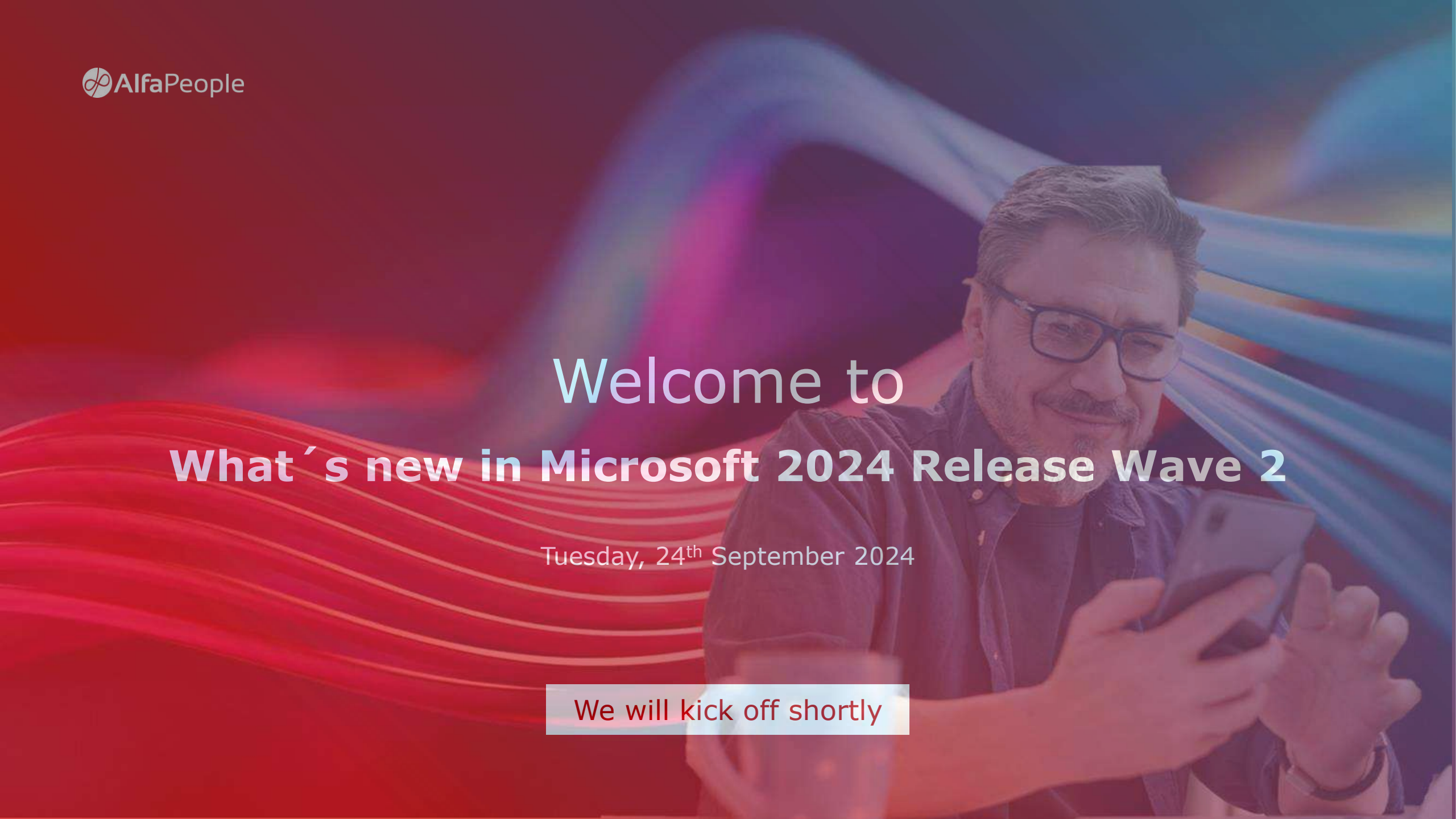


A background image of a man with glasses and a beard, smiling while looking at a smartphone. The image is overlaid with a semi-transparent red and blue wavy pattern.

Welcome to **What's new in Microsoft 2024 Release Wave 2**

Tuesday, 24th September 2024

We will kick off shortly

Agenda

- **10:00 ERP** by Helio Nascimento Costa de Jesus
- **10:30 Power Platform** by Filipe Mello de Souza
- **11:00 Customer Engagement** Filipe Mello de Souza
- **Q&A** after each session

Before we get started...

- We are recording today's webinar and share it afterward.
- We will share the presentation, including relevant links.
- We will send you a survey, which we would greatly appreciate if you would take 2 minutes to complete.
- Feel free to ask your questions by writing in the chat.



<https://forms.office.com/e/8NgbdzN9qF>

What are the Release Waves

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

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



July 16

Release
plan/documentation.



August 29

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



October 1

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's new in Dynamics 365 ERP

DEPRECATED

Deprecations / Replacements

ERP

Finance and Operations



Item	N / U	Deadline	Benefits / Observations
Finance - Sales tax report for Lithuania (design based on reporting codes)		May/2025	Lithuania 10.0.41 release - Deprecated: By May 1, 2025, we plan to no longer support the Sales tax report for Lithuania design that's based on reporting codes, including the VAT declaration (LT) Electronic reporting (ER) format under the VAT declaration model, Main economic activity code, and Deduction percent fields on the Sales tax tab of the General ledger parameters page. New VAT declaration XML (LT) and VAT declaration Excel (LT) ER formats are introduced under the Tax declaration model.
Finance - Sales tax report for Estonia (design based on reporting codes)		Feb/2025	Estonia 10.0.39 release - Deprecated: By February 1, 2025, we plan to no longer support the Sales tax report for Estonia (Estonian report layout). New VAT declaration XML (EE) and VAT declaration Excel (EE) Electronic reporting (ER) formats are introduced under the Tax declaration model.
Finance - Sales tax (Italy) SSRS format, Italian report layout, menu item		Mar/2025	Italy 10.0.39 release - Deprecated: By March 1, 2025, we plan to no longer support the Sales tax (Italy) SSRS format, Italian report layout, menu item. New VAT Declaration PDF (IT) Electronic reporting (ER) formats are introduced under the Tax declaration model.
Finance - Financial Dimension data model changes		Dec/2024	10.0.38 release - Deprecated: By December 22, 2023. These 22 fields and related indexes will be removed by December 27, 2024 to improve performance and reduce storage costs. All access to these fields should be internal only to the core Financial dimension API's and no action is required if using our API's. If any direct access to these fields is enabled by a customization, make the necessary changes to remove these direct references asap. The fields will be removed in Dynamics 365 Finance release 10.0.42 in December of 2024.
Finance - Electronic Invoicing integration using Microsoft Dataverse			10.0.38 release - Deprecated: Finance no longer supports Electronic Invoicing integration using Microsoft Dataverse. This feature is no longer required by the new version of the globalization feature for Electronic invoicing in Indonesia.
Finance - Dataverse solution for Electronic invoicing			Indodeia 10.0.38 release - Deprecated: Finance no longer supports Dataverse solution for Electronic invoicing. This plugin isn't required by the new version of the globalization feature for Electronic invoicing in Indonesia.

Item	N / U	Deadline	Benefits / Observations
Finance - TaxYearlyCom_IT, TaxYearlyComReport_IT tables for Italian Yearly tax communication			10.0.38 release - Deprecated: Finance no longer supports the and tables for Italian Yearly tax communication. They are replaced with new and tables for Italian Yearly tax communication.TaxYearlyCom_ITTaxYearlyComReport_ITTaxYearlyComV2_ITTaxYearlyComReportV2_IT
Finance - "FTA VAT Audit File (AE)" Electronic reporting (ER) format using the "Standard Audit File model mapping" and "FAF declaration" menu item		July/2024	Arab 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 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.

Item	N / U	Deadline	Benefits / Observations
Supply Chain - Service-based authentication methods for the Warehouse Management mobile app		Jul/2024	10.0.37 release - Deprecated. As of July 15, 2024, Microsoft will discontinue support for using service-based authentication methods (certificate and shared secret) to connect the Warehouse Management mobile app to Supply Chain Management. Service-based authentication is being replaced by user-based authentication (device code flow). Administrators must update all devices to use user-based authentication before July 15, 2024. For more information about device code flow, see User-based authentication FAQ and User-based authentication. Mass deployment with Microsoft Intune isn't yet supported for user-based authentication, but we expect to add support for it soon. For more information and the latest news about mass deploying to mobile devices for user-based authentication, see Mass deploy the mobile app for user-based authentication.

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	A data de fim do suporte está prevista para maio de 2024.

Item	N / U	Deadline	Benefits / Observations
Business Central - API (v1.0) for Business Central (removed)			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. 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 - 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.

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.

