don't support use of any model-driven application client-side code, including libraries that model-driven apps depend on. These libraries might change without warning. More information: Unsupported customizations. To determine if you're impacted, search your web resource code for this line: <code>/_static/_common/scripts/jquery-2.1.1.min.js</code>. Necessary action If your web resources have a dependency on this library, you should replace the reference with a newer version of JQuery. Note, there may be breaking changes between versions. For information about upgrading, see jQuery Core Upgrade Guides. Choose one of these options: 1. Create a new JavaScript web resource with the minified version of jQuery. The library is available here: jQuery Core – All Versions. More information: Create or edit model-driven app web resources to extend an app. 2. Locate the URL of a CDN for a newer version of jQuery. For example jQuery-libraries-cdnjs. Replace the reference to <code>/_static/_common/scripts/jquery-2.1.1.min.js</code> with the name of the web resource you created or the URL to the CDN resource with a newer version of jQuery.

Item	N / U	Deadline	Benefits / Observations
AI Builder image classification model by Lobe is deprecated		Apr/2023	Effective January 2023, the image classification model by Lobe (preview) was deprecated. The model allowed you to quickly create and train models to classify images into different categories. This was useful for classifying objects in images, such as animals, plants, and vehicles. The deprecation of this capability was needed because the model wasn't aligned with other models in AI Builder, which offer an in-browser training and model usage experience. These other models don't require a download and install. The impact of the deprecation of this capability is that you'll no longer be able to use the model to classify images and you won't be able to download the Lobe application. Models built with Lobe might continue to work and serve their purpose, but they won't be supported by the AI Builder team. Your Lobe installation might also continue to function, but won't be supported. Necessary action If you're impacted by the deprecation of this feature, you can use other methods to classify images, such as Azure Cognitive Services for Custom Vision.
Power App and Power Automate - Controls for model-driven apps		Apr/2023	As of January 2023, the following controls for model-driven apps will be deprecated: autocomplete, input mask, multimedia player, number input, option set, and star rating. Why is this necessary? We'll be introducing new Fluent UI controls that feature better usability, accessibility, and dark mode support. Impact As of April 2023, these controls will no longer be able to be added to forms. Existing control instances will work on existing forms until April 2024. Necessary action Evaluate existing forms that include a deprecated control and replace them with a newer control.

Power Platform

Item	N / U	Deadline	Benefits / Observations
Power Apps and Power Automate - Removal of Dataverse OData v2.0 service		Nov/2022	Migrate to Web API, an OData v4.0 service https://powerapps.microsoft.com/en-us/blog/odata-v2-0-service-removal-date-announcement/ Microsoft postponed the block to Oct/2023.
Microsoft Dataverse (legacy) connector for Power Automate flows will be deprecated and replaced with another connector		Oct/2022	Effective October 2022, the Microsoft Dataverse (legacy) connector (also referred to as the CDS 2.0 connector) is deprecated. However, this connector currently can be used to connect to Dataverse for use in multiple clients and components. Users will need to review their existing Power Automate flows to determine which ones need to be updated. In August 2023 , we'll announce a date after which no new flows can be created using the Dataverse (legacy) connector.
Microsoft Dataverse (legacy) connector for Azure Logic Apps will be deprecated and replaced with another connector		Oct/2022	Effective October 2022, the Microsoft Dataverse (legacy) connector (also referred to as the CDS 2.0 connector) is deprecated. This connector currently can be used to connect to Dataverse for use in multiple clients and components. The Microsoft Dataverse connector is available for use in Azure Logic Apps starting August 2022. The Dataverse connector provides both legacy triggers and actions and new preview triggers actions for the newest connector. Dates for when previews will be GA will be provided by August 2023.



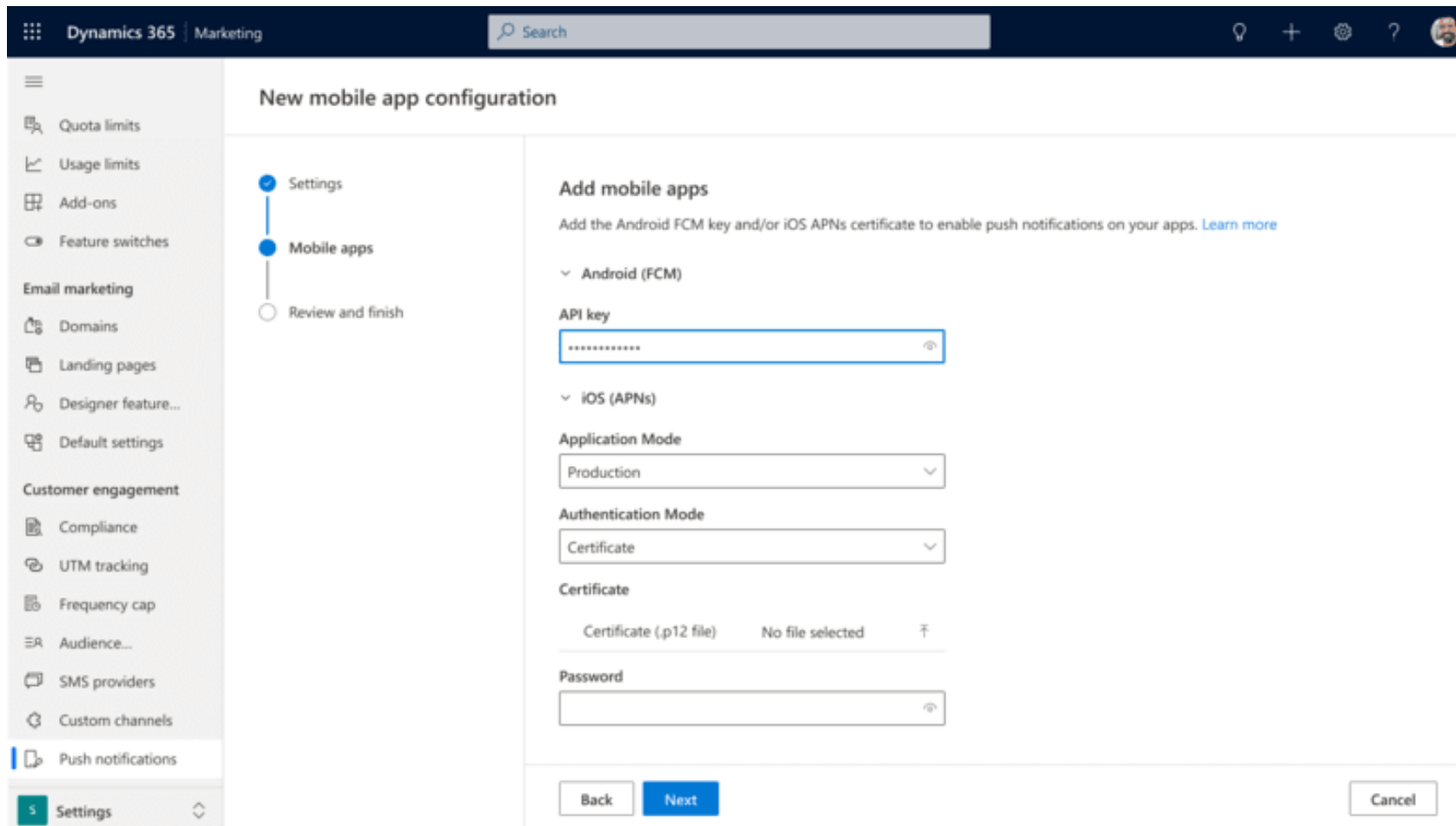
What's new in Dynamics 365 CE



Marketing

Marketing - Moments-based

Item	N / U	Deadline	Benefits / Observations
Easily set up push notifications and engage customers worldwide	Update	Jul/2023	- Push notifications are now available worldwide, increasing your global reach. - Set up the push notification channel easily using the enhanced guided experience: provide the credentials for the app, register devices, and start using push notifications right away. - Register more devices at once thanks to increased API throughput; maintain compliance and security by removing unused devices.



Dynamics 365 | Marketing Search

New mobile app configuration

- Settings
- Mobile apps**
- Review and finish

Add mobile apps

Add the Android FCM key and/or iOS APNs certificate to enable push notifications on your apps. [Learn more](#)

▼ Android (FCM)

API key
[Redacted]

▼ iOS (APNs)

Application Mode
Production

Authentication Mode
Certificate

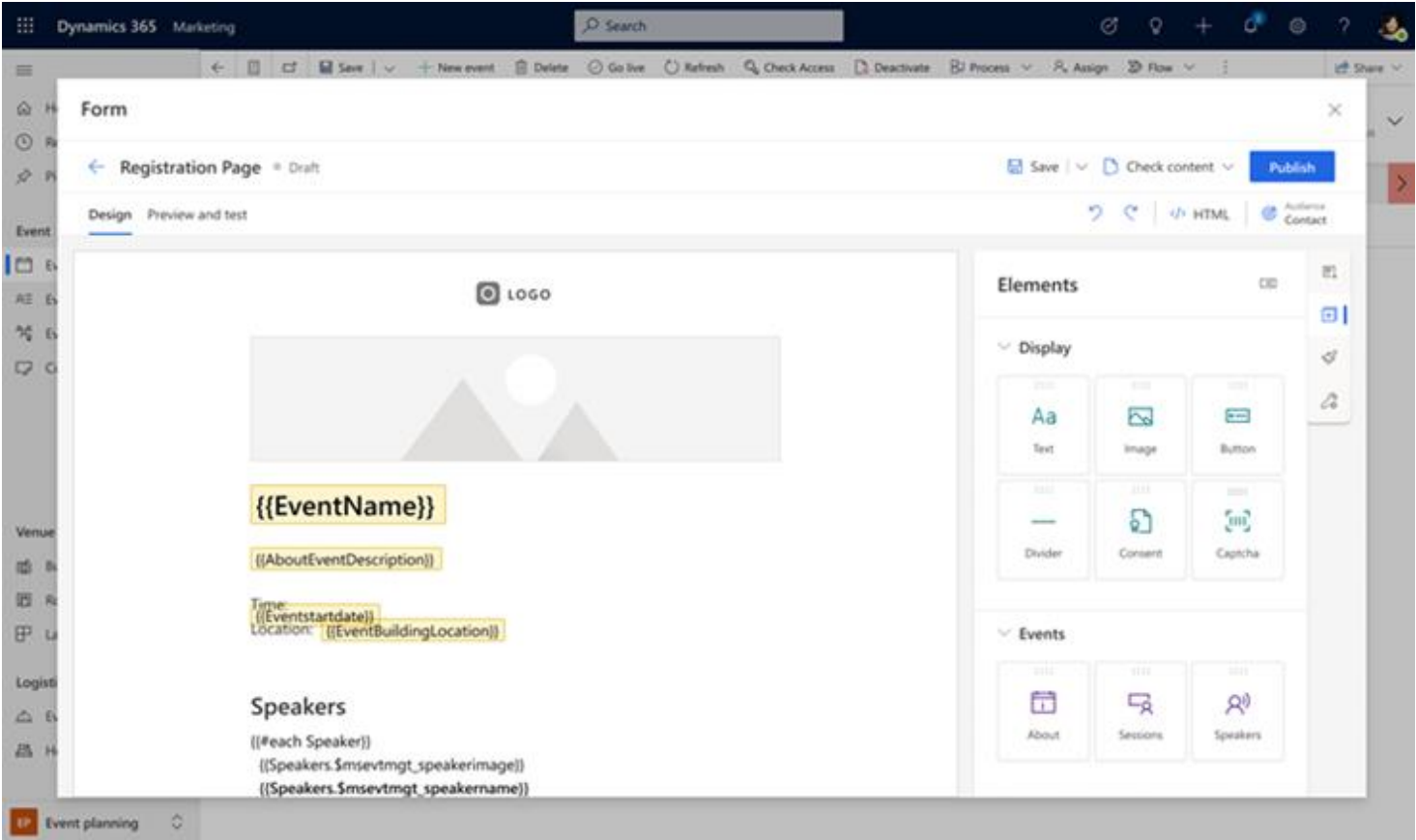
Certificate
Certificate (.p12 file) No file selected

Password
[Redacted]

Back Next Cancel

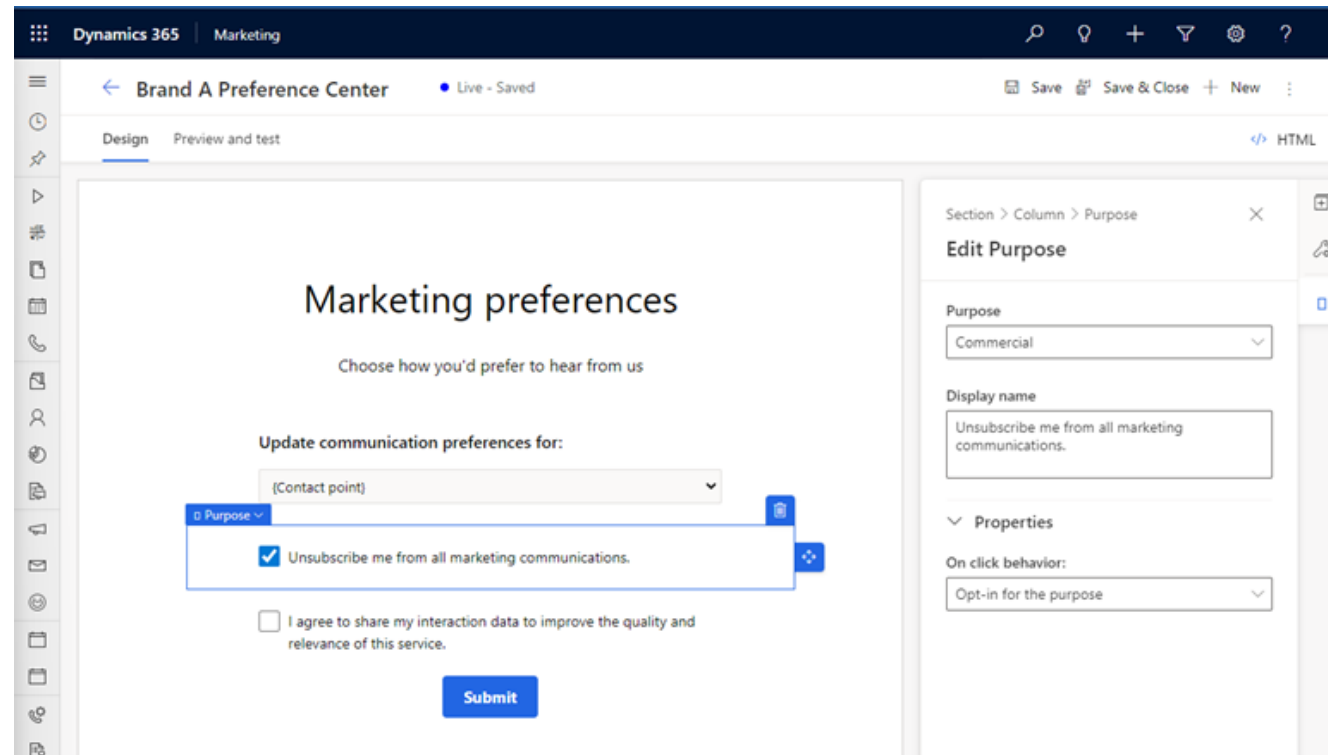
Marketing - Personalization

Item	N / U	Deadline	Benefits / Observations
Plan events with intuitive event registration form		Jul/2023	- Create single and multi-session events with a proven platform that hosts in-person and Teams events. - No need to rely on developers; create your event and registration form website within seconds. - Save time by reusing registration forms across multiple events and utilizing built-in templates. - Instantly publish your event's registration website with a single click, or integrate the registration form into your existing site. - Drive attendance and follow up with attendees with real-time marketing journeys and out-of-the-box event triggers.



Marketing - Personalization

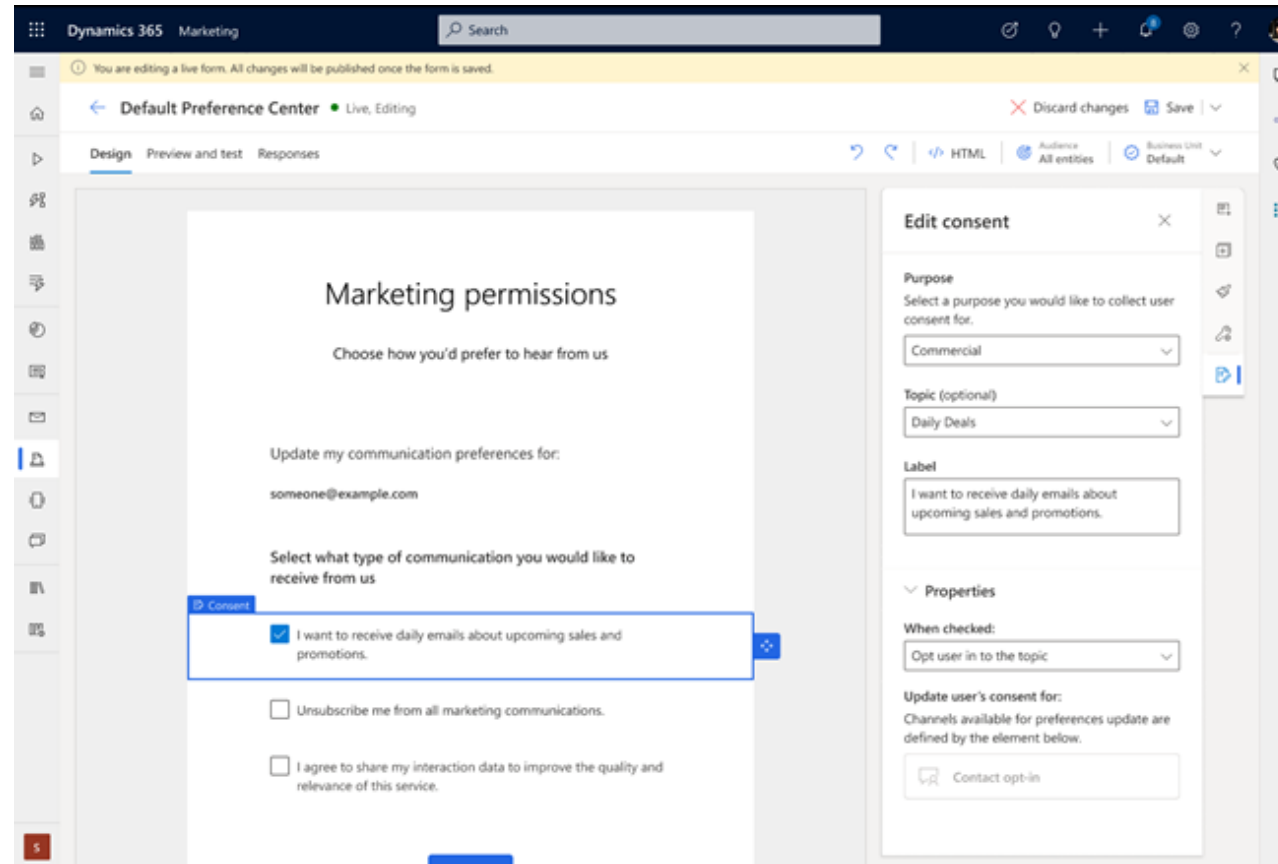
Item	N / U	Deadline	Benefits / Observations
Match your business needs with multi-brand consent and customizable preference centers	Update	Jul/2023	The following new functions allow you to design consent to match your brand and compliance needs: - Configure real-time marketing preference centers that represent your brand's look and feel with new logo, style, and color options. - Create multiple, line-of-business-specific preference centers. - Real-time marketing preference centers are hosted by Dynamics 365 Marketing out of the box and can be embedded directly in your website. - Capture and enforce consent independently for each line of business, allowing your customers to opt out of communication from one brand without impacting other lines of business. - Channel-specific consent is tied to each customer's specific email address or phone number, giving your customers more control over which messages they receive from which channels.



The screenshot shows the Dynamics 365 Marketing interface for editing a 'Brand A Preference Center'. The main design area displays a form titled 'Marketing preferences' with the subtitle 'Choose how you'd prefer to hear from us'. The form includes a section for 'Update communication preferences for:' with a dropdown menu for '(Contact point)'. Below this, there is a checkbox labeled 'Unsubscribe me from all marketing communications.' which is currently checked. At the bottom of the form is a 'Submit' button. On the right side, there is a sidebar titled 'Edit Purpose' with a dropdown menu for 'Purpose' set to 'Commercial'. Below this, there is a text field for 'Display name' containing 'Unsubscribe me from all marketing communications.' and a section for 'Properties' with a dropdown for 'On click behavior' set to 'Opt-in for the purpose'.

Marketing - Personalization

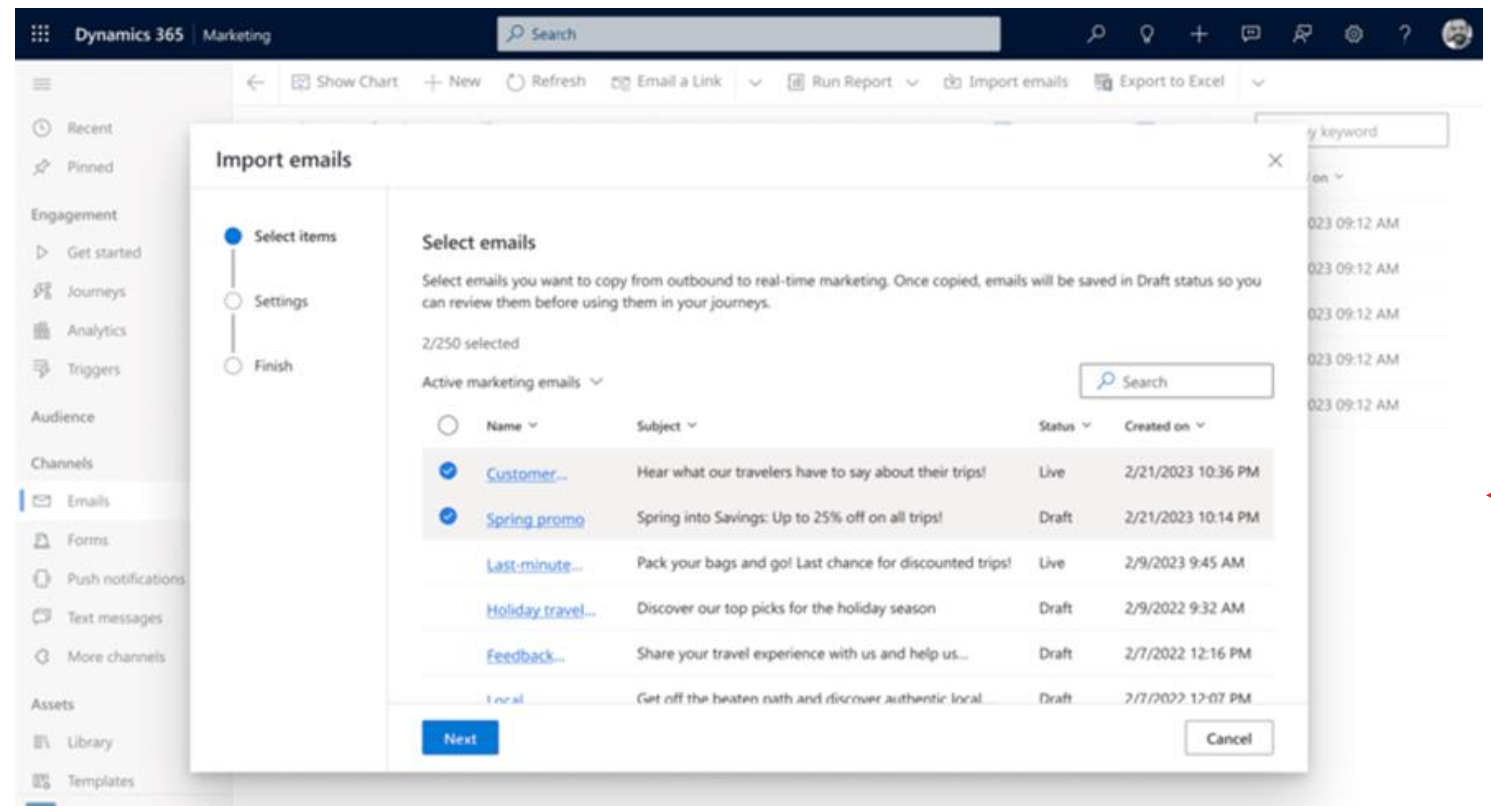
Item	N / U	Deadline	Benefits / Observations
Tailor communications to the topics customers want to receive	Update	Jul/2023	The following new functions allow you to reduce opt-out rates and gather consent at finer granularities: - Create an unlimited number of topics, enabling customers to opt in to receive marketing subscriptions such as "Newsletters," "Community Events," or "Product Discounts." - Easily capture consent for new customers on marketing forms with flexible options that allow you to gather consent explicitly (through visible fields) or implicitly (through hidden fields). - Real-time marketing automatically enforces topic checks without the need to create and manage subscription lists of contacts.



The screenshot shows the Dynamics 365 Marketing interface for editing a 'Default Preference Center' form. The form is titled 'Marketing permissions' and includes a sub-header 'Choose how you'd prefer to hear from us'. It contains a section for updating communication preferences for a specific email address, followed by a section titled 'Select what type of communication you would like to receive from us'. This section has three radio button options: 'I want to receive daily emails about upcoming sales and promotions.' (which is selected), 'Unsubscribe me from all marketing communications.', and 'I agree to share my interaction data to improve the quality and relevance of this service.'. On the right side, there is an 'Edit consent' panel with fields for 'Purpose' (set to 'Commercial'), 'Topic (optional)' (set to 'Daily Deals'), and 'Label' (set to 'I want to receive daily emails about upcoming sales and promotions.'). Below these are 'Properties' including 'When checked:' (set to 'Opt user in to the topic') and 'Update user's consent for:' (set to 'Contact opt-in').

Marketing

Item	N / U	Deadline	Benefits / Observations
Personalization - Further personalize journeys using custom events with entity references	Update	Aug/2023	With entity references for custom triggers, you can now: - Use custom triggers in journeys that use attributes tied to related Dataverse entities. - Enable greater customization of messages sent to customers. - Ensure attribute freshness.
Data and analytics - Easily import outbound emails, content blocks, and templates to real-time marketing	Update	Jul/2023	- Select the emails, templates, and content blocks you'd like to import from outbound marketing to real-time marketing. - Select up to 50 emails, content blocks, or templates and easily track the import process. - See which emails have been imported and find them thanks to “outbound” tags in the real-time email builder.



Dynamics 365 Marketing

Search

Show Chart + New Refresh Email a Link Run Report Import emails Export to Excel

Import emails

Select items Settings Finish

Select emails

Select emails you want to copy from outbound to real-time marketing. Once copied, emails will be saved in Draft status so you can review them before using them in your journeys.

2/250 selected

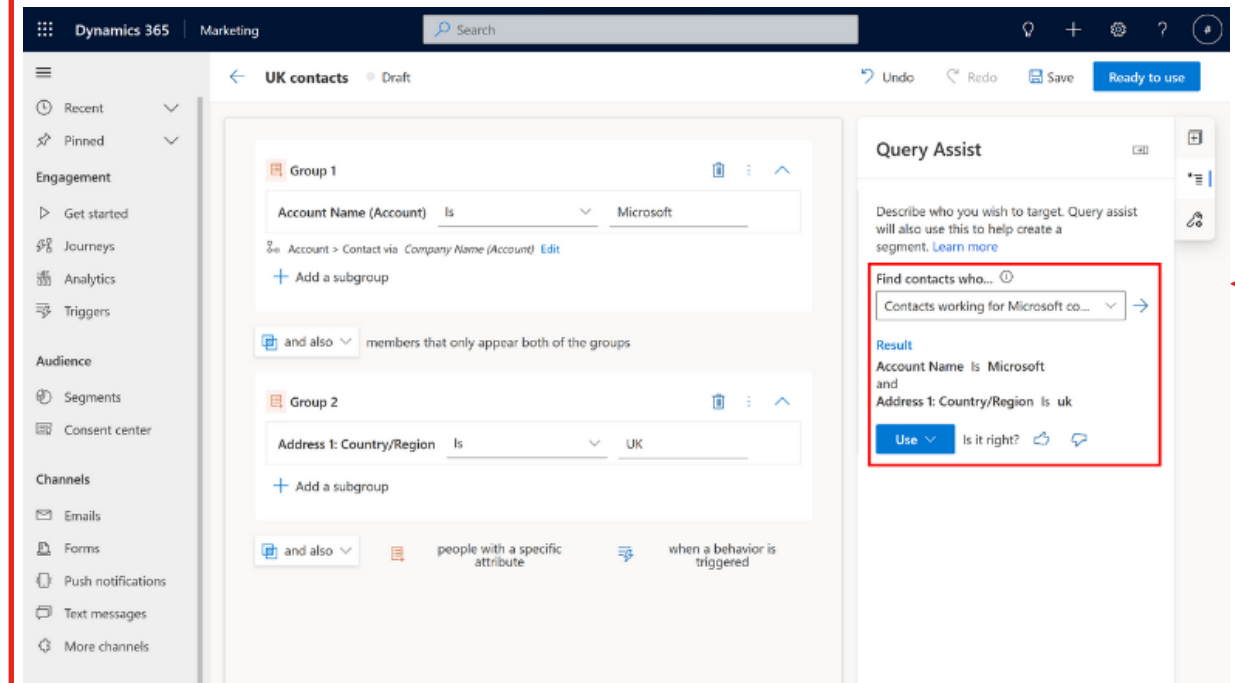
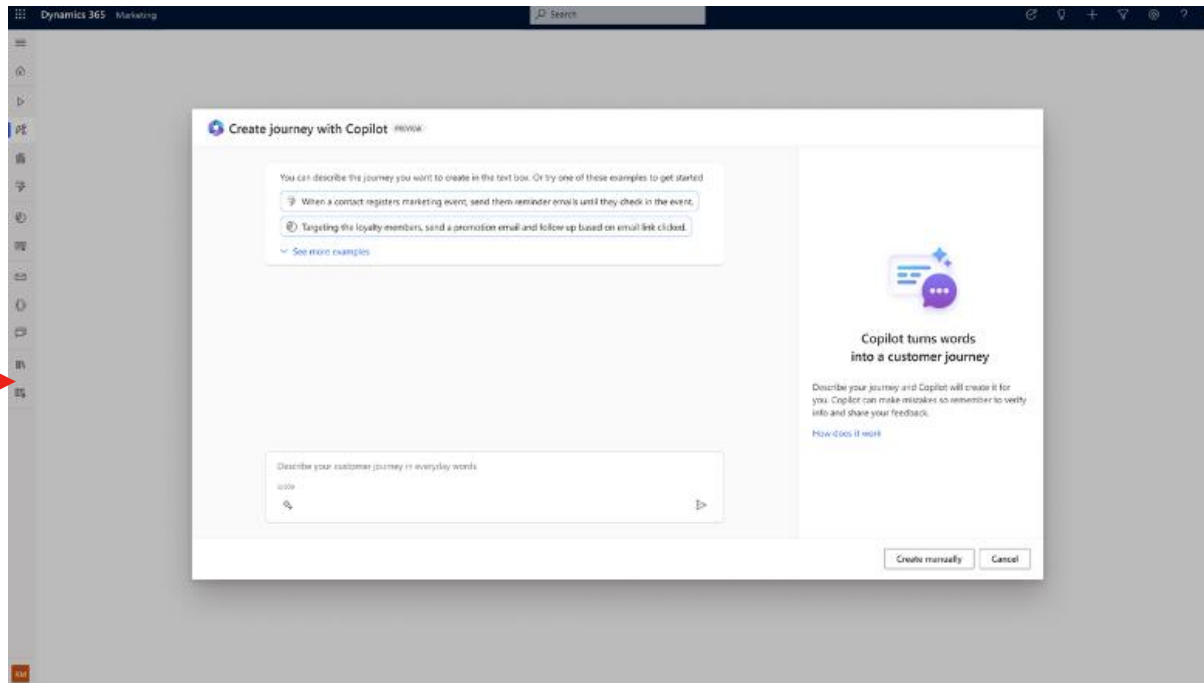
Active marketing emails

