

Welcome to

What's new in Microsoft 2024 Release Wave 2

Tuesday, 24th September 2024

We will kick off shortly



What's new in Dynamics 365 ERP

Agenda

- D365 Finance and Supply Chain & D365 Business Central
 - Deprecations / Replacements
- What's new in D365 Finance and Supply Chain
 - Finance & Oper Cross-App
 - Finance
 - Project Operations
 - Supply Chain
- What's new in D365 Business Central

DEPRECATED

Deprecations / Replacements

Finance and Operations

Item	N / U	Deadline	Benefits / Observations
Supply Chain - Job card terminal			10.0.41 release - Deprecated. Approximately one year after the release of version 10.0.41, the job card terminal will no longer be supported and may eventually be removed from the product.
Supply Chain - Inventory transactions support for internal warehouse operations			10.0.41 release - Deprecated. Inventory transactions will be deprecated for tracking on-hand inventory for internal warehouse operations. Existing customers will be able to continue using this scenario after that version, but new features and bug fixes for this scenario will only be implemented for warehouse-specific inventory transactions . 10.0.41 release - Approximately one year after the release of version 10.0.41, support for this scenario will be removed and all customers will be required to move to warehouse-specific inventory transactions for tracking on-hand inventory for internal warehouse operations.
Supply Chain - Release to warehouse page			10.0.41 release - Deprecated. The Release to warehouse page is now hidden in the app, but you can enable it if necessary by contacting Microsoft Support. We strongly recommend that you instead use the new pages (Release sales orders to warehouse and Release transfer orders to warehouse) because they provide equivalent functionality with significantly improved performance. The Release to warehouse page will be completely removed from the product one year after the release of Supply Chain Management version 10.0.41.
Supply Chain - Load planning workbench			10.0.39 release - Deprecated. The Load planning workbench page is now hidden in the app, but you can enable it if necessary by contacting Microsoft Support. We strongly recommend that you instead use the new pages (Inbound load planning workbench and Outbound load planning workbench) because they provide equivalent functionality with significantly improved performance. The Load planning workbench page will be completely removed from the product one year after the release of Supply Chain Management version 10.0.39.

Power Platform - ERP



Item	N / U	Deadline	Benefits / Observations
Platform is changing the authentication protocol from password based auth to Microsoft Entra ID based authentication for 10.0.39 and greater releases.		Oct/2024	10.0.39 release - End of support date is Oct 2024 starting with 10.0.39 (PU63) and greater releases.
Azure Active Directory Graph to Microsoft Graph Migration		Jul/2024	The Support for Azure Active Directory Graph will end in PU66.
SharePoint integration authentication using a Microsoft-managed high-trust connection		Jan/2024	10.0.40 release - The SharePoint user authentication feature is available in Dynamics 365 Finance version 10.0.40, and is mandatory in version 10.0.42. Migration to the new SharePoint authentication must occur by February 28, 2025, at which time the current SharePoint connection stops working.
Support for unregistered Microsoft account and external Microsoft Entra ID users		May/2024	Initial End Date for support was May 24.

Item	N / U	Deadline	Benefits / Observations
Business Central - API (v1.0) for Business Central (warning)			Replaced With Business Central you can create Connect apps. Connect apps establish a point-to-point connection between Business Central and a 3rd party solution or service using the standard REST API to interchange data. In 2020 release wave 2, we introduced a new improved API where all complex properties are replaced with first-level properties or navigation properties. This change significantly improves API performance, as complex fields were previously calculated at runtime. In API v2.0, all multipart keys and non-GUID keys are replaced with unique GUID keys, and entities can be retrieved using the SystemId, which is immutable, platform-enforced, and indexed. This change improves auditing and API reading performance. We're making the API (v1.0) obsolete in 2024 release wave 1 (to be removed in 2026 release wave 1). The API (v1.0) will be removed in 2026 release wave 1. The API v2.0 contains all the functionality from API v1.0, so migration should be possible. If this isn't the case, reach out to us via https://github.com/microsoft/ALAppExtensions. To learn about the replacement feature, go to Transitioning from API v1.0 to API v2.0.
Business Central - Legacy time sheets experience		Oct/2024	Replaced. You can use time sheets in Business Central to track absence, and to track time and resources that are spent on a project. In 2021 Release Wave 1 we introduced a new experience where we converted time sheet pages to document pages (instead of worksheets). Using document pages lets you access time sheets on mobile devices. We're making the legacy experience obsolete in 2023 Wave 2 (to be removed in 2024 Wave 2) and enabling the new experience as the default for all new customers. To learn about the replacement feature, go to Use Time Sheets.

Item	N / U	Deadline	Benefits / Observations
Business Central - Excel reports on the Business Manager and Accountant role centers			Replaced The Excel reports (Balance Sheet, Income Statement, Statement of Cash Flows, Statement of Retained Earnings, VAT Collected, Customer Statements, Aged Accounts Payable, and Aged Accounts Receivable) that are available from the Business Manager and Accountant role centers are being replaced by new reports. The new reports use Excel layouts that allow power users to modify the layouts with Excel and upload the new layouts to Business Central. The deprecated reports will be hidden from the role centers in 2025 release wave 1 and will be completely removed from Business Central in 2026 release wave 1.



What's new in Finance and Operations



Finance & Operations

Cross App

Finance & Operations - Copilot for Dynamics 365

Finance and Operations apps



Item	N / U	Deadline	Benefits / Observations
AI actions for finance and operations business logic	Updated	Sep/2024	Developers in finance and operations apps must be able to extend and customize Copilot experiences for their application users by adding capabilities through plugins. This includes both Copilot for finance and operations apps, which provides the in-app Copilot with a natural language chat experience, and other Copilot experiences across the Microsoft ecosystem, like Copilot for Microsoft 365 and custom copilots. This feature enables developers to create AI plugins based on the business logic of finance and operations apps for both in-app prompts or actions that can be used in any Copilot experience. These are copilot capabilities that use the business logic of the application without requiring any specific application context or user interface. This enables Copilot users to ask questions in Copilot that can be answered by directly invoking business logic in finance and operations apps, dramatically expanding the capabilities and customization options for Copilot.



Finance

Finance – Core financials

Item	N/U	Prazo final	Benefícios / Observações
Archive data		Jul/2024	Save storage space and gain performance with a reduced data set to work against.

Archive GL

About archiving

Schedule

Choose years

Choose legal entities

Review

Schedule

Choose when you would like the system to perform archiving

NAME

Schedule type

Sample update schedule type

Name

#

Description

Owner

Admin

SCHEDULING

Suggested time: 1:00am - 4:00am

Start time

11:00:00 PM

Time zone

(GMT) Coordinated Universal Ti...

Series start date

8/3/2023

Series end date

OCCURRENCE RUN TIMES

Start time

11:00PM

End time

1:00AM

Duration

4 hours

OCCURRENCE PATTERN

Repeat

Daily

REPEAT INTERVAL (DAYS)

Daily repeat interval

1

EVERY WEEKDAY

ALERTS

Enabled

Cancel

OK

OK

OTHER ALERTS

Email

OK

Show pop-ups

OK

api@contosoaz7.onmicrosoft.com

Back

Next

Cancel

Archiving

Section

General ledger archive

Calendar

Fiscal

Archive

Reset from history

Year	Status	Lines moved	Execution results
> 2019 (S)			
> 2018 (S)			
> 2017 (S)			
> 2016 (S)			
> 2015 (S)			
USMF	Moved to history table	10,000 lines	View
USJ	Moved to history table	10,000 lines	View
USRT	Moved to history table	10,000 lines	View
CEMF	Moved to history table	10,000 lines	View
MANF	Moved to history table	10,000 lines	View

Finance – Core financials



Item	N / U	Deadline	Benefits / Observations
Create online templates for consolidation		Jul/2024	Consolidation of online templates allows you to set up the consolidation information once and use it each time the consolidation process is performed. This saves time because multiple templates can be set up and then processed when needed. A full history of each consolidation process can be viewed, notes can be added, and each process can be marked as Reviewed.

Financial and Operations Reviewer Consolidations > Setup > Consolidation online template setup

Consolidation online templates

Name: Monthly Description: Monthly consolidation

General

Account: 1-10110 Period: 12/2023

Consolidation account: ☒ Yes Include initial amounts: ☒ Yes

Financial dimensions

Financial dimension	Specification	Segment id
Month	None	0
Department	None	0
Business Unit	Division	1
Cost Center	Division	2
Location	Division	3
Region/Account	None	0

Legal entities

Accounting: ☒ Show account type of consolidation...