Business Central - Platform



Item	N / U	Deadline	Benefits / Observations
Business Central - Schema version for custom APIs (changed default)		Apr/2024	Replaced. The API capability in Business Central is used many places, for example, in the APIs that come out-of-the-box. For these APIs, \$schemaVersion is always set to 2.0 to get the latest features in the Business Central OData stack. For custom APIs, it's possible to get these new features by simply calling the API with \$schemaVersion=2.0. Starting in version 24, the default value of \$schemaVersion is set to 2.0, also for custom APIs.
Business Central - Support for delta links with APIs (removed)		Apr/2024	Replaced. Delta links are opaque, service-generated links that a web service client can use to retrieve subsequent changes to a result (see Using Delta Links with APIs). This feature was introduced in Business Central (online version only) to support the Microsoft Invoicing product, which hasn't been available for years. Starting in version 24, ChangeTrackingAllowed will be set to "false" for all APIs provided by Microsoft and support for delta links will be removed from the server. Since the delta links feature was first introduced, the webhooks functionality in Business Central has been added and improved, making it the preferred approach to change tracking. For more information about the use of webhooks, see Working with Webhooks in Dynamics 365 Business Central .
Business Central - Server settings for database hints FORCEORDER and LOOPJOIN (removed)		Apr/2024	Removed. For Business Central installations on-premises, it's possible to control many server settings. Two of these control the way the Business Central server add hints to SQL statements: DisableQueryHintForceOrder and DisableQueryHintLoopJoin. Starting in version 24, these server settings will no longer be available.
Business Central - Remove write access to app database tables from AL (removal)		Apr/2024	Removed. For Business Central on-premises, the main difference between running in single tenancy mode or multi tenancy mode is that in the former, it's possible to write to the app database tables from AL. Starting in version 24, this is no longer possible.
Business Central - Direct cloud migration and data upgrade from version Dynamics Business Central 2019 (v.14.x) (removed)		Apr/2025	Removed. Warning in Oct/2024 and Removed in Apr/2025 . Direct cloud migration and data upgrade from version Business Central 2019 (v.14.x) is no longer supported. In order to upgrade (or cloud-migrate) data to v.26 or higher, follow one of these paths: - Pre-v.14 customers > upgrade to v.14 > upgrade to v.25 > upgrade or cloud migrate to v.26 - V.14 to v.24 customers > upgrade to v.25 > upgrade or cloud migrate to v.26 ObsoleteState = Removed fields are regularly cleaned up with a cadence of once every five major releases (referred to as the stepping-stone release). So after v.25, the next stepping-stone release will be v.30, and so on.

Business Central - Platform



Item	N / U	Deadline	Benefits / Observations
Business Central - Direct cloud migration and data upgrade from version Dynamics Business Central 2019 (v.14.x) (removal)		Oct/2024	Removed Direct cloud migration and data upgrade from version Business Central 2019 (v.14.x) is no longer supported. In order to upgrade (or cloud-migrate) data to v.26 or higher, follow one of these paths: Pre-v.14 customers > upgrade to v.14 > upgrade to v.25 > upgrade or cloud migrate to v.26 V.14 to v.24 customers > upgrade to v.25 > upgrade or cloud migrate to v.26 ObsoleteState = Removed fields are regularly cleaned up with a cadence of once every five major releases (referred to as the stepping-stone release). So after v.25, the next stepping-stone release will be v.30, and so on.
Business Central - Support for PowerShell 5.0 (removal)			As part of our move to .NET Core, we've converted the following Business Central administration modules from PowerShell 5 to PowerShell 7: Microsoft.Dynamics.Nav.Management.dll, Microsoft.Dynamics.Nav.Apps.Management.dll, and Microsoft.Dynamics.Nav.Apps.Tools.dll. The PowerShell 7 modules are renamed with the prefix Microsoft.BusinessCentral instead of Microsoft.Dynamics.Nav and are located in the new Admin folder of the Business Central Server installation. For those who aren't ready to use PowerShell 7, we've included a Windows PowerShell 5 compatibility layer module that consolidates the cmdlets/functions of all three modules into a single module that can run with PowerShell 5. The PowerShell 5 compatibility layer module is called Microsoft.Dynamics.Nav.Management.dll, and it's installed side-by-side with the new PowerShell 7 modules as a part of Business Central Server installation except in the Management folder. The PowerShell 5 compatibility layer module is using an approach similar to the Windows PowerShell Compatibility functionality in PowerShell 7. We highly recommend that you use the PowerShell 7 modules instead PowerShell 5 compatibility module because they'll give you the best performance. If PowerShell 7 is installed on your device, the PowerShell 7 modules are used by default by selecting Business Central Administration Shell in the Start menu or by running the NavAdminTool.ps1 script. The Windows PowerShell 5 compatibility layer module is planned for removal in version 26 and won't receive any new functionality added in the new PowerShell 7 modules in the meantime.

Business Central - Platform



Item	N / U	Deadline	Benefits / Observations
Remove ability to expose a Microsoft page as a SOAP endpoint (removal)		Oct/2024	Removed A UI page isn't an API and therefore changes to them can happen in a release without this being considered a breaking change. But for customers who expose UI pages as web services endpoints, a change in the UI can be felt as a breaking change for an integration built on this endpoint. Starting in version 26, it's no longer possible to expose a Microsoft page as a SOAP endpoint. If you need to have SOAP integrations to these pages, you need to copy the source code for the page and host the page in a per-tenant extension.

Business Central - Platform



Item	N / U	Deadline	Benefits / Observations
Direct cloud migration and data upgrade from version Dynamics Business Central 2019 (v.14.x) (warning)		Oct/2024	Removed Cloud migration tool and on-premises data upgrade toolkit support one-step upgrade path from any version starting from Dynamics Business Central 2019 (v.14) to the latest version of Business Central. This is possible because none of the schema elements (tables and fields) deprecated over 11 major updates (from v.14 to v.25) were removed from the released databases to preserve backwards compatibility and enable more seamless transition for our customers to the latest versions on-premises and online. Over these releases, we've accumulated a significant number of such obsolete schema elements, which increases complexity of working with the application code. This condition blocks the reuse of the long obsolete objects and field IDs, affecting our work of moving common functionality from local versions of Business Central to W1 version. At the same time, much has changed in the area of upgradeability since v.14 like: the move to extensions, the transition to Universal Code, introduction of AL Go for GitHub for tracking apps compatibility and more. These improvements make it simpler to follow Business Central update cadence more closely. So in the next release (that is, 2025 release wave 1 (v.26)), we're going to clean up all schemas that have been marked as ObsoleteState = Removed since Dynamics Business Central 2019 (v.14). As a result, data upgrade or cloud migration to v.26 or higher will have to be done via v.25 (referred to as the stepping-stone release) following one of the paths: Pre-v.14 customers > upgrade to v.14 > upgrade to v.25 > upgrade or cloud migrate to v.26 V.14 to v.24 customers > upgrade to v.25 > upgrade or cloud migrate to v.26 ObsoleteState = Removed fields will then be regularly cleaned up with a cadence of once every five major releases. So after v.25, the next stepping-stone release will be v.30, and so on.

AI and Copilot Assessment Workshop

AI in practice – leverage AI for strategic growth in your organization!



This workshop provides an AI integration roadmap fostering innovation, efficiency, strategic growth, operational readiness, and ethical practices, transforming challenges into competitive opportunities.

1-day workshop, On-site or Online.

The workshop is designed for managers, IT decision-makers, process owners, and data analysts.

[Learn more here!](#)

Sessions in the Workshop:

- **Introduction to Microsoft technologies:**
Exploring Microsoft AI, Copilots, and Azure services to enhance efficiency and address business challenges.
- **Use Case Exploration:**
We will explore use cases and identify challenges and priorities for strategic impact in your organization.
- **Design Thinking:**
Design Thinking session focuses on AI solutions, quick wins, ROI, consensus, and prioritizing value creation.
- **Organizational Readiness:**
Discussing AI integration, emphasizing data quality, change management, training, governance, and ethical AI practices.
- **Roadmap and Next Steps:**
Outlining a roadmap for AI adoption to accelerate your organization's journey.

Bridge to the Cloud 2 Promo (40%)

Until December 31, 2025

This promotion provides discounted Dynamics 365 online services for eligible Dynamics on-premises commercial customers committed to migrating to the cloud.

Discount of 40 percent for a three-year fixed term (non-renewable, non-cancellable)

Provides “introductory” promotional price for customers migrating from Dynamics on-premises to Dynamics 365 online

How it works

AlfaPeople placing eligible purchases through NCE partner-led motion should select the promotion during the purchase process and then update customer’s on-premises account.

[Bridge to the Cloud 2 Policy and FAQ](#)



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	Jul/2024	Makers 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 makers 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.
AI actions for finance and operations business logic	Updated	Sep/2024	Makers 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 makers 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 & Operations - One Dynamics One Platform

Item	N / U	Deadline	Benefits / Observations
Easily access Dynamics 365 finance and operations apps on Dataverse	Updated	Jul/2024	This feature helps administrators, developers, and makers save time setting up, configuring, maintaining virtual entities, and building integrations and custom applications for Dynamics 365 finance and operations apps.
Get offline support for Dynamics 365 finance and operations virtual tables	Updated	Oct/2024	Many enterprise mobile applications are used in the field where there may be inconsistent access to internet resources. In these cases, the mobile application must continue to function in offline mode. For mobile Power Apps built against Dataverse virtual tables for Dynamics 365 finance and operations apps, there will now be offline support to ensure work is not disrupted in areas without internet access.
Enable support for asynchronous operation in dual-write functionality	Updated	Oct/2024	This feature enables asynchronous business processes for dual-write functionality for your business.

Finance & Operations - Boost productivity with Copilot



Item	N / U	Deadline	Benefits / Observations
Extend Copilot in finance and operations apps with client actions	Updated	Sep/2024	Makers in finance and operations apps must be able to extend and customize Copilot experiences for their application users by adding capabilities through plugins, including the natural language chat experience of Copilot for finance and operations apps. This feature enables makers to add capabilities to the sidecar chat experience in finance and operations apps that are based in the business logic of the client code. Copilot users can then enter prompts such as questions or commands that receive a response by directly invoking business logic in finance and operations apps, dramatically expanding the capabilities and customization options for Copilot, enhancing the in-app Copilot experience.
Navigate and search using Copilot in finance and operations	Updated	Sep/2024	Users of finance and operations apps can face challenges finding specific pages and data they need in the application. Copilot in finance and operations apps streamlines this experience by enabling users to query data and navigate to specific pages and records in the application.



Finance

Finance – Core financials



Item	N / U	Deadline	Benefits / Observations
Archive data		Jul/2024	Save storage space and gain performance with a reduced data set to work against.