Name	Subject	Status	Created on
Customer...	Hear what our travelers have to say about their trips!	Live	2/21/2023 10:36 PM
Spring promo	Spring into Savings: Up to 25% off on all trips!	Draft	2/21/2023 10:14 PM
Last-minute...	Pack your bags and go! Last chance for discounted trips!	Live	2/9/2022 9:45 AM
Holiday travel...	Discover our top picks for the holiday season	Draft	2/9/2022 9:32 AM
Feedback...	Share your travel experience with us and help us...	Draft	2/7/2022 12:16 PM
Local	Get off the beaten path and discover authentic local...	Draft	2/7/2022 12:07 PM

Next Cancel

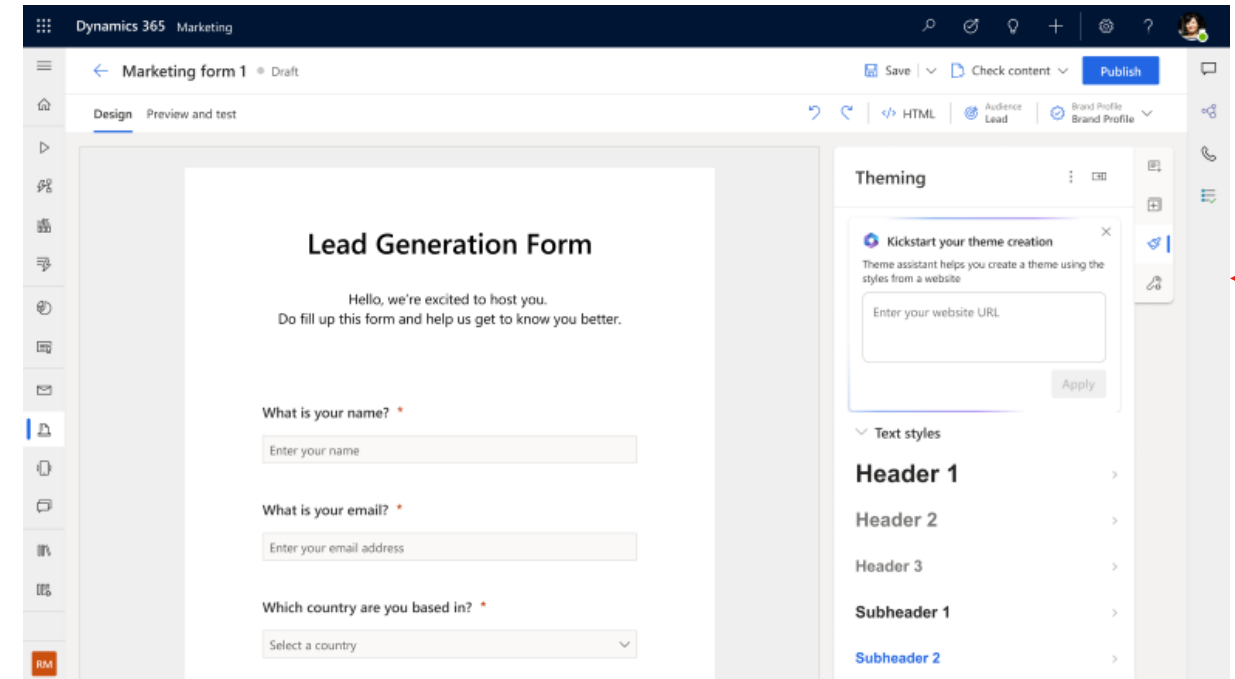
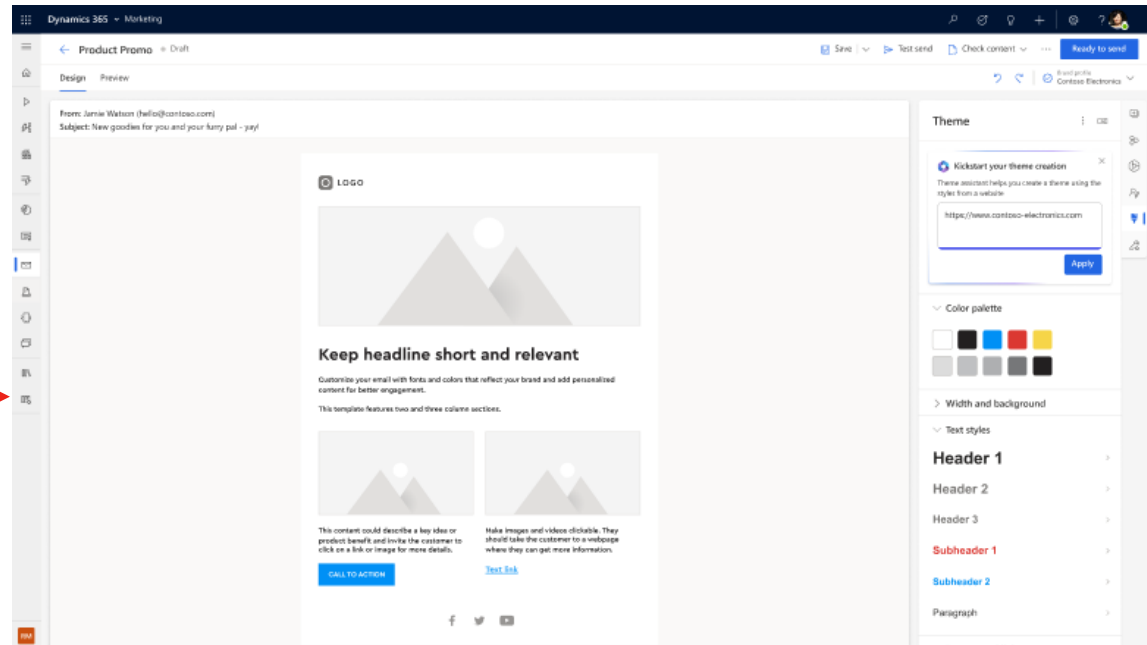
Marketing - Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Create customer journeys by describing them in your own words using Copilot	Update	Nov/2023	- Use everyday natural language to describe the customer journey you want to create. - Get inspired about how to get started with a list of suggested journeys.
Simplify and summarize your segments using query assist copilot functionality	Update	Jul/2023	- Improved accuracy when creating segments with an enhanced understanding of queries and creation logic. - Optimize segments effortlessly by eliminating redundant conditional statements. - Improve comprehension and performance by streamlining segment conditions.



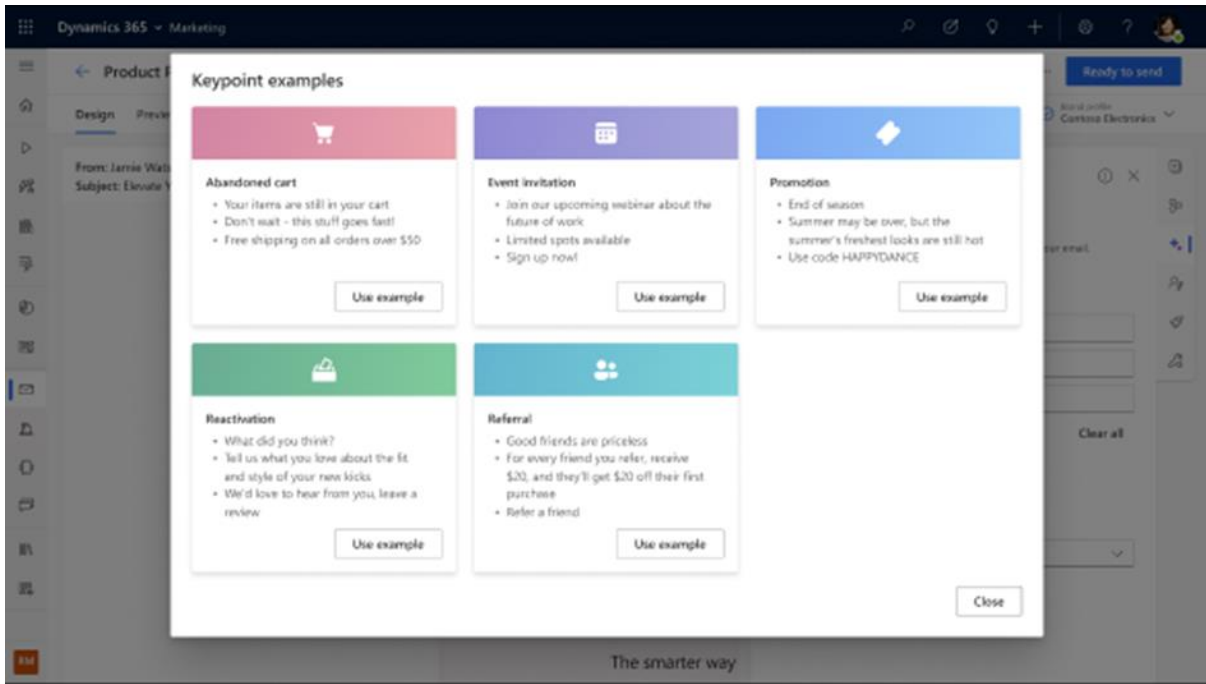
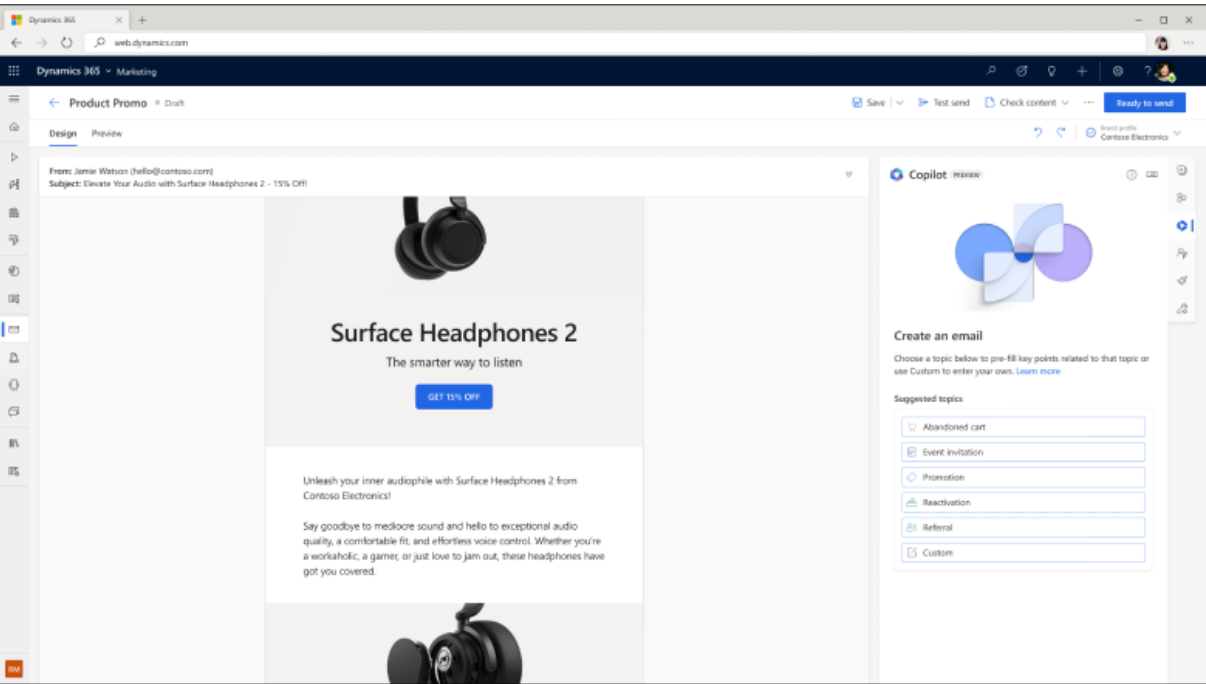
Marketing - Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Easily style your emails with Copilot	Update	Oct/2023	- Simply add your website URL to get design elements such as fonts, font size, and colors palette. - Fine-tune and adjust elements to match your campaign or brand guidelines.
Style your forms and event registration pages to match your website with Copilot	Update	Oct/2023	- Simply add your website URL to get design elements such as fonts, font size, and color palette and apply them to your forms and event registration pages. - Fine-tune and adjust elements to match your campaign or brand guidelines.



Marketing - Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Easily discover and use Copilot to create highly engaging emails	Update	Sep/2023	- Use Copilot for content inspiration by selecting a suggested topic such as an abandoned cart, event invitation, or promotion and viewing prefilled key points to kickstart your email. - Directly access Copilot within your email flow to generate content when adding or editing text.
Find inspiration with relevant content ideas using Copilot	Update	Sep/2023	- Enjoy higher quality generated content thanks to AI and a refreshed look and feel. - Select the tone of voice that best fits your brand and audience: engaged, adventurous, casual, luxury, or formal. - Use sample key points for typical email types, such as an abandoned cart, a referral, or an event invitation, to get inspired and easily kick off the creation process. - Generate engaging text snippets out of a few short key points. - Easily access and get inspired by generative AI when adding or editing text.



Marketing - Unify sales and marketing



Item	N / U	Deadline	Benefits / Observations
Increase lead conversions by routing to the correct sales rep		Aug/2023	- Define lead scoring criteria and update the relevant fields in the lead record when a lead meets the score threshold. - Based on the qualification status, create automated assignment rules (available in Dynamics 365 Sales Premium or Dynamics 365 Sales Enterprise) based on your business needs, such as the sales rep's capacity or matching attributes between the rep and lead.
Personalize customer experiences using calculated metrics from Customer Insights	Update	Oct/2023	- Leverage attributes from entities related to the customer profile entity in Dynamics 365 Customer Insights for personalization in marketing messages and branch conditions in journeys. - Easily access customer measures (for example, total revenue or loyalty points) from Dynamics 365 Customer Insights without moving data. - Create journey branches or content variants with customer measures using the familiar no-code personalization experience in Dynamics 365 Marketing.

Dynamics 365

Sales Hub

Search

Home

Recent

Pinned

Sales Insights

Global settings

Overview

Sales accelerator

Workspace

Sequences

Segments

Assignment rules

Assistant studio

Home

Insight cards

Optimize ranking (preview)

Productivity

Conversation intelligence

Auto capture

Email engagement

Notes analysis

Assignment rules

Create rules that automatically assign leads and opportunities to relevant sales reps

Rule

Team

Monitor

All

Leads

Opportunities

Created

Order

Rule name

MQLs (1)

1

Route MQLs to:

All leads - default segment (1)

1

Automatically di

Edit Assignment rule

Set rule conditions to automatically assign leads or opportunities to the relevant sellers

1

Rule name *

Route MQLs to Sales

2

Select eligible leads for this rule

All incoming leads

Specific leads

Choose segment

MQLs

+ Add Lead condition

Consider leads created in the last

120 hours

3

Assign these leads to sellers or a team

Any seller

Update rule

Cancel

Dynamics 365

Marketing

Search

Journey name

Draft

Undo

Redo

Save

Delete

Publish

Entry

Trigger name

+

Attribute

Branch on customer measure (revenue)

Revenue > \$100

+ Add branch

Other

Exit

Exit

Revenue > \$100

Branch name

Revenue > \$100

Conditions

Make condition on attribute

Choose an attribute

Search

Audience

CustomerProfile

Total loyalty points

Number of orders

Cumulative revenue

CustomerID (msdyn_customerid)

CustomerProfile (msdyn_customerprofileid)

emailaddress1 (msdyn_emailaddress1)

firstname (msdyn_firstname)

lastname (msdyn_lastname)

Marketing - Unify sales and marketing

Item	N / U	Deadline	Benefits / Observations
Prioritize best leads and empower sellers with new lead scoring builder	Update	Aug/2023	- Use the easy-to-use lead score builder to start quickly and update or optimize the model continuously. - Create lead scoring models with not only behavioral but also demographic or firmographic conditions. - Evaluate your scoring model outputs and performance using a new set of enhanced insights. - Define lead qualification criteria and post-qualification actions.

Dynamics 365 Marketing - Demo score 2023 (Draft)

Add to points

Group 1

Address 1 City is Seattle

Marketing website clicked

Leads who performed this action at least since 5/21/2021

Marketing Page URI contains pdf

Marketing website visited

- Customer Data
- Internal Marketing Interaction Id
- Lead Reference
- Marketing Page Reference
- Marketing Page URI
- Marketing Website Reference
- Referrer URI
- Source System
- Website Link
- Website Link Friendly Name

Dynamics 365 Marketing - Demo score 2023 (Live)

2,320 members scored by the model

Chart date range: Last 30 days

Score	Number of leads
0-5	30 (17%)
6-10	45 (25%)
11-15	65 (36%)
16-20	40 (22%)
21-26	13 (15%)
27-30	15 (17%)
31-35	9 (12%)

Scoring model details

General

Created on: 11/17/2022, 4:43:12 PM

Last updated: 11/18/2022, 12:31:22 AM

Minimum consent: ...

Creator: Misha Gubov

Target audience: Leads

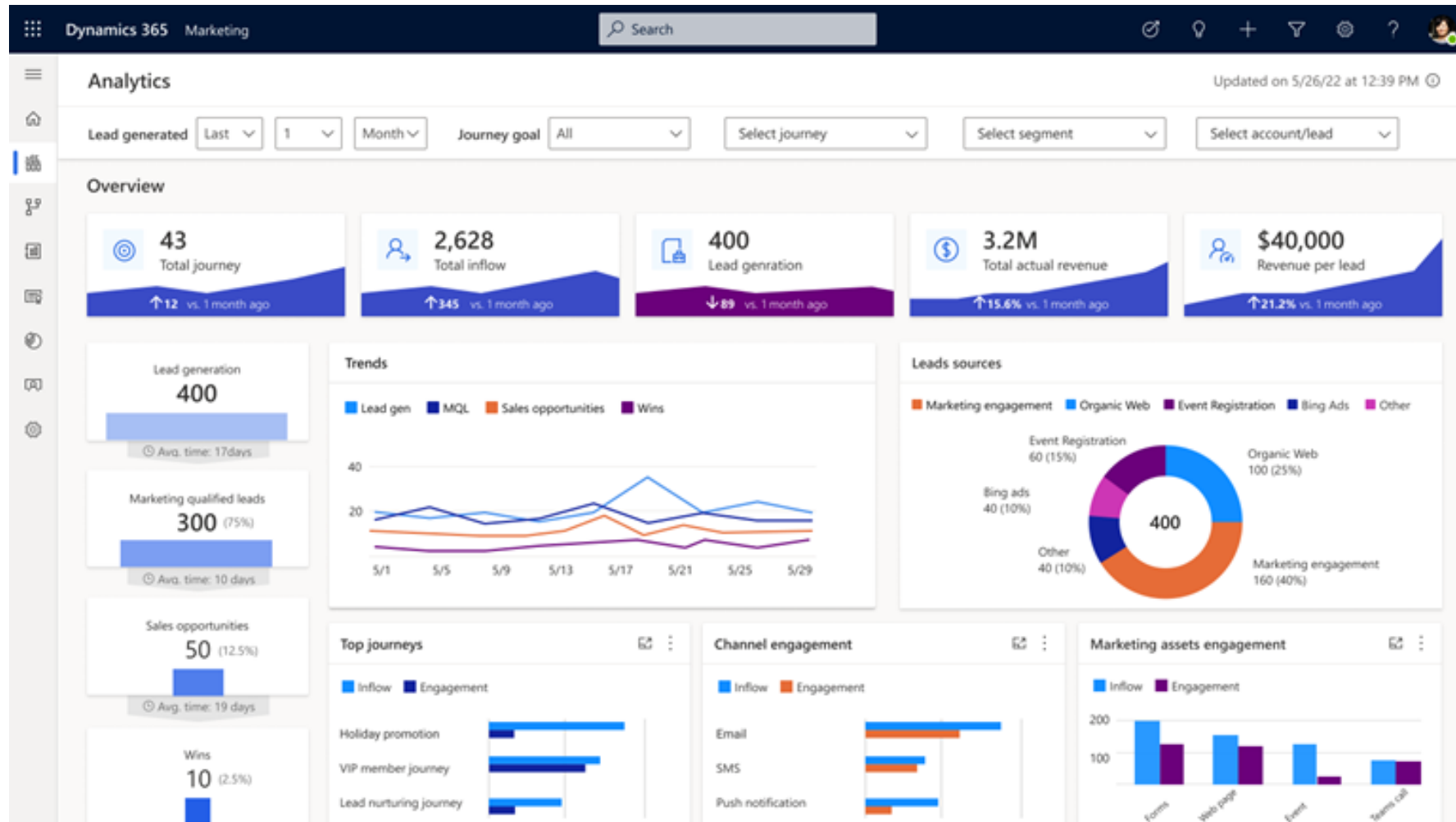
Usage (1)

Marketing Qualified Stage

Live model started on 11/24/2022, 1:23 PM

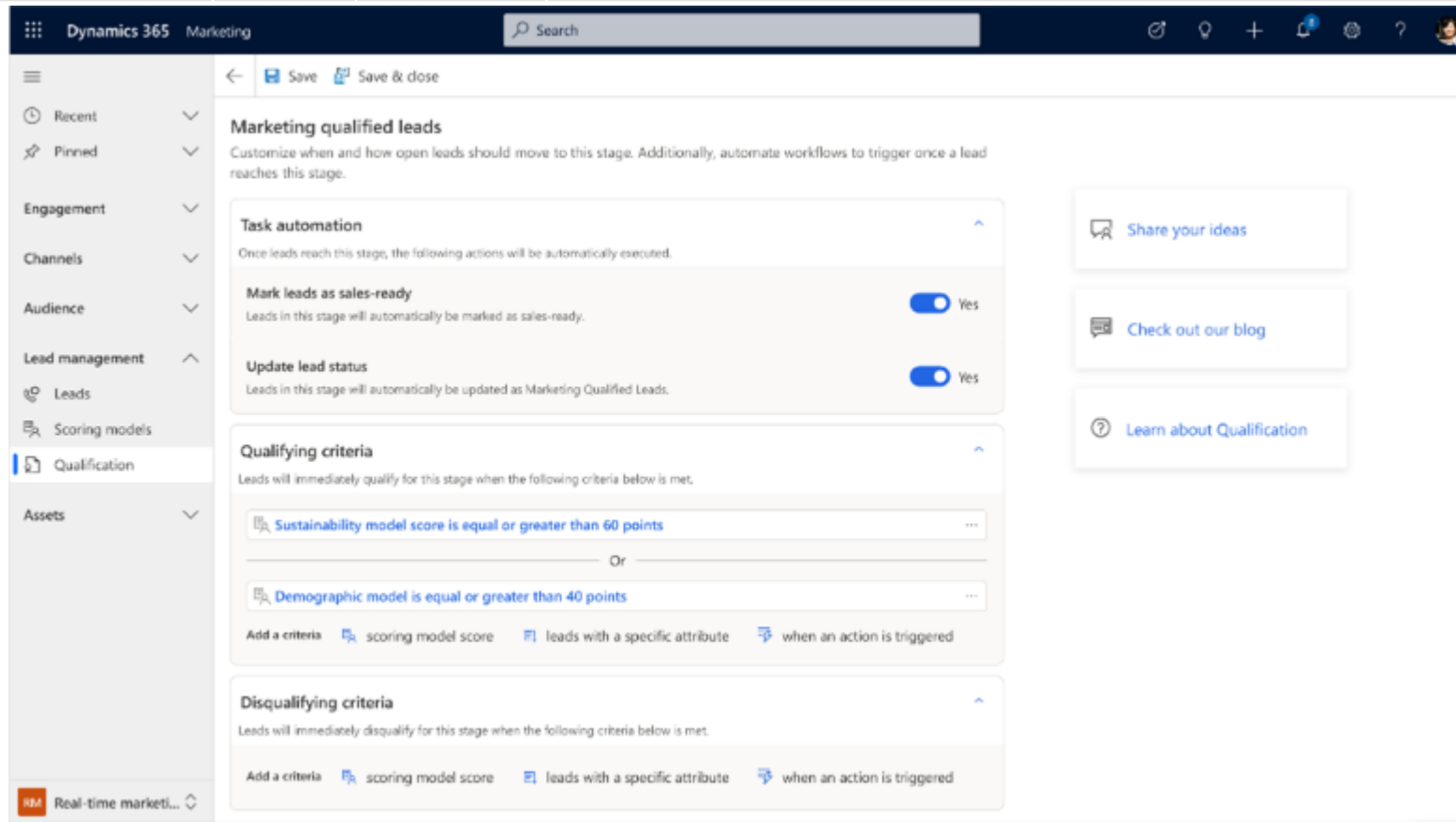
Marketing - Unify sales and marketing

Item	N / U	Deadline	Benefits / Observations
Accelerate your pipeline with integrated analytics	Update	Dec/2023	- Seamless integration with Dynamics 365 Sales gives a comprehensive view to track accounts moving through the pipeline (from prospects and leads to won opportunities). - Understand the main drivers for lead generation and qualification. - Learn about your most effective sources that produce high-quality leads.



Marketing - Unify sales and marketing

Item	N / U	Deadline	Benefits / Observations
Qualify leads and route to sales when buying is likely	Update	Nov/2023	- Define qualification criteria using multiple signals: fit (their profile or segment memberships), intent (for example, filling out a marketing form, watching a demo), recency (when the lead was created), and engagement (lead score crossing a certain threshold). - Identify intent using a variety of first-party signals, such as a customer's web browsing history, marketing form completions, and any other high-value activity that you can capture using a trigger. - Enable a seamless back and forth across Dynamics 365 Sales and Dynamics 365 Marketing by defining criteria to disqualify or requalify leads. - Take automated action every time a lead hits certain qualification criteria.



Dynamics 365 Marketing

Search

Save Save & close

Marketing qualified leads

Customize when and how open leads should move to this stage. Additionally, automate workflows to trigger once a lead reaches this stage.

Task automation

Once leads reach this stage, the following actions will be automatically executed.

- Mark leads as sales-ready** ☒ Yes
Leads in this stage will automatically be marked as sales-ready.
- Update lead status** ☒ Yes
Leads in this stage will automatically be updated as Marketing Qualified Leads.

Qualifying criteria

Leads will immediately qualify for this stage when the following criteria below is met.

- Sustainability model score is equal or greater than 60 points
- Or
- Demographic model is equal or greater than 40 points

Add a criteria ☐ scoring model score ☐ leads with a specific attribute ☐ when an action is triggered

Disqualifying criteria

Leads will immediately disqualify for this stage when the following criteria below is met.

Add a criteria ☐ scoring model score ☐ leads with a specific attribute ☐ when an action is triggered

[Share your ideas](#)

[Check out our blog](#)

[Learn about Qualification](#)

Real-time marketi...

Marketing - Moments that matter

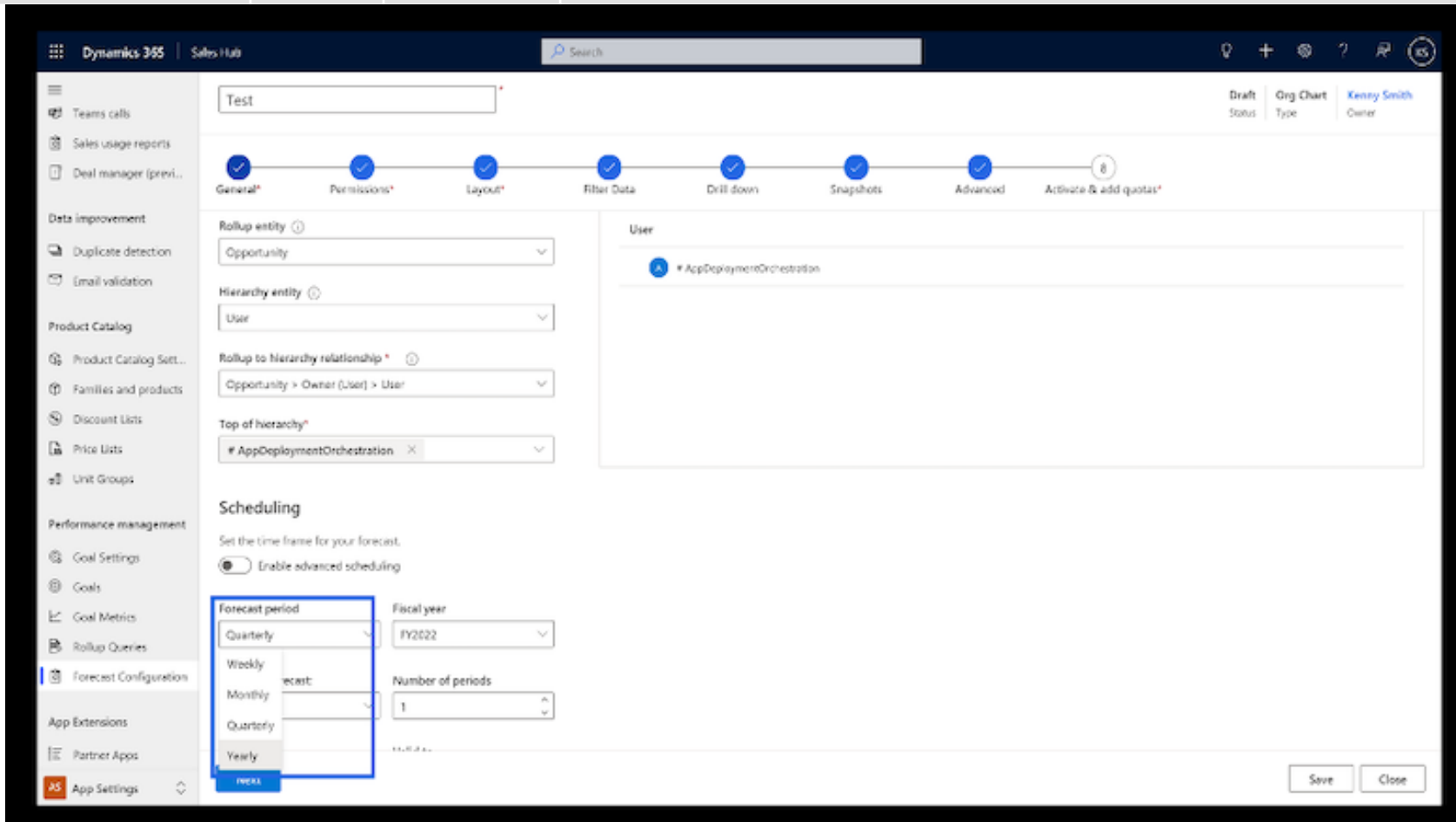
Item	N / U	Deadline	Benefits / Observations
Scale your business with confidence with 300M maximum monthly interactions	Update	Oct/2023	- Reach up to 100 million marketing contacts (up more than 3 times from the previous 30 million contact limit). Marketing contacts only include those that you engage with through interactions such as emails, SMS, and push notifications. - Deliver up to 300 million monthly interactions (through email messages, SMS, push, or custom channels). This is up 3 times from the previous 100 million outbound interaction limit. - Create segments of up to 100 million marketing contacts. - Engage with customers in near real time with a 30-second response time. (The response time is the time from a trigger being activated to a message being sent in a single-step customer journey. The actual message delivery time varies depending on the recipient's email server, the message-sending channel used, and other factors.).