USBT	30000 Profit and loss
DEBT	30000 Profit and loss

Translation

Consolidation accounting currency: Use currency translation

Select consolidation account from: Accounting currency

Source account	Source account	From account	To account
DEBT	EUR	200100	401000
DEBT	EUR	100110	200000

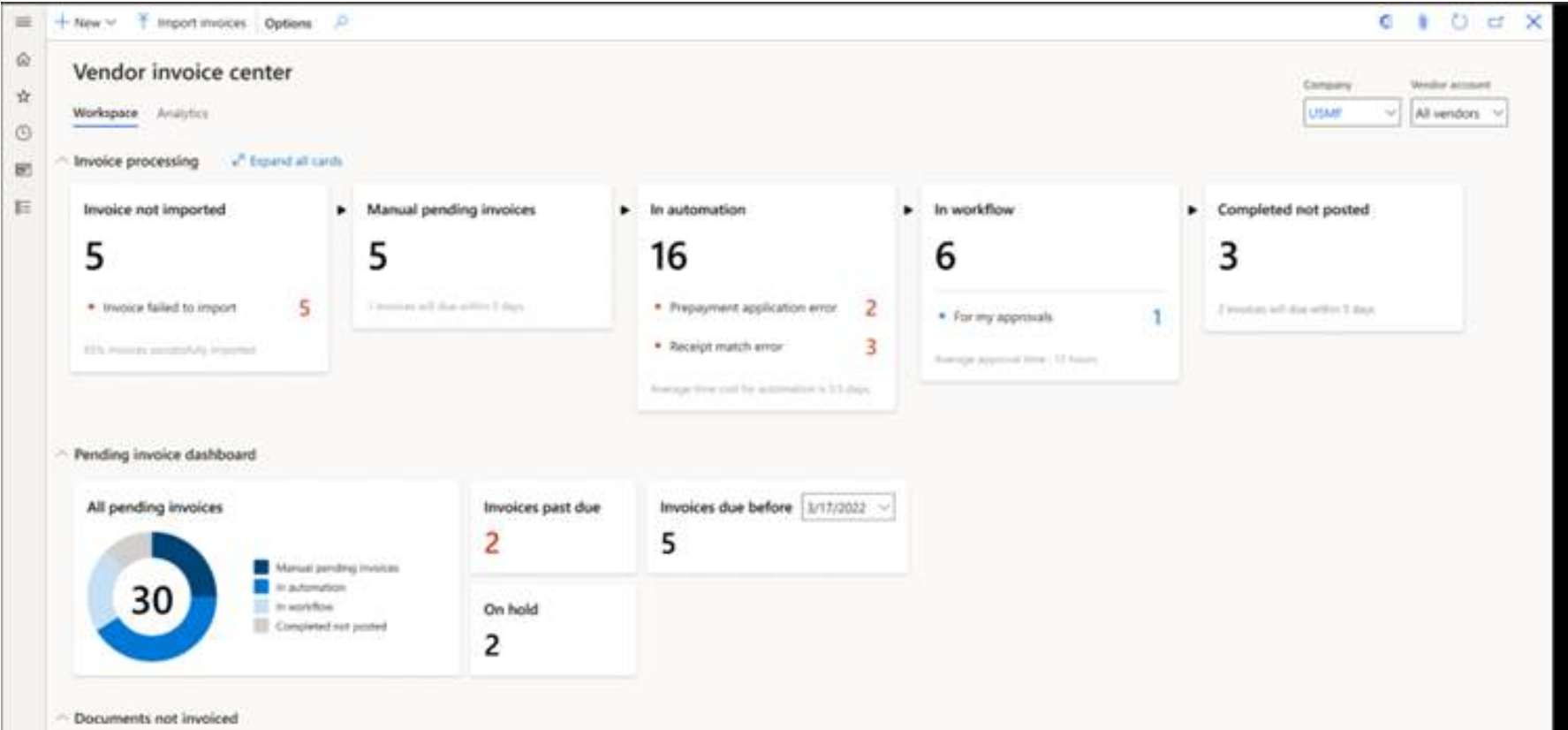
Exchange rate type: Buy/sell Rate type: Consolidation date: Exchange rate:

Budget

Include budget amounts: ☒ Yes

Budget account: From: To: Budget rate type:

Item	N / U	Deadline	Benefits / Observations
Check out new AP workspace capabilities (AP = Accounts Payable)	Updated	Jul/2024	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.



Finance – Core financials

Item	N / U	Deadline	Benefits / Observations
Manage advanced bank reconciliation with matching rule enhancement	Updated	Oct/2024	Dynamics 365 Finance offers an advanced bank reconciliation feature that helps businesses manage the bank reconciliation process more efficiently. Businesses benefit from increased automation and more functional capabilities, reducing the need for manual work and saving time for cash management clerks. By streamlining the bank reconciliation process, Dynamics 365 Finance helps businesses improve their financial management and ensure accurate reporting.

Dynamics 365 Finance Search for a page USMF

Posting rule 01
Description

Posting rule 02
Description

Posting rule 03
Description

Reconciliation posting rules

Posting rule name: 01 Description: Posting rule 01 Action: Generate voucher Active: No

Conditions

+ Add - Remove

Condition	Operator	Value
☒ Bank statement field	=	010
☐ Transaction code	=	USMF OPER

Related information

TRANSACTION DETAILS

Accounting date: *
Booking date: *
Offset account number: *
Description
Free text string

BANK

Bank transaction type: *
List

TAX

Sales tax group:
List

Item sales tax group:
List

FINANCIAL DIMENSIONS

BusinessUnit: *
001 Home

Department: *
023 Operations

FINANCIAL TAGS

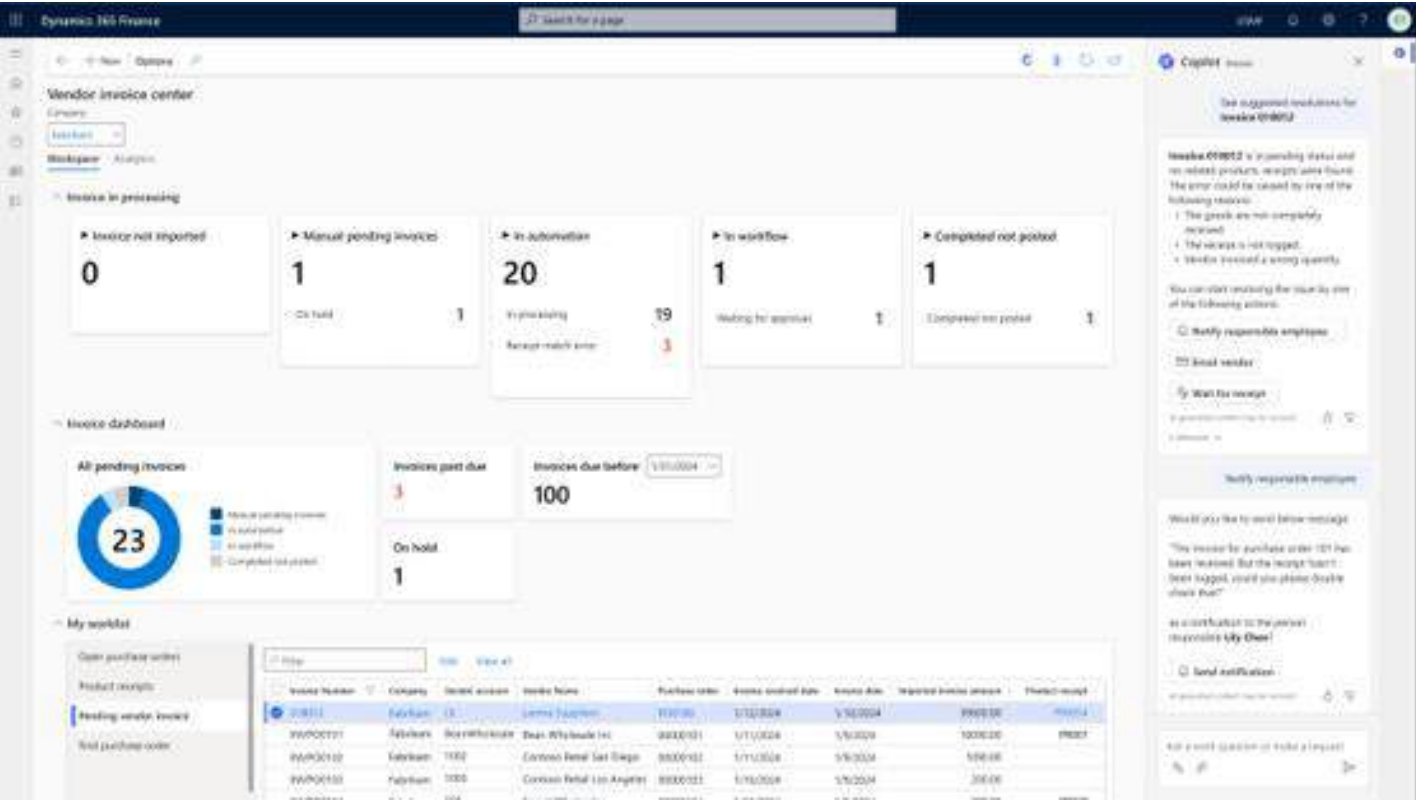
Financial tag: *
1234.2345

Financial tag name	Financial tag value
ADD1	1234
ADD2	2345
ADD3	

Finance – Core financials



Item	N / U	Deadline	Benefits / Observations
Use Copilot to handle vendor invoice exceptions	Updated	Oct/2024	In invoice automation, exceptions may occur at different stages. Copilot for vendor invoice exception handling can greatly reduce AP workspace’s manual effort on analyzing root cause for different invoice exceptions, thus reduce operation cost in Finance team. So, finance teams will be able to work on more strategical relevant tasks.