[illegible]

The screenshot shows the 'Archive G/L' dialog box in Dynamics 365 Finance. The 'Archive' tab is selected. The 'Choose year' section is active, displaying a list of years from 2018 to 2020. The '2019' year is selected. The 'Calendar' dropdown is set to 'FiscalUK'. The 'Next' button is highlighted in blue.

Dynamics 365 Finance | Search for a page | Four

Archive GL

- About archiving
- Schedule
- Choose year(s)
- **Choose legal entities**
- How-to's

Choose legal entities

Choose the legal entities you would like to archive by toggling the "Move to history folder" button.

Year	Legal entity	Move to history folder
2019		Yes
2019		No
2019		No
2019		No
2019		No
2019		No

Legal entity	Status	Moved to history folder
CNAM	Closed	☒ Yes
LSEI	Closed	☒ No
USRE	Closed	☒ No
CNAM	Closed	☒ No
AZWF	Closed	☒ No

Back **Select** **Cancel**

[illegible]

Dynamics 365 Finance

Search for a page

Home

Archive G.

- About archiving
- Schedule
- Choose users
- Choose legal entities
- Review

Review

Review all your selections and confirm archiving

Name	Type	Users to include
> 2018-01-01		
> 2018-01-01		
> 2018-01-01		
> 2018-01-01		
< 2018-01-01		
USDT	Yes	
USD	No	
GBP	Yes	
EUR	No	
AUD	No	

Scheduling

When:

End:

Start date:

End date:

Run times:

Priority:

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.

Consolidation online templates

General

Name:
 Description:

Personal dimensions

Dimension	Specification	Segment 4
Material	None	0
Quantity	None	0
Submaterial	Division	1
Date	Division	2
Customer	Division	3
Region/Region	None	0

Legal entities

Legal entity	Legal entity type	Legal entity description
1001	10000	Right part of 1001
1002	10000	Right part of 1002

Dimensions

Currently consolidated

Select consolidation period from:
 Use currency translation:

Legal entity	Currency	Account	Account
1001	EUR	200000	400000
1002	EUR	100000	200000

Budget

Budget model

Budget type:

Finance – Core financials

Item	N / U	Deadline	Benefits / Observations
Financial tags added to accounting distributions		Jul/2024	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. Financial tag values are displayed on inquiries, such as voucher transactions, and can be used for reporting and analytics. They will be available for processes such as ledger settlement to provide more matching options. For example, a financial tag can be created to track payment references, making it easier to match transactions within ledger settlement. This enhancement to financial tags for source document framework and the accounting distributions will further complete the financial tags.
Financial tags support added to more journals and documents		Jul/2024	Financial tags can be used to track up to 20 user-defined fields on accounting entries. Tags are considered an alternative to financial dimensions. They can be tracked on the accounting entries of transactions to help with analytical reporting or reconciliation, just like financial dimensions, but without the overhead of financial dimensions. Tags aren't subject to rules and validation. They aren't part of an account structure because they aren't part of the ledger account. No validation is performed on the tag values either.

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
Improve bank account lifecycle management		Jul/2024	Bank accounts are the key master data of all banks' relevant transactions. They need to be well managed, including bank account openings, closings, changes, signature management, and periodical auditing. With this feature, there's a sophisticated bank account lifecycle management.
Increase the length of invoice numbers		Jul/2024	This feature increases the length of invoice numbers in Accounts payable, which gives you more flexibility to adapt invoice numbers in ways that better serve your organization's needs.

Dynamics 365 Finance

My view

Proposed changes

General

CURRENT	PROPOSED
Name Advanced Bank Rec	Advanced Bank Rec new
Routing number 123456	234567

Signer

ID#	CURRENT	PROPOSED	Effective start date	Effective end date
Signer	Signing limit	Currency		
XXXX	10,000.00	USD	1/27/2022	7/7/2023
XXXX	10,000.00	USD	1/27/2022	12/31/2023

ADD

Signer	Signing limit	Currency	Effective start date	Effective end date
XXXX	10,000.00	USD	3/27/2022	
XXXX	15,000.00	USD	7/7/2023	7/7/2024

REMOVE

Signer	Signing limit	Currency	Effective start date	Effective end date
XXXX	10,000.00	USD	3/27/2022	

Additional identification

OR	OR label	Post account

SMT code	Company ID	Sort code

BAN	Branch	IBN

Dynamics 365 Finance

My view

Proposed changes

Advanced Bank Rec

Bank account status: Active from: Active to:

Applies for all transactions

General | Payment Method | Reconciliation | Negotiable Instrument | Contact | Signatures

General

CURRENT		PROPOSED	
Name	Advanced Bank Rec	Name	Advanced Bank Rec new
Routing number	123456	Routing number	234567

Signer

CURRENT		PROPOSED		CURRENT	PROPOSED
Signer	Sigging link	10,000.00	15,000.00	for start date	Effective end date
XXXX	10,000.00	USD	1/27/2022	7/7/2023	12/31/2023
XXXX	10,000.00	USD	1/27/2022	12/31/2023	

ADD

Signer	Sigging link	Currency	Effective start date	Effective end date
XXXX	10,000.00	USD	3/27/2022	
XXXX	15,000.00	USD	7/1/2023	7/1/2024

REMOVE

Signer	Sigging link	Currency	Effective start date	Effective end date
XXXX	10,000.00	USD	3/27/2022	

Additional Identification

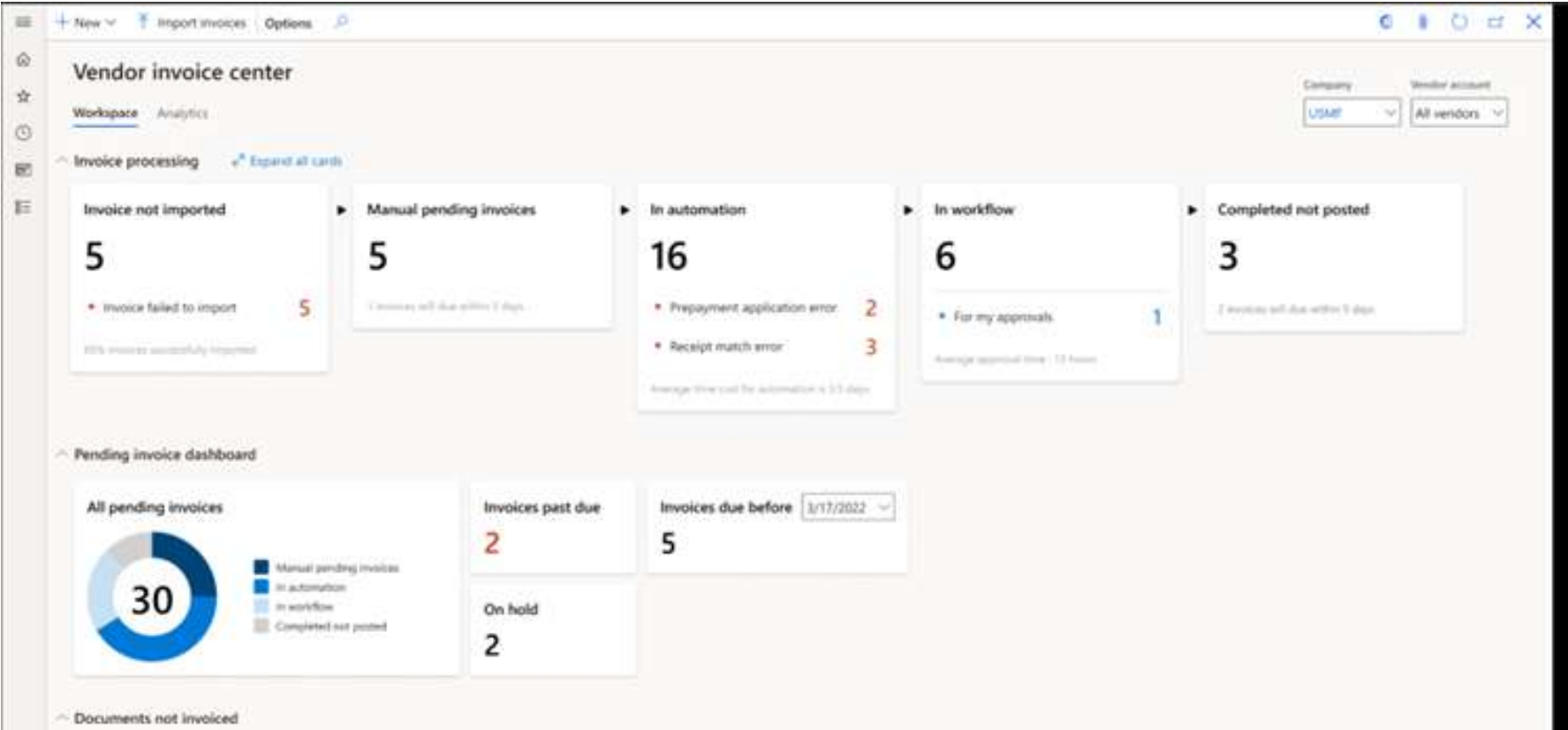
OR	OR - BARS	Post account

SWIFT code	Company ID	Sort code

BAN	Branch	IBN

Close

Item	N / U	Deadline	Benefits / Observations
Check out new AP clerk workspace capabilities	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
Explore customer and vendor balance netting	Updated	Jul/2024	Netting can minimize the exchange of money between an organization and the customer/vendor party. It can help a company avoid making unnecessary payments or receipts, and save on transaction fees, by consolidating the company's customer and vendor balances.