Sales

Sales - Revenue intelligence

Item	N / U	Deadline	Benefits / Observations
Improve forecast accuracy with yearly and weekly forecasts		Sep/2023	As an administrator or forecast manager, you can: - Configure forecasts with a yearly recurrence. - Configure forecasts with a weekly recurrence. As a seller or sales manager, you can: - Track your yearly and weekly forecasts



Dynamics 365 | Sales Hub

Search

Test

Draft Status | Org Chart Type | Kenny Smith Owner

General* | Permissions* | Layout* | Filter Data | Drill down | Snapshots | Advanced | Activate & add quotas*

Rollup entity ⓘ
Opportunity

Hierarchy entity ⓘ
User

Rollup to hierarchy relationship ⓘ
Opportunity > Owner (User) > User

Top of hierarchy*
AppDeploymentOrchestration

User
AppDeploymentOrchestration

Scheduling
Set the time frame for your forecast.
☐ Enable advanced scheduling

Forecast period
Quarterly

Fiscal year
FY2022

Forecast
Weekly

Number of periods
1

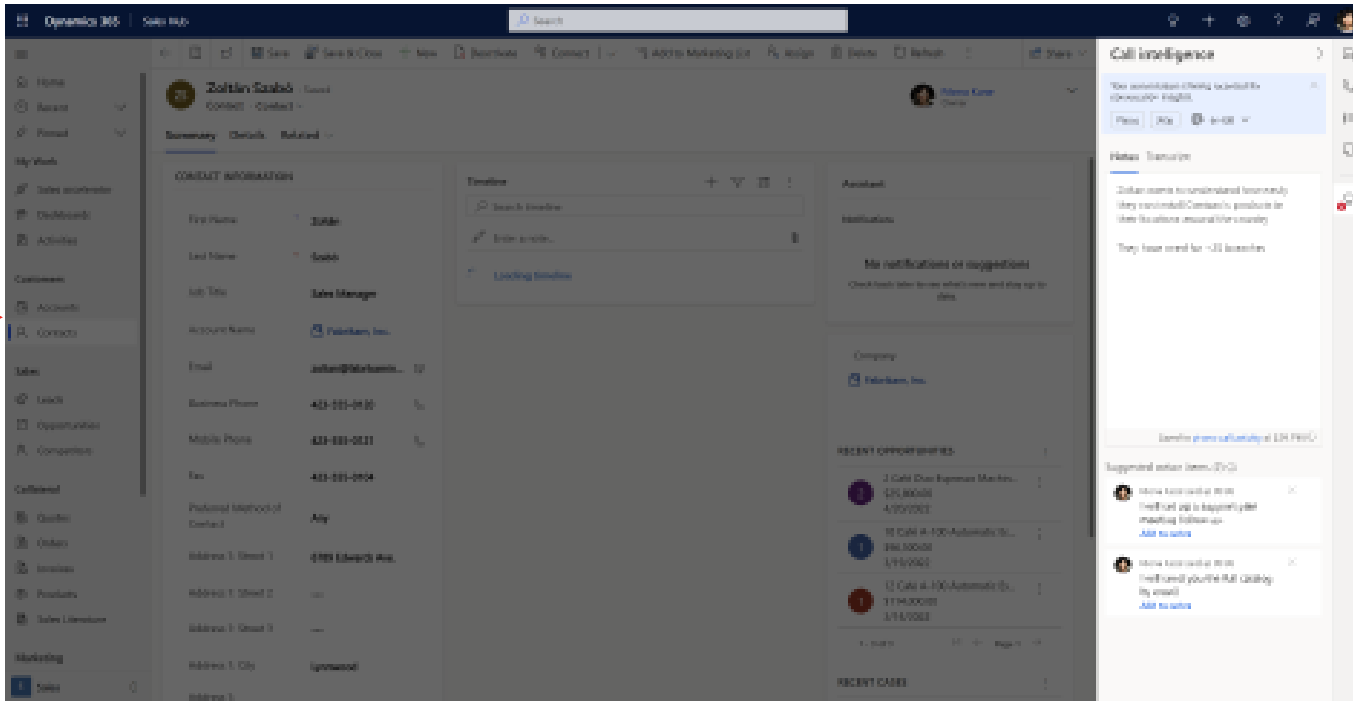
Save Close

Sales - Revenue intelligence

Item	N / U	Deadline	Benefits / Observations
Configure forecasts for multiple business units		Jul/2023	As an administrator or forecast manager, you'll be able to: - Configure forecasts based on a business unit, which allows your sales team to monitor and track the progress of each business unit separately. - Restrict the forecast only to the sales team in that business unit. As a seller, you'll be able to: - See the forecast for your business unit and make informed decisions to meet or exceed your quotas. - Get a macro and micro view by monitoring your BU forecast and then drill down to your forecast to see how you're contributing to the BU forecast.
Enhanced pipeline management with distraction-free and customizable side panel	Update	Jul/2023	With these enhancements, you can: - Make the most of the space on their side panels and have more room to work with. - Hide or display BPF and header on the side panel at any time with ease. - Freedom to customise their side panel by a click to increase the width of side panel. - Filter the opportunities in the underlying chart and grid on clicking the KPIs. - Navigate to main form with a single click on hovering on the grid row and an overflow menu for in context actions.
Personalize opportunity pipeline view with your default metrics and side panel form	Update	Jul/2023	With this feature: - Administrators can default out-of-the-box metrics in pipeline view for sellers and set a default form to be displayed in the side panel. - Sellers can customize the default metrics to choose their specific needs.

Sales - Sales engagement

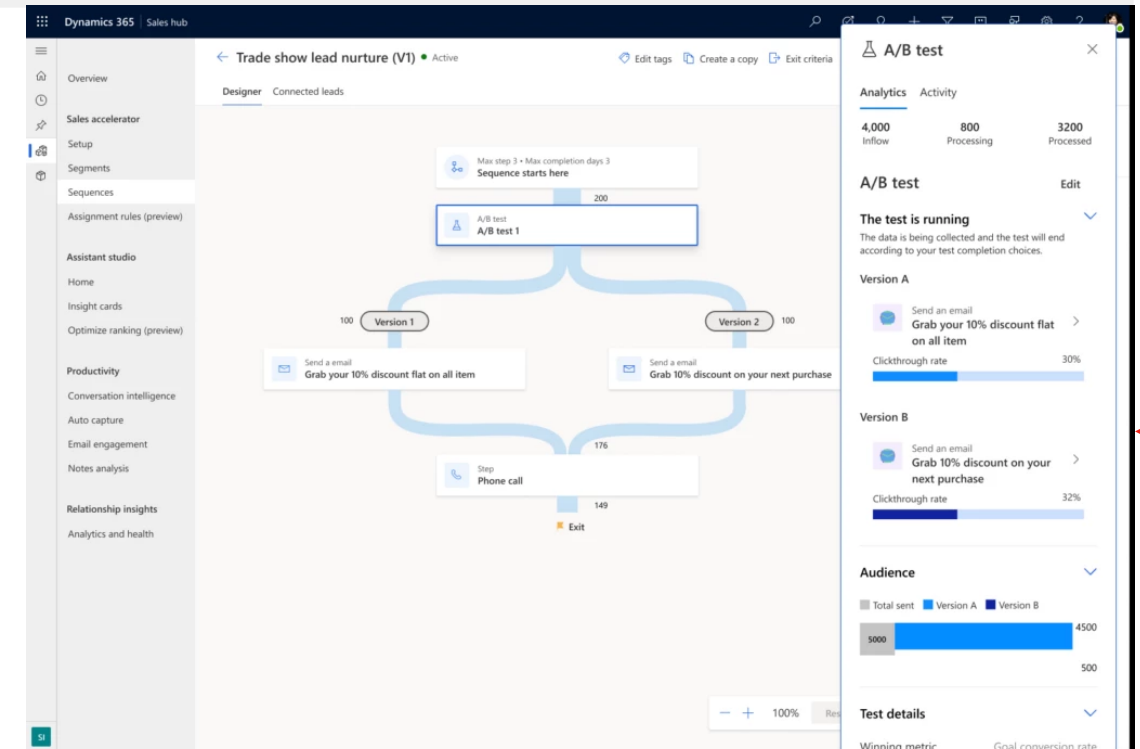
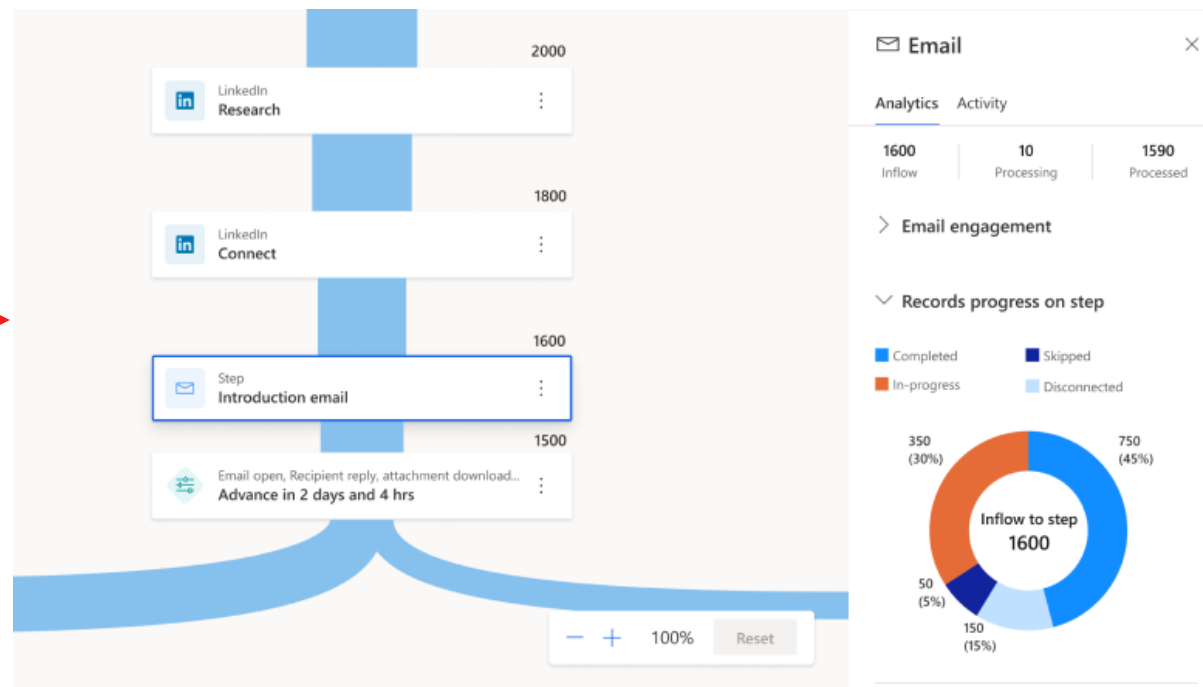
Item	N / U	Deadline	Benefits / Observations
Get insights for calls made through third-party softphones from Dynamics 365		Jul/2023	As an administrator, you can: - Configure conversation intelligence for the third-party telephony providers or softphones used by your sellers. As a seller or sales manager, you can: - Get real-time conversation intelligence, business insights, post-call reporting, and coaching tools for phone calls made through Dynamics 365 using third-party telephony providers or softphones.
Connect your own provider to send text message from Dynamics 365 Sales	Update	Jul/2023	The key capabilities are: - Enabling support to configure custom providers as part of SMS set up. This will also include support for configuration of Azure Communication Service as a provider. - Ability to add multiple numbers as part of a configured provider. - Assigning an added number to a user or a team.



The screenshot displays the Dynamics 365 Sales interface. On the left, a navigation pane shows various modules like Home, Recent, Forecast, and My Work. The main area shows a contact record for 'Zoltan Szabo' with details such as First Name, Last Name, Job Title, and various phone numbers. A 'Call intelligence' overlay is visible on the right side of the screen, showing a transcript of a call and suggested next steps. The overlay includes a search bar, a list of recent opportunities, and a section for suggested next steps with a 'Add to notes' button.

Sales - Sales engagement

Item	N / U	Deadline	Benefits / Observations
Improve process efficiency using sequence insights	Update	Jul/2023	This capability will enable sales engagement managers to identify the inefficiencies within a sequence to refine for greater impact. This capability helps SEMs: - Monitor the inflow and outflow of every step to identify ways to improve the steps for better sales outcomes and sequence performance. - Drill down details to help identify changes to drive efficiency and effectiveness. - Identify deviations from the process to find areas to focus on.
Utilize A B testing in sequences	Update	Jul/2023	With sequence testing, you can: - Experiment with different versions of the subject line or entire email content. - Control distribution of email versions. - Select the winning metric (open rate or click rate). - Automatic winner determination with statistical significance.



Sales - Sales engagement

Item	N / U	Deadline	Benefits / Observations
Navigate to new records faster with sales accelerator form load updates	Update	Oct/2023	When a seller selects sales accelerator and navigates across worklist items, the overall application performance should be easy and quick to move through. As a part of this capability, the underlying entity record form loading and navigation model will be upgraded to reduce the loading time within Sales Accelerator Workspace.
Engage with your Customers using SMS conversation	Update	Jul/2023	The key capabilities that your sellers will be able to use as part of this feature include: - Admins will be able to assign specific numbers to any user/team for SMS. - Receive customer responses for SMS sent and revert to build an ongoing conversation. - Send and receive SMS from all relevant Dynamics 365 Sales entity forms. - Get real-time notifications for incoming SMS.

The screenshot displays the Dynamics 365 Sales application interface. On the left, the 'My worklist' sidebar shows a list of leads and tasks. The main area displays the lead record for 'Devon Lane'. Key sections include:

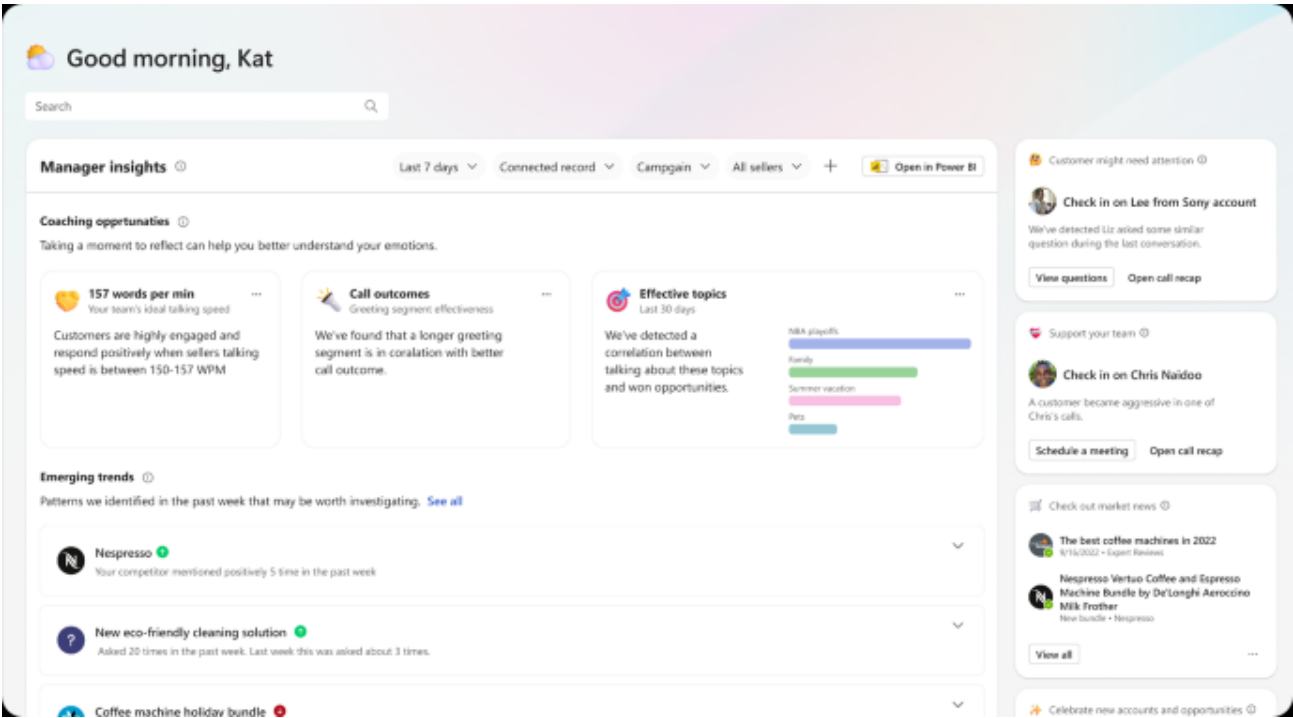
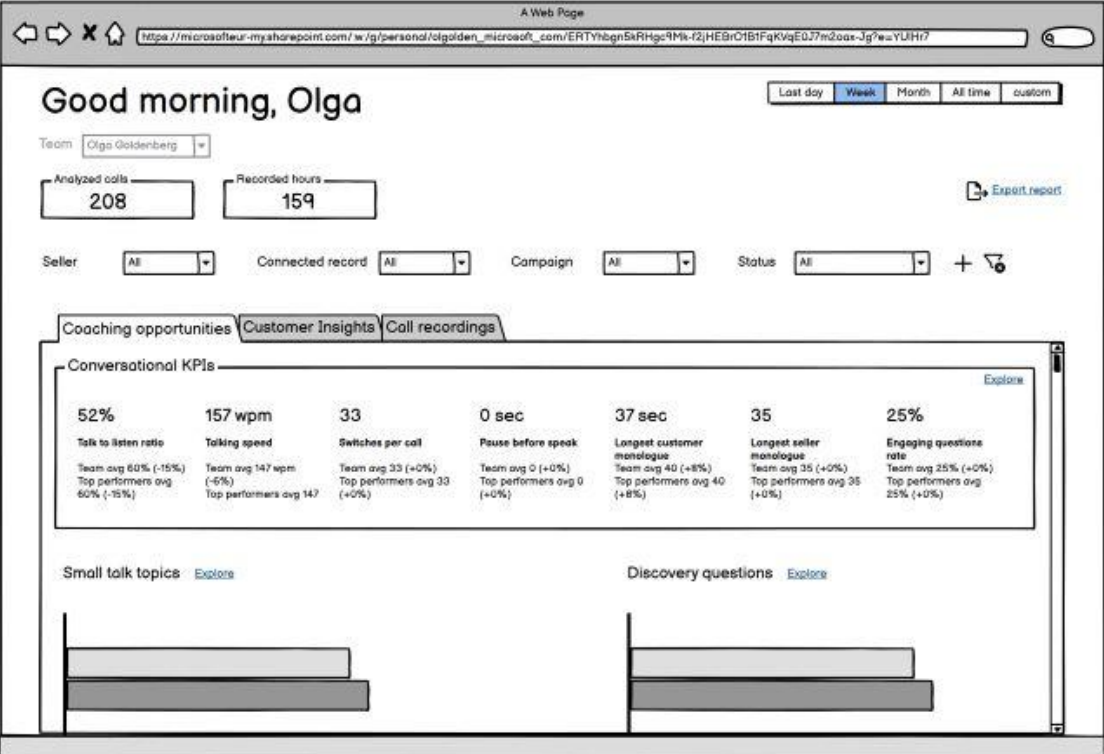
- ACCOUNT INFORMATION:** Fields for Name, Contact, Last name, Purcher, Currency, Budget, and Description.
- Up next:** A task list with 'Prepare lineup doc' due by 10:00 AM.
- Lead score:** A score of 88, Grade A, with a 'Improving' trend.
- Timeline:** A list of activities, including emails and tasks, with a search bar.
- Right Panel:** A chat window for 'Regina Murphy' showing a message about a 20% discount offer.

Sales - Sales engagement

Item	N / U	Deadline	Benefits / Observations
Redact sensitive personal data from customer calls		Sep/2023	As an administrator, you'll be able to: - Enable the feature so that sensitive information will be redacted in all future calls As a seller, you'll see, - Sensitive information related to credit cards is redacted from call summaries, transcripts, notes, and action items.
Work in Focus mode with Advanced filtering and view management capabilities		Sep/2023	The functionality will allow your sellers to choose and work in the layout that works best for their use cases. The key capabilities will include: - Additional filtering based on advanced filter query and save as custom views. - Customize the Worklist card to surface relevant fields. - Manage and share views from the view picker.

The screenshot displays the AlfaPeople Sales engagement interface. On the left, a sidebar shows a list of recent calls with details like contact names (e.g., Babak Shammis, Cassandra Dunn), timestamps, and brief descriptions. The main area is divided into two sections: a top section for an active video call titled 'Intro meeting' showing participants Alberto Burgos and Daisy Phillips, and a bottom section for a chat window. The chat window displays a transcript of the call, including a recap of key points and follow-up actions. The interface is clean and professional, with a focus on managing sales interactions.

Item	N / U	Deadline	Benefits / Observations
Leverage manager dashboards to coach sellers		Sep/2023	Managers can stay in touch with their field and sellers using the new manager insights dashboard for conversation intelligence. In addition to the existing SCI dashboard functionality, as a sales manager, you'll be able to view: - Customer sentiment correlation with keyword and competitor mentions. - Conversation style correlation to deal outcomes. - Conversational KPI's over time. - Holistic view of sellers' performances, as well as insight into conversation patterns that close deals. - Messaging performance in the field and customer perceptions of the competitive landscape. - Sales-oriented filters such as, call time and length, seller, connected record, connected record status, campaign, and more.



Sales - Copilot

Item	N / U	Deadline	Benefits / Observations
Follow up on emails using recommended actions	Update	Oct/2023	With this feature, sellers will be able to: - View suggestions to create follow-up tasks based on the content in an incoming email in Dynamics 365. - View the follow-up tasks in the Copilot pane. - Get reminders to complete tasks.
Stay on top of your lead with AI-generated lead summary	Update	Oct/2023	With these enhancements, you'll be able to: - View enriched data for leads with data from Dynamics 365 Marketing and Customer Insights. - Identify existing contacts and accounts for a lead. - Experience improved lead qualification. - Map the lead to one opportunity or multiple opportunities. - Capture product information, budget, and closure dates.
Stay updated with contextual news within Copilot chat	Update	Oct/2023	With this feature, sellers will be able to: - View the latest news about an account or company contextually within Dynamics 365 Sales, curated from Bing. - Trigger the 'Get latest news' command from the Contacts or Opportunities page to view the latest news about the associated account.

Sales - Copilot

Item	N / U	Deadline	Benefits / Observations
Gear up for your meetings using AI-generated preparation notes	Update	Oct/2023	With this feature, sellers will be able to prepare better for their meetings with all the essential information at hand. Sellers will be able to: - Get a summary of the latest interactions with the contact including notes, emails, and previous meeting summaries. - Search for the latest and relevant news about the account. - Search the system for relevant information such as similar opportunities. - Get a summary of your important documents.
Stay on top of your deals with AI-generated opportunity summaries	Update	Oct/2023	With this feature, sellers will be able to: - View the AI-generated summary of an opportunity in a reader-friendly format. The summary includes an overview of the status and progress of a potential sale or deal. It provides a snapshot of where the opportunity stands in the sales process, how likely it is to close, and the potential revenue it could generate. - View the highlighted changes, which indicate the changes since the last sign-in and the degree of importance, helping you pay close attention to the most critical changes.

The screenshot shows the Dynamics 365 Sales Hub interface for the '5 Café BG-1 Pro Grinders for Northwind Traders' opportunity. The interface includes a 'My work list' on the left, a central 'Opportunity' view with tabs for Summary, Relationship Analytics, Product Line Items, Quotes, and Related. The 'Summary' tab is active, showing a '75 Grade B' opportunity score, a 'Steady' status, and a 'Purchase timeframe' of 'Unknown'. A 'Copilot' chat window is open on the right, displaying a summary of the opportunity and a list of recent activities.

The screenshot shows the Dynamics 365 Sales Hub interface for the '5 Café BG-1 Pro Grinders for Northwind Traders' opportunity. The interface includes a 'My work list' on the left, a central 'Opportunity' view with tabs for Summary, Relationship Analytics, Product Line Items, Quotes, and Related. The 'Summary' tab is active, showing a '75 Grade B' opportunity score, a 'Steady' status, and a 'Purchase timeframe' of 'Unknown'. A 'Copilot' chat window is open on the right, displaying a summary of the opportunity and a list of recent activities.

Sales - Sales execution and sales force automation

Item	N / U	Deadline	Benefits / Observations
Empower seller to proactively pick next prioritized record based on business rule	Update	Nov/2023	As a sales managers, you can: - Maintain assignment rules to queue up for self-assignments by sellers. - Prioritize items in the queue for self-assignment. As a seller, you'll be able to request to assign a number of leads and opportunities to yourself, and the system will allocate the top priority leads and opportunities as defined in the business rule.
Improve success rate of assignment rules with harmonized pipeline monitoring	Update	Dec/2023	As an administrator or sales manager, you can: - View key pipeline statistics for all the records in a given time period. - View records successfully processed. - View records that are errored out due to a technical or business rule issue. You'll clearly see the step at which it has errored out and the reason. - Manually process the errored records in background or perform a manual assignment of seller and sequence. - See patterns of errors to improve your assignment rules.



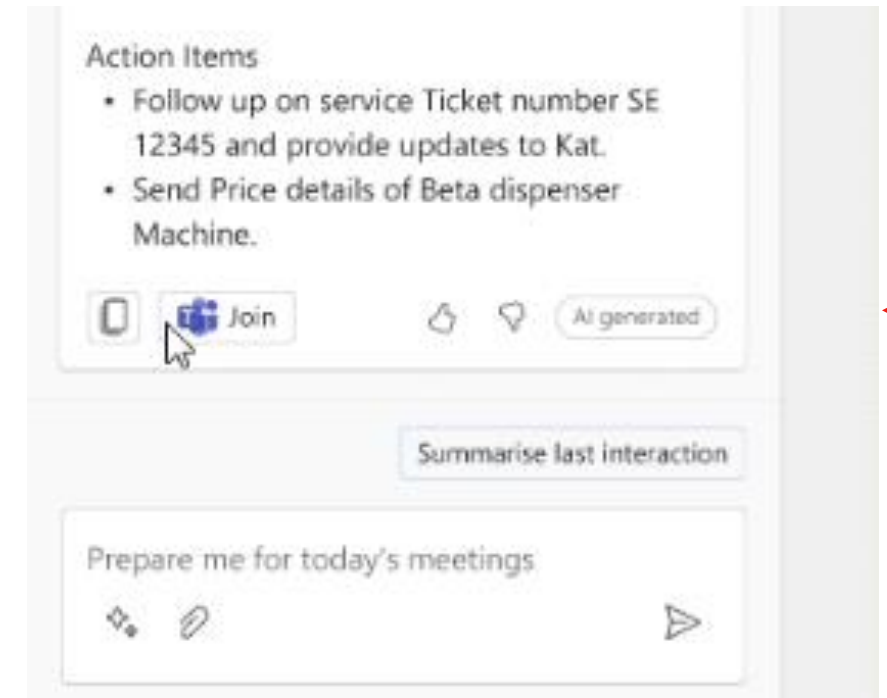
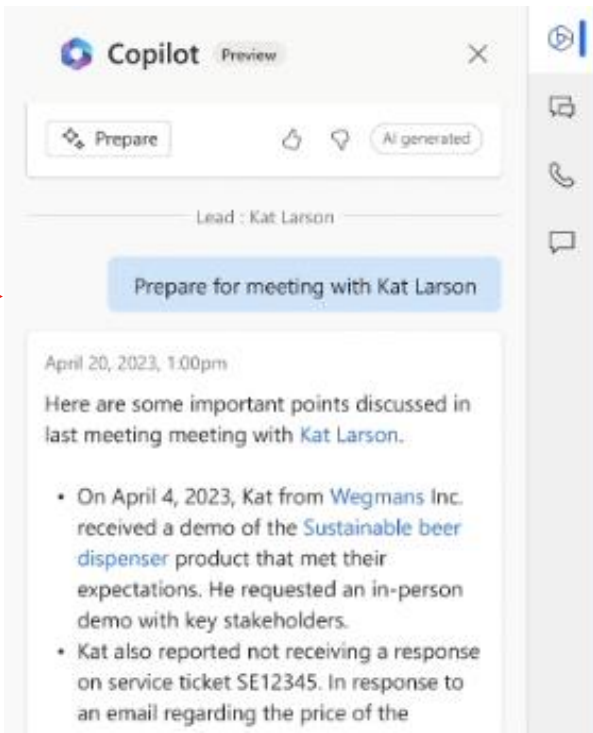
Sales Copilot

Ex Viva Sales

<https://www.microsoft.com/pt-br/microsoft-viva/sales>

Sales Copilot - Insights for sellers

Item	N / U	Deadline	Benefits / Observations
Summarized CRM data for customer meeting preparation		Aug/2023	Sellers spend a lot of time researching accounts and opportunities prior to engagements. This includes prospects that are new leads, existing engagements, or just the latest updates since last talking. Building trust is critical and unknown risks are liabilities. Viva Sales can keep sellers up to date with a 360-degree view, thereby reducing risk and improving sales success rates.
Seller can easily send follow-up email after a meeting	Update	Sep/2023	Sellers get an effortless way to complete follow-ups after meetings, so that they can streamline post-meeting tasks and focus on other sales activities. - Support Copilot for emails in compose mode within Viva Sales. - Suggest relevant content for a follow-up meeting. - Email content is augmented with CRM information. - Email content for follow-up relies on the sales conversation intelligence insights that were created for the meeting.



Sales Copilot - CRM connectivity



Item	N / U	Deadline	Benefits / Observations
Easily collaborate by mentioning sales records		Aug/2023	Microsoft 365 users commonly use @mention to engage with colleagues. Viva Sales will enable the ability to @mention sales data from CRM.
Enhance sales effectiveness with Teams meeting integration		Sep/2023	During a Teams meeting, sellers can: - Access the Viva Sales app. - View the connected CRM record. - Edit the connected CRM record. - Copy a link to the connected CRM record. - Open the connected record details in CRM.
Match email to lead entity	Update	Dec/2023	Supporting leads in Viva Sales means: - Sellers can match an email to leads that surface from the selected email, the same way the product does for contacts. - Sellers can schedule a meeting and match it to a lead. - Sellers can create new leads from external emails they receive from leads that are not already tracked in their CRM. - Sellers can make edits to fields in the lead entity from Viva Sales. - Admins have the ability to disable support for the lead entity.

Sales Copilot - Extensibility

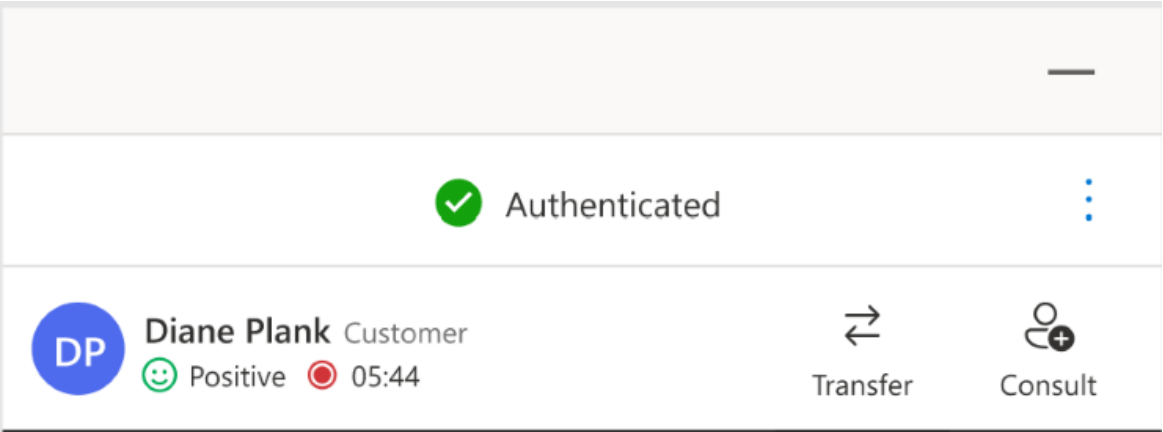
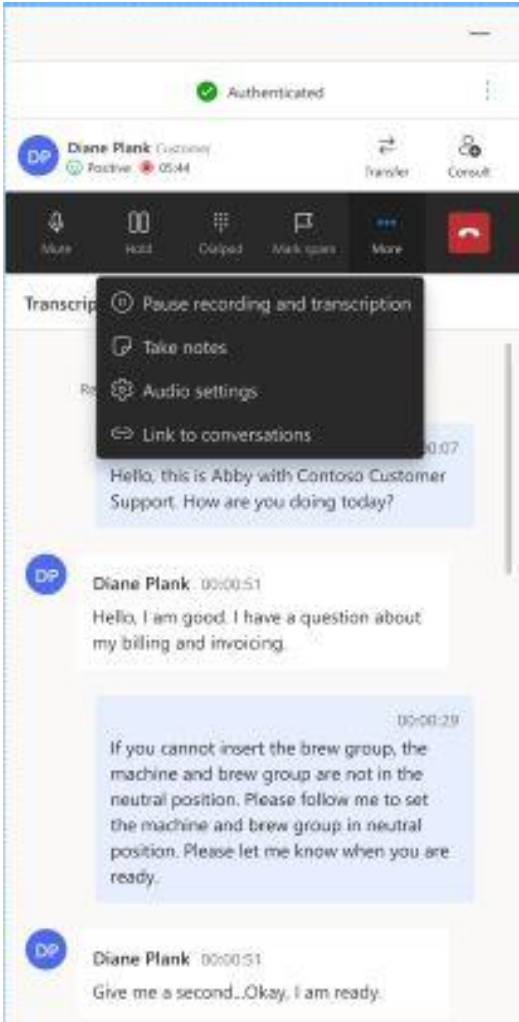
Item	N / U	Deadline	Benefits / Observations
Partner apps can consume conversation insights		Aug/2023	Get more out of your third-party sales enablement tools with Viva Sales extensibility. Easily connect apps to your Dataverse storage, allow them to consume conversation intelligence data generated by Viva Sales, and get their insights displayed for your sellers as part of the Viva Sales interface. To enable your sales enablement tools in Viva Sales: - Allow storing conversation intelligence data in Dataverse, using the Viva Sales admin controls in Teams. - Decide which type of conversation intelligence insights can be accessed by each partner. - Download your third-party partner's app from the AppSource or configure a Power Automate flow, and consent to their access to the data in Dataverse.