Finance – Business performance



Item	N / U	Deadline	Benefits / Observations
Provide actionable insights that drive strategic decisions and operational efficiency	Updated	Oct/2024	Business performance analytics is the key to unlocking your organization's full potential. By systematically collecting, analyzing, and interpreting data from various business functions, Business performance analytics provides actionable insights that drive strategic decision-making and operational efficiency. With advanced reporting and visualization tools, Business performance analytics transforms raw data into clear, impactful metrics, enabling you to track performance, identify trends, and capitalize on opportunities for continuous improvement.

The screenshot displays the Dynamics 365 Business Performance Analytics interface. The top navigation bar includes "Dynamics 365", "Business performance analytics (preview)", and a "Sandbox" environment selector. A sidebar on the left contains navigation options: Data explorer, Reports, Administration, Administration home, Dimensions, Dimension groups, Roles, and Users.

Admin home

Recommended

Link with Microsoft Fabric review

By clicking Link (1) you agreed to the [privacy policy](#) and (2) this feature connects your organization's Power BI workspace to its business performance analytics data in the same tenant. [Learn more](#)

Manage

Security

Dimensions

Dimension security lets you control which data is visible on a report. Select the dimensions for which you want to secure data.

Manage

Dimension groups

Dimension groups filter report data so that only the filtered values are visible to users who are assigned to that group.

Manage

Roles

Use roles to organize how users can access reports.

Manage

Microsoft reports

Name	File type	Type	Last edited	Owner
Balance sheet	Power BI	Microsoft	4/10/2024 12:10 AM	+ Business performance analy...
Budget vs. actual	Power BI	Microsoft	4/10/2024 12:10 AM	+ Business performance analy...
Financial performance	Power BI	Microsoft	4/10/2024 12:10 AM	+ Business performance analy...
General ledger dimension details	Power BI	Microsoft	4/10/2024 12:10 AM	+ Business performance analy...
General ledger transaction details	Power BI	Microsoft	4/10/2024 12:10 AM	+ Business performance analy...
Profit and loss	Power BI	Microsoft	4/10/2024 12:10 AM	+ Business performance analy...
Purchase orders	Power BI	Microsoft	4/10/2024 12:11 AM	+ Business performance analy...
Sales aging	Power BI	Microsoft	4/10/2024 12:11 AM	+ Business performance analy...
Sales transaction details	Power BI	Microsoft	4/10/2024 12:11 AM	+ Business performance analy...
Trial balance	Power BI	Microsoft	4/10/2024 12:10 AM	+ Business performance analy...
Vendor aging	Power BI	Microsoft	4/10/2024 12:10 AM	+ Business performance analy...
Vendor invoices	Power BI	Microsoft	4/10/2024 12:11 AM	+ Business performance analy...
Vendor payments	Power BI	Microsoft	4/10/2024 12:10 AM	+ Business performance analy...
Vendor transaction details	Power BI	Microsoft	4/10/2024 12:10 AM	+ Business performance analy...

Rows: 14

Business performance analytics (beta)

← Data validation Refresh data Duplicate Details Refreshed on 3/20/2025 3:30:41 PM

Balance validation

Applied filters

Legal entity

- SOPC
- CHMP
- MYMT
- GSI
- RUMF
- DSEP
- FORT
- SAUF
- PSEI
- THMF

Accounting currency validation

Legal entity	General ledger account	General ledger account name	Accounting currency (closing balance)
USMF	110110	Bank Account - USD	(\$1,574.37)
	110111		\$318.55
	110120		(\$4.97)
	110130		(\$775.27)
	110140		(\$74.98)
	110150		(\$512.70)
	110160		(\$626.15)
	110180		(\$2,409.53)
	112000		(\$662.70)
	112010		(\$516.28)
	112100		(\$283.00)
	112110		\$680.05
	112120		\$372.74
	112130		(\$193.99)
	112140		(\$289.45)
	112150		(\$1,228.15)
	112160		\$406.42
	120100		\$359.09
	120200		(\$616.89)
	120300		\$89.68
	120400		\$650.20
	120500		(\$328.57)

Currency Type

Accountancy Reporting

Accounting currency validation instruction

Purpose: Report identifies that the closing balance, for each general ledger account has correctly to Dynamics 365 Finance for the Business performance analytics model.

Settings:

Dynamics 365 Finance

Run the first balance for one legal entity (General ledger) > Inquiries and reports > Trial Balance)

Select the parameters as follows:

- From date: January 1 of the year being validated.
- To date: January 31 of the year being validated.
- Financial dimension ref.: Main account
- Posting type: Select all options
- OLS calculation: Balance

Balance validation report

Select the Accounting option from the Currency type option on the top right of the report

Get sliders to match report parameters

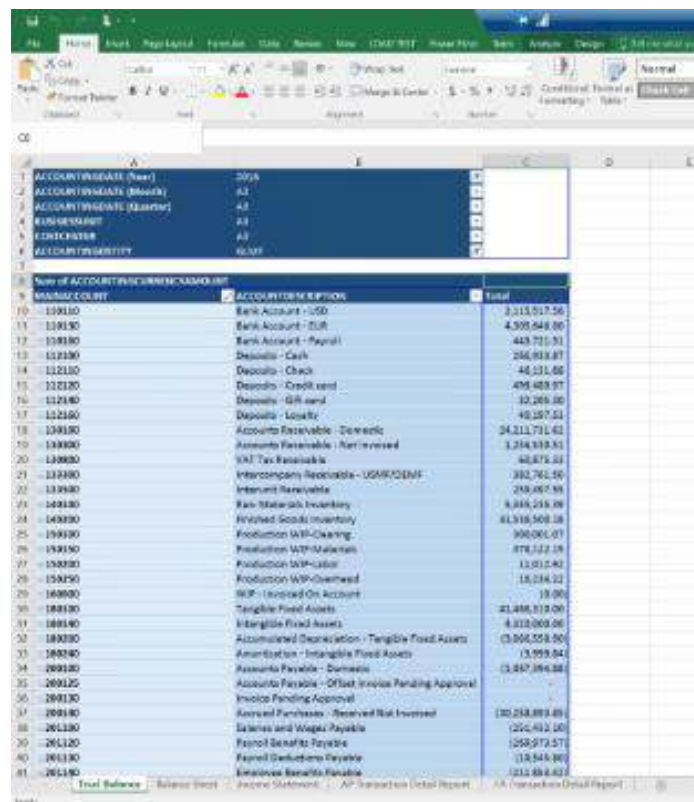
- Accounting year: Validation year selected in DSEP Trial balance
- Ending month: Month + 1 roll month from the time frame selected in DSEP Trial balance)
- Legal entity: Legal entity identified on the header bar of the DSEP instance

Expected outcome: Compares that the closing balance of each general ledger account matches between DSEP Trial balance and the balance validation report.

Finance – Business performance

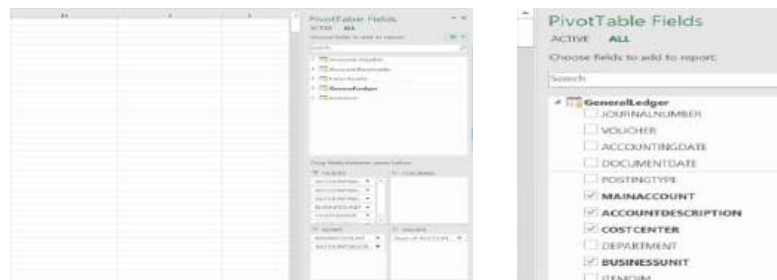


Item	N / U	Deadline	Benefits / Observations
Analyze data using the Record to Report data model	Updated	Oct/2024	The Record to Report data model in Business performance analytics delivers fine-grained financial data, empowering users to create custom reports and perform dimension-based analysis with ease. By enhancing the accuracy and timeliness of financial statements and supporting key processes like General Ledger, Budgeting, and Financial Dimensions, the Record to Report model drives strategic decision-making, optimizes financial operations, and ensures effective period-end reporting, ultimately contributing to sustainable business growth and competitive advantage.