Finance and Operations Preview

Standard view

Netting agreement	Customer	Customer account	Open customer invoice balance	Vendor account	Open vendor invoice balance	Settle date	Trade
Agreement1	100	1000	1000	1000	1000	2024-10-01	

Finance and Operations Preview

Create netting

Create netting from Agreement

Netting agreement: Agreement1

Netting currency: USD

Customer account: 1000

Vendor account: 1000

Netting posting date: 2024-10-01

Open customer invoices

Invoice	Invoice date	Invoice amount	Netting currency
1000	2024-10-01	1000	USD

Netting advice

Date of compensation: 7/1/2023

Customer account: DE-010

Vendor account: DE-001

A Datum Corporation
Lilienweg 9
24103 Kiel
den
Opal Audio
Reibuhweg 45
79539 Berlin
DEU

Customer transactions

Invoice	Transaction date	Due date	Voucher	Transaction text	Currency	Amount currency	To settle	Settled
INV-000163	1/10/2017	2/1/2017	INV-10000162		EUR	2,082.33	2,082.33	571.39
Total						2,082.33	571.39	

Vendor transactions

Invoice	Transaction date	Due date	Voucher	Transaction text	Currency	Amount currency	To settle	Settled
TESTINV001	7/4/2023	7/14/2023	PNV-110000056		EUR	571.39	571.39	571.39
Total						571.39	571.39	
Netting amount							571.39	

Finance and Operations Preview

Reverse netting

Customer and vendor balance netting history

Standard view

Journal batch name	Netting date	Netting posting date	Net...	Netting a...	Account type	Account	Contains...	Total (incl...	Created by
(2) Journal batch name	6/21/2023	6/21/2023	XXX	785.00	Vendor	Vendor account name	0	785.00	1
	6/21/2023	6/21/2023	XXX	785.00	Customer	Customer account name	0	785.00	1

Finance and Operations Preview

Options

Standard view

Netting journal

Vendor invoices

Invoice	Invoice currency	Invoice amount	Netting currency
XXX	XXX	785.00	XXX

Systemic B2B Finance

Create new process automation

Define the steps used to create the netting journals and settle customer and vendor open invoices for this series of the netting automation.

Parameters

Netting posting date: 2024-10-01

Records to include

Invoice currency: USD

Netting agreement: Agreement1

Vendor account: 1000

Customer account: 1000

Run in the background

Run in batch: On

Finance and Operations Preview

Netting agreement

Agreement1

Agreement2

Agreement3

Agreement4

Agreement5

Agreement6

Agreement7

Agreement8

Agreement9

Agreement10

Agreement11

Agreement12

Agreement13

Agreement14

Agreement15

Agreement16

Agreement17

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Agreement98

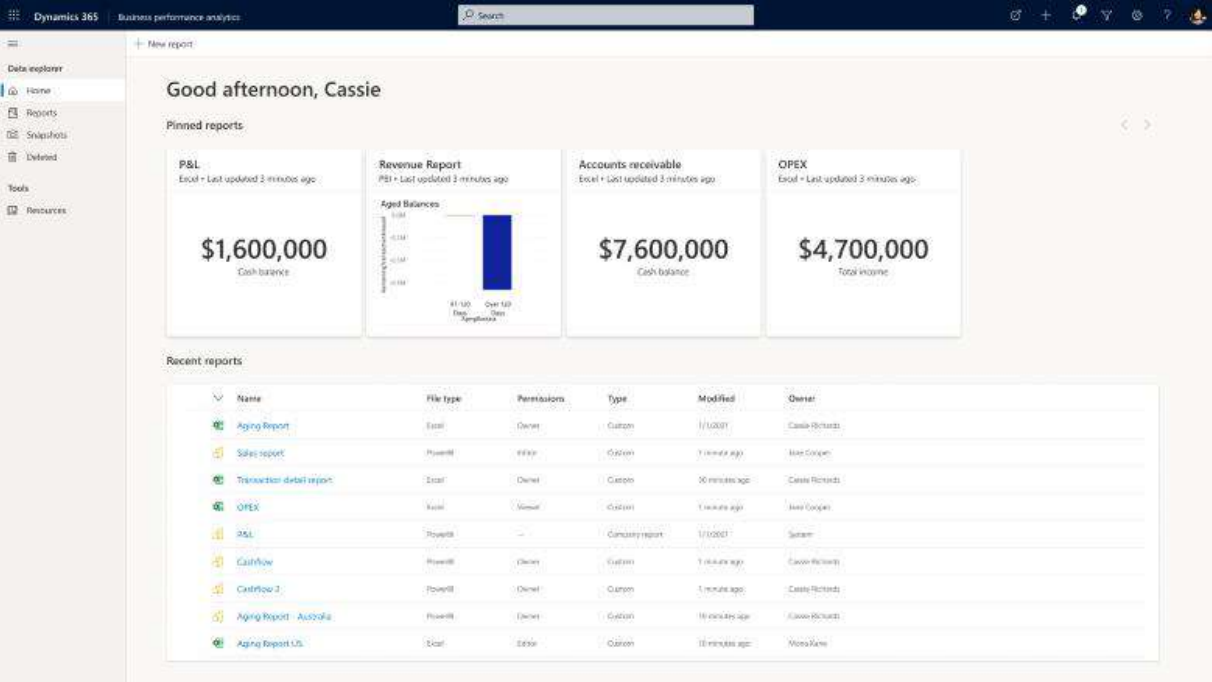
Agreement99

Agreement100

Finance – Core financials



Item	N / U	Deadline	Benefits / Observations
Empower users with generative help and guidance	Updated	Aug/2024	With the help of Copilot, users can get assistance without leaving business performance analytics. Users can ask Copilot questions about the application and receive responses without needing to manually find an answer themselves, saving time for our end-users and potentially their company's IT support division as well.
Extend data models in Microsoft Fabric	Updated	Aug/2024	The Extend to Fabric feature in business performance analytics (BPA) enhances the platform's flexibility by integrating BPA data with proprietary datasets, enabling customized analytical experiences tailored to specific business needs. This integration facilitates a holistic view of operations, breaking down data silos for comprehensive analysis and supporting better strategic planning.



Finance – Core financials



Item	N / U	Deadline	Benefits / Observations
Add efficiency with enhanced bank reconciliation report	Updated	Oct/2024	Dynamics 365 Finance offers an advanced bank reconciliation feature that help 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.
Automatically clear bridged transactions	Updated	Oct/2024	This feature reduces manual operations of clearing bridged transactions by automating the process in advanced bank reconciliation.

Bank reconciliation - Operating account - USD

Account number: 34567453 Page No.: 1
Currency: USD User: Julia.Funderburk
Period: 2/5/2017 - 9/15/2023

Bank statement ending balance:	60,000.00	Company ending balance:	50,000.00
		• Posted amount:	45,000.00
		+ Unposted amount:	5,000.00
Unreconciled amount:	20,000.00	Unreconciled amount:	10,000.00
Reconciled amount:	40,000.00	Reconciled amount:	40,000.00
		+ Amount:	40,100.00
		• Correction amount:	-100.00

Company unreconciled details:

Bank Transaction type	Date	Document type	Document number	Payment reference	Amount	Correction amount
	12/1/2018			3	1,000.00	0.00
	12/2/2018			3	6,000.00	0.00
	12/3/2018			3	1,000.00	0.00
				Total	10,000.00	0.00

Company reconciled details:

Bank Transaction type	Date	Document type	Document number	Payment reference	Amount	Correction amount
	12/1/2018			3	2,000.00	0.00
	12/2/2018			3	6,000.00	0.00
	12/3/2018			3	6,000.00	0.00
	12/7/2018			3	25,100.00	-100.00
				Total	40,100.00	-100.00

Bank unreconciled details:

Bank transaction code	Booking date	Document number	Reference No.	Entry reference	Description	Amount
						5,000.00
						10,000.00
						5,000.00
					Total	20,000.00

Bank reconciled details:

Bank transaction code	Booking date	Document number	Reference No.	Entry reference	Description	Amount
	12/1/2018					5,000.00
	12/2/2018					10,000.00
	12/3/2018					25,000.00
					Total	40,000.00