Services

Services - Agent experiences

Item	N / U	Deadline	Benefits / Observations
New call control user interface with intuitive icons for voice channel	Update	Oct/2023	The enhanced interface for Conversation control includes the following: - Bigger icons that occupy the standardized grid of the conversation panel. - Icons have a description to help agents understand the icon's intended action without hovering over it. - The Transfer and Consult icons are the most used icons and are available next to the customer's name.



Services - Agent experiences

Item	N / U	Deadline	Benefits / Observations
Improved search control to manage subjects	Update	Oct/2023	The enhanced search control for subjects will be available by default for all the out-of-the-box and custom forms, and will provide the following capabilities: - Easy-to-view subject tree hierarchy - Ability to search across parent subjects and child nodes - Highlight search results
Relate notes and create entities from notes	Update	Jul/2023	This feature provides agents the flexibility to: - Create an entity record from a note on the timeline. Entities that are currently supported are case, account, and contact. For example, agents can create a case from a note taken on an account or the contact timeline, depending on how it's configured by the administrator. - Relate the note from one entity record to another: Agents can transfer the note they took on an account or contact timeline to an existing case. Administrators can define the mapping of attributes to be copied from the note to the case that's created or associated with that note.
Improve agent productivity with modernized case grids	Update	Jul/2023	The improvements to the case grid enable you to perform the following actions: - Visualize information like priority and the origin channel with their icons and agents assigned to the cases with their avatars. - View key KPIs, such as case age, next SLA breach, and latest activity to make faster decisions. - Perform inline edits and use quick navigation to respond to the latest communication. For more information about this feature, go to Manage cases with case grid.
Conversation-centric agent experience for channels	Update	Oct/2023	This feature allows agents to personalize the size of the conversation control when using Customer Service workspace.

Services - Agent experiences

Item	N / U	Deadline	Benefits / Observations
Show agents their live chats and voice calls in the inbox	Update	Oct/2023	The following inbox enhancements are included: - Routing of live work items to the agent's inbox - View of live work items in a focused "live" section - Agent ability to see live chat and voice call views - Card layouts for live chat and voice that display key information

Dynamics 365 ▼ Omnichannel for Customer Service

omnichannel

Alton Stott
00:06:00 | 😐 Neutral

AS Alton Stott

Sure, I can help you. Please share model.

Customer, 9:36 AM
Model is X321

Clay Roddy, 9:37 AM
Please hold on for a moment while I get the details.

Customer, 9:37 AM
Sure.

Voice call
Video call

End

Services - Omnichannel



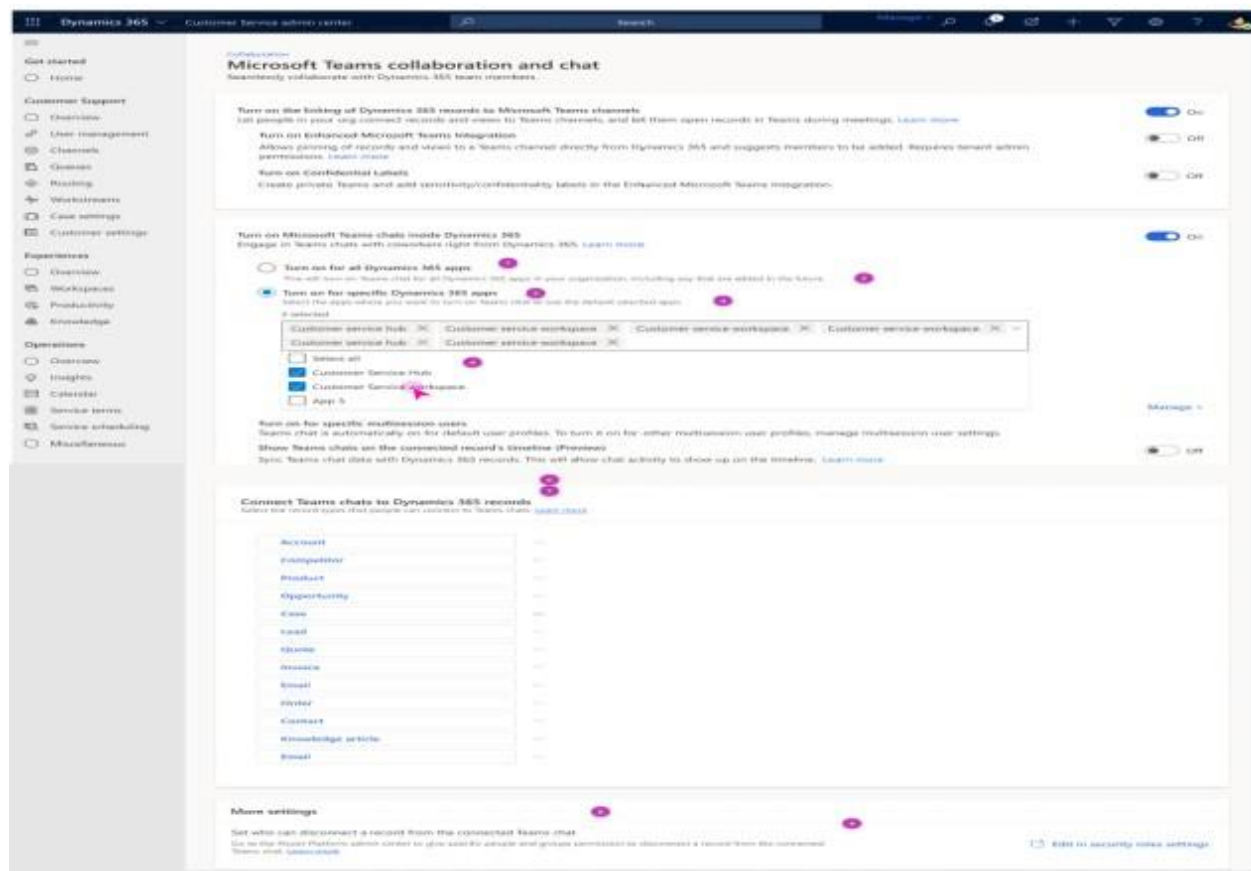
Item	N / U	Deadline	Benefits / Observations
Enable VDI support on Azure Virtual Desktop for Omnichannel Voice	Update	Dec/2023	By deploying the voice channel in Customer Service via remote desktops, businesses gain significant IT cost savings in providing standardized and secure agent desktops. It's also key for managing environments for remote workers efficiently as remote agents can be onboarded by simply providing an Azure Virtual Desktop setup and login to get started.
Monitor operational telemetry through Application Insights	Update	Oct/2023	By integrating Omnichannel for Customer Service with Application Insights, customers can now access self-serve information to monitor operational telemetry, troubleshoot issues, and understand the root cause to guide their mitigation plan. With this capability, customers use Application Insights to: - Access granular information for behind-the-scene operations. - Leverage configurability to create custom diagnostic events and log telemetry
Caller ID number support for outbound calls	Update	Oct/2023	Organizations are recommended to configure an outbound caller ID. If caller ID isn't configured, PSTN carriers might considering the outbound calls as fraudulent activity, and may drop them. Outbound caller ID configuration is also required to be compliant with laws in regions such as Australia and Europe. Also, the support of anonymous calling can be business-critical in privacy-sensitive areas. The outbound caller ID, company name, and numbers should be displayed to customers in the following scenarios: - During customer callbacks. - If an agent makes an outbound call. - If an agent transfers a call, for example, to an external number.
Enhanced security with OAuth 2.0 support in live chat	Update	Oct/2023	The following features will be available to provide enhanced security: - The Omnichannel administrator can configure live chat to use an OAuth 2.0 authorization code flow, and accept fields that are commonly used in an OpenID integration with most identity providers. - The web developer who implements the live chat widget on your website can pass an authorization code through as a part of the authentication flow. - You can set up a custom action in your Dynamics 365 instance to identify the contact related to the authorized user.

Services - Omnichannel

Item	N / U	Deadline	Benefits / Observations
Integrate Nuance IVR with Customer Service		Aug/2023	This feature enables organizations to improve customer satisfaction and contact center productivity by integrating Nuance IVR technologies with the voice channel in Dynamics 365 Customer Service. It includes Nuance IVR capabilities as is today and escalation to omnichannel agents with call intent, and transcript by leveraging existing telephony services to orchestrate the call between IVR and omnichannel using SIP operations. Use cases - Customer can perform self-service tasks with conversational IVR. - Customer intent and context for calling are precisely identified via industry-specialized natural language models. - Customers can be transferred along with custom-defined context data to an agent who is fully informed and ready to continue the conversation and resolve cases. - Call intent and customer data can be used for proper call routing. Benefits As we move forward into an AI world with increased speed and information, experiences have become more seamless and automated. This integration allows customers to achieve the following benefits: - Improve call center productivity by increasing the ratio of call deflections and self-service calls. - Reduce costs by optimizing the workforce. - Reduce average time spent on calls escalated from IVR to agents due to the availability of context.

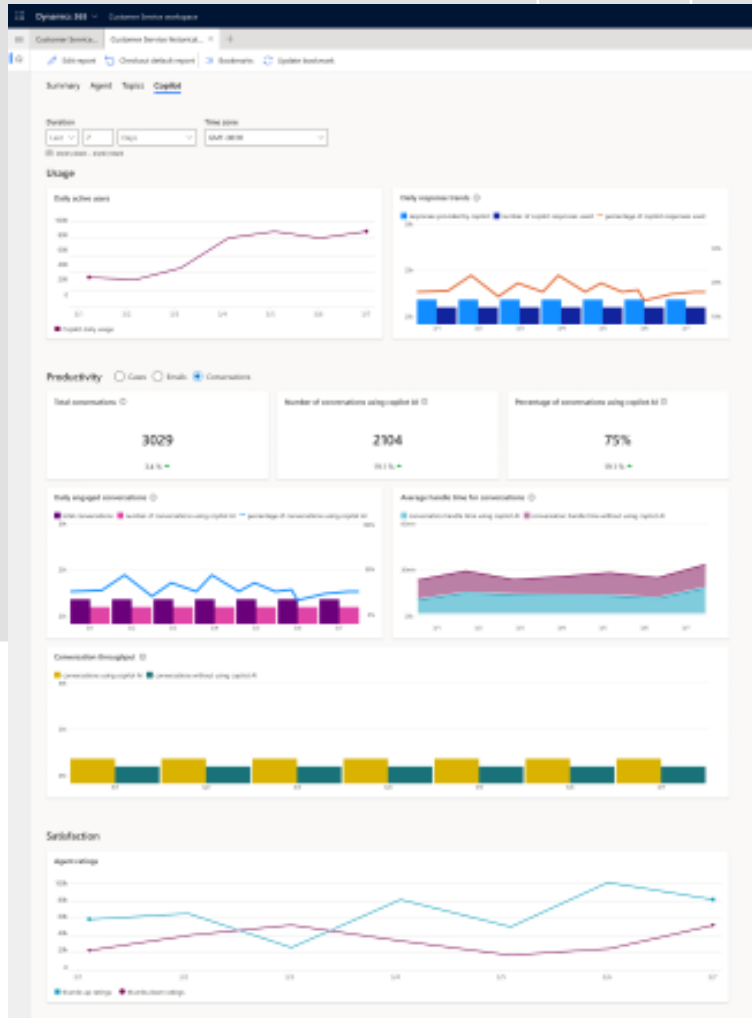
Services - Teams integration

Item	N / U	Deadline	Benefits / Observations
Collaborate using Teams embed chat without having to enable it	Update	Oct/2023	You no longer need a global tenant admin to turn on the Teams collaboration feature, embed chat. Embed chat will be on by default for all organizations in: - Customer Service Hub - Customer Service workspace for all out-of-the-box agent workspace profiles. For any custom profile, a Dynamics 365 admin will still need to turn on embed chat for it to show in the productivity pane. At any time, a Dynamics 365 admin can disable embed chat if needed.



Services - Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
View analytics for Copilot's impact on your business	Update	Oct/2023	The copilot report in Customer Service historical analytics empowers supervisors and customer service managers to identify the impact that Copilot helps create across their entire customer service operation. With Copilot, customer service agents are able to complete various tasks related to conversations, cases, and email more easily. The copilot report contains the following key metrics: - Daily active users: Displays the number of unique users who used any of the copilot features in the last day. - Percentage of copilot responses used: Displays the number of responses that Copilot generated across all copilot features, and the percentage of those that were actually consumed by the agents. - Agent ratings: Users are allowed to provide a thumbs-up or thumbs-down on Copilot when they use any of its features. The trend of the aggregated data provides an understanding of user satisfaction. The following metrics display two values that indicate when Copilot is and isn't used: - Average handle time for conversations: Displays the impact on the average handle time metric of conversations. - Average days to close for cases: Also known as case resolution time. - Average email response time: Displays the time taken to draft and send an email. These measurements help demystify for a customer service manager how their agents are interacting with the copilot capabilities and how they help improve their business.



Services - Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Summarize conversations with Copilot	Update	Oct/2023	Copilot in Customer Service lets agents quickly summarize conversations with generative AI. Copilot automatically generates summaries of chat and transcribed voice conversations. Customer Service agents get concise and accurate summaries of customer issues, troubleshooting steps, error codes, resolution attempts, and conversation outcomes. Agents can request copilot conversation summaries on demand and automatically when they join the customer conversation or end the conversation. Copilot eliminates the need for agents to sift through lengthy transcripts, enabling them to deliver exceptional customer service quickly.

 **Conversation summary** ✕

Customer ordered 2 units of filters by mistake and wants to return one unit. Customer is unable to submit a return request through the portal. Agent asked for customer's order number and initiated a return for one filter for the customer, notifying the customer they have 30 days to return the filter.

 Copy

AI generated  

 Type your message... 

      ...

Services - Copilot and AI innovation



Item	N / U	Deadline	Benefits / Observations
Summarize support cases with Copilot	Update	Oct/2023	Copilot in Customer Service empowers agents to quickly summarize case details, linked notes, emails, and conversation summaries with generative AI. Customer Service agents receive concise and accurate summaries of customer issues and important events throughout the case lifecycle including the participants who helped in addressing the customer issue. - A simple-to-read natural language summary - The ability for agents to regenerate a summary on demand - A simple and extendable case summary - Experience component to integrate with custom forms With Copilot, agents will be able to ramp up on the cases quicker and accelerate time to resolution for customers.

Details

Timeline

Related

Case summary

Customer Diane Plank reached out on April 1, 2023, via live chat about an issue with their Contoso Coffee Smart Brew 300. They tried turning it on and off again but it didn't help. They are part of the VIP warranty plan, account number ABC-123-Brew. They said they already looked on [blogs.contoso.com](#). On April 15, 2023, the customer emailed saying they have not heard any further updates from Contoso.

Copy

AI generated

Customer

Item	N / U	Deadline	Benefits / Observations
Unified routing - Route calls to agents who are idle for longest period	Update	Oct/2023	The Most idle assignment method for the voice queues, that assigns work items to agents who are idle (or least active) for the longest period, was previewed in October 2022. Now, this capability will be generally available with the name Least Active routing. The functionality remains unchanged from its public preview version. Least Active will be the default assignment method for new voice queues. The selection for existing voice queues will remain unchanged.
Administrator experiences - Leverage enhancements to the activity monitor tool		Sep/2023	This feature provides the following capabilities for administrators: - View the additional column in Activity monitor view, with suggested actions for each event, and resolve customer issues quickly. - Review recommendations and fix customer issues independently.

 Save
  Save and close
  Refresh

Queue name
 ← Assignment method

Create new

☐  **Highest capacity** Read-only
 Work items will be prioritized in the order they enter the queue. Among the agents who match skills, presence, and capacity, work will be assigned to the agent with the most capacity.

☐  **Round robin** Read-only
 Work items will be prioritized in the order they enter the queue. Among the agents who match skills, presence, and capacity, work will be assigned to agents in list-order, starting with the first agent on the list.

☒  **Least active** Read-only
 Work items will be prioritized in the order they enter the queue. Among the agents who match skills, presence, and capacity, work will be assigned to agent who is least active. [Learn more](#)



Field Services

Field Services - Optimize service operations

Item	N / U	Deadline	Benefits / Observations
Complete bookings while preserving end time	Update	Oct/2023	Simplify your users' experience by controlling when booking times are automatically updated.
Expedite service delivery with extended customer details	Update	Oct/2023	Capture manufacturer warranties, tag assets, and note location contact information to give frontline workers a comprehensive view of the asset they need to service, including where it is, if it's covered under warranty, and contacts where it's located.
Maintain customer facilities with enhanced capabilities	Update	Oct/2023	New location types allow organizations to better manage complex buildings, campuses, and factories and location properties enable service providers to capture and organize critical location information.

Building A - Saved Functional Location

General Assets and locations Related

Details

Name * Building A

Short name ---

Category  Office

Parent functional location ---

Cost center ---

Open date ---

Email address --- 

Primary time zone Eastern Daylight Time...

Address

Service address 120 S Main St
Smith Center
Kansas 66967
United State

Building A - Saved Functional Location

General Assets and locations Related

Details

Name * Building A

Short name ---

Category  Office

Parent functional location ---

Cost center ---

Open date ---

Email address --- 

Primary time zone Eastern Daylight Time...

Address

Service address 120 S Main St
Smith Center
Kansas 66967
United State

Field Services - Optimize service operations



Item	N / U	Deadline	Benefits / Observations
Manage frontline worker certifications	Update	Oct/2023	Managing frontline worker documentation is essential for maintaining a service-ready workforce. Organizations can track insurance, licenses, and certifications for frontline workers to ensure they can complete work at the quality customers expect and in compliance with legislation.

Building 15 insurance - Saved

Insurance

General Related

Details

Policy name	*	Building 15 insurance
Policy holder	*	 Adatum Corporation
Insurance carrier	*	 Humongous Insurance
Policy number	*	10005819
Start date	*	1/10/2022 
Expiration date	*	1/9/2024 
Description		---

Policy document

File



Open

Field Services - Optimize service operations



Item	N / U	Deadline	Benefits / Observations
Generate a work order from a quote	Update	Oct/2023	When a customer accepts your quote, you can automatically generate a work order with quote details and connect your sales and service activities.
Improved flexibility for booking status automation	Update	Oct/2023	Save time to duplicate work orders that require follow-up by returning them to an unscheduled state after completing a booking.
Deploy IoT solutions with simpler experience	Update	Dec/2023	The new ARM template tool eases the complexities of deployment with Azure IoT Hub: - A step-by-step template configuration guide for a seamless deployment experience. - Increased automation to reduce the manual effort required to connect to a Field Service environment after deployment. - Azure tags to organize and identify your Azure resources. - Allow existing IoT Hub instances to connect to Field Service without having to create a new IoT Hub instance.

Field Services - Empower frontline workers



Item	N / U	Deadline	Benefits / Observations
Performance, offline sync, and device memory improvements in Field Service Mobile application	Update	Jul/2023	This set of features includes: - Faster times to launch the app and load forms. - Faster synchronization of offline data. - Increased stability to minimize crashes or app freezing. - Improved memory management on iOS resulting in fewer errors and better user experience. - Improving offline form validation experience to prevent unexpected validation errors. - Offline experience improved by allowing internal APIs to fetch data from the server when a connected device is trying to access a record that is not found in the offline database. If network access is not available, a more specific error message will be shown to the user, informing them of the missing table in offline mode. These improvements roll out with incremental deployments over the course of 2023 release wave 1 and aren't tied to a specific release date.

Field Services - Resource scheduling



Item	N / U	Deadline	Benefits / Observations
Enable mouse scroll to change date-range granularity	Update	Oct/2023	Schedule board users can use a keyboard and mouse combination (Ctrl + scroll) and command keys to change the date range granularity on the schedule board. These shortcuts allow users to quickly move between data and time ranges without losing the context of where they are on the board.
Show bookings proportional to duration on multiday views	Update	Oct/2023	Determine a resource's availability and utilization quickly with an updated multiday view.
Work hours calendar supports multiple recurrences	Update	Oct/2023	Today, you can only have one work hour recurrence per resource. With the added capability of multiple recurrences, you can now unlock greater flexibility in your resource scheduling to meet business demands further while adjusting to the needs of your workforce for employee retention and job satisfaction.



Customer Insights

Customer Insights - Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Identify and eliminate data quality issues effortlessly with copilot	Update	Oct/2023	The data prep report, a copilot feature, gives you all the information you need to understand the overall quality of your data. It informs you which insights are suited to your data and what you need to do to improve your data. Specifically, it goes through the following steps: - Get an AI-generated summary of your data quality. - Assess your customer data and assign an overall data quality grade to provide detailed information on data quality issues, categorized by data quality pillar, severity of impact, and impacted insights features. - Assess your customer data to determine which predictions are ready to use. - Include actionable recommendations on how you can improve your data quality to maximize its insights-to-noise ratio.

Data prep report (preview)

Last updated: 2/16/23

Total issues: 10

 Critical issues: 7  Warnings: 2  Improvements: 1

Your data needs improvement

Review the data quality grade, insights which are ready to be generated, the issues present in your data, and then address the recommendations.

Overall data quality grade

The better the grade, the more insights you can run and the higher the quality of their output.



[Learn more](#)

Insights readiness

The following insights are ready or not ready to use based on your current data:

Predictions

- ☐ Customer lifetime value
- ☐ Customer sentiment analysis
- ☐ Product recommendations
- ☐ Subscription churn model
- ☐ Transaction churn model

☒ Ready to use ☐ Not ready to use

Segments

- ☒ Build your own
- ☐ Suggested segments

Measures

- ☒ Build your own
- ☐ From templates

[Learn more](#)

Data quality issues and recommendations

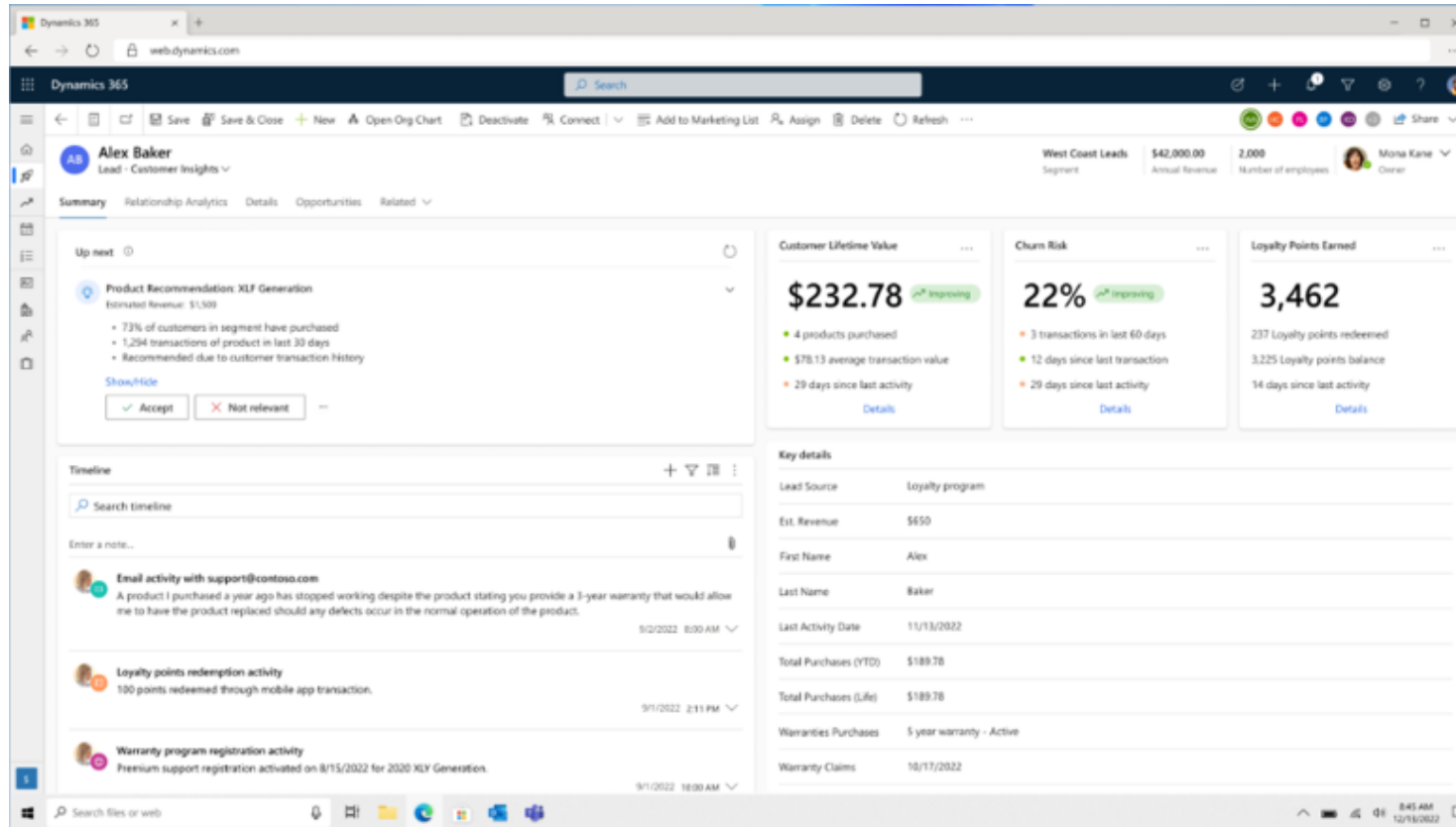
☒ Show only critical issues

Group by: Data quality pillar

 Search

Customer Insights - Unify sales and marketing

Item	N / U	Deadline	Benefits / Observations
Leverage customer insights in other business applications	Update	Dec/2023	Dynamics 365 Customer Insights makes it easy to create golden profiles and insights for your customers by unifying and enriching data from a variety of demographic, transactional, and behavioral data sources. - Every unified customer profile now has a direct relationship to its corresponding contact and lead records in Microsoft Dataverse and indirect relationships to other tables such as opportunity, accounts, and more. - Admins can augment customer records in model-driven apps, add insights from the corresponding customer profiles, and access the customer profile just like any other related table in Microsoft Dataverse. - Users can access customer profiles in Dynamics 365 applications. For example, marketers using Dynamics 365 Marketing can create segments of contacts or leads based on their customer lifetime value metric and add customer profile fields as dynamic content in messages even when targeting contacts or leads.



The screenshot displays the Dynamics 365 Customer Insights interface for a lead named Alex Baker. The interface is divided into several sections:

- Summary:** Includes a "Up next" section with a "Product Recommendation: XLF Generation" card, showing a bonus revenue of \$1,500 and a 73% purchase rate for customers in the segment.
- Customer Lifetime Value:** Displays a value of \$232.78, marked as "Improving". It lists 4 products purchased, a \$75.13 average transaction value, and 29 days since last activity.
- Churn Risk:** Displays a risk level of 22%, marked as "Improving". It lists 3 transactions in the last 60 days, 12 days since last transaction, and 29 days since last activity.
- Loyalty Points Earned:** Displays 3,462 points earned, with 237 points redeemed and a 3,225 points balance.
- Timeline:** A section for viewing and adding activities, including "Email activity with support@contoso.com", "Loyalty points redemption activity", and "Warranty program registration activity".
- Key details:** A table of lead information including Lead Source (Loyalty program), Est. Revenue (\$650), First Name (Alex), Last Name (Baker), Last Activity Date (11/13/2022), Total Purchases (YTD and Life), Warranties Purchases (5 year warranty - Active), and Warranty Claims (10/17/2022).

Customer Insights - Unify sales and marketing



Item	N / U	Deadline	Benefits / Observations
Get insights by automatically unifying your customer data from Dataverse	Update	Nov/2023	Dynamics 365 Customer Insights can automatically configure Dataverse entities out of the box and create a unified picture of your customers across these entities, with little to no manual configuration required. - Eliminate lengthy and costly configuration projects to automatically generate unified profiles from Dataverse entities, such as contact, lead, opportunity, and accounts. - Increase clarity by removing noisy, redundant, and duplicate data, using AI-assisted matching to reconcile customer records even when they don't share the same phone number or email address. - Empower your business users to make better decisions and personalize the customer experience by seamlessly making the insights from the unified profiles available in their business apps.