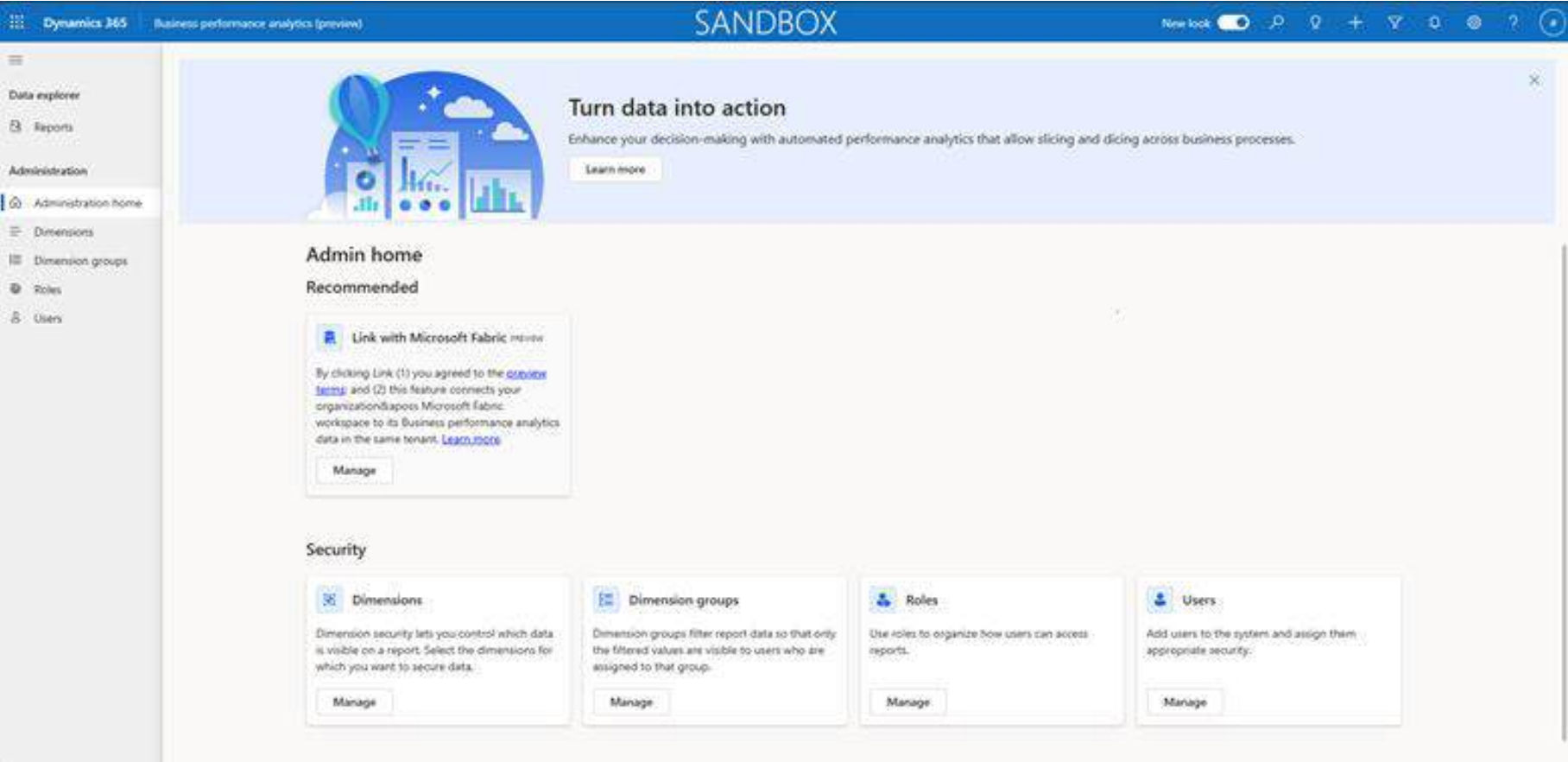
ACCOUNTINGVIEW...		Financial Statement Worksheet For the year ending 2016																							
		Jan		Feb		Mar		Apr		May		Jun		Jul		Aug		Sep		Oct		Nov		Dec	
Revenue																									
Jan		19,945,302	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00	19,945,302.00
Feb		17,147,840	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00	17,147,840.00
Mar		16,545,440	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00	16,545,440.00
Operating Expenses																									
Jan		12,335,000	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00	12,335,000.00
Feb		11,800,000	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00	11,800,000.00
Mar		11,500,000	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00	11,500,000.00
Net Income																									
Jan		7,610,302	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00	7,610,302.00
Feb		5,347,840	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00	5,347,840.00
Mar		5,045,440	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00	5,045,440.00

AP Transaction Detail Report					
ACCOUNTINGDATE (Year)	2016				
ACCOUNTINGDATE (Quarter)	All				
ACCOUNTINGDATE (Month)	All				
ACCOUNTINGENTITY	USMF				
Sum of AMOUNT					
MAINACCOUNT		ACCOUNTDESCRIPTION	VENDORNAME	INVOICENUMBER	INVOICE DATE
= 601300		Advertising Expense	Acme Office Supply	1743981743	12/31/2016
Grand Total					Grand Total
					94,400,000.00 94,400,000.00



Finance – Business performance

Item	N / U	Deadline	Benefits / Observations
Set dimensional row level security in Business performance analytics	Updated	Oct/2024	Dimensional row-level security in Business performance analytics provides significant business value by offering precise control over data access and enhancing compliance. By ensuring that users can only view data relevant to their roles, this security model minimizes the risk of unauthorized access, protecting sensitive information. It simplifies report management by eliminating the need for multiple report versions tailored to different access levels, streamlining the reporting process.



Finance - Copilot



Item	N / U	Deadline	Benefits / Observations
Improve efficiency using Customer page summary		Jul/2024	Users must use multiple modules in their daily work to look up information like customer activities. By using this summarization feature, users get a summary of the relevant data for the selected customer directly on the page, instead of switching among pages. This allows users to quickly determine the actions and improve business operation efficiency.
Make faster decisions using workflow summary		Jul/2024	Workflow approvers must navigate to the workflow history and then look through multiple entries to find the status of a given workflow. By using this summarization feature, approvers don't have to search for the submitter, the most recent status, comments, and the due date. Relevant history also gives more information about specific workflow types to improve the overall process.

← → + New Delete Customer Sell Invoice Collect Projects Service Market Commerce General Credit management Recurring contract billing Options ⌵

[All customers](#) | My view ▾

US-001: Contoso Retail San Diego

[Lines](#) [Header](#)

Summary

Status
 The customer has 23 posted invoices totaling 460,090 USD, with 88,000 USD outstanding. In-scope chain management, 23 delivered orders amount to 260,198 USD, with 150,000 USD not yet invoiced.

Outlines
 Invoice ID000710 with an outstanding balance of 198 USD stands out. Delivered but not invoiced sales orders suggest potential revenue loss. Lack of data in item statistics raises inventory tracking concerns.

Risks
 The presence of 5 overdue invoices poses collection risks. High outstanding balances and undelivered sales orders indicate liquidity and delivery risks respectively. Inaccurate item statistics may lead to inventory management issues.

Summary based on data as of 12 months. May take 48 hours to generate content in scope and out-of-scope before using. [Learn more](#)

General					
Customer					
Name	Customer group		ORGANIZATION DETAILS		STAFF
Account	Customer Retail San Diego		Number of employees		75000
LIN 000			ID		20000 number
Type	Customer Retail San D		Organization number		
Organization			3001		
STAFF INFORMATION					
Address details					
Name Last					
Language					
City ID					
Business name					
Business ID					
Addresses					
Contact information					
Miscellaneous details					
Sales demographics					
Credit and collections					
Sales order defaults					
Payment defaults					
Financial dimensions					
Warehouse					
Invoice and delivery					

Finance and Operations Preview | Account payable > Invoices > Invoice journal

Standard view

Invoice journal
Standard view

Show: Not posted ☐ Show user-created only

List General Setup Blocking Financial dimensions History Financial tags

	Journal No.	Name	Description	Posted	Posted on	Log	In use by	Modified
	00043	WRAPWV	WF AP invoice					SARA
	00045	APInvoice	AP Invoice					akraddo
	00043	WRAPWV	WF AP Invoice					Admin

Ledger daily journal workflow - Approve

Comment

Add any comments here that you would like the other party to know.

Summary by Copilot

- Overview**
Submitted by April on 4-10-2024 04:12:55 PM with comment: "Need supplier". Due date is 04-12-2024 04:05:04 PM. Rejected by Julia with comment: "Missing attachment". Delegated to Cassie with comment: "Different department". You are the final approver.
- Outlets**
There have been instances where the workflow has been stopped for errors: "Release reason is mandatory." This suggests the setup is not correct.
- Potential risks of failure**
You have rejected this workflow type 3 times with comments about attachments missing.
[View past 10 generated entries to see what was rejected before why. Learn more.](#)

Approve Cancel



Project Operations

Item	N / U	Deadline	Benefits / Observations
Progress-based billing on fixed-price contracts		Sep/2024	This feature supports additional progress-based contracting models for project-based companies.
Use fixed exchange rate agreements for project contracts		Sep/2024	Customers currently using Project Operations for resource/non-stock deployments are limited to using fluctuating exchange rates. This release provides the ability to enter a fixed exchange rate to be used to meet contractual or regulatory requirements.