Finance and Operations Preview

Search for a page

Logout

Back navigation

Standard view

Bank account: All Show user-created only

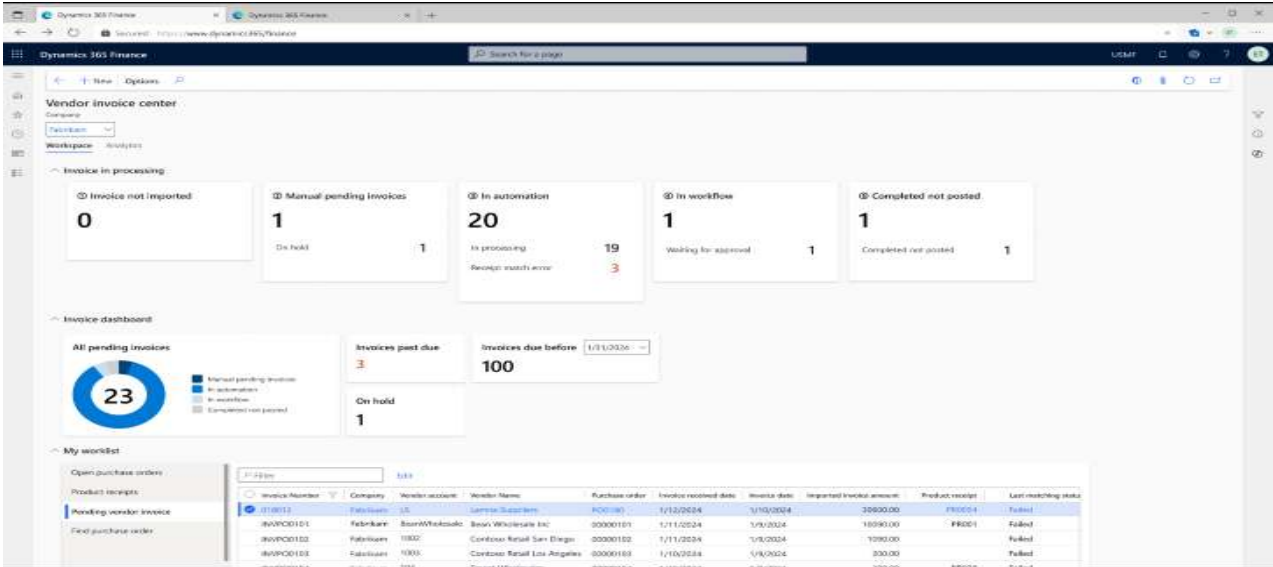
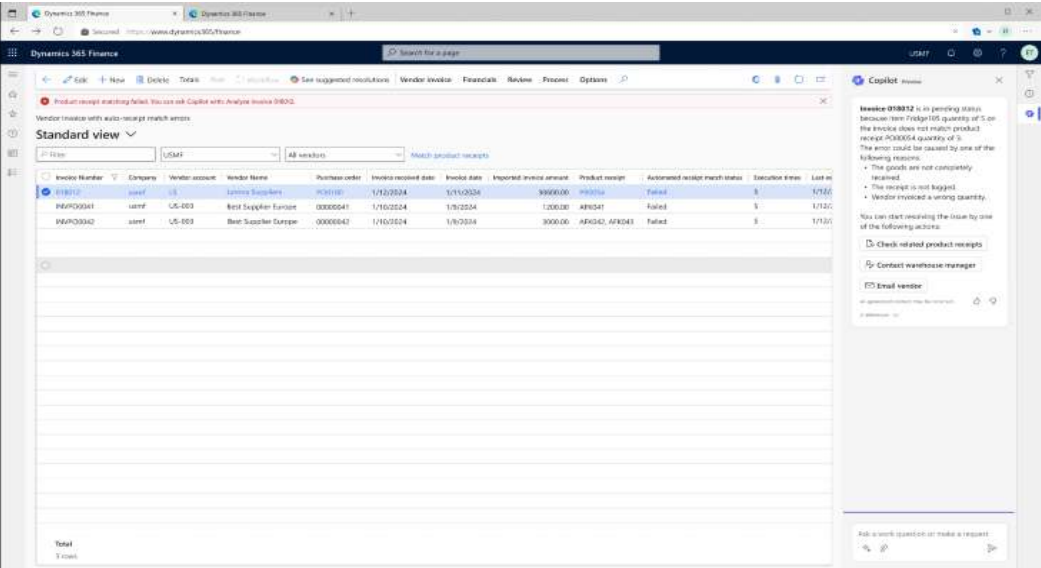
Overview | Search | Settings | History

Bank account	Revenue ID	Description	Currency	Cash date	Last statement ID	Posting balance	Total amount	Reconciled	User	Status
Bank EUR	00000	00000	EUR	05-09-2023	00001	4,230.00	4,230.00	✓		Cleared
Bank1	00001	1241	USD	01-09-2023	00002	6,500.00	6,500.00	✓		Cleared
Bank1	00002	1241	USD	08-09-2023	00003	6,500.00	6,500.00	✓		Cleared
Bank1	00003	1241	USD	08-09-2023	00004	6,500.00	6,500.00	✓		Cleared
Bank1	00004	1241	USD	11-09-2023	00005	6,500.00	6,500.00	✓		Cleared
Bank1	00005	1241	USD	11-09-2023	00006	6,500.00	6,500.00	✓		Cleared
Bank1	00006	1241	USD	11-09-2023	00007	6,500.00	6,500.00	✓		Cleared
Bank1	00007	1241	USD	11-09-2023	00008	6,500.00	6,500.00	✓		Cleared
Bank1	00008	1241	USD	11-09-2023	00009	6,500.00	6,500.00	✓		Cleared
Bank1	00009	1241	USD	11-09-2023	00010	6,500.00	6,500.00	✓		Cleared
Bank1	00010	1241	USD	11-09-2023	00011	6,500.00	6,500.00	✓		Cleared
Bank1	00011	1241	USD	11-09-2023	00012	6,500.00	6,500.00	✓		Cleared
Bank1	00012	1241	USD	11-09-2023	00013	6,500.00	6,500.00	✓		Cleared
Bank1	00013	1241	USD	11-09-2023	00014	6,500.00	6,500.00	✓		Cleared
Bank1	00014	1241	USD	11-09-2023	00015	6,500.00	6,500.00	✓		Cleared
Bank1	00015	1241	USD	11-09-2023	00016	6,500.00	6,500.00	✓		Cleared
Bank1	00016	1241	USD	11-09-2023	00017	6,500.00	6,500.00	✓		Cleared
Bank1	00017	1241	USD	11-09-2023	00018	6,500.00	6,500.00	✓		Cleared
Bank1	00018	1241	USD	11-09-2023	00019	6,500.00	6,500.00	✓		Cleared
Bank1	00019	1241	USD	11-09-2023	00020	6,500.00	6,500.00	✓		Cleared
Bank1	00020	1241	USD	11-09-2023	00021	6,500.00	6,500.00	✓		Cleared
Bank1	00021	1241	USD	11-09-2023	00022	6,500.00	6,500.00	✓		Cleared
Bank1	00022	1241	USD	11-09-2023	00023	6,500.00	6,500.00	✓		Cleared
Bank1	00023	1241	USD	11-09-2023	00024	6,500.00	6,500.00	✓		Cleared
Bank1	00024	1241	USD	11-09-2023	00025	6,500.00	6,500.00	✓		Cleared
Bank1	00025	1241	USD	11-09-2023	00026	6,500.00	6,500.00	✓		Cleared
Bank1	00026	1241	USD	11-09-2023	00027	6,500.00	6,500.00	✓		Cleared
Bank1	00027	1241	USD	11-09-2023	00028	6,500.00	6,500.00	✓		Cleared
Bank1	00028	1241	USD	11-09-2023	00029	6,500.00	6,500.00	✓		Cleared
Bank1	00029	1241	USD	11-09-2023	00030	6,500.00	6,500.00	✓		Cleared
Bank1	00030	1241	USD	11-09-2023	00031	6,500.00	6,500.00	✓		Cleared
Bank1	00031	1241	USD	11-09-2023	00032	6,500.00	6,500.00	✓		Cleared
Bank1	00032	1241	USD	11-09-2023	00033	6,500.00	6,500.00	✓		Cleared
Bank1	00033	1241	USD	11-09-2023	00034	6,500.00	6,500.00	✓		Cleared
Bank1	00034	1241	USD	11-09-2023	00035	6,500.00	6,500.00	✓		Cleared
Bank1	00035	1241	USD	11-09-2023	00036	6,500.00	6,500.00	✓		Cleared
Bank1	00036	1241	USD	11-09-2023	00037	6,500.00	6,500.00	✓		Cleared
Bank1	00037	1241	USD	11-09-2023	00038	6,500.00	6,500.00	✓		Cleared
Bank1	00038	1241	USD	11-09-2023	00039	6,500.00	6,500.00	✓		Cleared
Bank1	00039	1241	USD	11-09-2023	00040	6,500.00	6,500.00	✓		Cleared
Bank1	00040	1241	USD	11-09-2023	00041	6,500.00	6,500.00	✓		Cleared
Bank1	00041	1241	USD	11-09-2023	00042	6,500.00	6,500.00	✓		Cleared
Bank1	00042	1241	USD	11-09-2023	00043	6,500.00	6,500.00	✓		Cleared
Bank1	00043	1241	USD	11-09-2023	00044	6,500.00	6,500.00	✓		Cleared
Bank1	00044	1241	USD	11-09-2023	00045	6,500.00	6,500.00	✓		Cleared
Bank1	00045	1241	USD	11-09-2023	00046	6,500.00	6,500.00	✓		Cleared
Bank1	00046	1241	USD	11-09-2023	00047	6,500.00	6,500.00	✓		Cleared
Bank1	00047	1241	USD	11-09-2023	00048	6,500.00	6,500.00	✓		Cleared
Bank1	00048	1241	USD	11-09-2023	00049	6,500.00	6,500.00	✓		Cleared
Bank1	00049	1241	USD	11-09-2023	00050	6,500.00	6,500.00	✓		Cleared
Bank1	00050	1241	USD	11-09-2023	00051	6,500.00	6,500.00	✓		Cleared
Bank1	00051	1241	USD	11-09-2023	00052	6,500.00	6,500.00	✓		Cleared
Bank1	00052	1241	USD	11-09-2023	00053	6,500.00	6,500.00	✓		Cleared
Bank1	00053	1241	USD	11-09-2023	00054	6,500.00	6,500.00	✓		Cleared
Bank1	00054	1241	USD	11-09-2023	00055	6,500.00	6,500.00	✓		Cleared
Bank1	00055	1241	USD	11-09-2023	00056	6,500.00	6,500.00	✓		Cleared