Power Platform



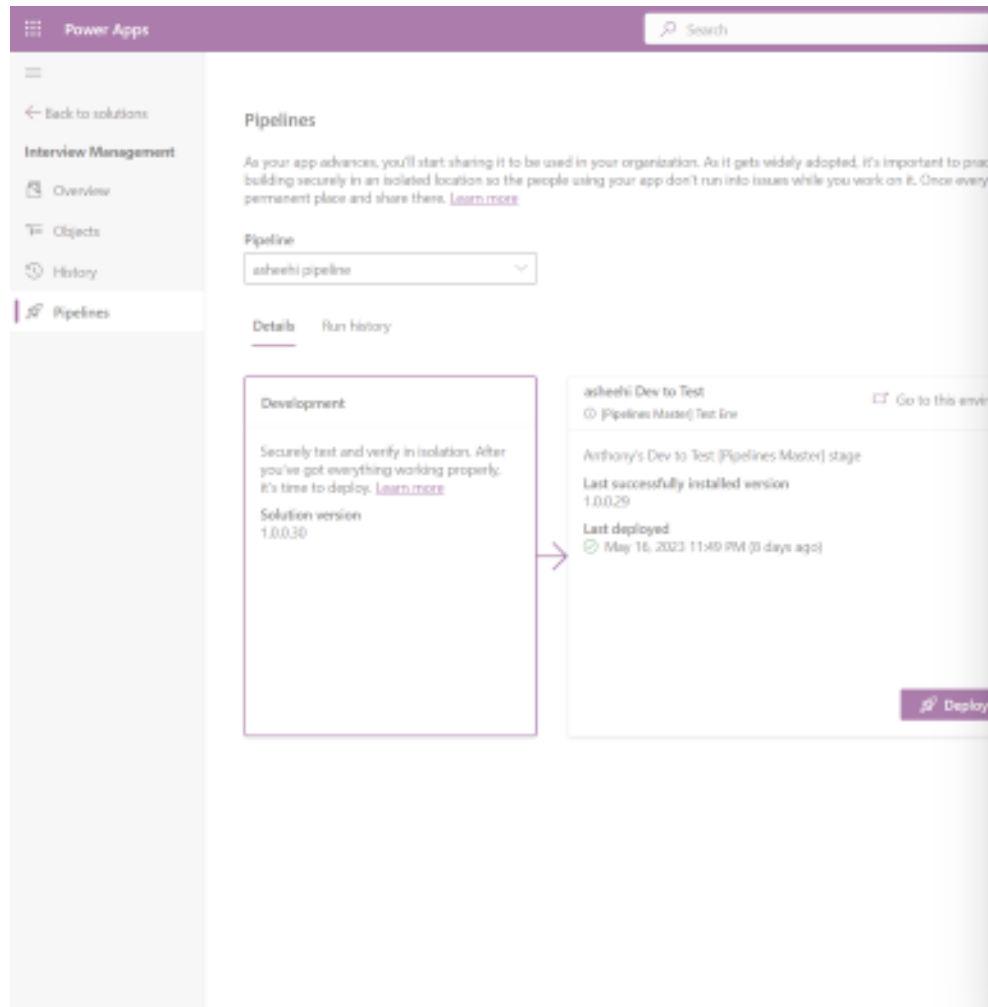
What's new in Power Platform



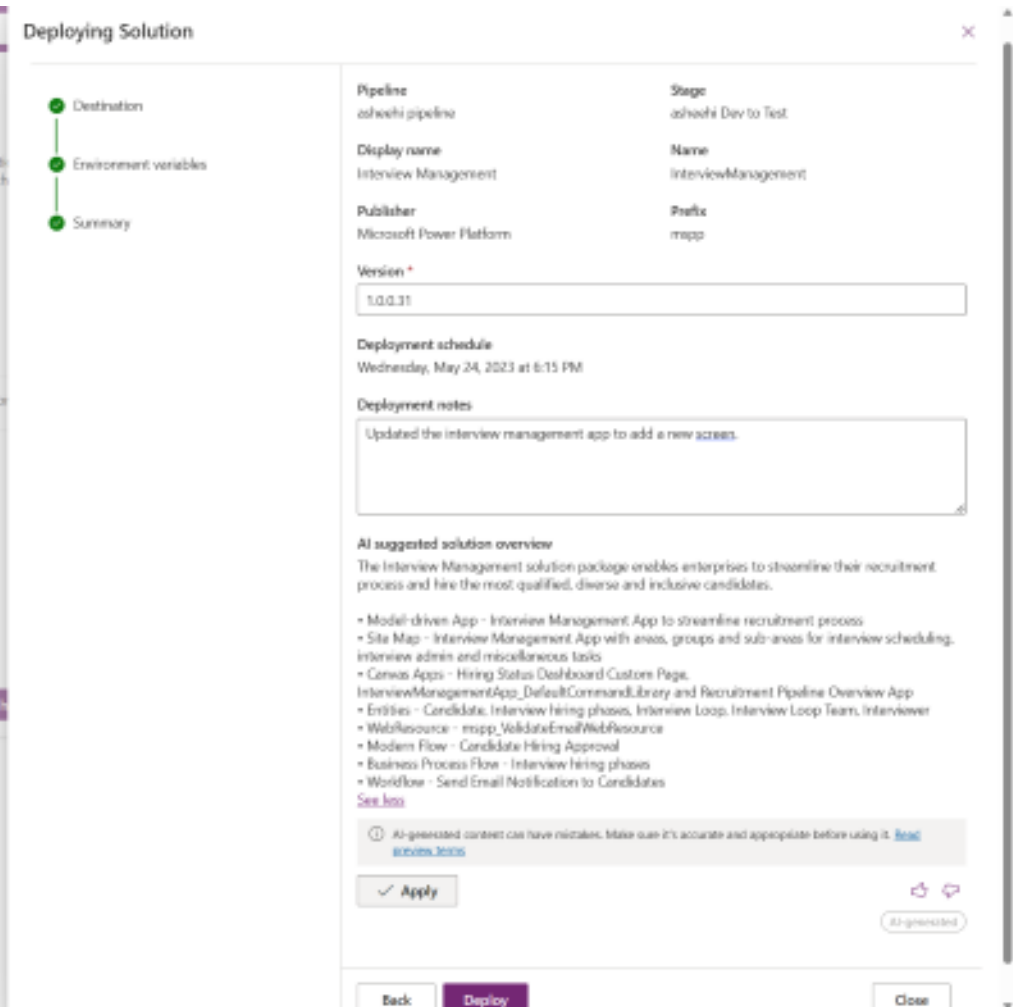
Power Apps

Power Apps - Copilot for makers and users

Item	N / U	Deadline	Benefits / Observations
AI-generated deployment notes in pipelines for Power Platform	New	Aug/2023	Makers can use the AI-generated solution overview in their deployment notes by clicking Apply on the final Summary page of the deployment. Once clicked, the AI content will be appended to the deployment notes to prevent deletion of any existing notes the maker wrote, and allow for any changes to be made.



The screenshot shows the 'Power Apps' interface with the 'Pipelines' section selected. On the left, a sidebar contains 'Back to solutions', 'Interview Management', 'Overview', 'Objects', 'History', and 'Pipelines'. The main area is titled 'Pipelines' and includes a dropdown menu for 'Pipeline' set to 'asheehi pipeline'. Below this, there are tabs for 'Details' and 'Run history'. The 'Details' tab is active, showing a 'Development' section with instructions on testing and deploying. A purple arrow points from the 'Development' section to the 'Deploy' button at the bottom right. The 'Deploy' button is labeled 'Deploy to environment'.



The screenshot shows the 'Deploying Solution' dialog box. On the left, a progress bar indicates the steps: 'Destination', 'Environment variables', and 'Summary'. The 'Summary' step is currently active. The main area displays deployment details for the 'asheehi pipeline'. It includes fields for 'Pipeline', 'Stage', 'Deploy name', 'Name', 'Publisher', 'Prefix', and 'Version'. The 'Version' field is set to '1.0.0.31'. Below these fields, the 'Deployment schedule' is listed as 'Wednesday, May 24, 2023 at 6:15 PM'. The 'Deployment notes' section contains the text 'Updated the interview management app to add a new screen.' and a link to 'Learn more'. The 'AI suggested solution overview' section provides a detailed description of the 'Interview Management' solution package, including its purpose and a list of components. At the bottom, there is a warning about AI-generated content and an 'Apply' button. The dialog also features 'Back', 'Deploy', and 'Close' buttons at the bottom.

Power Apps - Efficient maker experiences



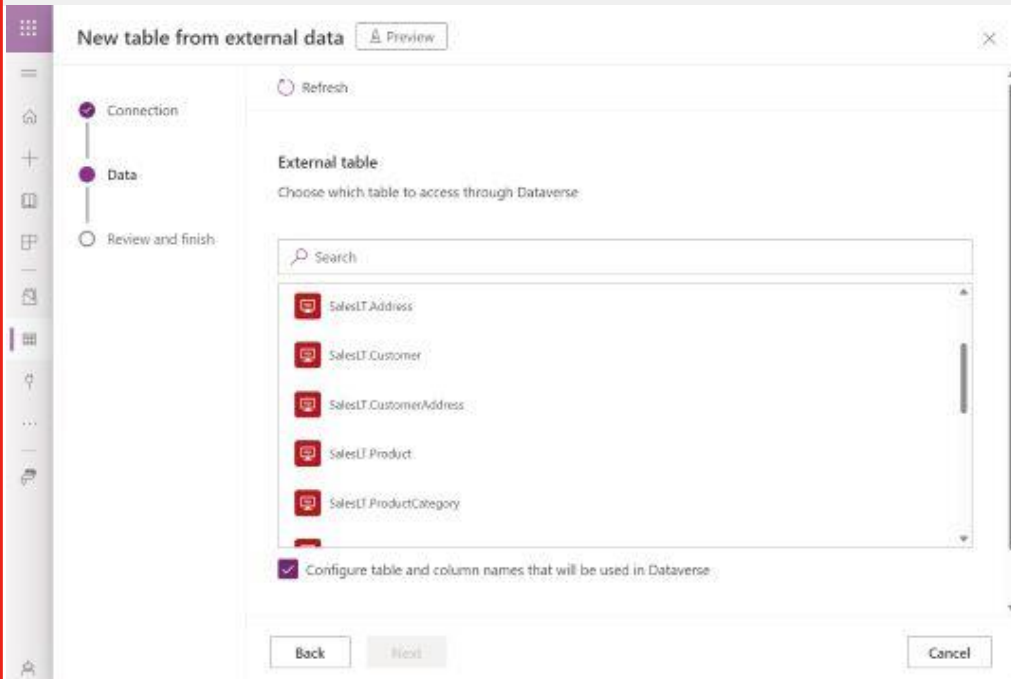
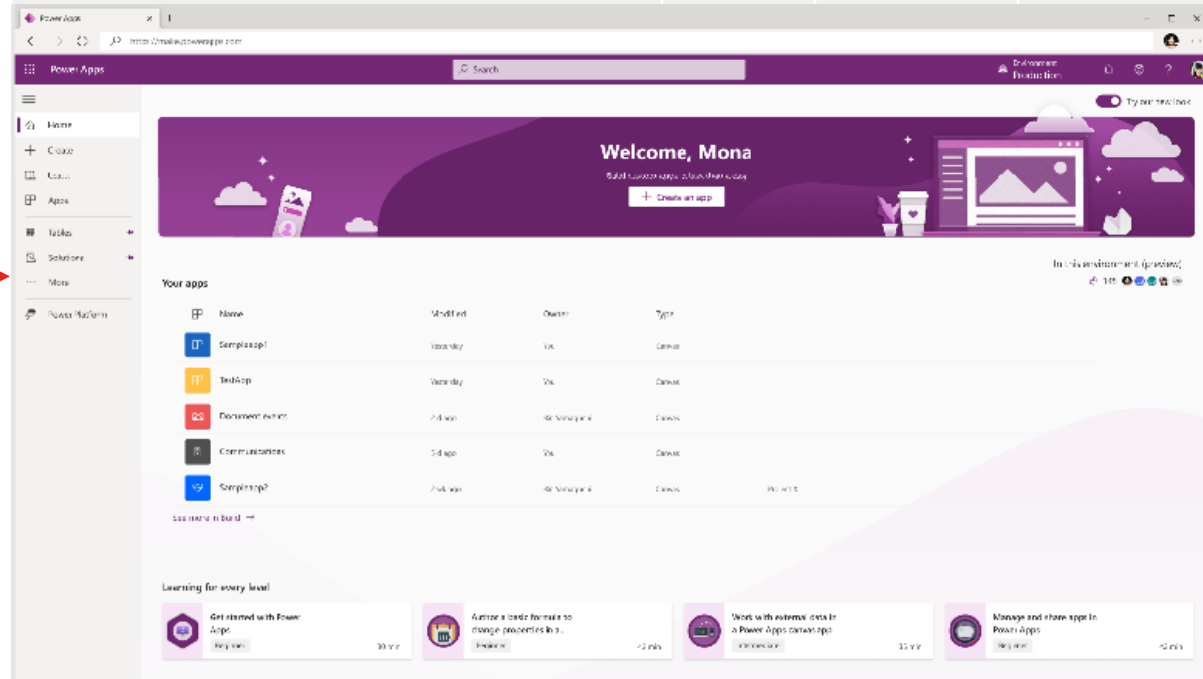
Item	N / U	Deadline	Benefits / Observations
Experience Copresence in Canvas Studio	Update	Jul/2023	Multiple makers can now access an app in Power Apps Canvas Studio together and discover each other's copresence. Copresence provides the following benefits: - Only one editor allowed, but other makers can now access app in the Power Apps Canvas Studio in read-only mode. - Icons and names of people who have the app open are displayed with indicators to show who is editing the app and who's viewing it. - Read-only labels are displayed to indicate to makers that they're in read-only mode - While in read-only mode, makers will receive notification for saved changes made from the current editor. Then, they'll be prompted to refresh the app to stay on the latest version so as not to lose your work or overwrite other's work later.
Power Fx supports direct calls to Dataverse actions	Update	Sep/2023	Power Apps will support the ability to directly call synchronous Dataverse actions without having to create a Power Automate Flow. For apps that need to call many Dataverse actions, this will provide a significant performance boost. It'll be easier to directly call Dataverse actions from the new Power Fx language element Environment. The Environment object allows authors to dot into actions available in the environment.
Enhance delegation for Updatelf and Removelf		Aug/2023	This feature will allow Power Fx to delegate the Updatelf and Removelf functions to be executed on Dataverse. They won't be subject to delegable limits. It will allow the delegation of greater than 2,000 records.

Power Apps

Item	N / U	Deadline	Benefits / Observations
Efficient maker experiences - Secure implicit connections	Update	Aug/2023	Secure implicit connections will provide several new security features to prevent the reuse of a connection created for Power Apps: - The connection is no longer distributed with the application. The app talks to a proxy connection that is created for the application. Other end-user authors no longer have access to the connection used in the app. - The proxy connection will only communicate with the app for which it was created. - An app published with secure implicit connections will only allow queries that are defined in the app. It won't accept any other queries. Existing applications with implicitly shared connections can convert them to use secure implicit connections by republishing the app. Any existing connections previously published with the app must be disallowed.
Enable enterprise scale - Direct new makers to their own developer environments	Update	Oct/2023	Environment routing is a feature of Managed Environments that enables Power Platform admins to direct new makers to their own developer environments when they go to the maker portal page, instead of the default environment.
Enable enterprise scale - Power Apps can make direct calls to SQL Server stored procedures	Update	Oct/2023	Customers can directly call both bound and unbound actions in Microsoft Dataverse using Power Fx. Customers can add an 'Environment' object to their data sources and then access Dataverse actions off of the environment object.

Power Apps - Efficient maker experiences

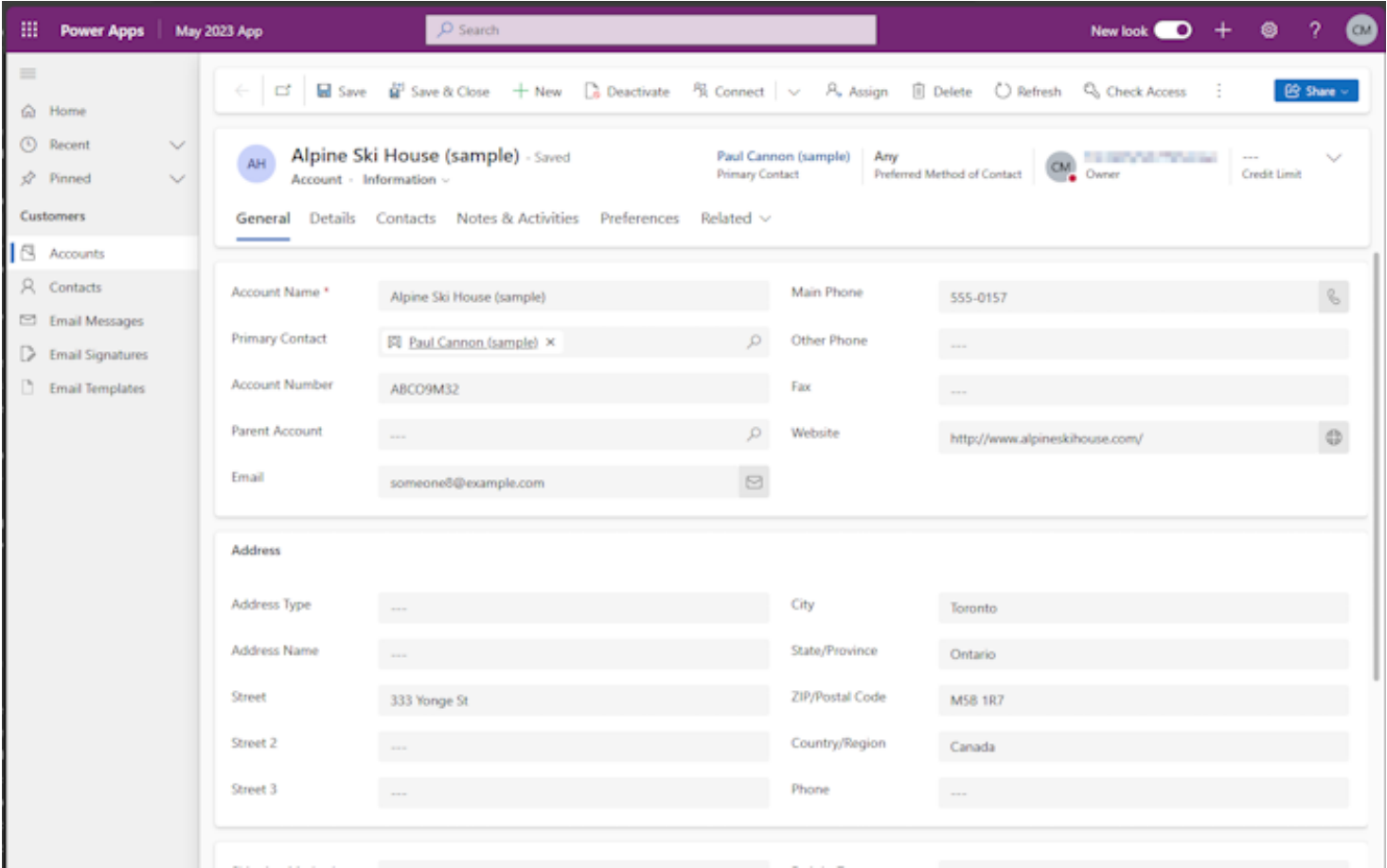
Item	N / U	Deadline	Benefits / Observations
Experience the new Power Apps home page		Sep/2023	The Power Apps home page now has improved performance and the following enhancements: - Modernized apps list - Improved navigation experience - Just in Time (JIT) developer environment provisioning (if allowed by admin) - Integrated banner that includes the Copilot experience - More options when creating an app including updates to existing create experiences
Create virtual tables easily in Maker Portal		Sep/2023	By introducing a guided, step-by-step wizard in Power Apps , all makers can quickly and easily create virtual tables in minutes. Existing virtual table users will find a dramatic decrease in clicks, time, and resources needed to create virtual tables. Virtual tables will give makers new ways to use Dataverse to read and update data sourced in SQL and SharePoint. They can bring these datasets into model-driven apps and create new relationships with existing data.



Power Apps - Building modern apps



Item	N / U	Deadline	Benefits / Observations
Enjoy the new look and feel for model-driven Power Apps	Update	Oct/2023	Give your model-driven app a fresh, new look by trying out the latest layouts, themes and colors. Users can opt-in by selecting the Try the new look option. Once enabled, model-driven apps use the latest Microsoft Fluent Design-based elements as they're released. Users can switch back at any time. Microsoft Fluent is an open-source, cross-platform design system to create engaging product experiences—accessibility, internationalization, and performance included.



Power Apps - Modern user experiences

Item	N / U	Deadline	Benefits / Observations
Build canvas apps by using new and refreshed controls		Sep/2023	The new look and feel for canvas apps will be an opt-in feature for makers that will enable Fluent-based designs, theme, and updated styling like fonts, colors, borders, shadows, and more.
See which colleagues are viewing the same records as you	Update	Aug/2023	This feature applies to all entities, including custom tables, and is enabled by default. This feature uses the Azure Fluid Relay Service (FRS), which must be available in your region. For more information, go to Azure Fluid Relay Service availability. Note An admin can turn this feature off in the Power Platform admin center by going to the environment settings, viewing the features, and turning off the Show other people when they're using the same form feature, which is found under Collaboration.
Power Apps can make direct calls to SQL Server stored procedures	Update	Oct/2023	Customers can directly call both bound and unbound actions in Microsoft Dataverse using Power Fx. Customers can add an 'Environment' object to their data sources and then access Dataverse actions off of the environment object.



Governance, Adm and Dev

Governance, Adm and Dev - Power Platform analytics

Item	N / U	Deadline	Benefits / Observations
Discover analytics reports more easily	Update	Jul/2023	Experience a new and improved user interface in the Power Platform admin center for interacting with Power Apps and Power Automate analytics reports. The new and improved experience helps you navigate across tenant and environment-level reports more easily.
See how Power Automate and Dynamics 365 Customer Service applications are performing		Sep/2023	This feature extends the Data Export feature in the Power Platform admin center so that it delivers Power Automate and Dynamics 365 Customer Service signals to Application Insights in Azure Monitor. In addition to the new signals, customers may filter specific Power Automate signals, such as cloud flow runs, triggers, and actions. Additional enhancements to the feature include: - The ability to provide a friendly name to an Application Insights export package. - Additional columns with sorting capability when running the Application Insights Management page.

Power Apps analytics

[Learn more](#) · [Who can view these reports?](#)

[Overview](#) [Environment View](#)



Enable tenant level analytics

This feature aggregates data from environments across all regions in your tenant and copies it into the default environment region for tenant-level reporting. The data will include aggregated metrics, user object IDs, and names of resource, such as apps and flows. [Learn more](#)

Enable

Governance, Adm and Dev

Item	N / U	Deadline	Benefits / Observations
Power Platform user experiences - Use PowerShell scripts to remove stale System Administrator role assignments in bulk		Aug/2023	With this feature, you can use PowerShell scripts to remove stale System Administrator role assignments in Dataverse environments in bulk. Specifically, you'll be able to: - Review a list of users assigned to the System Administrator role and decide who must be removed from the role. - Execute PowerShell commands to remove users from the System Administrator role in one or more environments. The PowerShell scripts are available in GitHub.
Power Platform data policies and governance controls - Manage Customer Lockbox in sovereign clouds	Update	Sep/2023	There are three core capabilities included with Customer Lockbox for Power Platform: - For the duration of the preview, customers can configure a lockbox policy that will apply to customer data stored in all environments in the tenant. - On the rare occasion that Microsoft needs to temporarily access data in those lockbox-protected environments to resolve a critical issue, administrators will be notified. Admins can visit the Power Platform admin center to approve or reject the data access request. - Actions related to accepting, denying, or expiration of a lockbox request are recorded automatically in Microsoft 365 Defender for customer audit.

Governance, Adm and Dev - Licensing and reporting



Item	N / U	Deadline	Benefits / Observations
Get more visibility into license consumption of Dynamics 365 finance and operations apps	Update	Sep/2023	The licensing experience provides insight into user license consumption of Dynamics 365 finance and operations apps. The experience helps answers questions, such as: - How many licenses have I assigned to users? - Which users have these licenses been assigned to? - Which users have roles assigned in Finance and Operations environments? - Is there an overage with my license or role assignment?
Get more visibility into license consumption of Power Apps and Power Automate	Update	Sep/2023	The licensing experience provides insight into app usage in specific environments. The experience helps answer questions, such as: - How many licenses have I assigned to users? - Which users have these licenses been assigned to? - What type of licenses are users using to launch custom apps made with Power Apps, flows, and first-party Dynamics 365 apps? - Which apps and flows are driving which type of license usage? - Which users are active and which users are inactive?
License autoclaim for Power Apps licenses		Sep/2023	Admins will be able to setup an autoclaim policy for Power Apps per user licenses in the Microsoft 365 admin center just like they can for other Microsoft licenses. After they do so, any user in their tenant that needs a standalone Power Apps license will be automatically assigned a Power Apps per user license when they need it. For example, if a user without a standalone Power Apps license opens an app that requires a premium license, the user will automatically be assigned a Power Apps per user license. A report of all users who have been assigned licenses under the autoclaim policy will be available in the Microsoft 365 admin center. Admins can choose to enable or disable the autoclaim policy at any time.
Better understand your pay-as-you-go charges		Sep/2023	There are two mechanisms for understanding your Power Platform pay-as-you-go charges. You can go to: - Azure portal to view top-level charges to your Azure subscription. - Power Platform admin center to download a detailed report to understand what users, environments, apps, flows, and other features generated those charges. We plan to make improvements to both of these experiences to make it easier for you to understand the charges.

Governance, Adm and Dev - Licensing and reporting



Item	N / U	Deadline	Benefits / Observations
Use pay-as-you-go model in Government Community Cloud	Update	Aug/2023	This feature enables GCC customers to purchase Power Platform services in a pay-as-you-go model using an Azure subscription. Customers must have a Microsoft 365 GCC tenant and a commercial Azure subscription. Azure Government subscriptions will not work. See pay-as-you-go plan for details.
Allocate Dataverse storage to pay-as-you-go environments		Sep/2023	Currently, customers who turn on Power Platform pay-as-you-go for an environment pay for all Dataverse usage at pay-as-you-go rates for any usage above 1 GB of database and 1 GB of file storage. This feature will allow administrators to allocate quantities of Dataverse storage from the pool of storage they receive from Dataverse entitlements included in Power Platform and Dynamics 365 licenses. When storage is allocated to an environment, pay-as-you-go charges will start after storage consumption has exceeded the given amount.
Use management connector in Power Automate and Logic Apps		Sep/2023	As the Power Platform API matures in feature capabilities across the platform, the need for the related tooling to be auto-generated and always up-to-date grows. This new version of the management connector for administrators will work and be available in Power Automate and Azure Logic Apps. This gives extra flexibility for those customers who use ARM templates and manage their tenant automation capabilities in Azure to stay in Azure. For those who don't want the additional complexity of Azure, they can stay within Power Automate and Power Platform.

Governance, Adm and Dev

Item	N / U	Deadline	Benefits / Observations
Managed Environments for Power Platform - Do more with pipelines in Power Platform		Aug/2023	Pipelines provide more control and better visibility with less effort. Pipelines continue to evolve and will soon offer many critical new capabilities and more streamlined experiences. These capabilities include: - Set up automated deployment pipelines with less friction. - Add low-code logic and approvals to your deployment process with cloud flows or extend pipelines using plug-ins. - Schedule deployments for a later date and time. - Deploy using service principals so that citizen developers don't require elevated permissions within production environments. - Custom-tailor deployment processes to meet the needs of your organization. - Developers can do more with additional command line capabilities and build task support. - Admins have better visibility and auditing capabilities within the streamlined management experience. - More control over how solutions are managed across various connected environments.
Managed Environments for Power Platform - Take advantage of enhancements to Managed Environments		Sep/2023	In the first wave of Managed Environments, we're introducing a new set of capabilities, including: - Providing a one-click activation experience from the Power Platform admin center and the option to downgrade to a standard environment. - Enabling system administrators to enable Managed Environments, in addition to global administrators and Power Platform administrators. - Enhancing the downgrade experience with built-in validation to inform the administrator what features are in use and need to be removed before downgrading.

Governance, Adm and Dev

Item	N / U	Deadline	Benefits / Observations
Power Platform code-first development - Experience combined Power Platform and Finance and Operations Visual Studio tools		Sep/2023	We're continuing the ongoing work to align experiences across Microsoft Dataverse, Dynamics 365 apps, and Finance and Operations by consolidating today's disparate developer tools into single packages. This tooling can easily be installed in every developer's Visual Studio or Visual Studio Code environment. This feature begins our consolidation work by providing a single Visual Studio extension installer for both Power Platform Tools and Dynamics 365 Finance and Operations, thereby removing friction for developers that need to work in both environments. This feature will also complete the initial phase of our work on a new developer experience for Finance and Operations based on cloud runtimes and developer tools that don't require a VHD or a Cloud Hosted Environment to work. Over the upcoming release waves, we'll focus on creating consistent experiences that modernize and consolidate the user experience.
Pro development - Create finance and operations apps against cloud runtime	Update	Oct/2023	Developers can now create Dynamics 365 finance and operations applications against a Microsoft Cloud deployed runtime (Tier 2) instead of a finance and operations instance running in a virtual machine (VM). Visual Studio installed anywhere can connect to a cloud-based finance and operations development environment, which is paired with a Microsoft Dataverse instance. Support for this unified cloud runtime will cover all typical developer workloads: writing code in collaboration with others, building, packaging, deploying, debugging, and executing unit tests. In addition, this feature allows you to switch between different versions of a finance and operations runtime with Dataverse, and different configurations for different projects, all from a single instance of Visual Studio. Using a single instance of Visual Studio removes the need for different VMs and cloud-hosted environments.
Pro development - Publish a custom connector to Power Platform within Visual Studio	Update	Oct/2023	We've enabled professional developers to build API and custom connectors for Power Platform from within Visual Studio. This feature will improve the outer loop experience and how Visual Studio interacts with Dataverse solutions. This new feature provides the following capabilities: - Enable developers to select a Dataverse solution where the custom connector will be created. - Enable developers to select a Dataverse solution where the custom connector will be updated. - Select a catalog when publishing a custom connector.



Power Pages

Power Pages - Design studio

Item	N / U	Deadline	Benefits / Observations
Use guided learning in design studio	Update	Jul/2023	As a Power Pages maker, you will have an easy way to find the correct documentation, tutorials, videos, and guided tutorials to get started and build their websites. The guided learning pane will open inside the design studio without covering the canvas where you are editing your site, allowing you to have a side-by-side view of tutorials and learning content.
Configure code components on forms and webpages in Power Pages design studio		Sep/2023	Makers will be able to configure the properties of code components added to form fields or webpages in the Pages workspace of the design studio. The properties are specified in the code component manifest by pro developers.
Configure web templates in Power Pages design studio		Sep/2023	A pro developer can add a manifest to a web template to specify configurable properties in the Power Pages design studio. The web template can be added as a component to a webpage where makers can configure the properties of how the web template component will render and interact with website users.

Power Pages - Administration and Governance



Item	N / U	Deadline	Benefits / Observations
Disable anonymous access in Power Pages	Update	Aug/2023	Currently, administrators don't have control over Power Pages for blocking data access to anonymous users. Using this governance control (a tenant setting in Power Platform admin center) admins can enforce a data policy to block anonymous access in Power Pages. This will prevent makers from unintentionally exposing organizational data to anonymous users and will enforce authentication of users to access Dataverse data.
Provide website inventory data for tenants and environments	Update	Aug/2023	Currently, the Power Platform admin center provides a read-only list of all websites in a tenant (or environments to which the user is an admin) that can't be exported for further analysis. The list has the following metadata: Name, Status, Environment, Created On, Type, Site Visibility This new feature provides the following: - Additional website metadata like last modified time, last modified by, and when the site was made public. - Admins can export this data to a CSV and access the additional metadata through admin APIs.

Power Platform admin center

Home

Environments

Analytics

Subscriptions + billing

Settings

Help + support

Data integration

Data (preview)

Policies

Admin centers

Tenant settings

These settings are applicable to your tenant. [Learn more](#)

Name	Description
Weekly digest	Manage additional recipients for the weekly digest email for Managed Environments.
Developer environment assignments	Include data on most- and least-used resources in your own personal homepage dashboard.
Production environment assignments	Control who can create and manage production and sandbox environments.
Trial environment assignments	Control who can create and manage trial environments.
Add-on capacity assignments	Control who can allocate add-on capacity to an environment.
Analytics	Enable tenant-level analytics.
Customer lockbox	Include a URL for a modal welcome message for new makers.
☒ Disable anonymous access for Power Pages	Control anonymous access to Dataverse data via Power Pages

☒ = This setting applies to Managed Environments only.

Power Pages sites

Export to CSV

View and manage all websites across your environments. [Learn more](#)

Name		Status
prTesting161123	...	Configured
testwidsin1p	...	Configured
Sk-NovReg-1	...	Configured

Power Pages - Administration and Governance

Item	N / U	Deadline	Benefits / Observations
Use admin security and analytics views	Update	Oct/2023	The security view will provide details, such as: - Website security scores - Websites with anonymous data access enabled - Authentication methods used (to understand alignment with organisation policy) - Phishing sites detected on tenant - Other details The analytics view is planned to provide metrics, such as: - Website authenticated/anonymous monthly active users and daily active users - Service errors - Other metrics Additionally, both views can be filtered at tenant, environment, and website level.

Power Platform admin center

Search

Home

Action center

Environments

Settings

Analytics

Apps & resources

Dynamics 365

Power Pages

Power catalog

Power Apps assets (preview)

Data management

Monitoring

Policies

Billing

Help & support

Customer lockbox

Admin centers

Secure your sites

Get to know the security score, know which security warnings need resolving, the severity of security incidents, and more.

Inventory

Security center

Analytics

Web application firewall disabled

5 Sites

View all

External authentication enabled

10 Sites

View all

Data with anonymous access

18 Sites

View all

Security summary

Secure sites

21/28

2

Sites with critical risk

5

Sites with moderate risk

21

Sites secured

Sites with security risks

Sites

[Confidential] Finance report

Student loan application

Unemployment assistance

Low income residents

Power Pages



Item	N / U	Deadline	Benefits / Observations
Template hub and prebuilt templates - Create new sites with FAQ template	Update	Jul/2023	This feature enables a prebuilt FAQ website template. This template features common customer questions and topics and provides corresponding answers. The template offers a customer experience for viewing the content and an admin experience for managing and publishing articles and topics.
Professional developer experiences - Use Bootstrap version 5 in Power Pages	Update	Nov/2023	Bootstrap is a commonly used CSS framework, providing a powerful and extensible front-end toolkit for developers. Power Pages currently supports Bootstrap version 3. With this release, we'll provide the support for Bootstrap version 5 to apply to your customizations as well as for the site templates shipped with Power Pages. Power Pages will continue to support both version 3 and version 5 Bootstrap libraries for a limited time. Bootstrap version 5 support with Power Pages will provide the following advantages: - Save time converting your existing websites to Bootstrap version 5 using a migration tool that will convert CSS code and provide recommendations for the breaking changes. - Use the latest CSS controls offered by Bootstrap. - Receive new security updates and fixes from Bootstrap.
Power Pages home page - Use Power Pages trials for 90 days		Jul/2023	Websites created in a production Power Platform environment will start as a 90-day trial. The longer trial duration will give makers a longer time to develop their website without concern of losing their site access within 30 days or having to start paying for licenses by converting the website to production mode.