Finance and Operations

Project management and accounting > Projects > Project contracts

<

Save

+ New

Delete

Options

Fixed rate agreements | 00000104 : Fabrikam Residences

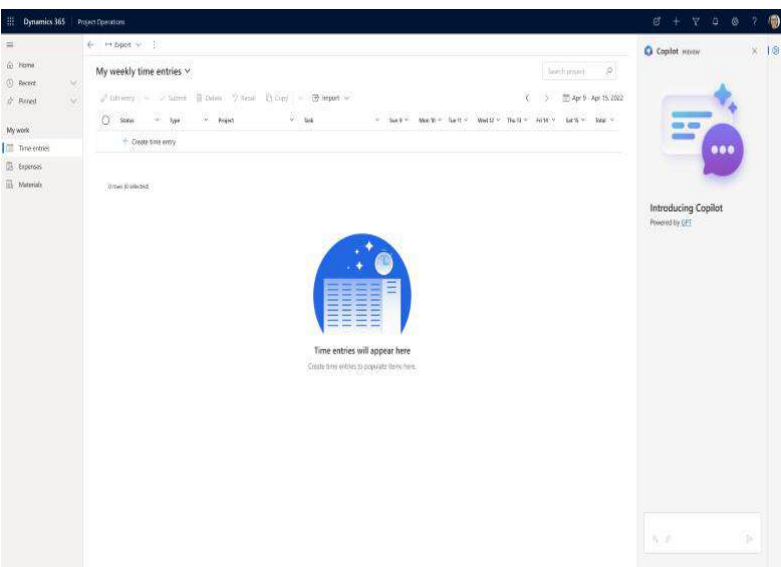
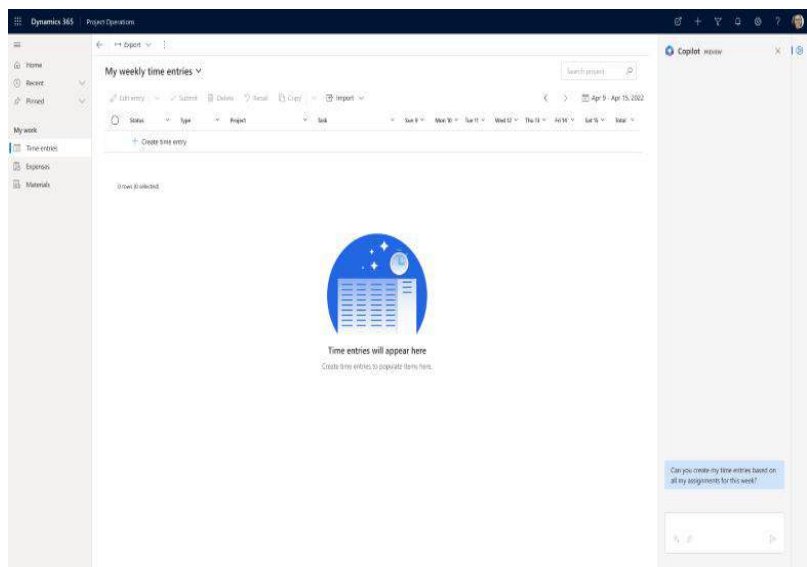
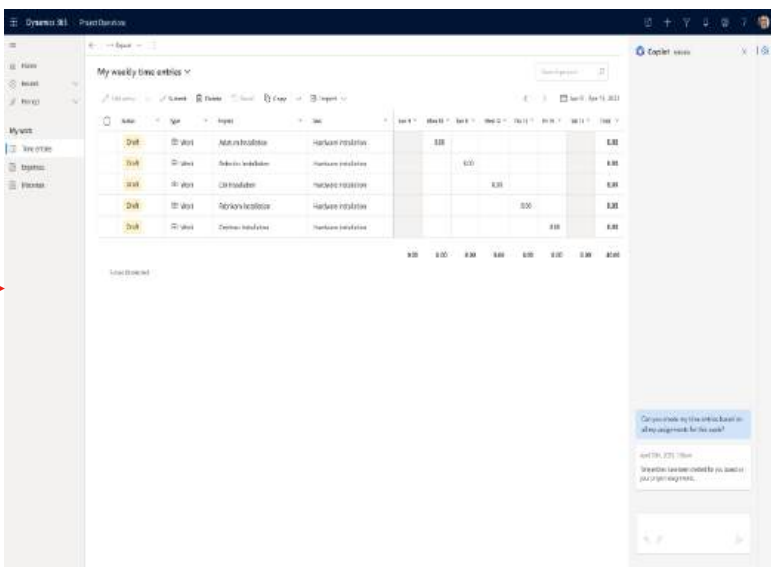
Standard view *

Filter

		Project contract ID ↑	Sales currency	Exchange rate
		00000104	EUR	92.00000000000000

Project Operations - Copilot in Project Operations

Item	N / U	Deadline	Benefits / Observations
Use Copilot for time entry		Sep/2024	Introducing Copilot for time entry, powered by generative AI that simplifies how you log time.





Supply Chain

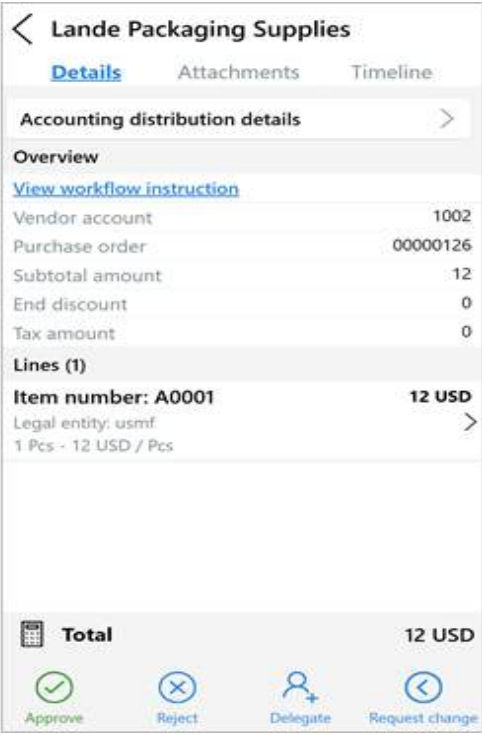
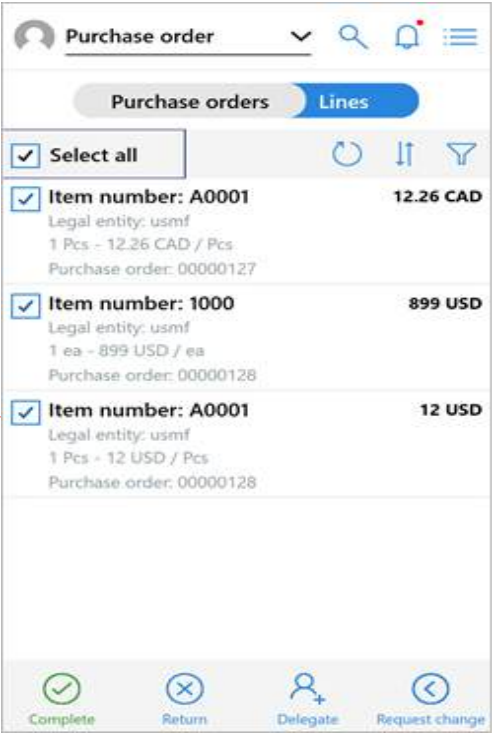
Supply Chain - Inventory and logistics

Item	N / U	Deadline	Benefits / Observations
Track time-series inventory in Inventory Visibility	Updated	Aug/2024	External systems integrated with Dynamics 365 Supply Chain Management can now access accurate and up-to-date inventory availability information. This capability enables users to promise sales orders, search for spare parts, and view material availability more efficiently and confidently.
Enable quality control for goods-in-transit orders	Updated	Jul/2024	Enriching the goods-in-transit process with Quality Control in Dynamics 365 is a transformative initiative that elevates supply chain operations. This integration ensures that products undergo stringent quality checks throughout transit, guaranteeing the delivery of high-quality goods when they are received at the warehouse.
Trace goods through the supply chain		Jul/2024	Companies are under increasing pressure to comply with legislation (such as the EU and German Supply Chain Act), especially when it comes to recalling defective and potentially unsafe products, or for the sake of linking products with certain documents. Supply chain traceability in Dynamics 365 Supply Chain Management lets you collect business and industry-specific data across the product value chain, which can be used for regulation audits and compliance process. Beyond compliance, the supply chain traceability also enables companies to meet a wide range of business objectives, including efficiency, resilience, responsiveness, and sustainability.