Bank1	00056	1241	USD	11-09-2023	00057	6,500.00	6,500.00	✓		Cleared
Bank1	00057	1241	USD	11-09-2023	00058	6,500.00	6,500.00	✓		Cleared
Bank1	00058	1241	USD	11-09-2023	00059	6,500.00	6,500.00	✓		Cleared
Bank1	00059	1241	USD	11-09-2023	00060	6,500.00	6,500.00	✓		Cleared
Bank1	00060	1241	USD	11-09-2023	00061	6,500.00	6,500.00	✓		Cleared
Bank1	00061	1241	USD	11-09-2023	00062	6,500.00	6,500.00	✓		Cleared
Bank1	00062	1241	USD	11-09-2023	00063	6,500.00	6,500.00	✓		Cleared
Bank1	00063	1241	USD	11-09-2023	00064	6,500.00	6,500.00	✓		Cleared
Bank1	00064	1241	USD	11-09-2023	00065	6,500.00	6,500.00	✓		Cleared
Bank1	00065	1241	USD	11-09-2023	00066	6,500.00	6,500.00	✓		Cleared
Bank1	00066	1241	USD	11-09-2023	00067	6,500.00	6,500.00	✓		Cleared
Bank1	00067	1241	USD	11-09-2023	00068	6,500.00	6,500.00	✓		Cleared
Bank1	00068	1241	USD	11-09-2023	00069	6,500.00	6,500.00	✓		Cleared
Bank1	00069	1241	USD	11-09-2023	00070	6,500.00	6,500.00	✓		Cleared
Bank1	00070	1241	USD	11-09-2023	00071	6,500.00	6,500.00	✓		Cleared
Bank1	00071	1241	USD	11-09-2023	00072	6,500.00	6,500.00	✓		Cleared
Bank1	00072	1241	USD	11-09-2023	00073	6,500.00	6,500.00	✓		Cleared
Bank1	00073	1241	USD	11-09-2023	00074	6,500.00	6,500.00	✓		Cleared
Bank1	00074	1241	USD	11-09-2023	00075	6,500.00	6,500.00	✓		Cleared
Bank1	00075	1241	USD	11-09-2023	00076	6,500.00	6,500.00	✓		Cleared
Bank1	00076	1241	USD	11-09-2023	00077	6,500.00	6,500.00	✓		Cleared
Bank1	00077	1241	USD	11-09-2023	00078	6,500.00	6,500.00	✓		Cleared
Bank1	00078	1241	USD	11-09-2023	00079	6,500.00	6,500.00	✓		Cleared
Bank1	00079	1241	USD	11-09-2023	00080	6,500.00	6,500.00	✓		Cleared
Bank1	00080	1241	USD	11-09-2023	00081	6,500.00	6,500.00	✓		Cleared
Bank1	00081	1241	USD	11-09-2023	00082	6,500.00	6,500.00	✓		Cleared
Bank1	00082	1241	USD	11-09-2023	00083	6,500.00	6,500.00	✓		Cleared
Bank1	00083	1241	USD	11-09-2023	00084	6,500.00	6,500.00	✓		Cleared
Bank1	00084	1241	USD	11-09-2023	00085	6,500.00	6,500.00	✓		Cleared
Bank1	00085	1241	USD	11-09-2023	00086	6,500.00	6,500.00	✓		Cleared
Bank1	00086	1241	USD	11-09-2023	00087	6,500.00	6,500.00	✓		Cleared
Bank1	00087	1241	USD	11-09-2023	00088	6,500.00	6,500.00	✓		Cleared
Bank1	00088	1241	USD	11-09-2023	00089	6,500.00	6,500.00	✓		Cleared
Bank1	00089	1241	USD	11-09-2023	00090	6,500.00	6,500.00	✓		Cleared
Bank1	00090	1241	USD	11-09-2023	00091	6,500.00	6,500.00	✓		Cleared
Bank1	00091	1241	USD	11-09-2023	00092	6,500.00	6,500.00	✓		Cleared
Bank1	00092	1241	USD	11-09-2023	00093	6,500.00	6,500.00	✓		Cleared
Bank1	00093	1241	USD	11-09-2023	00094	6,500.00	6,500.00	✓		Cleared
Bank1	00094	1241	USD	11-09-2023	00095	6,500.00	6,500.00	✓		Cleared
Bank1	00095	1241	USD	11-09-2023	00096	6,500.00	6,500.00	✓		Cleared
Bank1	00096	1241	USD	11-09-2023	00097	6,500.00	6,500.00	✓		Cleared
Bank1	00097	1241	USD	11-09-2023	00098	6,500.00	6,500.00	✓		Cleared
Bank1	00098	1241	USD	11-09-2023	00099	6,500.00	6,500.00	✓		Cleared
Bank1	00099	1241	USD	11-09-2023	00100	6,500.00	6,500.00	✓		Cleared
Bank1	00100	1241	USD	11-09-2023	00101	6,500.00	6,500.00	✓		Cleared
Bank1	00101	1241	USD	11-09-2023	00102	6,500.00	6,500.00	✓		Cleared
Bank1	00102	1241	USD	11-09-2023	00103	6,500.00	6,500.00	✓		Cleared
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Bank1	00104	1241	USD	11-09-2023	00105	6,500.00	6,500.00	✓		Cleared
Bank1	00105	1241	USD	11-09-2023	00106	6,500.00	6,500.00	✓		Cleared
Bank1	00106	1241	USD	11-09-2023	00107	6,500.00	6,500.00	✓		Cleared
Bank1	00107	1241	USD	11-09-2023	00108	6,500.00	6,500.00	✓		Cleared
Bank1	00108	1241	USD	11-09-2023	00109	6,500.00	6,500.00	✓		Cleared
Bank1	00109	1241	USD	11-09-2023	00110	6,500.00	6,500.00	✓		Cleared
Bank1	00110	1241	USD	11-09-2023	00111	6,500.00	6,500.00	✓		Cleared
Bank1	00111	1241	USD	11-09-2023	00112	6,500.00	6,500.00	✓		Cleared
Bank1	00112	1241	USD	11-09-2023	00113	6,500.00	6,500.00	✓		Cleared
Bank1	00113	1241	USD	11-09-2023	00114	6,500.00	6,500.00	✓		Cleared
Bank1	00114	1241	USD	11-09-2023	00115	6,500.00	6,500.00	✓		Cleared
Bank1	00115	1241	USD	11-09-2023	00116	6,500.00	6,500.00	✓		Cleared
Bank1	00116	1241	USD	11-09-2023	00117	6,500.00	6,500.00	✓		Cleared
Bank1	00117	1241	USD	11-09-2023	00118	6,500.00	6,500.00	✓		Cleared
Bank1	00118	1241	USD	11-09-2023	00119	6,500.00	6,500.00	✓		