DataVerse

Item	N / U	Deadline	Benefits / Observations
Microsoft 365 collaboration - Associate activities with multiple related records	Update	Oct/2023	Users will be able to associate an activity record with multiple related records. This means a user can perform actions like associating a meeting or phone call to multiple related records, such as a phone call or meeting related to multiple cases or opportunities.
Dataverse infrastructure features - Encrypt customer data using customer-managed key enhancements	Update	Sep/2023	To enable key admins better control of their Azure key vault's network access, to provide support for FIPS-140-2 Level 3 and to allow for auto key rotation without taking a system downtime.
Dataverse infrastructure features - Use access checker to view all users who have access to your record	Update	Aug/2023	This functionality allows the owner of a record to see a list of users who have access to their record.
Dataverse infrastructure features - Maintain security role privileges for better ALM solution import	Update	Sep/2023	Support the application lifecycle management (ALM) process where security role privilege updates are honored after managed solution import.
Dataverse extensibility - Include dependent assemblies with plug-ins		Jul/2023	Support for dependent assemblies with Microsoft Dataverse plug-ins allows developers to be more productive by leveraging capabilities provided by additional assemblies.
Dataverse events - Receive real-time notifications in Power Apps		Jul/2023	Contextual communication is becoming an essential part of every business. This feature provides real-time contextual notifications to Power Apps users.
Do more with your data in Power BI and Azure Synapse - Synapse Link for Dataverse includes finance and operations data	Update	Nov/2023	If you're a finance and operations apps customer who's currently using the export to data lake feature in finance and operations, you can easily transition to Synapse Link for Dataverse. If you're an AX 2012 or AX 2009 customer planning an upgrade to cloud-based finance and operations, you can easily query finance and operations data using Azure Synapse Analytics. You can preserve your existing data integration pipelines by accessing finance and operations data in the lake in table form.

Dataverse - Build your low-code, hyperscale backend on Dataverse



Item	N / U	Deadline	Benefits / Observations
Build your own business logic using low-code plugins	Update	Dec/2023	This feature enables makers to author low-code plugins as they build and deploy their apps. What can low-code plugins do? - Perform Dataverse CRUD operations using Power Fx. - Access other tables in the environment: * LookUp(< TableName >, < condition >) * Patch(< TableName >, < Row >, { < Updates > }) - Instant actions can accept input and output parameters. - Call other actions that have been activated, like SendAppNotification.
Use one connector for all legacy connectors	Update	Oct/2023	Dataverse is deprecating its legacy connectors to provide a unified experience with faster performance, full functionality, and improved user experiences. This single connector will replace the use of the following connectors: - Dynamics 365 - Dataverse Legacy - Finance and operations apps All features using the existing legacy connections will migrate to the new connector.
Build your canvas app with low-code plugins for better experiences	Update	Dec/2023	Experience a performance boost with the ability to trigger Microsoft Dataverse actions directly from a canvas app.
Dataverse AI columns come with data operations	Update	Dec/2023	AI Builder create text with GPT can be most efficiently used in a Dataverse action when it's intended for generating content when both the input and the rule output is indeterministic based on the prompt, such as when the rule can't be simplified to a function. A couple examples where this can be valuable are: - Say "Generate sample data for a blank table." - Summarize text from a catalog of books.

Dataverse - Build your low-code, hyperscale backend on Dataverse



Item	N / U	Deadline	Benefits / Observations
Experience enhancements to formula columns	Update	Dec/2023	The goal of this feature is to address calculated columns capabilities that aren't currently supported inside formula columns. Formula columns will eventually replace the classic calculated columns feature. Here are some of the known gaps that formula columns don't support today: - Creation of currency columns. - Support for date and time with user local and time zone. - Support for choice columns. - Ability to set precisions for decimals.
Experience adaptive scalability for Power Platform data flows	Update	Dec/2023	With this feature, you'll experience reduced effort and supportability costs for Microsoft Dataverse customers. You'll also get the enhanced ability to bring external data into Dataverse platform to build apps and solutions.



Power Automate

Item	N / U	Deadline	Benefits / Observations
Copilot for Power Automate - Use natural language to create flows		Sep/2023	Using state-of-the-art AI models like GPT3, the feature launched in preview for the United States region at Ignite 2022. Now, we'll be making the feature generally available, adding several new enhancements in the process: - Support for more connectors and actions. Power Automate understands natural language input to build flows that include Dataverse, approvals, and Power Apps. - Availability in EU (European Union) region and GCC (Government Community Cloud). - Automatic flow parameter filling. Once a flow is created in natural language, the flow won't only include the individual actions but also the parameters in the action cards. - Explainability to understand how your description of the flow translates to the different flow actions with suggested improvements.
Cloud flows - Define sequential approvals in Power Automate	Update	Sep/2023	This feature allows users to create more complex approval workflows within Microsoft Teams and Power Automate flows.

 **Approvals**
Create a new approval request

Name of request *

Give 25% discount to Quinn Campbell

Recipients *

1

 Charlotte de Crum

2

 Babak Shammass  Aaron Buxton

3

 Krystal McKinney

 Add another recipient

Priority

Important

Details

< Back

Send

Power Automate - Cloud flows

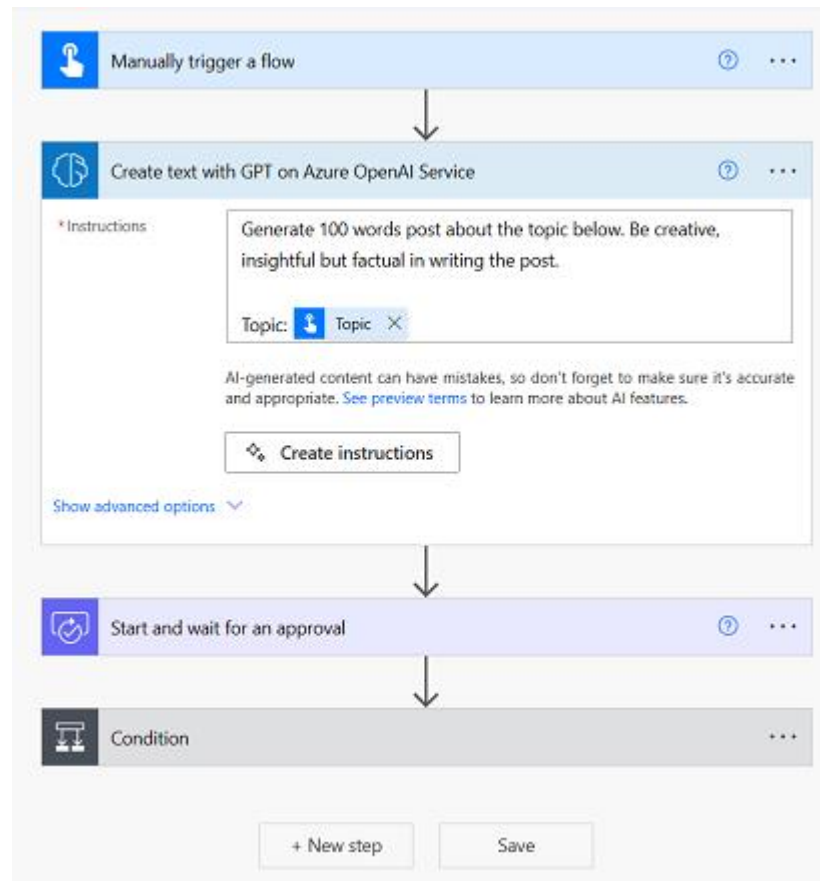
Item	N / U	Deadline	Benefits / Observations
Connect to other environments from the Microsoft Dataverse connector		Sep/2023	Currently, you must use the Microsoft Dataverse (legacy) connector to connect to environments outside of the current environment. With this feature, you can connect to other environments from the Microsoft Dataverse connector's actions and triggers.
Identify platform roles to connect to the correct environment		Aug/2023	This enhancement brings parity between Power Apps and Power Automate environment pickers. It helps to guide makers to environments with sufficient permissions and access.
Cancel all flow runs for a version of a flow	Update	Sep/2023	This feature helps to reduce incidents and feedback on the limited number of flows that users can resubmit and cancel on the My flows page in Power Automate.
Manage solution-aware cloud flows using admin APIs	Update	Sep/2023	Power Automate admin APIs have full support for solution cloud flows.

Power Automate - Desktop flows

Item	N / U	Deadline	Benefits / Observations
Introduce UISpy to work with UI elements		Sep/2023	UISpy is a new sub-app of Power Automate for desktop. You can use it to inspect all the UI elements of your screen, check the hierarchy trees of all windows, capture the elements you desire, and test actions like click or populate without any interaction with the flow designer.
Use custom actions in Power Automate for desktop		Sep/2023	Users are now able to: - Create custom actions through a publicly available SDK (Modules SDK). - Manage groups of actions for their flows by adding/removing custom-developed action groups through a dedicated UI (Assets library) in the Power Automate for desktop designer.
Manage work queues for Power Automate	Update	Sep/2023	This feature introduces some key workload management features in the form of work queues: - Power Automate portal experience to create and manage work queues and their item details. - Work queues support custom prioritization and built-in role-based access control support. - Work queues support for cloud flows, desktop flows and APIs. - Human-in-the-loop experiences for exception management. - Work queue actions in Power Automate for desktop. - Processing history and execution logs.
Configure option to include or to not include screenshots in the error logs		Aug/2023	This feature enables makers to refrain from capturing screenshots in cases where the desktop flow is processing sensitive data.
Log message action		Aug/2023	Environment makers and admins can audit and review the desktop flow execution through custom messages in the flow run details.
Power Automate for desktop displays dynamic messages in the home screen		Sep/2023	You're informed of valuable information regarding Power Automate for desktop in the most timely manner.
Use SAP-dedicated actions in desktop flows		Sep/2023	SAP UI elements tend to have dynamic properties, making UI automation difficult to achieve. So, the introduction of SAP-dedicated actions aims to create a smoother maker experience and result in a more accurate attended/unattended runtime.

Power Automate / AI Builder

Item	N / U	Deadline	Benefits / Observations
Build intelligent solutions with AI capabilities - Incorporate OpenAI GPT actions in AI Builder		Sep/2023	AI Builder is making Azure OpenAI's large language models (LLMs) available in a responsible form factor to citizen developers, starting with integrations in Power Automate and Power Apps. GPT text creation is available as the latest capability in AI Builder. On the AI Builder Explore screen, you can access the capability and try asking GPT to generate text, answer questions, and summarize documents for you.



Create text, answer questions, summarize documents and more with GPT

This model runs on Azure OpenAI Service and can be used for many tasks that involve creating text. Try a template to see how to use generative AI in a variety of scenarios. You can also try writing instructions from scratch. When you're done, you can use the model in an app or a flow.

Prebuilt model

Premium

Templates

Select a sample

Instructions

Enter an instruction or select a sample to get started.

0/5000

Test it out



Response

AI-generated content can have mistakes. Make sure it's accurate and appropriate before using it. [Read our preview terms](#)

Waiting for instructions...

[View documentation](#)

Use in a flow

Use in an app

Power Automate / AI Builder



Item	N / U	Deadline	Benefits / Observations
Governance and administration - Monitor usage and performance of AI Builder models		Sep/2023	Preconfigured monitoring reports are available for you to track where AI Builder models are used, how often they're used, and at what performance level. This ensures greater tracking capabilities and allows AI Builder models to deploy more easily in a production setting.
Automate with intelligent document processing - Retrain documents using the feedback loop feature		Sep/2023	After models in AI Builder are trained and deployed to production, it's possible that customers will use the models with new datasets that aren't optimized for them. With the feedback loop feature, documents are flagged and sent back to the training wizard queue for retraining if they didn't yield sufficient confidence scores when analyzed by AI Builder. The maker will be able to view the set of documents that require retraining and update the model to take into account these new documents. This ensures that AI Builder models maintain an optimal level of quality over time.



Power Virtual Agents

Power Virtual Agents



Item	N / U	Deadline	Benefits / Observations
Enhanced natural language capabilities - Use conversational language understanding to improve bots		Jul/2023	You can use custom conversational language understanding (CLU) models in Power Virtual Agents, Microsoft's Conversational AI chatbot-building canvas, to expand and refine how your bots parse and respond to user queries. Your customers will have higher overall satisfaction, and you'll spend less time on analyzing and resolving abandoned, escalated, and failed conversations.
Service and runtime - View billing and usage details in the Power Platform admin center	Update	Oct/2023	System and bot admins will be able to review billing and usage analytics in the Power Platform admin center. Using this data, they can identify and report on how teams within your organization are using Power Virtual Agents.

Add intents and entities

×

Upload your model data file

Map existing topics to CLU intents

Create new topics for CLU intents

Review

Create new topics for CLU intents

Your CLU model contains intents that are not used for any PVA topic. Create a new topic for each intent you select in the table below.

For CLU intent	Create a new topic
None	
☒ Timetable	
RouteQuestion	
PurchaseTickets	
Goodbye	

Power Virtual Agents - Copilot and AI innovation



Item	N / U	Deadline	Benefits / Observations
Use Dataverse as a source for AI-created generative answers	Update	Oct/2023	The following are benefits to your stakeholders when using a Microsoft Dataverse store for generative answers: - Bot makers: Reduced time to create or update chatbots from days to minutes - System and bot admins: Reduced data loss prevention and data exfiltration concerns. Keep your organization's data inside the organization. - Support center and helpdesk: Improved deflection rate - Bot users: Get answers directly from your organization's existing knowledge
Use internal SharePoint content as a source for AI-created generative answers	Update	Oct/2023	The following are benefits to your stakeholders when using an internal SharePoint for generative answers: - Bot makers: Reduced time to create or update chatbots from days to minutes - System and bot admins: Reduced data loss prevention and data exfiltration concerns. Keep your organization's data inside the organization. - Support center and helpdesk: Improved deflection rate - Bot users: Get answers directly from your organization's existing knowledge



Power BI

Item	N / U	Deadline	Benefits / Observations
Create and share paginated reports in the Power BI service	Update	Sep/2023	Create simple operational reports with low code, drag-and-drop experiences in the Power BI service on the web. You can share these in a variety of formats or just print them out!
Combine existing mapping visuals into one with Azure Maps		Sep/2023	Customers will now get the best of all mapping visuals in a single visual, including the use of shapes, points, shading, and more data points than the current default map visual.

File

Home

View

Insert

Editing

Export

1

Contoso

Sales Report

CategoryID	CategoryName	Description
1	Beverages	Soft drinks, coffees, teas, beers, and ales
2	Condiments	Sweet and savory sauces, relishes, spreads, and seasonings
3	Confections	Desserts, candies, and sweet breads
4	Dairy Products	Cheeses
5	Grains/Cereals	Breads, crackers, pasta, and cereal
6	Meat/Poultry	Prepared meats
7	Produce	Dried fruit and bean curd
8	Seafood	Seaweed and fish

Build

Filters

Search

> CategoryID

> CategoryName

> Description

Add data fields here

Data

Search

Northwind

> Categories

> CategorySyno...

> Continents

> Countries

> Customers

> Employees

> EmployeeTerrit...

> GeoAreas

> GeoRegions

Item	N / U	Deadline	Benefits / Observations
Edit relationships in the properties pane		Aug/2023	With this feature, you can create semantic models over big data and quickly edit relationships in the properties pane.

Product

ProductKey

Expand

Customer

CustomerKey

Expand

Sales Territory

SalesTerritoryKey

Expand

Reseller

ResellerKey

Expand

Sales

CustomerKey

DueDateKey

OrderDateKey

ProductKey

ResellerKey

SalesOrderLineKey

SalesTerritoryKey

ShipDateKey

Expand

Date

DateKey

Expand

Sales Order

SalesOrderLineKey

Expand

All tables

+

Properties

Relationship

Table

Sales

Column

ProductKey

Cardinality

Many to one (*:1)

Table

Product

Column

ProductKey

Make this relationship active

Yes

Cross filter direction

Single

Apply security filter in both directions

No

Apply changes

Open relationship editor

Fields

Search

Customer

Date

Product

Reseller

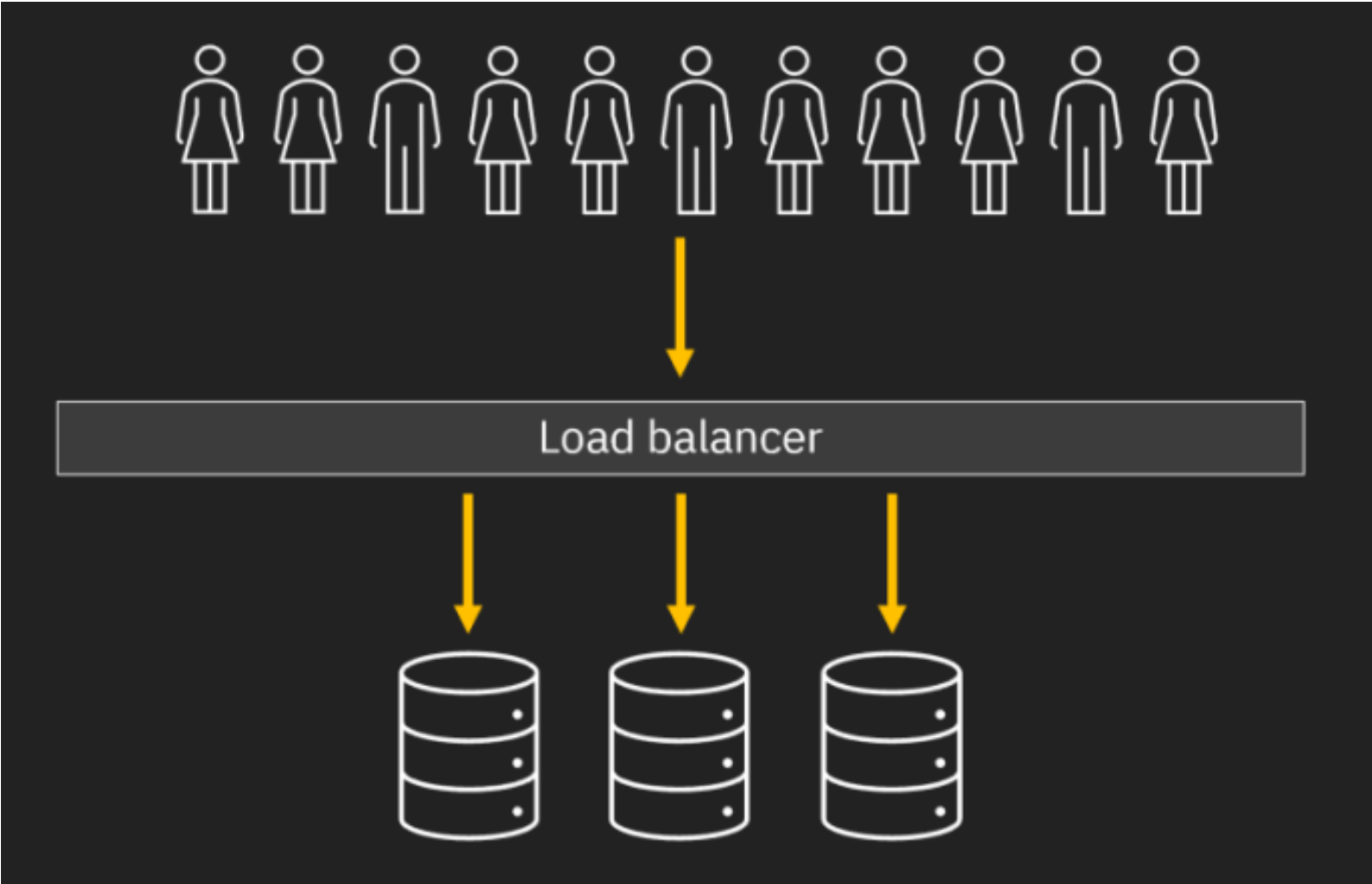
Sales

Sales Order

Sales Territory

72%

Item	N / U	Deadline	Benefits / Observations
Balance user queries with query scale-out	Update	Nov/2023	Support high user-concurrency workloads for large-scale deployments of semantic models (datasets) in Power BI Premium. Management of query scale-out in Power BI Premium is largely automated for customers.



Item	N / U	Deadline	Benefits / Observations
Embedded analytics playground enhancements	Update	Sep/2023	The added features include: - Built-in log: Code snippets whose results are not visible on the report itself (for example, Get visuals) will be accessible through a dedicated built-in log and not only through the browser's log. - Editor and report resizing: Users will have the flexibility to resize the different components on the page (code editor, report, and log) for a smoother coding experience.



Data Integration

Data Integration



Item	N / U	Deadline	Benefits / Observations
Power Query connectors - Support custom connectors in Power BI dataflows		Sep/2023	You'll be able to use your custom connectors in Power BI dataflows experiences through the use of an on-premises data gateway.

ERP



What's new in Finance and Operations



Finance

Finance - Core financials

Item	N / U	Deadline	Benefits / Observations
Accounts payable fully automated with invoice capture	Update	Jul/2023	Continued enhancements around matching, and additional capabilities around the non-PO invoice and vendor invoice journal were added so users can have a full accounts payable automation solution. - Support invoice journal: There are two categories of invoices—pending vendor invoice and invoice journal. Invoice journal support was added for general availability. - Support custom AI model: Although prebuilt invoice processing model can cover a large ratio of vendor invoices, to handle some complex invoice formats, customers need to define custom models. To efficiently orchestrate prebuilt and custom AI models during runtime, administrators will need to spend the effort to build flows to consume those AI models. - Continuous AI model training by exceptional data: For recognized invoice data, the confidence score could be low for some fields. In an application layer, we have an app to let users check and correct the value with low confidence score. The corrected data should be sent to AI Builder for further training purposes so that the accuracy of recognition can be improved.

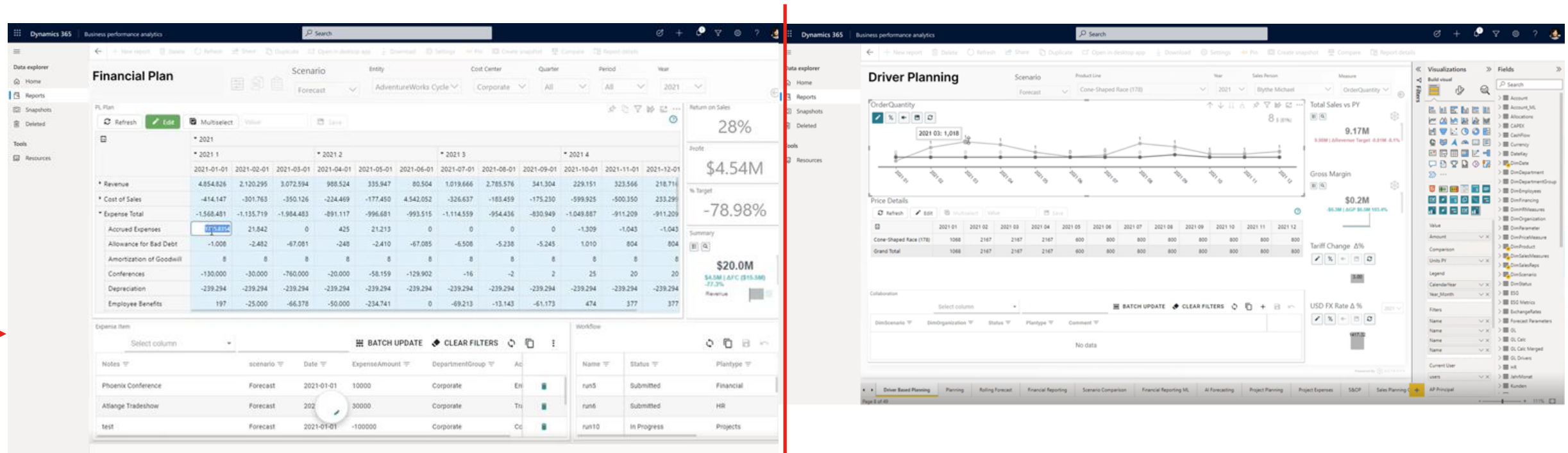
The screenshot displays the Dynamics 365 Finance 'Invoice capture' interface. The main window shows a scanned invoice from 'Acme Supplies Ltd' for 'Maintenance Services' with a total amount of \$10,000. The interface includes a left navigation pane with 'Captured Invoices' selected, a top action bar with 'Complete review', 'Validate', and 'Void' buttons, and a right sidebar with 'Messages' and 'Invoice header' sections. The 'Messages' section lists recognition confidence scores for various fields, and the 'Invoice header' section shows details like 'Vendor name', 'Invoice number', and 'Total amount'.

Finance - Core financials

Item	N / U	Deadline	Benefits / Observations
Invoice automation – process vendor invoices during import		Jul/2023	This feature, part of the vendor invoice automation capability, saves time and effort for accounts payable clerks by processing vendor invoices automatically. The feature can also help reduce errors that arise through manual processing.
Utilize vendor aging report with large volumes of data		Jul/2023	The vendor aging report can time out due to large data volume. This feature provides an alternative way to let customers export results from the vendor aging report. Customers will be able to do reporting based on the exported data, and this assures business continuity.
Directly view posted vouchers from bank statement		Aug/2023	Improve usability and user efficiency in bank statement processing.
Filtering capability in bank reconciliation		Aug/2023	Improve usability and user efficiency in bank reconciliation.
Reverse posted new transactions in bank statement		Aug/2023	With this feature, you can complete the end-to-end process in a bank statement and reduce risks caused by manual financial adjustment.
Calculate gain/loss for reporting currency only	Update	Oct/2023	Currently, if the accounting currency is in balance (debits = credits) for matched transactions in ledger settlement, no realized gain/loss is posted if the reporting currency doesn't balance to zero. This feature addresses that gap by posting a gain/loss in the reporting currency if the accounting currency is in balance. This speeds up period-end closing by eliminating the need to first post the gain/loss in the reporting currency if it isn't already posted through accounts payment, accounts receivable settlement, or a manual reporting currency adjustment journal.
Handle periodically recurring invoices	Update	Oct/2023	This feature eliminates a large functional gap about recurring invoices in accounts payable. Customers will be able to handle periodically recurring invoices, like monthly electricity prepayment invoices or monthly insurance.
Import bank statement automatically	Update	Oct/2023	With this feature, manual upload of bank statements can be replaced by a batch job. This will save considerable effort for the accounting team.
Post new transactions directly from bank reconciliation	Update	Oct/2023	This feature greatly improves the usability of bank reconciliation by reducing the number of manual steps.

Finance - Core financials

Item	N / U	Deadline	Benefits / Observations
Use bank foreign currency revaluation enhancements	Update	Oct/2023	The bank foreign currency revaluation (bank FCR) will be enhanced in two ways. First, we will allow an organization to define whether to use all or no financial dimensions when calculating the unrealized gain or loss. Second, the calculation of the unrealized gain or loss will change.
Extended planning and analytics for Dynamics 365 Finance	Update	Dec/2023	Turn insight and plan into immediate action by using extended planning and analysis to connect the impact across the operational and finance departments to make strategic decisions quicker.



Finance - Core financials

Item	N / U	Deadline	Benefits / Observations
Support customer refunds with credit transfer format	Update	Nov/2023	This feature introduces ISO20022 Credit Transfer format in the Customer payments journal in the following scenarios: - Refund or reimbursement with credit note. - Refund of prepayment by using payment proposal. - Manual refund.
Support more complex bank reconciliation matching rules	Update	Nov/2023	With this new feature, users can define more complex matching rules between multiple bank statement lines and multiple bank account transactions. Automatic bank reconciliation matching will be done for the following scenarios: 1:N - One bank statement line matches with multiple bank transactions - N:1 - Multiple bank statement lines match with one bank transaction - M:N - Multiple bank statement lines match with multiple bank transactions
Financial tags added to accounting distributions	Update	Oct/2023	Financial tags let organizations track user-defined fields on accounting entries posted to the general ledger. Financial tags are an alternative to financial dimensions and can be used to track transaction-specific data, such as document numbers or master data. Additional financial dimensions increase the size of an organization's chart of accounts, negatively impacting performance on processes such as the foreign currency revaluation and year-end close.

Free text invoice : | Standard view ▾

Accounting distributions

Free text invoice lines

Line 1:

Extended price: 5.00 USD

Tax: AV_CAST

Tax: 0.36 USD

Distributed by

Percent ▾

Distributions

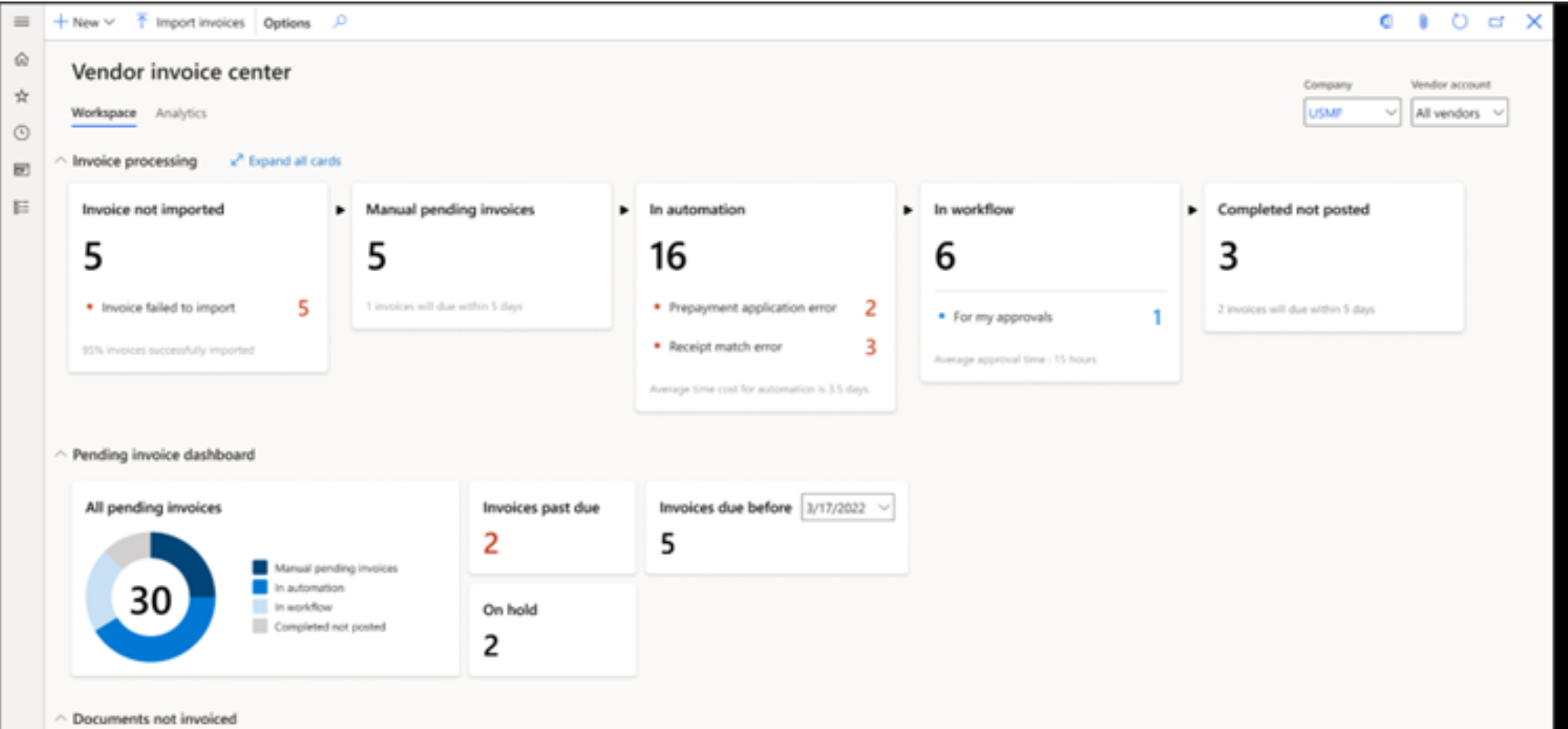
+ Split | Delete | Correct | Reset | Distribute equally

	Number	Ledger account	Financial tags	Percent	Amount	Currency	Accounting event	Accounting date
	1	110180-001-	12	100.0000	5.00	USD	None	3/8/2023

Finance - Core financials



Item	N / U	Deadline	Benefits / Observations
Check out new AP clerk workspace capabilities	Update	Oct/2023	Our goal is to provide customers with a comprehensive vendor invoice automation solution. While the invoice automation can handle the majority of invoices, there are still some exceptional cases that require user intervention. Our new workspace will provide an intuitive view of all the pending vendor invoices in various processing status, allowing accounts payable clerks to easily identify and correct exceptional invoices.