Supply Chain - Procurement



Item	N / U	Deadline	Benefits / Observations
Approve POS and requisitions from mobile device	Update	Sep/2024	Many businesses make use of approval workflows to make sure all new purchase requisitions and purchase orders are valid, in-budget, and in line with all business practices and standards. Unfortunately, this extra layer of security can sometimes add delays to the purchasing process. Therefore, Dynamics 365 Supply Chain Management now provides a mobile approval experience, which adds flexibility, efficiency, resiliency, and responsiveness to the approval process.



Supply Chain - Copilot and AI innovation



Item	N / U	Deadline	Benefits / Observations
Customize the conversational help provided by Copilot		Oct/2024	Copilot empowers users by providing tailored, precise help and guidance on how to use the product and accomplish daily tasks. Admins can now customize the source information indexed by Copilot to ensure that the guidance provided is targeted and relevant for your business. This allows for a more personalized and accurate support experience because the guidance is based on information specific to your company's context and needs.



Business Central

Business Central - User experiences

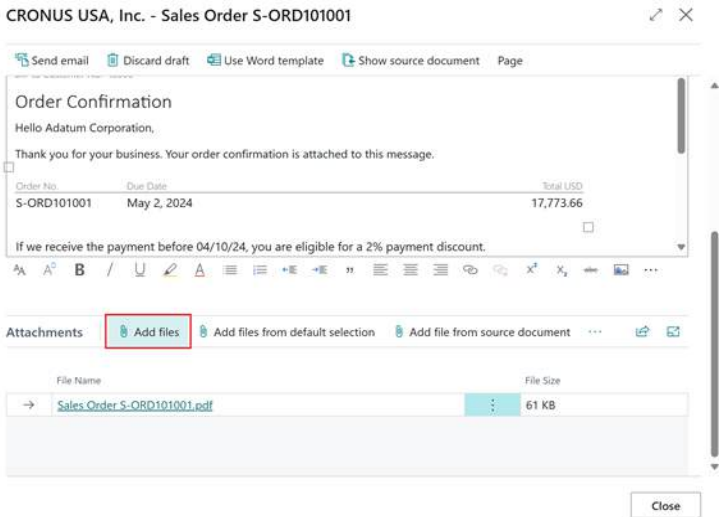
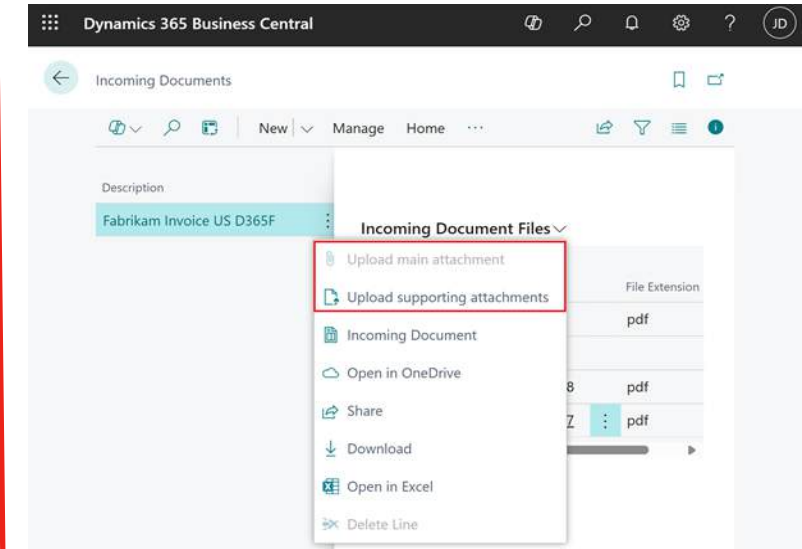
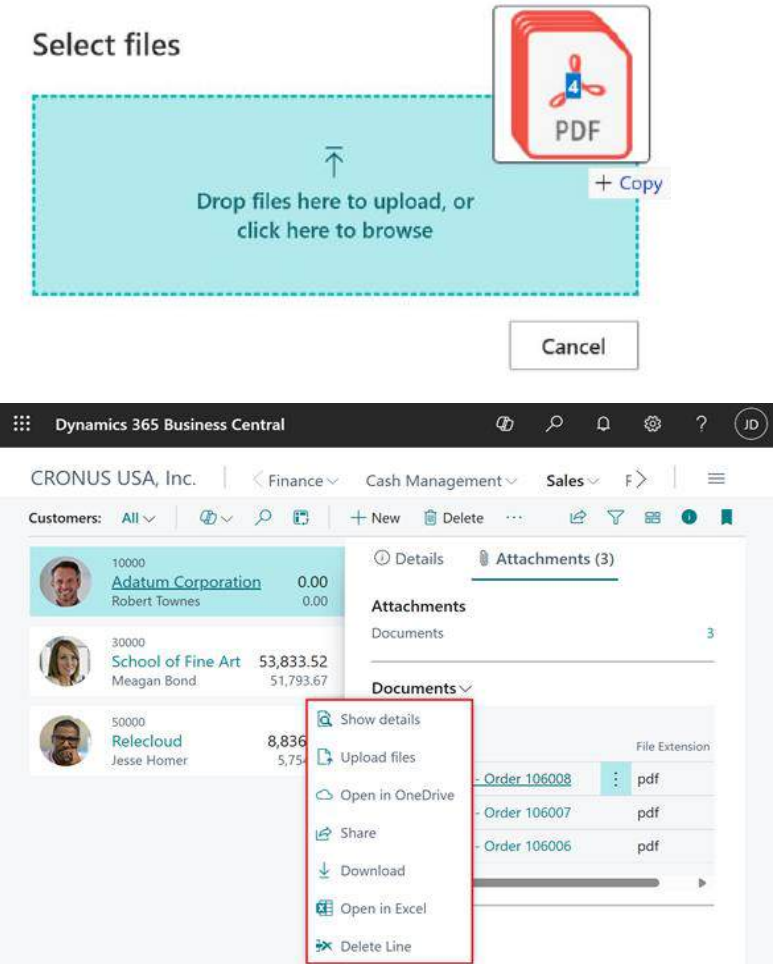


Item	N / U	Deadline	Benefits / Observations
Access keys with Key Tips in more languages	Update	Oct/2024	Organizations are looking to streamline their operations through AI, automation, and empowering workers with productivity tools. When time to enter data is critical, every keystroke and mouse click counts. Business Central adopts the familiar experience from Microsoft 365 applications, such as Excel and Word, to boost efficiency for keyboard users. Access keys with key tips help users quickly explore, navigate, and activate any action in the action bar, navigation menus, and other user interface (UI) elements.
Resize columns even when personalization isn't enabled	Update	Oct/2024	People using the Business Central web client often need to adjust the widths of their data columns. Whether you're looking for a particular record or optimizing the layout of their pages for efficient reading or accelerated data entry. Now, this is disconnected from the UI customization system to let you quickly and easily resize columns on any list.

No.	Name	Net Change
18100	Petty Cash	76,549.23
18200	Business account, Operating, Domes...	17,835.35
18300	Business account, Operating, Foreign	—
18400	Other bank accounts	-17,835.35
18500	Certificate of Deposit	—
18999	Total, Cash and Bank	76,549.23
19999	Total Assets	191,167.17

Business Central - User experiences

Item	N / U	Deadline	Benefits / Observations
Use drag and drop on file upload dialog to attach multiple files	Update	Oct/2024	Drag and drop functionality to attach multiple files to Business Central records makes it easier to manage files. This feature benefits users who work with multiple files and adds value to organizations by enhancing data organization and accessibility.



Business Central - Legislation



Item	N / U	Deadline	Benefits / Observations
Report sustainability entries with financial reports	Updated	Oct/2024	Integrating sustainability metrics, particularly greenhouse gas emissions, into financial reports significantly enhances business value. It demonstrates a commitment to transparency and accountability, fostering trust among stakeholders.
Use e-documents with Power Automate	Updated	Oct/2024	Because e-documents are pretty much the standard these days, modern businesses need flexible and compliant ways to share them with the right people. To that end, you can use APIs for Power Automate to share e-documents with other applications, so that people can access them in their preferred tools.
Use multiple VAT numbers for a customer	Update	Oct/2024	Customers that have warehouses in multiple EU countries probably have a different VAT number for each country. Business Central makes it easy to accommodate that situation. You can set up alternate ship-to addresses for the customers and specify the VAT number to use for those addresses on your sales documents.

Customer Card

10000 · Kontorcentralen A/S

Home Request Approval New Document Prices & Discounts

Ledger Entries Dimensions Statistics AI Assistant

General

No 10000

Name Kontorcentralen A/S

Balance (LCY)

Address & Contact

Address

Address Carl Blochs Gade 7

Address 2

Country/Region Code DK

City Nyborg

Post Code 5800

Show on Map

Invoicing

VAT Registration No.