Finance – Core financials



Item	N / U	Deadline	Benefits / Observations
Correct receipt matching error in vendor invoices with Copilot	Updated	Oct/2024	During the vendor invoice automation process within Dynamics 365 Finance, exceptions may arise at various stages of the process. The AP clerk may have to take many actions and search for data to make a correction. Copilot in the pending vendor invoice list and vendor invoice center eliminates the need for repeated and time-consuming navigation between the vendor invoice list and the detailed pending invoice page.
Enable financial tags for purchase order invoicing	Updated	Oct/2024	When the Enable financial tags for purchase order invoicing feature is enabled, customers can use the financial tag to track the subledger data with purchase order numbers, vendor names instead of using financial dimensions. This helps reduce the performance issue during the analysis phase.



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

Logout

Standard view

Reconciliation posting rules

Posting rule 01

Posting rule 02

Posting rule 03

Posting rule name

Description

Active

Active

01

Posting rule 01

Generate voucher

No

Conditions

+ Add

Remove

☐ Bank statement field

Operator

Value

☒ Transaction code

=

010

☐ Bank account

=

USMF OPES

Related information

TRANSACTION DETAILS

BANK

TAX

FINANCIAL DIMENSIONS

FINANCIAL TAGS

Accounting date *

Bank transaction type *

Sales tax group

BusinessUnit *

Finance tag *

Booking date *

Liab

Liab

001

Liab

1234.2345

Offset account number *

Item sales tax group

Department *

Financial tag name

Financial tag value

Liab

002

Operations

A001

1234

Description

Free text string

A002

2345

A003

Finance – Core financials



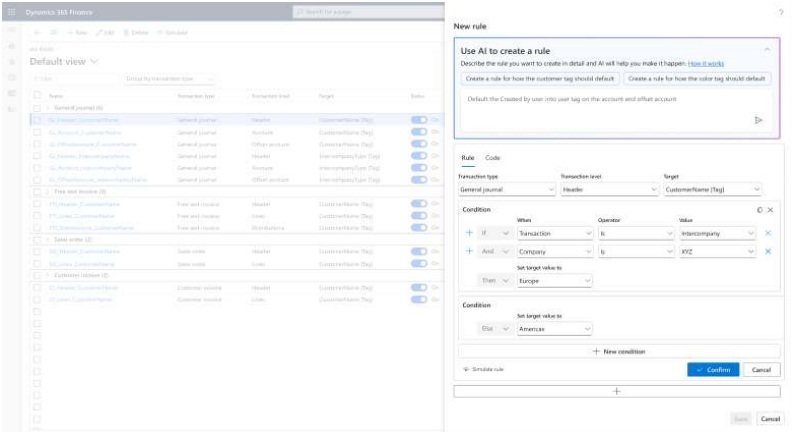
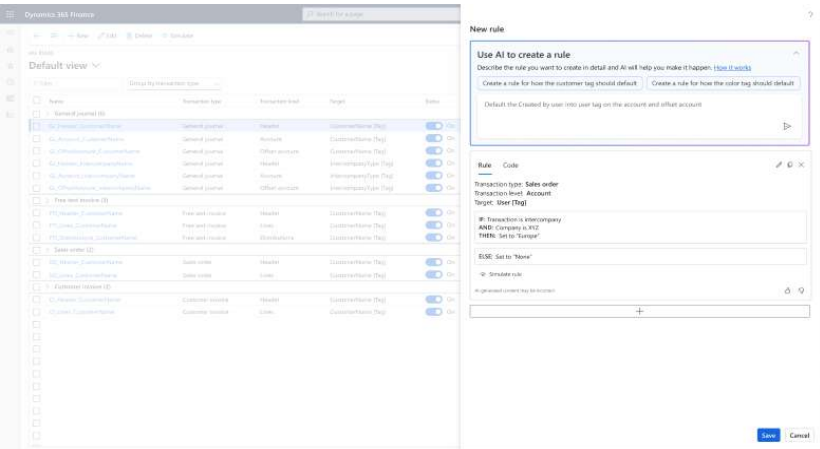
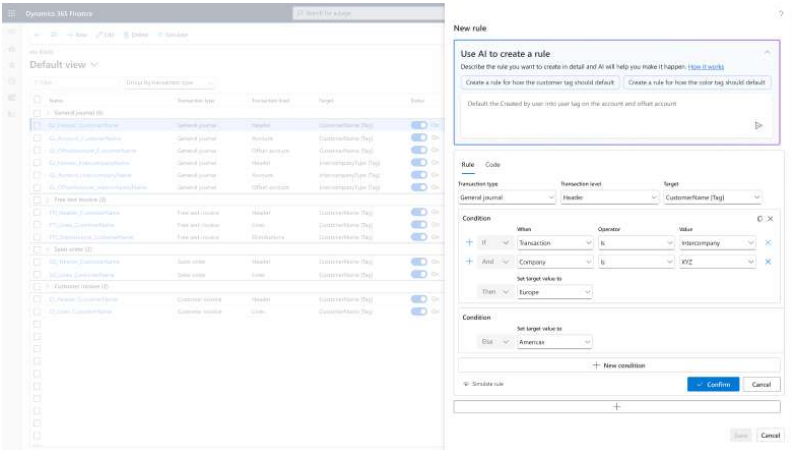
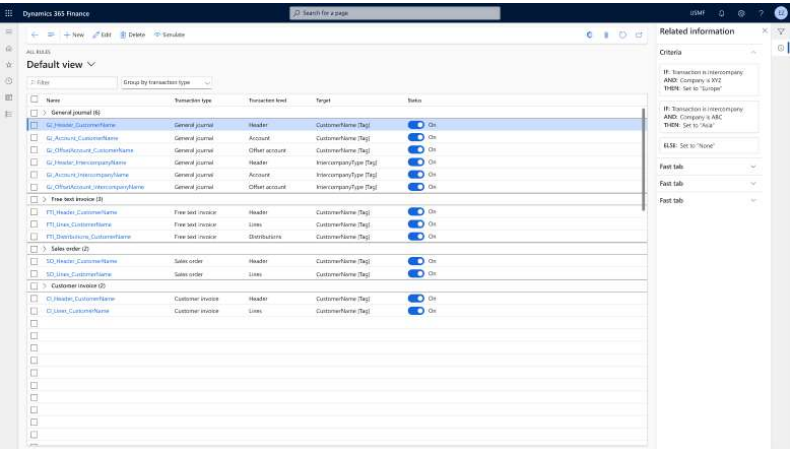
Item	N / U	Deadline	Benefits / Observations
Increase the length of invoice numbers	Updated	Oct/2024	This feature increases the length of invoice numbers in Accounts payable, which gives you more flexibility to adapt invoice numbers in ways that better serve your organization's needs.
Save time with automated cash application	Updated	Oct/2024	Dynamics 365 Finance offers an advanced bank reconciliation feature that helps businesses manage the bank reconciliation process more efficiently. Businesses can 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.

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Finance – Core financials



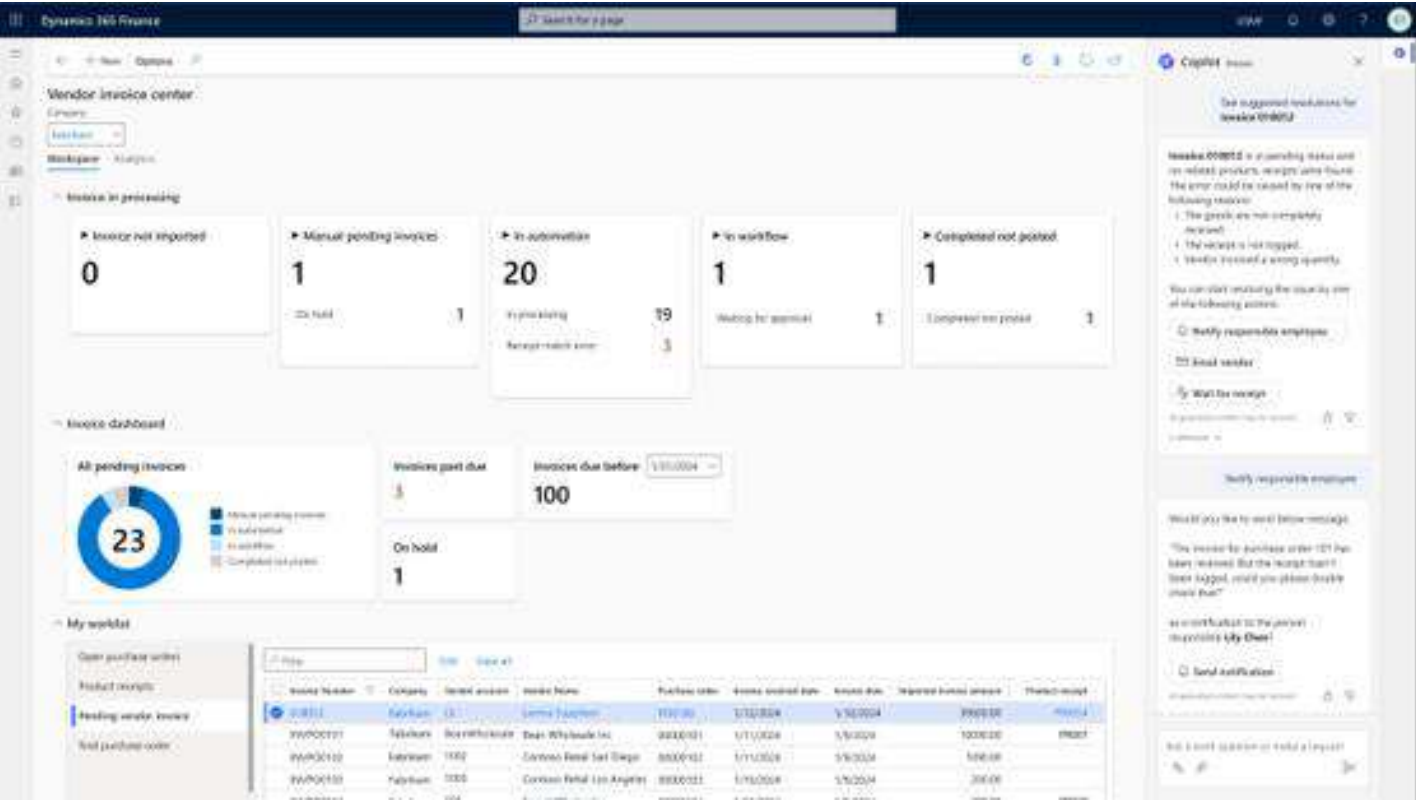
Item	N / U	Deadline	Benefits / Observations
Use copilot to default financial tags	Updated	Oct/2024	Financial tags can be used to track up to 20 user-defined fields on accounting entries. The defaulting capabilities for financial tags are limited with the initial releases. This feature gives control to accounting managers and system administrators to capture important transactional data in Tags with the help of Copilot-assisted rules creation. It reduces the manual efforts and mistakes of team members entering transactions by defaulting financial tags.



Finance – Core financials



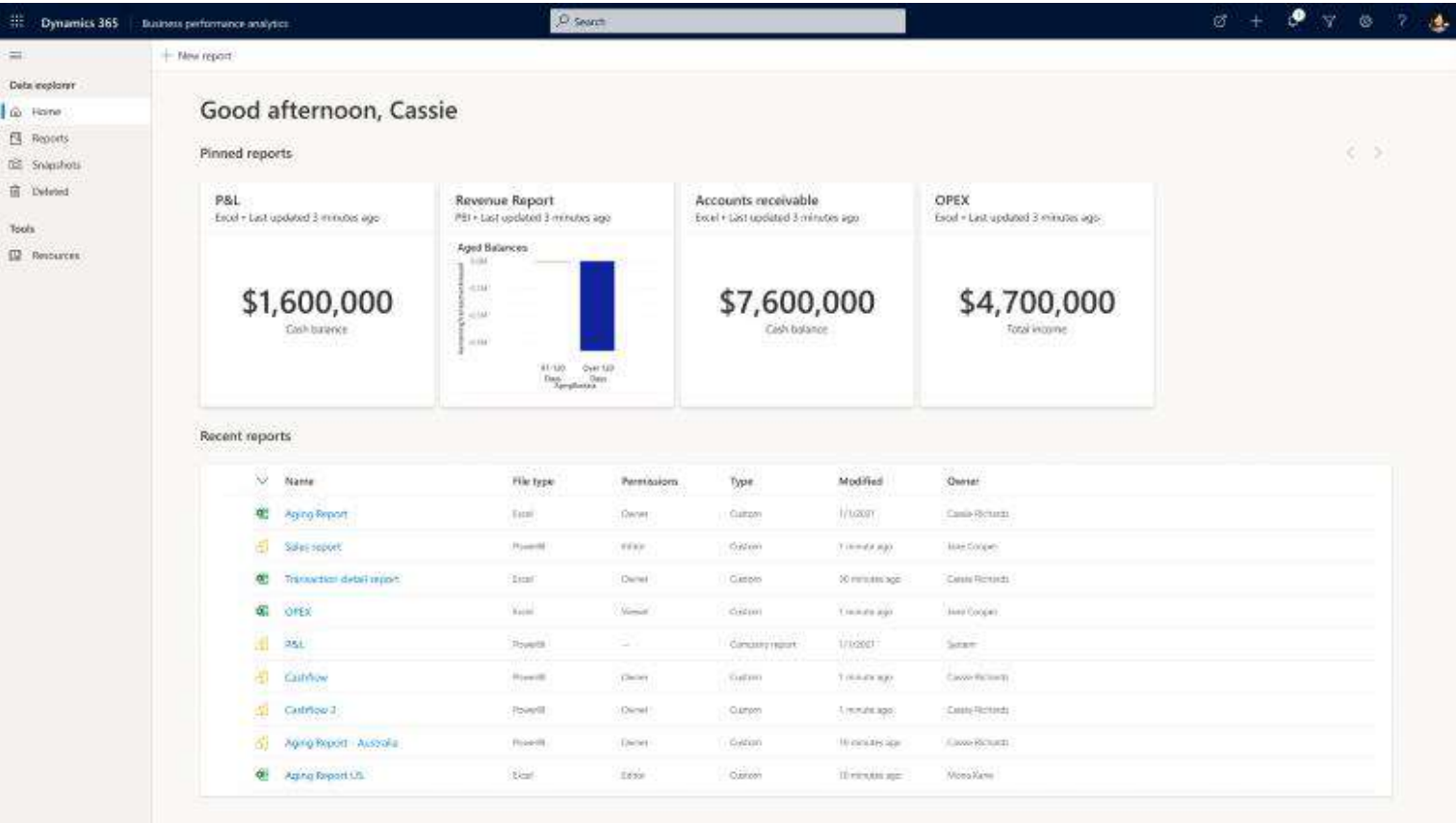
Item	N / U	Deadline	Benefits / Observations
Use Copilot to handle vendor invoice exceptions	Updated	Oct/2024	In invoice automation, exceptions may occur at different stages. Copilot for vendor invoice exception handling can greatly reduce AP clerk's manual effort on analyzing root cause for different 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