Item	N / U	Deadline	Benefits / Observations
AI powers collections workspace timeline summary		Sep/2023	When a collections agent views a customer record, a lot of information is needed from credit ratings, payment history, and communication history. This process can take anywhere from 15-30 minutes to search and find in Dynamics 365 Finance. With the new workspace page, the collections agent will have a summary of past activities and the most relevant information in one place. Personalized emails can save them even more time when sending reminder letters to customers.
Archive tax transactions	Update	Oct/2023	Save storage space and gain performance with a reduced data set to work against.

Dynamics 365 Finance

Search for a page

Home

Favorites

Recent

Workspaces

Modules

View timeline

Contact customer

All customers

Standard view

Contoso Robotics has good credit and usually pays on time, but recently defaulted on \$20,000.

Alberto, from the accounting department, was consistently responsive until last December, with all project feedback being positive.

Overview

Invoices

Account details

AGED BALANCE

< 30 days

30-60 days

60-90 days

90-120 days

120-180 days

> 180 days

\$11,400.00

\$10,500.00

\$0.00

\$0.00

\$100.00

\$0.00

Valued Client

\$320,000

18.3% of year-to-date

4 Open contracts

15 Closed contracts

37 Months as a customer

The \$20,000 collections account with Contoso Robotics, a key partner of a pressing concern. Their consistent engagement and positive history is recover the substantial outstanding sum while maintaining this valuable

Contact details

CUSTOMER

Primary Contact

Alberto Burgos

Last Response

12/13/2022

Alternate Contact

Forest Vendor Service

INTERNAL TEAM

Account Manager

Benjamin Martin

Project Manager

Carmen Giettle

Customer Relations

Kayo Mwa

Finance and Operations Preview

Search for a page

Standard view

Create new process automation

General

Tax archive automation matc...

Select the fiscal calendar, relative fiscal year for which tax transactions will be moved to history tables.

Tax archive automation parameters

Refresh

Fiscal calendar	Company	Fiscal calendar year	Archive status
Fiscal	demf	2016	Ready
Fiscal	demf	2017	Ready
Fiscal	demf	2023	Ready

Finance - Globalization Studio



Item	N / U	Deadline	Benefits / Observations
Comply with the Qualified Invoice System in Japan		Jul/2023	The extended invoicing functionality in Accounts payable and Accounts receivable provides capabilities that can help you stay compliant with the new Qualified Invoice System requirements in Japan.
Electronic Invoicing service - Global e-invoicing ISV last-mile connector		Jul/2023	This feature delivers a connector with a global ISV's e-invoice connectivity services to: - Provide a fully automated end-to-end regulatory e-invoicing experience for the countries where governments require intermediate certified operators. - Extend e-invoicing coverage for non-Microsoft localized countries. - Provide access to the E-Invoicing Exchange Frameworks, such as Open PEPPOL in Europe, to route electronic invoices created by using the Electronic Invoicing service.
Indian taxation localization support for project integration journal		Jul/2023	This feature helps you record Indian taxes such as GST and TDS/TCS. Using Project integration journals, including Fee, Hour, Expense, and Item, you can also show project profitability correctly. This feature also allows you to generate legally compliant tax invoices and financial reporting.
See improvements in stock transfer order feature	Update	Oct/2023	This feature introduces the following improvements in the Stock transfer order functionality for India: - Default values of Transfer type and Price type can be configured in the Inventory and warehouse management parameters. - Unit price on a stock transfer order line is correctly recalculated based on the inventory dimensions specified on the line until the first shipment is posted for the line. - Shipment of a stock transfer order line with a unit price of zero can be prevented. - Correct inventory costs are posted for stock transfer orders in cases of partial shipments or receipts, batch-controlled items, and more. - Unrealized profit or loss isn't posted upon the shipment or receipt of a stock transfer line if the unit price differs from the inventory cost price of the item. - A stock transfer shipment can be canceled with the correct reversal of inventory costs and taxes. The feature also restricts changing units of measure and financial dimensions in stock transfer order lines.

Item	N / U	Deadline	Benefits / Observations
Enable additional exchange rate types for tax currency conversions	Update	Jul/2023	This feature enables additional exchange rate types for tax currency conversions. You can maintain the tax exchange rate types based on the local tax authority requirement. Tax is calculated based on the transaction currency amount of the document and converted to the tax currency amount using this exchange rate type.
Withhold tax calculation during invoicing		Jul/2023	Though in many countries/regions, withholding tax is only due on payment, there are companies in other countries/regions such as Italy, Netherlands, Mexico, Egypt, Indonesia, and the Philippines with firm practices to calculate, display, and post withholding tax at invoice time. In the Philippines, withholding tax posting at invoice time is legally required.

Finance and Operations Preview

Search for a page

My view

General ledger parameters

Ledger

Sales tax

Withholding tax

Inventory dimensions

Reverse charge

Number sequences

Batch transfer rules

Chart of accounts and dimensions

Standard Audit File for Tax (SAF-T)

Set up sales tax and sales tax group information

General

Tax options

CASH DISCOUNT

Reverse sales tax on cash discount

Yes

Deduct cash discount before sale...

No

CUSTOMER CASH DISCOUNT

Cash discount is calculated on a...

Yes

Mandatory item tax groups

No

INVOICE

Sales tax amount per invoice line

Yes

EXCHANGE RATE TYPES

Sales tax receivable exchange rat...

Default

Sales tax payable exchange rate t...

Default

Enable exchange rate types for s...

Yes

Standard view

Temporary withholding tax transactions

Overview

General

Amount

TRANSACTION CURRENCY	WITHHOLDING TAX CURRENCY
Currency	Currency
EUR	USD
Amount exempted from withhold	Amount exempted from withhold
0.00	0.00
Basis for withholding tax calculat...	Basis for withholding tax calculat...
480.16	657.75
Withholding tax amount	Withholding tax amount
48.02	65.78

Finance - Globalization Studio



Item	N / U	Deadline	Benefits / Observations
Simplify integration with tax solution ISVs	Update	Sep/2023	The following functions are supported in the Tax Calculation service to support tax determination and calculation with external tax solution providers: - External tax rates API based on a unified tax data model. This data model can be extended. - An ISV can configure the Tax Calculation service to define endpoints, parameters, mappings, and other required components to connect with an ISV tax solution. - Configure credentials with Azure Key Vault, ISV tax solution parameters, and other required information to enable the ISV tax solution. - Address validation. - Tax tolerance validation for purchase invoices.

Finance and Operations

Search for a page

USMF

Save

Complete

Options

External tax solution provider configuration

DRAFT

Latest version:2.0

Current version:1.0

Upgrade to latest version

General setting

Solution name

External tax solution provider configuration

Description

External tax solution provider configuration

Environment

PROD

Azure Account

XXX

Password

XXX

Links

[Tax solution provider website](#)

[Help Center](#)

Parameters

Parameter 1

XXXX

Parameter 3

On

Parameter 5

On

Parameter 7

On

Parameter 2

XXXXX

Parameter 4

On

Parameter 6

On

Address validation

Enable address validation

On

Select countries for address validation

USA

Finance - Globalization Studio

Item	N / U	Deadline	Benefits / Observations
See new capabilities in the Tax Calculation service	Update	Oct/2023	The Tax Calculation service integrates with the following Dynamics 365 Finance transactions to provide the full capabilities of enhanced tax determination and calculation: - Invoice register - Invoice approval - Invoice pool
Use electronic invoicing in Australia, New Zealand	Update	Oct/2023	In the scope of this feature, the following functionality is implemented: - XML file generation of e-invoices in a format specific for Australia and New Zealand, which is an extension to PEPPOL. - Import of vendor invoices in the appropriate PEPPOL format.
Use Tax Audit SAF-T for Denmark	Update	Oct/2023	Businesses can use this feature to remain compliant with digital tax reporting laws in Denmark.

Finance - Globalization Studio

Item	N / U	Deadline	Benefits / Observations
Use electronic invoicing in Poland	Update	Nov/2023	This feature provides compliance with the legal requirements for electronic invoicing in Poland. - Ability to generate XML files of Sales, Project, and Advance electronic invoices in the legally required format provided by KSeF. - Ability to import electronic invoices issued and available for a recipient in the KSeF platform. - Ability to integrate with the KSeF services to enable automatic submission of generated electronic invoices to Polish tax authorities.

Regulatory Configuration Service

Search for a page

DAT

Save

Validate

Options

(PREVIEW) POLISH KSEF SUBMISSION (PL) 2: SUBMIT CUSTOMER 1

Standard view

Feature version setup

Processing pipeline

Applicability rules

Variables

Parameters

Set up actions and parameters

Processing pipeline

+ New

Delete

Up

Down

		Action	Action name	Description	Enable retry	Retry action	Export
		Transform document	Transform document		☐		☐
		(Preview) Save document	(Preview) Save document		☐		☐
		(Preview) Process response from KSeF service	(Preview) Process response from...		☐		☐

Parameters

		Name	Description	Value
		Data channel	Data channel identifier	KSeF
		Custom file name	Custom file name from the client	
		Input file	File to save	Transform document: Output file



Supply Chain

Supply Chain - Inventory and logistics

Item	N / U	Deadline	Benefits / Observations
Empower users with near real-time inventory insights	Update	Aug/2023	The Inventory Visibility Add-in dashboard lets business users (such as supply chain planners, inventory managers, and sales clerks) view inventory quantity and status across data sources, legal entities, locations, and channels, with a quick, wholistic overview. It enables users to do the following: - Set up and filter on inventory dimensions to focus on the regions and products you care about most. - Identify stock out, understock, and overstock products for timely inventory replenishment or reduction. - Compare allocated and consumed quantities to decide whether an allocation top-up is needed (for example, to support a promotion or campaign). - View inventory KPIs (such as on-hand quantity, supply, and demand) into the near future so that inventory trend risks can be mitigated before it's too late.
Integrate Inventory Visibility with Dynamics 365 Commerce	Update	Oct/2023	Inventory Visibility for Dynamics 365 Supply Chain Management now integrates with Dynamics 365 Commerce Scale Units (CSU) to offer channel-side inventory availability calculations with near-real-time and holistic inventory accuracy across channels and locations for retailers. The integrated solution provides the following capabilities: Provider, Inventory query, Inventory reservation, Inventory adjustment, Inventory offset
Sell and price multiple items as a bundle	Update	Oct/2023	Product bundles allow businesses to group multiple items into product bundles to price and sell them together. It's an easy way to enable and ensure that the correct items are always sold and priced together while allowing the individual items included in the bundle to be shipped individually with revenue recognized against the shipped items.
Provide a better configuration experience for Inventory Visibility users		Jul/2023	The rebuilt power app for Inventory Visibility offers a new configuration experience that enhances the onboarding experience. New user interface (UI) designs for working with features—including on-hand queries, soft reservations, allocations, and available to promise (ATP) - make it faster and easier for business users to query and act on inventory as part of their daily operation.
Calculate available-to-promise for up to three months		Aug/2023	The maximum time fence for the Inventory Visibility Add-in available-to-promise (ATP) feature has been extended from seven days to a full three months. This significantly increases visibility into your future inventory statuses and order-promising capacity.

Supply Chain - Inventory and logistics

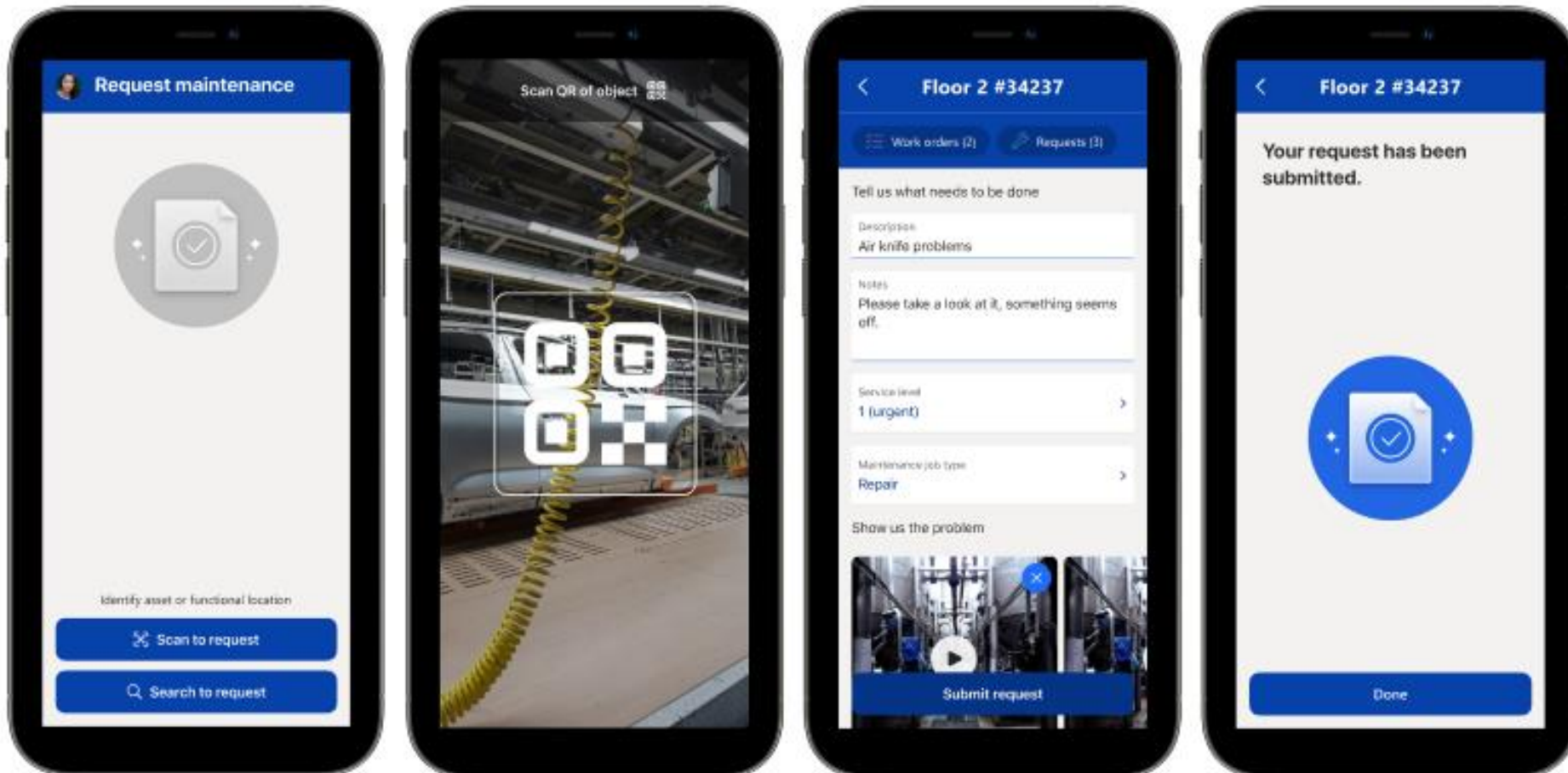
Item	N / U	Deadline	Benefits / Observations
Evaluate costs in discrete manufacturing using standard cost	Update	Sep/2023	This enhancement for the Global Inventory Accounting Add-in enables discrete manufacturing companies to perform parallel inventory accounting practices for the standard cost (based on a single document) using multiple currencies. This release enables you to: - Build three categories of manufacturing expenses (materials, labor, and overhead) by setting up cost element policies. - Gain an accurate understanding of cost inflow and outflow processes. Visible posting policies and rules establish the foundation for enhanced transparency. - Track and record discrete manufacturing costs by applying standard cost calculations to production documents (including picking lists, route cards, job cards, and report-as-finished journals). - Query for operational events and measurements related to production orders to track and trace the calculation basis. You can also query for events and measurements within Global Inventory Accounting for calculated results in different ledgers. - Analyze costing results and make management decisions using visual, interactive, and informative Power BI reports embedded into the system.

Supply Chain - Warehouse Management

Item	N / U	Deadline	Benefits / Observations
Capture multiple GS1 label segments simultaneously		Jul/2023	Workers at companies that use GS1 barcode labels to encode multiple pieces of information into a single bar code label can now capture all this information with a single scan. This enables workers to operate more efficiently when handling items in the warehouse.
Improve worker efficiency with optimized mobile device screen layout		Jul/2023	The Warehouse Management mobile app improves worker effectiveness and efficiency by providing the following usability enhancements: - More key fields can be highlighted on the screen to help draw workers' attention to the most important information more quickly. - Item images, which help workers identify items more quickly, can be displayed as thumbnails that workers can select to zoom in for more details when needed.
Optimize warehouse management implementation and maintenance	Update	Jul/2023	New capabilities of Dynamics 365 Supply Chain Management help warehouse managers to set up, monitor, troubleshoot, and maintain their warehouse management system. The system now includes tools that will help improve efficiency by enabling warehouse managers to: - Set up and configure Supply Chain Management through a business-focused user experience supported by guardrails to ensure a quality outcome. - Address and manage complex warehouse configurations using a simplified configuration and maintenance experience built for efficiency. - Verify their warehouse configuration using monitoring tools that ensure the smooth operation of business processes. - Make continuous or breakthrough warehouse configuration changes using change-management tools that help managers adjust the system to adapt quickly to changing business needs.
Optimize warehouse management processes	Update	Jul/2023	New optimization tools for Dynamics 365 Supply Chain Management enable warehouse managers to manage and improve their warehouse management system. With these tools, warehouse managers can: - Monitor and evaluate warehouse quality, efficiency, and productivity through innovative solutions for measuring configurational and operational effectiveness. - Understand and optimize the warehouses management processes through easy-to-use tools for viewing and monitoring the configuration and operation of the warehouse management system.

Supply Chain - Manufacturing and asset management

Item	N / U	Deadline	Benefits / Observations
Empower maintenance workers with new mobile experience		Sep/2023	The Asset Management mobile app provides the following capabilities for workers and organizations using the Asset Management Add-in for Microsoft Dynamics 365 Supply Chain Management: - Manage work orders - Create maintenance requests



Supply Chain - Manufacturing and asset management



Item	N / U	Deadline	Benefits / Observations
Over pick materials for production orders and batch orders	Update	Oct/2023	Manufacturers can now secure efficient and flexible warehouse operations by empowering their workers to pick the full contents of nearly empty locations, freeing up space when selecting materials for production orders (including batch orders). Over-picking can also be relevant in situations where it is more efficient for workers to over-pick by rounding up to the nearest packing unit.
Detect spikes and deviations in sensor data	Update	Nov/2023	The new anomaly detector for Sensor Data Intelligence provides the following capabilities: - Collect details from machines and equipment to detect anomalies to predict and prevent issues before they become urgent. - Set up the solution using a simple onboarding wizard rather than manually installing and configuring its components from Lifecycle Services. - Configure, scale, and extend the solution to meet your unique business needs. The business logic runs on Azure components managed using your own Azure subscription, which provides the flexibility required to customize the solution as needed.

Supply Chain

Item	N / U	Deadline	Benefits / Observations
Procurement - Improve security for vendor bank account information updates	Update	Jul/2023	Legal compliance and protecting supplier's bank account information against fraud are two of the most important requirements for any organization. One of the best ways to prevent fraud is to implement the right controls for managing changes. The new vendor bank account information approval workflow makes it more difficult for employees to commit fraud and enables financial controllers and auditors to oversee the accuracy of each supplier's bank account information.
Product information management - Manage compliance with export control restrictions	Update	Jul/2023	Companies that trade internationally and are subject to external regulations and internal policies are challenged to keep track of the many different rules and policies. The new advanced export control functionality allows you to express these rules, including complex ones, by using formulas like those in Microsoft Excel and ensure that the rules are honored throughout the sales and fulfillment process.
Planning - Plan for manufacturing with Planning Optimization	Update	Jul/2023	Planning Optimization now supports many manufacturing planning features that were previously only supported by the older deprecated planning engine. This means that most manufacturers can now move to Planning Optimization to start taking advantage of its significant performance improvements and other benefits. The following manufacturing capabilities are now supported by the service: - Bill of material (BOM) lines with multiples or rounding factors - BOM lines with negative quantity - Scheduling with explosion of production orders - Release production orders with a scheduled start date earlier than today
Copilot and AI innovation - Summarize purchase order changes for better decision making	Update	Sep/2023	The procurement copilot summarizes purchase order changes as they arrive in responses from vendors. It helps purchasing agents make better decisions by summarizing the downstream impact of changes, such as by identifying which planned downstream sales, production, or maintenance work orders won't be able to start as planned due to changed delivery dates.

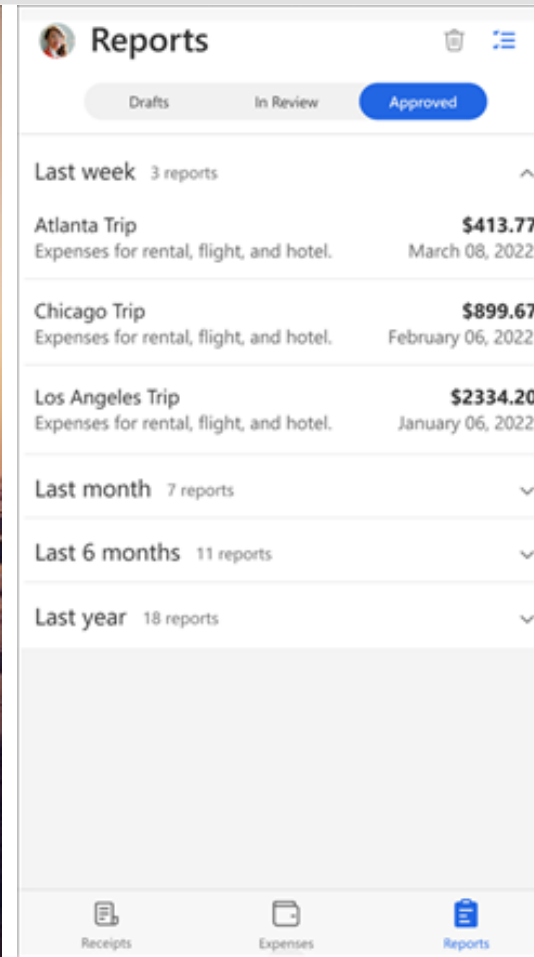
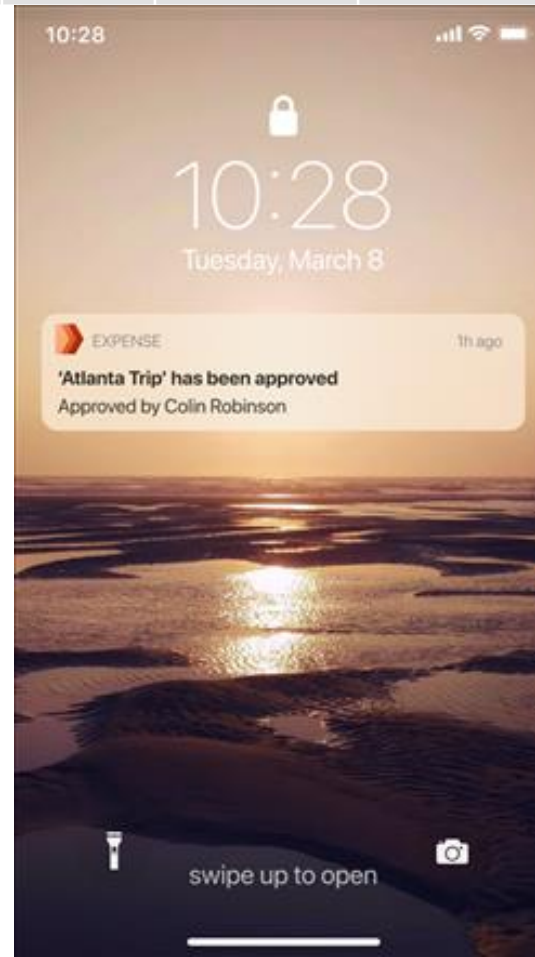


Project Operations

Project Operations - Optimize project operations



Item	N / U	Deadline	Benefits / Observations
Use expense mobile application for intuitive expense entry experience		Sep/2023	Our new expense mobile app will be further improved with the following capabilities: - Expense itemization: When required by your expense policy, you can split the total expense amount into the required breakdown, such as hotel day rate, fees, and meals. - Review and approve expense reports that are submitted to you. - Get notifications about the expense reports your manager has reviewed and that require action from you.



Project Operations - Optimize project operations



Item	N / U	Deadline	Benefits / Observations
Define working hours by day that vary for each project		Aug/2023	This feature provides the ability to define working hours by day for each project so projects that are delivered in different regions can plan schedules and resource capacity based on the practices in their region.
Use deferrals for stock or production project scenarios		Sep/2023	This feature will include the following capabilities: - Configuring cost and revenue deferrals for different project transaction types. - Recording deferred cost and revenue to the project subledger. - Adjusting project transactions with cost and revenue deferrals.

Standard view

Project groups

Project group Name
TM_Def Time and materials with defe...

General

Project type: Time and material

Ledger posting search priority: Category

Line property search priority: Project

Default line property: Billable

Verify cost against remaining for... ☐ No

Ledger

Post costs - hour: Deferred

Post costs - expense: Deferred

Post costs - item: Deferred

On-account invoicing: Balance

Accrue revenue - hour: ☐ No

Accrue revenue - expense: ☐ No

Accrue revenue - item: ☐ No

Accrue revenue - fee: ☐ No

Deferred revenue - item: ☒ Yes

Deferred revenue - expense: ☒ Yes

Deferred revenue - hour: ☒ Yes

Deferred revenue - fee: ☒ Yes

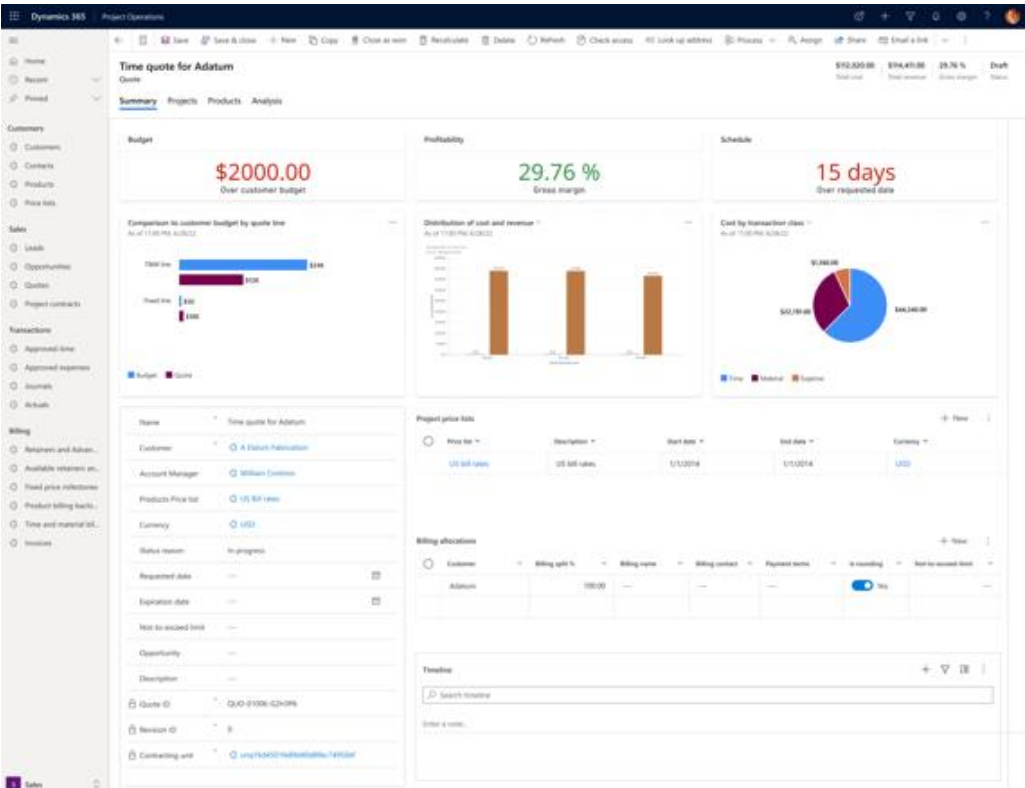
Estimate

Cost accounts

Revenue accounts

Project Operations - Optimize project operations

Item	N / U	Deadline	Benefits / Observations
Leverage quote, win, contract creation improvements		Sep/2023	Key enhancements will include: - Limit the creation of chargeable roles and categories for every new contract line by moving to an exception model. - Leverage xMultiple paradigms and parallelize CRUD options in the contract creation context to improve the scale and throughput. - Continue usability improvements to Quotes to make it easy and intuitive to: * Visualize key metrics like profitability and comparison to customer expectations. * Update prices for specific roles and categories on a quote line. * Complete the migration to editable grid experiences to be able to change values and visualize the impact on key metrics.



Project Operations - Optimize project operations



Item	N / U	Deadline	Benefits / Observations
Project invoicing usability and performance improvements		Sep/2023	Key enhancements will include: - Usability investments to ensure that a Project Manager can: * Review billing backlog for the next invoice cycle with lines and details and proposed invoice total with the fewest clicks possible. * Make edits to billable hours and chargeable aspects of transactions. * Add transactions to the invoice when reviewing the invoice. * Easily evaluate the impact of any of these changes on the amount to be invoiced. - Enhance the creation of proforma invoice entry points by improving the control and selection of which transactions in the billing backlog are OK to get included on an invoice. - Leverage xMultiple paradigms and parallelize CRUD options in the invoicing context to improve the scale and throughput of invoicing operations.

The screenshot displays the Dynamics 365 Project Operations interface. The left sidebar shows navigation options: Home, Recent, Filtered, Customers, Sales, Transactions, and Billing. The main area shows a table titled 'Project contracts' with columns: Status, Contract, Customer, Contract value, Invoiced amount, Ready to be invoiced, Available amount, and Total non-chargeable amount. The table lists various contracts with their respective statuses (Draft, In review, Confirmed, Lost, Abandoned) and financial details.