EORI Number

Use GLN in Electronic Documents

Copy Sell to Addr. to Qtn From

Account Code

Documents

10000 · Kontorcentralen A/S

Ship-to Address List

Code Y

CHELTENHAM

HAMBURG

KONTORCENTRALEN A/S

Ship-to Address

10000 Kontorcentralen A/S HAMBURG

Kontorcentralen A/S

General

Code HAMBURG

Contact Robert Townes

Name Kontorcentralen A/S

Location Code

GLN

Address Carl Blochs Gade 7

Address 2

City Hamburg

Post Code DE-20097

Country/Region Code DE

VAT Registration No. 123456789

Gen. Bus. Posting Gro. EU

VAT Bus. Posting Group EU

Show on Map

Business Central - Application



Item	N / U	Deadline	Benefits / Observations
Integrate Field Service with service management	Updated	Oct/2024	This integration is particularly valuable for organizations that provide regular maintenance and proactive repair. It offers a seamlessly integrated solution for managing service tasks, consumption, and financial transactions to benefit service technicians, service managers, and finance teams. It's a powerful solution for managing work orders and consumption in Field Service and efficiently invoicing and fulfilling them in Business Central.
Replenish items for projects	Updated	Oct/2024	Business Central makes it fast and easy to ensure that you have the items you need to kick off a new project or keep one running smoothly. On the Project Card page, you can create purchase orders for the items by choosing the Create Purchase Order action. Afterward, you can review and edit the orders before you send them to your vendors.
Use directed put-away and pick warehouses with projects	Updated	Oct/2024	Businesses can use warehouse activities with projects to help drive an effective flow through the warehouse, and to organize and maintain inventory.

Business Central - Application



Item	N / U	Deadline	Benefits / Observations
Use new reports and demo data for financial reporting	Updated	Oct/2024	New reports are provided as demo data for Business Central. The reports can serve as ready to use reports, or as template you can use to create your own financial reports. In addition, you can generate more demo data to get a better idea of what data the reports display.
View item availability in Field Service work orders	Updated	Oct/2024	When integrated with Business Central, technicians and dispatchers can get insight into item availability for a specific warehouse or technician's truck on a work order in Field Service. Having this information readily available helps businesses optimize work order scheduling, avoid unnecessary (travel) costs, and at the same time, optimize their service and purchasing operations.

Dynamics 365 Business Central

CDL

Environment: Production

IS DET

Financial Report

Home

Definitions

Column

Period

Export to Excel

More options

Recalculate

Revert to defaults

Print...

Edit defaults

Hide options

IS DET - Income Statement Detailed - IS DET - CVC YTOBUD

Options

IS DET

Month

03/01/24..03/31/24

No

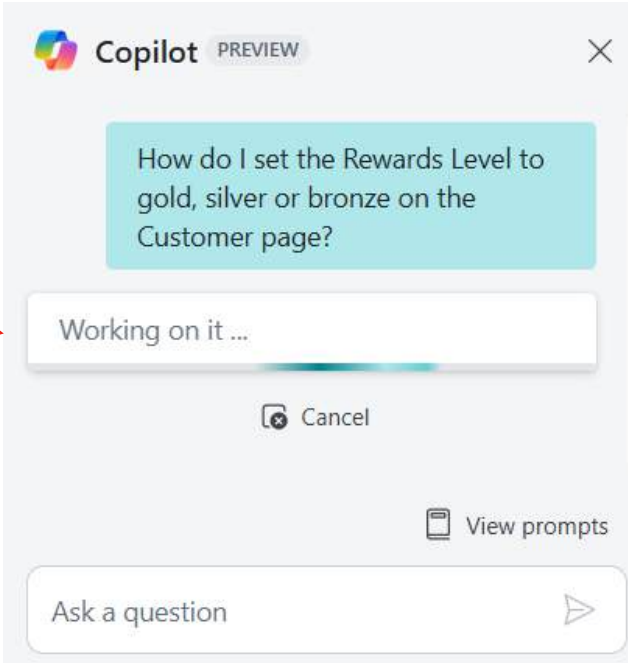
Dimensions

Row No.	Description	Current Month Actual	Current Month Budget	Difference	Year to Date Actual	Year to Date Budget	Difference
	Revenue	-	-	-	-	-	-
R	Product Revenue	-46,758.30	-44,000.00	-2,758.30	-	-231,046.19	-140,445.00
R	Job Revenue	-	-	-	-	-	-
R	Services Revenue	-	-	-	-	50,000.00	-50,000.00
R	Other Revenue	-	-	-	-14,558.43	-14,000.00	-558.43
R	Discounts and Returns	558.85	1,000.00	-441.15	1,666.81	1,000.00	666.81
F1	Total Revenue	-46,199.45	-43,000.00	-3,199.45	-243,937.81	-103,445.00	-140,492.81
		-	-	-	-	-	-
	Cost of Goods	-	-	-	-	-	-
C	Materials	45,138.70	43,000.00	2,138.70	145,198.66	138,000.00	7,198.66
C	Labor	-	-	-	-	-	-

Business Central - Copilot and AI innovation



Item	N / U	Deadline	Benefits / Observations
Simplify collections with Copilot for Finance and Business Central	Updated	Sep/2024	Improve your cash flow and lower the cost of collecting payments for unpaid invoices by empowering your collections team with easy access to relevant and timely data about customers with outstanding payments, without having to do expensive task-switching between applications.
Chat with Copilot and learn to use installed add-on apps	Updated	Oct/2024	2024 release wave 2 introduced chat: a conversational experience where people can get assistance from Microsoft Copilot to find data, get unblocked, or learn new skills. Most of our customers install one or more ISV add-on apps from Microsoft AppSource to enhance Business Central with industry-specific solutions, localized functionality, or other critical capabilities that meet their needs. Now, Copilot in Business Central is able to explain and guide workers through using functionality of these add-ons, transforming Copilot from a simple "librarian" to an in-house expert that understands your unique Business Central.



Business Central - Copilot and AI innovation



Item	N / U	Deadline	Benefits / Observations
Complete bank account reconciliation faster with Copilot	Updated	Oct/2024	Bookkeepers in SMB organizations need to import bank statements and reconcile transactions with their bank ledger entries, making sure all transactions are accounted for. While Business Central already reduces effort through rule-based transaction matching, the residual work to process the unmatched transactions every week remains cumbersome and quickly accrues to lost workdays. Copilot reduces bookkeeping effort by matching more transactions and suggesting G/L accounts to post the remaining transactions.

Bank Account Reconciliations

Search

Analyse

+

New

Manage

+

Reconcile with Copilot

+

Post

Bank Account No. ↑	Bank Account Name	Statement No. ↑	Statement Date
CHECKING	World Wide Bank	24	21/03/2023

Copilot G/L Account Transfer Proposals

Preview

AI-generated content may be incorrect

Terms of use

Learn more

Auto-matched2 of 14 lines (14.3%)

Statement Ending Bala...0.00

Copilot matched2 of 14 lines (14.3%)

Post if fully applied

28.6% of lines are matched. Review match proposals.