Status	Contract	Customer	Contract value	Invoiced amount	Ready to be invoiced	Available amount	Total non-chargeable amount
Draft	Adatum Fabrication contract	Adatum Fabrication	\$100,000.00	\$50,000.00	\$20,000.00	\$1,000.00	\$5,000.00
Draft	Adventure Works contract	Adventure Works	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
In review	City Power & Light contract	City Power & Light	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
In review	City Power & Light contract	City Power & Light Engineering	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Confirmed	City Power & Light Instr contract	City Power & Light Instrumentation	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Confirmed	City Power & Light Int contract	City Power & Light Integration	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Confirmed	Trey Research contract	Trey Research	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Confirmed	Trey Research Assembly contract	Trey Research Assembly	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Confirmed	Trey Research Electronics contract	Trey Research Electronics	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Confirmed	Trey Research Fabrication contract	Trey Research Fabrication	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Confirmed	Trey Research Instr contract	Trey Research Instrumentation	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Confirmed	Trey Research Fab contract	Trey Research Fabrication	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Confirmed	A Datum Fab contract	A Datum Fabrication	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Confirmed	Adventure Works contract	Adventure Works	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Lost	Adventure Works contract	Adventure Works	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Lost	A Datum Integration contract	A Datum Integration	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Lost	Adventure Works contract	Adventure Works	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Abandoned	City Power & Light contract	City Power & Light	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Abandoned	A Datum Fabrication contract	A Datum Fabrication	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Abandoned	Adventure Works contract	Adventure Works	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00
Abandoned	Adventure Works contract	Adventure Works	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00



Finance & Operations

Cross App

Finance & Operations



Item	N / U	Deadline	Benefits / Observations
Cross-application features - Configure X++ enum data types for more than 251 values		Sep/2023	In 2023 release wave 1, we are removing the enum value restriction. That way, enums that require more than 251 values, such as LedgerPostingTypes, can be successfully configured.
Cross-application features - Enable continuous number sequence performance improvements		Jul/2023	Enterprise customers expect similar performance when using a continuous number sequence as with a non-continuous number sequence. This feature provides enterprise readiness with continuous number sequence, which was challenging in finance and operations apps.
One Dynamics One Platform - Enable support for asynchronous operation in dual-write functionality		Sep/2023	This feature lets you enable asynchronous business processes for dual-write functionality for your business.
One Dynamics One Platform - Simplify access to Dataverse by Finance and Operations apps		Aug/2023	This feature brings Finance and Operations closer together with Microsoft Power Platform.
One Dynamics One Platform - Dual-write availability expands to new countries		Sep/2023	Dual-write availability in China encourages Dynamics 365 customers to take advantage of the dual-write capability for their businesses.



What's new in Business Central



Business Central

Business Central - User experiences



Item	N / U	Deadline	Benefits / Observations
Fix errors yourself with actionable error messages	Update	Jul/2023	To help you resolve issues when working with Business Central, we've added actions to error messages. Making error messages more user friendly helps build trust in Business Central and saves time by making it easier to correct issues.
Distinguish between browser tabs when multitasking	Update	Oct/2023	Business Central now uses a simple and clear schema for naming browser tabs and windows: - Context: The tab name for list, card, and document pages reflects the current record, page or view, no matter how you navigated to that page. - Readability: To improve readability, the tab name has been trimmed of all secondary information. For example, the full product branding is no longer included, and the view or edit state of the page is also omitted. - Current: The tab name is automatically updated while you navigate within the web client. Multicompany: The company badge is included in the tab name, if the company has been assigned a badge.

←

Error Messages

🔍 Search

✓ Accept recommended action

🗑️ Hide fixed errors

🔗 Open related record

☐	Description	Recommended action	Message Type ↑	Status
☐	The Dimension Value Code must be OFFICE for Dimension Code B...	Set the value to OFFICE	Error	Fixed
☐	The Dimension Code SALESCAMPAIGN with Dimension Value Code...	Add SALESCAMPAIGN dimension set	Error	Fixed
☐	The Dimension Code SALESCAMPAIGN with Dimension Value Code...	Add SALESCAMPAIGN dimension set	Error	Fixed
☐	The Dimension Code SALESCAMPAIGN with Dimension Value Code...	Add SALESCAMPAIGN dimension set	Error	Fixed
☐	The Dimension Code SALESCAMPAIGN with Dimension Value Code...	Add SALESCAMPAIGN dimension set	Error	Fixed
☐	The Dimension Code SALESCAMPAIGN with Dimension Value Code...	Add SALESCAMPAIGN dimension set	Error	Fixed
☐	The Dimension Code SALESCAMPAIGN with Dimension Value Code...	Add SALESCAMPAIGN dimension set	Error	Fixed
☒	The Dimension Value Code must be blank for Dimension Code BUSI...			
☒	The Dimension Value Code must be blank for Dimension Code BUSI...			
☒	The Dimension Value Code must be blank for Dimension Code BUSI...			
☐	The Dimension Code SALESCAMPAIGN with Dimension Value Code...	Add SALESCAMPAIGN dimension set	Error	Fixed
☐	The Dimension Code SALESCAMPAIGN with Dimension Value Code...	Add SALESCAMPAIGN dimension set	Error	Fixed

?

The recommendations will be applied to 3 error messages.

Do you want to continue?

Yes

No

Guest

Chart of Accounts (CRO) X

Chart of Accounts (AZN) X

← ↻ https://businesscentral.dynamics.com

Dynamics 365 Business Central

CRONUS USA, Inc. | Finance ▾ Cash Management ▾

Chart of Accounts: All ▾ | Search + New Delete Edit List

No.	Name
17000	Short-term investments
17100	Bonds

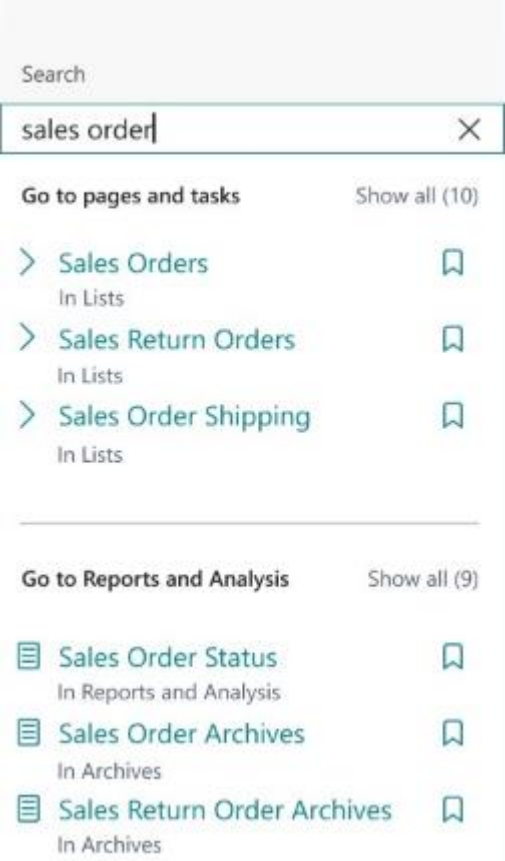
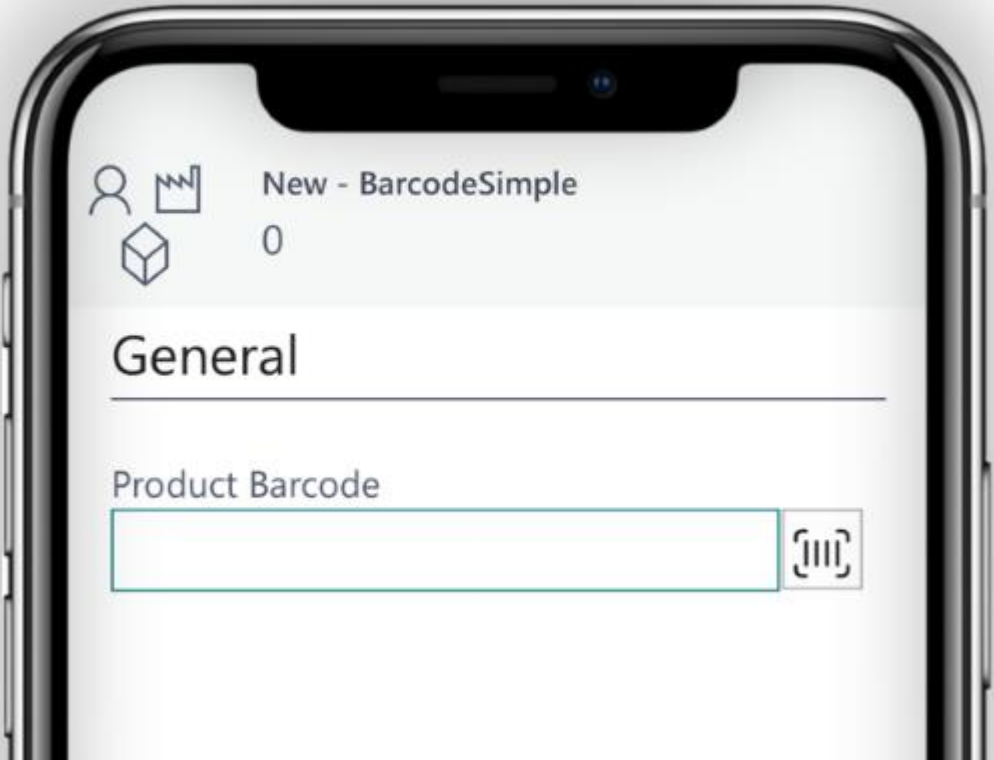
Business Central - User experiences



Item	N / U	Deadline	Benefits / Observations
Manage user expectations with selection context-based actions	Update	Oct/2023	We've made the experience of using actions on pages easier to understand and more consistent. While you're working, only the actions that are relevant to your current selections are available. Because only the actions you can use are available, you'll spend less effort on trying to figure out what you can do with your selections.
Peek at summarized data from editable fields	Update	Oct/2023	Peek view offers a quick and easy way to access and understand key information about related records. Peeking records can improve decision-making by providing a clear and concise overview of important information without leaving your current task.
Use actions to navigate or fix errors from inline validation dialog	Update	Oct/2023	Business Central validates data to improve its accuracy and reliability. When there's an error, Business Central shows a small validation dialog to inform you. We've added actions on validation dialogs that take you to the problem so you can fix it, or have Business Central fix it for you when possible. The clear and actionable information in validation messages helps you quickly resolve errors so you can get about your business.
Copilot and AI innovation - Get marketing text suggestions with Copilot	Update	Oct/2023	Business Central's first copilot feature, marketing text suggestions, moves from public preview to being generally available. This wave includes: - Various quality improvements that address customer feedback. - Support for more languages beyond English. - Use of marketing text on the Price List report. - Improved discoverability from within the web client. - Improvements to content moderation.

Business Central - User experiences

Item	N / U	Deadline	Benefits / Observations
Scan barcodes with Business Central mobile app for iOS and Android	New	Oct/2023	The barcode scanner control increases warehouse users' productivity as they can scan barcodes using the device camera or even the dedicated barcode scanner. This feature also opens scenarios for partners to create more advanced experiences using a barcode scanner. - Scenario 1: UI button - Scenario 2: AL action - Scenario 3: Barcode event
Search for pages and data in the mobile app	Update	Sep/2023	More and more people use mobile phones or tablets to access Business Central. The ability to quickly find pages or data on mobile devices opens up many new possibilities for mobile scenarios.



Business Central - Application



Item	N / U	Deadline	Benefits / Observations
Add more columns to pages for better insight	New	Oct/2023	Based on feedback from our community, we've added more fields and columns to choose from on several pages: the Description 2 fields.
Availability overview helps you calculate quantities in your warehouse	Update	Oct/2023	Increase warehouse handling efficiency by having accurate and real-time information about inventory levels, locations in your warehouse, processing stage, and other factors that affect available quantities - for example, quarantine or reservations.
Configure the right level of handling for different warehouse operations	Update	Oct/2023	Warehouse processes such as picking and replenishment are no longer one-size-fits-all. You can configure your warehouse processes differently to suit your inbound, outbound, and internal workflows.
Do financial consolidations across environments in multicompany setups	Update	Oct/2023	You can consolidate financial data for companies that have different Business Central environments without having to handle files.
Get more productive while approving time sheets	Update	Oct/2023	The ability to quickly and easily approve multiple time sheets at the same time makes the process more efficient for managers. Reducing the time and effort managers spend on reviewing and approving individual time sheets gives them more time to focus on their core business.
Get more productive while entering time sheets	Update	Oct/2023	Copying time sheets from previous periods can save you time and effort by reducing the need to manually enter data. The process improves productivity and efficiency by allowing you to quickly and easily create time sheets based on data you already have. Additionally, copying time sheets can help to ensure that your data is consistent and accurate by reducing the risk of data entry errors.
Include approvals for intercompany general journals in your workflows	Update	Oct/2023	To increase control and reduce errors in intercompany posting, you can include intercompany general journals in an approval workflow. The approval workflow gives someone, like a manager, the opportunity to review intercompany general journals before they're posted.
Make intercompany transactions across Business Central environments	Update	Oct/2023	It's easier for businesses to handle transactions when they have multiple companies. Intercompany postings help you do accounting for multiple companies operating in multiple Business Central tenant environments, eliminating the need to manage files.
Use General Ledger Allocations to distribute costs and revenue more efficiently	Update	Oct/2023	To make data entry efficient and reduce errors for recurring types of posting, you can use allocations to predefine how to distribute revenue for transactions or cost amounts across G/L accounts and dimensions. You can use allocation keys on document and document lines, and in most journals

Business Central - Application



Item	N / U	Deadline	Benefits / Observations
Edit in Excel on item journals and warehouse worksheets	Update	Oct/2023	The Edit in Excel action on item journals and warehouse worksheets lets you change records in Excel and then publish the changes back to Business Central. When Excel opens, you'll see the Excel Add-in pane on the right. - Excel respects most filters on the page, so the Excel workbook will contain almost the same records and columns. - To get the latest data from Business Central, choose Refresh on the Excel Add-in pane. - If your organization has configured OneDrive for system features, the Excel workbook opens in your browser by using Excel for the web. If you aren't using OneDrive for system features, the workbook downloads to your device. From there, you can open it using either the Excel desktop app or Excel online, depending on what you have.

←

Item Reclassification Journals

🔖

📄

Batch Name

.....

DEFAULT

...

Manage

Home

Line

More options

🔗

🔍

📄

Post

⌵

📄

Get Bin Content...

🖨

Print...

📄

Open in Excel

📄

Edit in Excel

📄

Share to Teams

🔗

Copy link

Posting Date

Document No.

Item No.

Description

New Location Code

→

4/10/2023

*

Business Central - Application



Item	N / U	Deadline	Benefits / Observations
Identify and track items easier with item references	New	Oct/2023	Streamline inventory management by providing quick and accurate identification of related items.
Suggest the next step for sales and production orders	Update	Oct/2023	Improve customer satisfaction by delivering on sales and production orders faster. Business Central monitors the inventory status of the items on orders for you, and suggests the next step accordingly.

←

Item Reclassification Journals

🔖

🔗

Batch Name

.....

DEFAULT

Manage

Home

Line

More options

📄 Post

▼

📄 Get Bin Content...

🖨 Print...

Item Reference No.

Specifies a reference to the item number as defined by the item's barcode.

Learn more

Posting Date

Document No.

Item No.

Item Reference No. ▼

Description

Location Code

→

4/10/20.

📅

*

Create Warehouse Shipment

↗

✕

Options

Do not fill Qty. to Handle

.....

🔘

Reserved stock only

.....

▼

Full and Partial

Full

Filter: Warehouse Request

× Source Document

.....

▼

× Source No.

.....

▼

× Location Code

.....

▼

Business Central - Application



Item	N / U	Deadline	Benefits / Observations
Improved processes for inventory counts and adjustments	New	Oct/2023	Productivity increases when processes are easy, so we've improved the usability of several areas within counting and adjusting inventory processes. For example, you can include items into physical inventory order regardless of their availability or turnover, and in several places, data is easier to access and digest.

Physical Inventory Order

PHIO0000

Home Prepare

Copy Document

General

No. PHIO

Description

Location EAST

Person Re...

No. Finish...

Calc. Phys. Invt. Order Lines

Options

Calculate Qty. Expected

Items Not on Inventory

Include Items without Transacti...

Include Items without Transactions

Specifies if physical inventory order lines should be created for items that are not on inventory and are not used in any transactions.

Learn more

× NO.

× Inventory Posting Group

× Item Category Code CHAIR

Inventory Setup

General Posting Journal Templates More options

General

Automatic Cost Post...

Automatic Cost Adju... Always

Default Costing Met... FIFO

Prevent Negative In...

Variant Mandatory if...

Skip Prompt to Crea...

Copy Item Descr. to ...

Allow Inventory Adj...

Allow Inventory Adjustment

Specifies if you want to allow manual adjustment of the inventory in the item card.

Learn more

Location

Location Mandatory

Business Central - Application



Item	N / U	Deadline	Benefits / Observations
Sync document and posting dates for sales and purchases	Update	Oct/2023	The option to synchronize or decouple document dates and posting dates on sales and purchase documents improves financial accuracy and operational flexibility.
Troubleshoot Shopify integration issues	Update	Oct/2023	When a business experiences a problem with the integration of their front end, Shopify, and their back end, Business Central, it's important to quickly get to the bottom of the issue. Having different levels of logging reduces the time it takes to resolve a problem with your integration between Shopify and Business Central.

Purchases & Payables Setup

General

Show less

Discount Posting ····· All Discounts ▾

Check Prepm. when ... ····· ☒

Receipt on Invoice ····· ☒

Prepm. Auto Update ... ····· Never ▾

Return Shipment on C... ····· ☐

Default Posting Date ····· Work Date ▾

Invoice Rounding ····· ☒

Default Qty. to Receive ····· Remainder ▾

Create Item from Item... ····· ☐

Combine Special Ord... ····· Always Combine ▾

Copy Cmts Ret.Ord. t... ····· ☒

Link Doc. Date To Pos... ····· ☐

Exact Cost Reversing ... ····· ☐

Link Doc. Date To Posting Date

Specifies whether the document date changes when the posting date is modified.

Learn more

Number Series

Shopify Shop Card

Related

Synchronization

More options

General

Show less

Code ····· STORE

Language Code ····· ▾

Shopify URL ····· https:// ····· .myshopify.c...

Logging Mode ····· Error Only ▾

Enabled ····· ☐

Allow Background... ····· Error Only ▾

Has AccessKey ····· ☐

Allow Data Sync t... ····· ☒

Currency Code ····· ▾

Item/Product Synchronization

Business Central - Application



Item	N / U	Deadline	Benefits / Observations
Usability improves for warehouse, inventory, and tracking	Update	Oct/2023	Productivity increases when processes are easy, so we've improved the usability of several areas within inventory and warehouse management. For example, you can get help to create warehouse employees, and in several places data is easier to access and digest.
Use directed pick and put-away suggestions in basic warehouse configurations	Update	Oct/2023	We're enabling a capability for basic warehouse configurations that was previously available only when a location is configured to use directed put-away and pick, which is an advanced configuration. Business Central suggests the most appropriate bin for items at any given time based on the put-away template that you've set up for the warehouse, the way you rank your bins, and the minimum and maximum quantities that you specify for fixed bins.

Warehouse Employees

Locations

	☐ Code ↑		Name
	☒ EAST		East Warehouse
	☐ MAIN		Main Warehouse
	☒ SILVER		Silver Warehouse
	☐ WEST		West Warehouse
→	☒ <u>WHITE</u>	:	White Warehouse
	☐ YELLOW		Yellow Warehouse

Business Central - Development



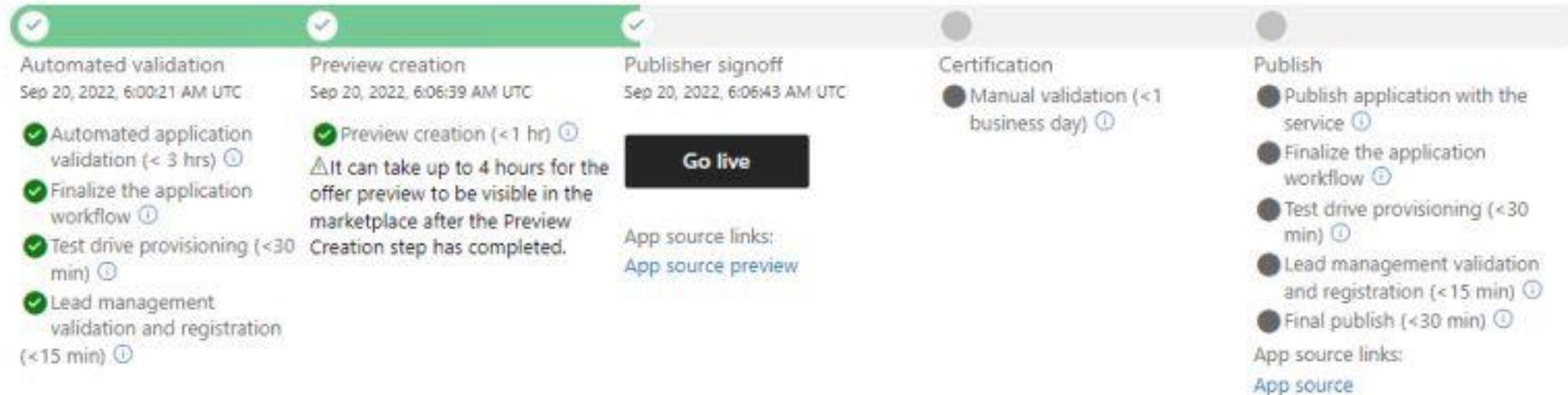
Item	N / U	Deadline	Benefits / Observations
Get AL VSIX preview versions on Visual Studio Code Marketplace	New	Oct/2023	Visual Studio Code already supports the ability to notify users about and install prerelease versions of VSIX extensions. Using this mechanism will make it easier for developers to be aware of and opt in to prerelease AL VSIX extensions.
Sell Business Central apps through AppSource	New	Oct/2023	Business Central apps through AppSource will go live after having gone through both private and public previews. Initially, credit card payment or direct billing is supported along with per-user monthly or yearly subscription licensing managed through the Microsoft admin center.
Extend general ledger posting aggregations	Update	Sep/2023	Regulations in different countries and industries, and customer business practices, might require a change to how general ledger entries are aggregated during posting.
New SecureText string type to store variable secrets that should not be debugged	New	Oct/2023	A new SecureText data type will be introduced. The declaration syntax will be similar to the Text data type, with the sole difference that it won't support constraints on the length. SecureText will be usable as a: Variable value, Return value, Parameter value
Open Visual Studio Code from web client to investigate or troubleshoot extensions	Update	Oct/2023	Recreating a locally installed Visual Studio Code workspace to investigate or troubleshoot a customer environment includes creating workspaces, projects, and launch configurations, and downloading symbols, all of which require knowledge as well as time to go through it. To simplify and speed up this process, a new option to open a local Visual Studio Code instance for a given extension and environment will be added to the web client.
Turn off data analysis mode on pages and queries	Update	Oct/2023	We make the following possible: - AL developers can turn off the data analysis mode using page metadata. - Tenant admins can override the developers choice in the client (by using a list page on a system table) on the tenant level. - Tenant admin can turn off the data analysis mode for specific users (probably done using a specific permission).
Use the built-in rich text editor to enter data	Update	Oct/2023	Rich text editing capabilities improve the user experience by providing an intuitive and easy-to-use way to create and edit content in Business Central.

Business Central - Development

Item	N / U	Deadline	Benefits / Observations
AppSource ISV publishers can preview their AppSource apps with select customers		Sep/2023	Allow AppSource ISV publishers to test and collect early feedback on the new version of their app by organizing a private preview with a select group of their customers.
Segment AL code and reduce naming conflicts with namespaces	New	Oct/2023	Business Central AL will now support namespaces, similar to other code languages. Namespaces provide a way of organizing objects and code in a logical and hierarchical manner. They can be used to help avoid naming conflicts between different extensions, making it easier to maintain and understand extensions, including the relationship between different objects.

Publish status  Showing details

⚠ Version of offer in Preview is different from Live version. Select to Go live on the version in Preview when you are ready to replace what is Live.



Business Central - Country and regional

Item	N / U	Deadline	Benefits / Observations		
Expanding Business Central to new markets across the globe	Update	Jul/2023	- Armenia - Azerbaijan - Bahamas - Bermuda - Bolivia - British Virgin Islands - Cambodia - Cameroon - Cayman Islands - Ethiopia - Fiji	- Ghana - Kazakhstan - Kosovo - Macau (SAR China) - Madagascar - Malawi - Mozambique - Namibia - Nepal - Sao Tome & Principe - Senegal	- Tanzania - Uganda - Zambia Jun/2023 - Andorra - Guernsey - Isle of Man - Jersey - Liechtenstein - San Marino More countries and regions are added to bring Business Central to approximately 150 countries and regions.
Localization	Update	Oct/2023	- Advance payment and a posting preview of tax documents - Czechia - Direct transfer - Czechia - Intercompany posting cues to the Accountant Role Center - Czechia - E-submission of VAT return in Denmark - Registration and notification functionality for Denmark - E-invoicing with NemHandel in Denmark		
Localization	Update	Nov/2023	- Iceland localization app - delocalization: the localized version for Iceland is delivered as an extension		
New design for report Language and Region settings	Update	Dec/2023	We've simplified language and regional settings, and you can change them to suit your needs for each specific report.		

Business Central - Adapt faster with Power Platform



Item	N / U	Deadline	Benefits / Observations
Change modification limits for triggering flows and bulk updates	Update	Oct/2023	Processing large datasets in Power Automate or triggering automation when multiple rows have been updated works smoothly, even for larger updates.
Support business events in Business Central connector for Power Automate	Update	Oct/2023	With this release, building flows that react to specific business events in Business Central (version 22.2 and later) is now possible. This feature enables users and makers to hook flows to specific business events raised by Business Central (version 22.2 and later), or even events built by partners who added business event code into their applications.
Consolidated Power Automate flow creation from Business Central templates	New	Oct/2023	It's essential that all Power Automate integration capabilities and sample templates are clearly defined, marked, and visible in the product so that decision makers can use them effectively when needed.
Enable specific virtual tables when you connect to Dataverse	Update	Oct/2023	Avoiding duplicate data entry is a key value proposition for integrating Business Central with Dataverse. Enabling virtual tables makes more data available between Business Central and Dataverse, which enriches integrations without additional customizations.
Get control over how to view Power BI embedded content	Update	Oct/2023	In this release, we add more capabilities to the Power BI embedded experience in Business Central. While details are still being finalized, here are some capabilities that you can expect: - Control over pages in reports - Stretch the view to full page - Control zoom level of reports more easily - Show scorecards
Get list of companies using Business Central connector in Power Automate	New	Oct/2023	This capability enables the creation of more dynamic workflows that function seamlessly across different companies.
Simplified Power Automate approval flow experience	New	Oct/2023	Approving documents or data changes in a modern company must be straightforward. We listen to feedback and continue to improve this area, making sure this experience matches business users' expectations.

Business Central - Governance and administration



Item	N / U	Deadline	Benefits / Observations
Auto-update AppSource apps with minor updates	Update	Aug/2023	With this release wave, it'll be easier to make sure that apps that are installed in an environment are always updated to the latest version.
Assign more granular administration rights	Update	Oct/2023	Administrators' access rights can be better controlled by assigning roles that exclude access to other Microsoft products and apply extra restrictions on Business Central environments.
Improved update release processes	Update	Dec/2023	Improved update release processes ensure that updates run as close to the start of the update window as possible and that updates are made available globally more gradually.
Include or exclude tables from cloud migration		Sep/2023	Explicitly including or excluding certain tables from cloud migration runs will make it easier to specify what data you want to migrate to the cloud.
Transfer environments between Azure AD tenants	Update	Sep/2023	In 2023 release wave 1, the process for transferring a Business Central environment to a different Azure AD tenant will be a self-service scenario. Internal administrators can request an environment transfer from the source tenant, then accept the transfer from the target tenant.

Business Central - Service and platform

Item	N / U	Deadline	Benefits / Observations
Data loads faster in the server	Update	Oct/2023	This release focuses on optimizing two essential parts of the data stack in the Business Central server: - The data model for table extensions. - The use of modern SQL datatypes for Booleans and blobs.
Faster application scenarios	Update	Oct/2023	This release includes optimizations for the following scenarios in the Business Central base application: - Running country-specific (long-running) reports. - Renumbering General Journal entries. - Validating the Sales Order Subform field for Tax Group Code. - Generating report 120 Aged Accounts Receivable for larger datasets. - Assigning serial numbers and posting reservation entries and item tracking lines. - Assembly-to-order processes.
Pages load faster in client	Update	Oct/2023	In this release, we optimize two essential areas of the Business Central client: - Opening a new tab. - Rendering the navigation bar and action bar on all pages.
Performance gain by reducing locks in the database	Update	Oct/2023	In this release, we will optimize this very central part of the data stack in the Business Central server: - Change the default locking behavior in AL from SerializedRead to ReadCommitted.

Business Central - Legislation



Item	N / U	Deadline	Benefits / Observations
Digital vouchers	Update	Oct/2023	You can have one or more sourced documents for each of GL register as proof of a transaction and a full audit trail. You can set up the system to enforce attaching documents if this is required by law.
Drop shipments in Intrastat triangular trade	New	Oct/2023	User will get more accurate reporting when they use the Drop Shipment option with different countries or regions.
E-documents core as a global solution	Update	Oct/2023	The Dynamics 365 Business Central E-documents module enables different models of electronic invoicing required by different countries.
Large companies to report payment times	Update	Oct/2023	This new feature sorts vendors based on size or payment terms, and provides reporting for the vendors for the following as required by local authorities: - The average agreed payment period. - The average actual payment term. - The proportion of invoices paid after the end of the agreed payment period.

Work Date: 1/23/2025

Intrastat Report Setup

Intrastat Report Checklist

General

Report Receipts

Report Shipments

Include Drop Shipment

Shipments Based On

Tax Reg. No. Based On

Intrastat Contact Type

Intrastat Contact No.

Company Tax Reg. No. on File

Vendor Tax Reg. No. on File

Customer Tax Reg. No. on File

Get Tax Reg. No. For

Default Transactions

Default Trans. Type

Default 3-Party Trade Tax Reg. No.

General

No.

Ending Date

Modified Manually

Aggregation Type

Generated On

Starting Date

Generated By

Overall Statistics

Average Agreed Payment Period

Average Actual Payment Period

Pct Paid on Time

Lines

Line No. 1

Payment Period Description

Prct Paid in Period

Prct Paid in Period (Amount)

Modified Manually

Item	N / U	Deadline	Benefits / Observations
Productive with Microsoft 365 - Enhancements to Excel add-in	Update	Oct/2023	This release wave includes the following enhancements to the Business Central add-in for Excel: - Dimensions are included on more pages when using the Edit in Excel feature. - Increased accuracy of filters when they're transferred from Business Central to Excel. - Improved reliability and performance of data refresh and publish through the latest OData V4 technology. - The add-in now supports on-premises deployments that have a dedicated server instance specifically for OData feeds.
Onboarding - Modify texts on the welcome banner and skip banner intro state	Update	Oct/2023	Partners can give new users a warm welcome experience by showing personalized greetings in the welcome banner.
Onboarding - Set initial role before first sign-in for a better first-run experience	Update	Oct/2023	Trial and onboarding experiences that are based on the sign-up context can pivot using prospect profiles to set the initial role for users when they sign up.
Reporting and data analysis - Analyze, group, and pivot data on queries using multiple tabs	Update	Oct/2023	In this release, we take this concept even further: - It's possible to analyze data from any query the same way as on a list page. - From any analysis tab, you can share a link to the tab with co-workers. - Shared links can also be used as a click-once installation of good out-of-the-box analysis.
Reporting and data analysis - Discover report and data analysis content easily	Update	Oct/2023	Business Central comes with many options for reporting, business intelligence (BI) dashboards, and data analysis. In this release, we aim to make this content much easier to discover for users through search and a new report explorer page.



What's new in Supply Chain Center



Supply Chain Center

Supply Chain Center - Intelligent Order Management



Item	N / U	Deadline	Benefits / Observations
Add new providers	Update	Oct/2023	This feature will add providers for: - Additional delivery carriers: J.B. Hunt, Uber Freight - New logistics providers: Flexe, Koerber - New pricing provider: Flintfox - Additional e-commerce platform: Shopify
Try real-time inventory dashboards	Update	Oct/2023	New functionality in Dynamics 365 Intelligent Order Management provides customers with access to dashboards that offer real-time insights to their inventory, allowing customers to plan and make remediations where needed.
Try new order types that support your business	Update	Oct/2023	This feature provides support for: - Backorders and preorders: * Place an order as a backorder when inventory is unavailable and provide regular checks so that the order is placed back in for fulfillment when inventory becomes available. * Place an order to be reserved for a later date. - Manual orders: Create and update an order and enable the order to be orchestrated in Intelligent Order Management. - Return orders: Enable returns through the bidirectional integration between Intelligent Order Management and finance and operations apps.
Use self-service product returns powered by FedEx	Update	Oct/2023	The following functionality will be available as part of this feature release: - A pluggable returns user interface (UI) component that can easily integrate with your e-commerce site. - End-to-end return order orchestration - Access to a dashboard that will include the following KPIs for return orders - The following graphs and charts



Thank you
very much!

Contato

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