Match proposals

Delete Line

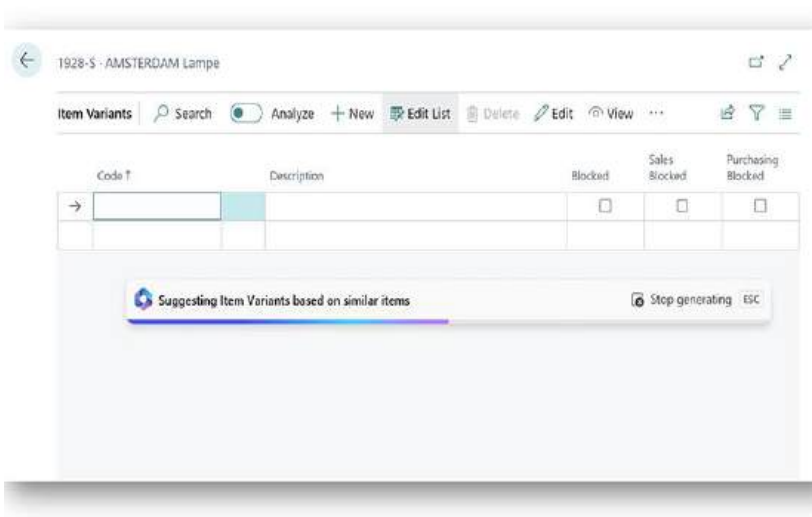
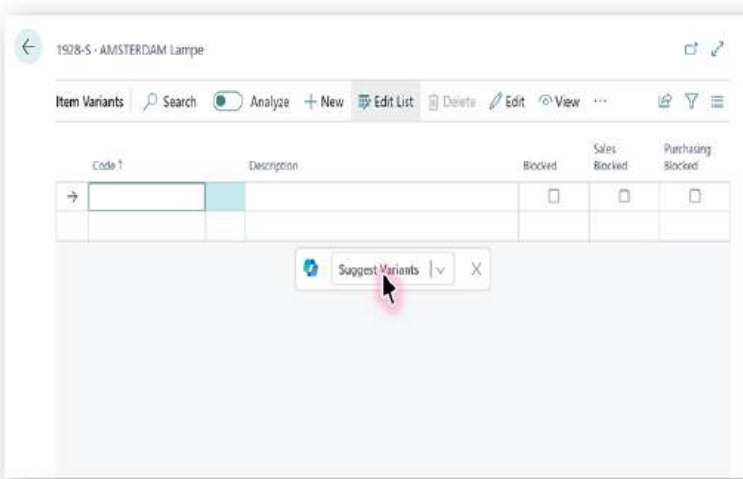
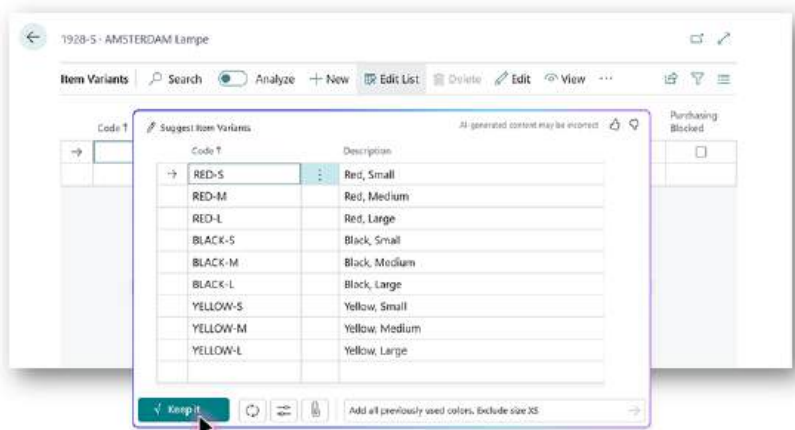
Transaction Date	Description	Amount to Apply	Proposal
→ 7/14/2023	Bank charges JULY	-15.00	Post payment to account 67100 (B... Save...
7/15/2023	Fuel Stop US4	-45.00	Post payment to account 62110 (P... Save...

Keep it

Business Central - Copilot and AI innovation



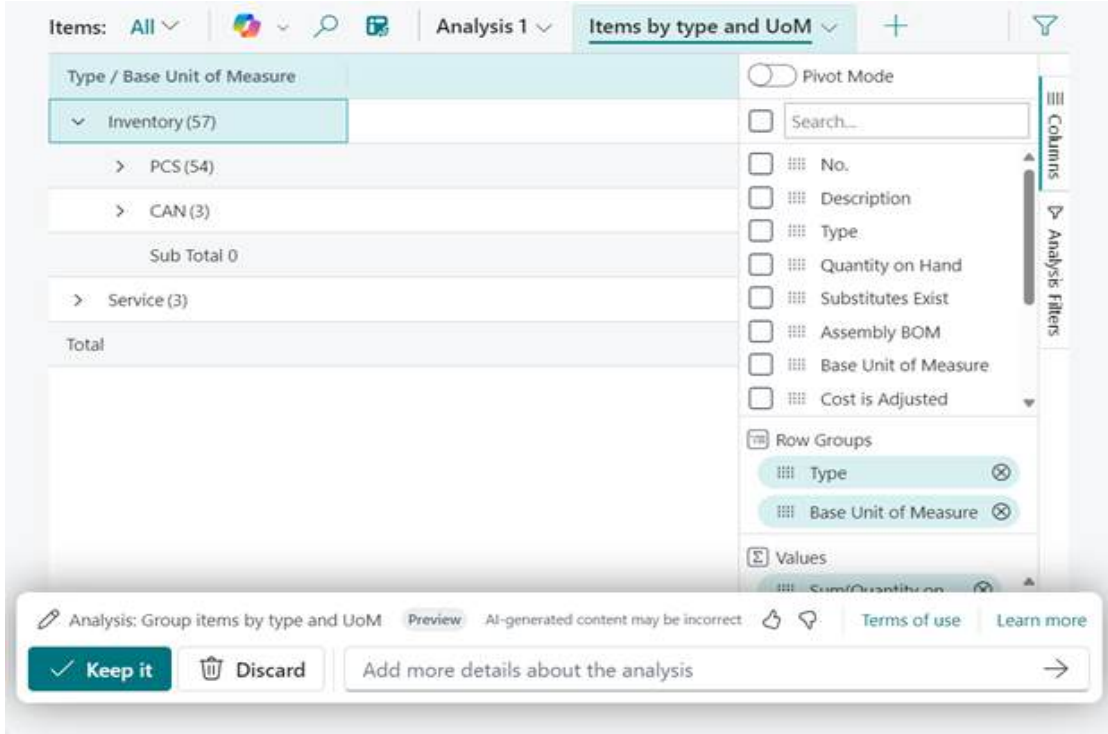
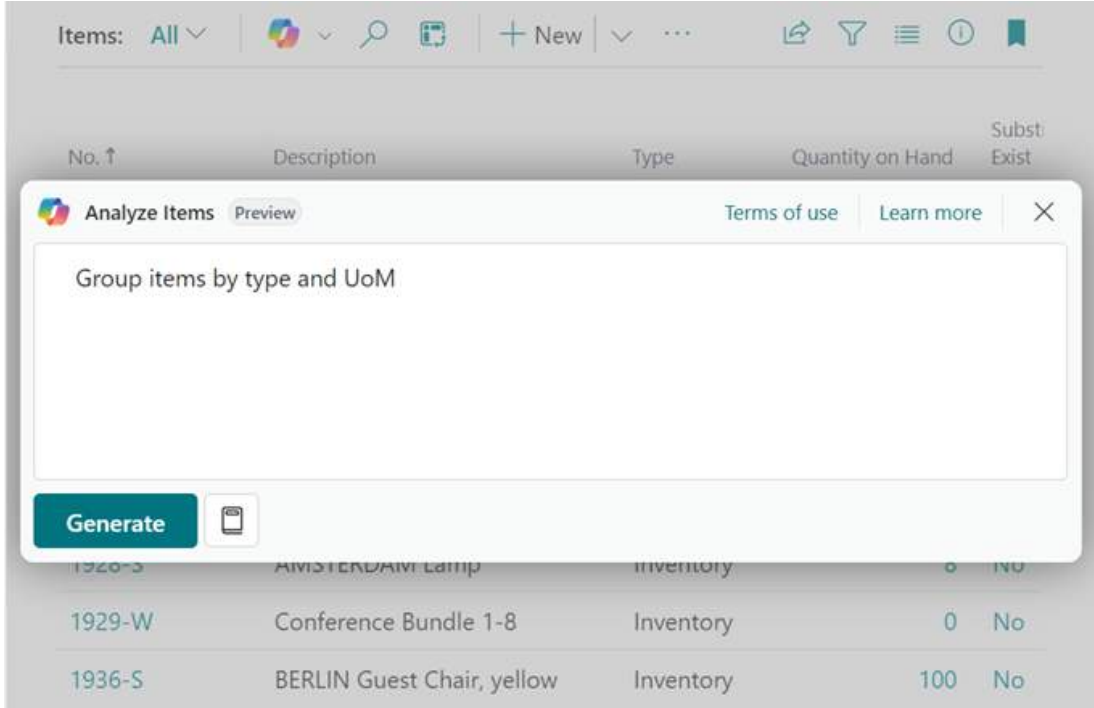
Item	N / U	Deadline	Benefits / Observations
Create product information faster with Copilot	Updated	Oct/2024	In a business landscape that changes fast, companies often need to evolve the portfolio of products they sell. Whether it's adding new products, changing existing products, or adding entire new product lines and categories, it's often time consuming to create and manage product (item) information. Copilot can significantly reduce this effort and accelerate the time to market for new products, which means you have more time to focus on what matters most, your business.



Business Central - Copilot and AI innovation



Item	N / U	Deadline	Benefits / Observations
Experience enhancements to Analysis Assist with Copilot	Updated	Oct/2024	Microsoft Copilot in Business Central is the AI-powered assistant that boosts creativity, improves productivity and eliminates tedious tasks. Copilot can help reduce the time it takes to identify trends and anomalies in your business data by enabling you to express your analysis as a simple sentence, and without ever leaving Business Central. By describing how you want to structure your data analysis, such as “show me vendors by location sorted by amount of purchases,” you can quickly get to insights instead of spending time on the clicks and keystrokes to construct analysis views. For example, you can use this feature to identify which vendors supply each of your warehouses, and then take steps to optimize your supply chain or negotiate better deals with your vendors.



Business Central - Reporting and data analysis



Item	N / U	Deadline	Benefits / Observations
Use embedded Power BI reports out of the box	Update	Oct/2024	It's easier than ever to leverage your business data to get insights into your operations. You can analyze your business data with out-of-the-box Power BI reports for finance, sales, purchasing, inventory, manufacturing, and projects.

Thank you!



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