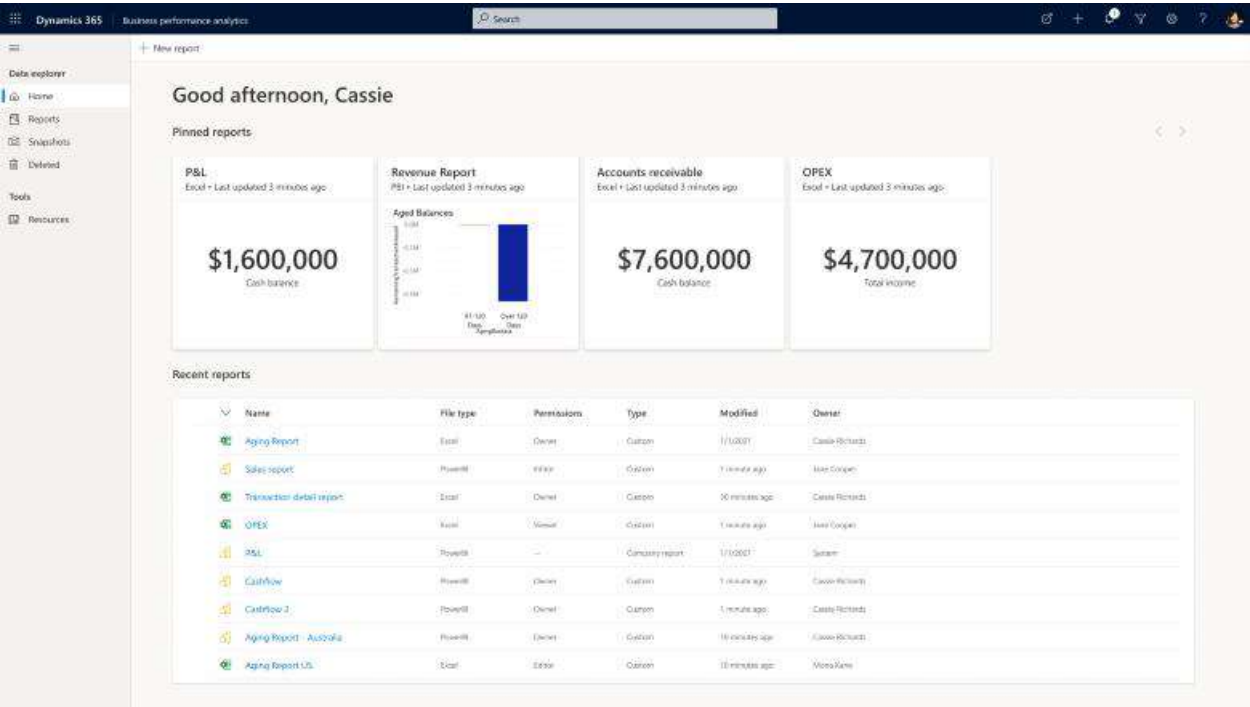
Item	N / U	Deadline	Benefits / Observations
Analyze business data in Excel	Updated	Oct/2024	The Analyze in Excel feature in business performance analytics enhances data analysis capabilities by integrating business performance analytics data directly with Excel. This allows you to use Excel's powerful tools for creating custom analyses, pivot tables, and charts, leveraging familiar functions to explore data in-depth. The feature supports real-time decision-making with automatically refreshed data, ensuring that analyses are always current.



Finance – Business performance



Item	N / U	Deadline	Benefits / Observations
Empower users with generative help and guidance	Updated	Aug/2024	With the help of Copilot, users can get assistance without leaving business performance analytics. Users can ask Copilot questions about the application and receive responses without needing to manually find an answer themselves, saving time for our end-users and potentially their company's IT support division as well.
Extend data models in Microsoft Fabric	Updated	Aug/2024	The Extend to Fabric feature in business performance analytics (BPA) enhances the platform's flexibility by integrating BPA data with proprietary datasets, enabling customized analytical experiences tailored to specific business needs. This integration facilitates a holistic view of operations, breaking down data silos for comprehensive analysis and supporting better strategic planning.



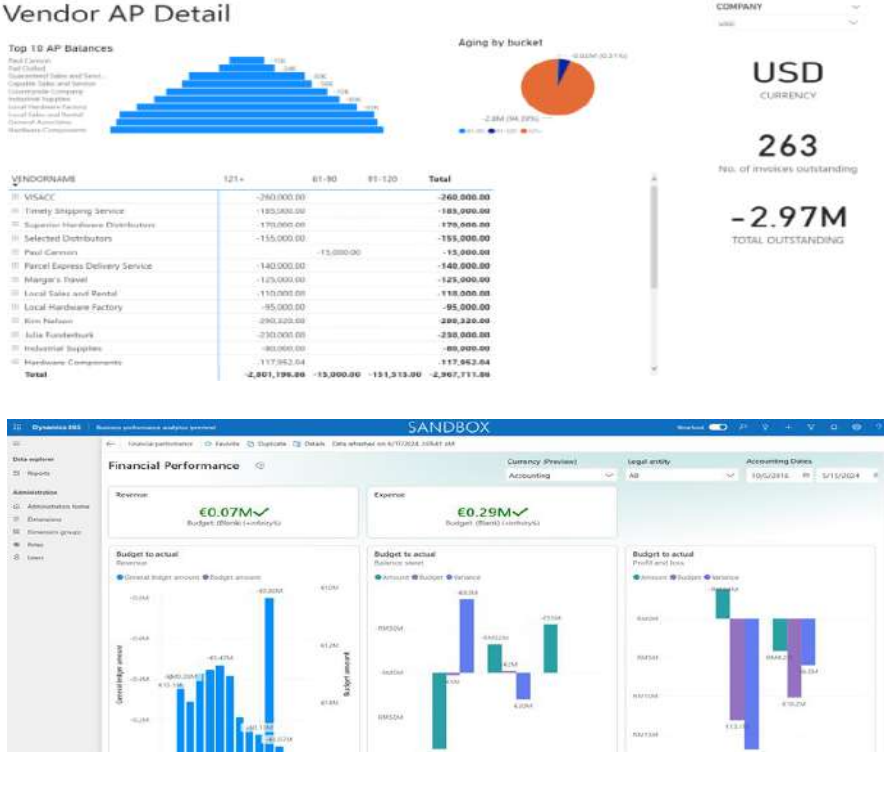
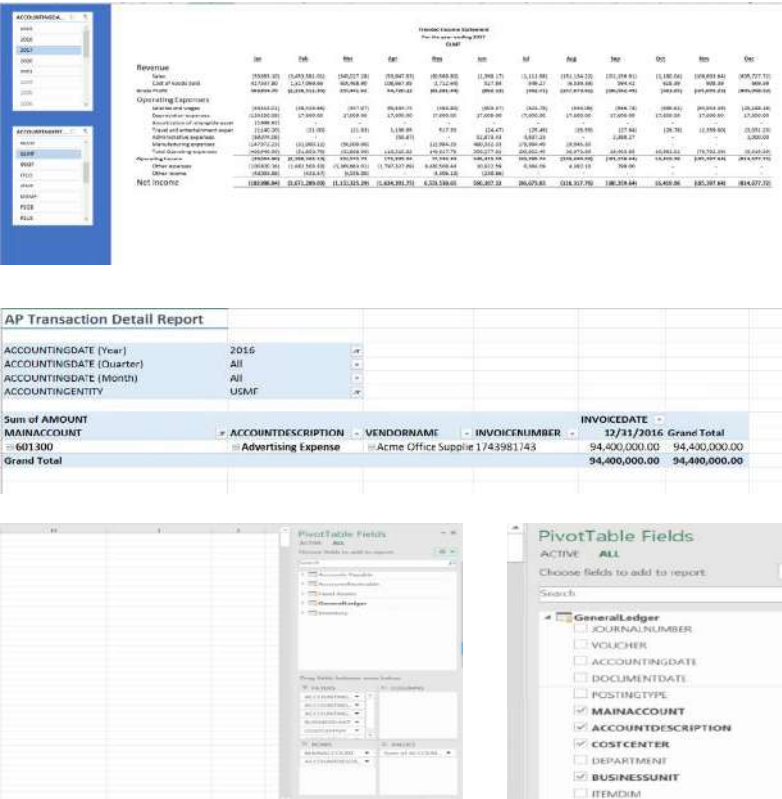
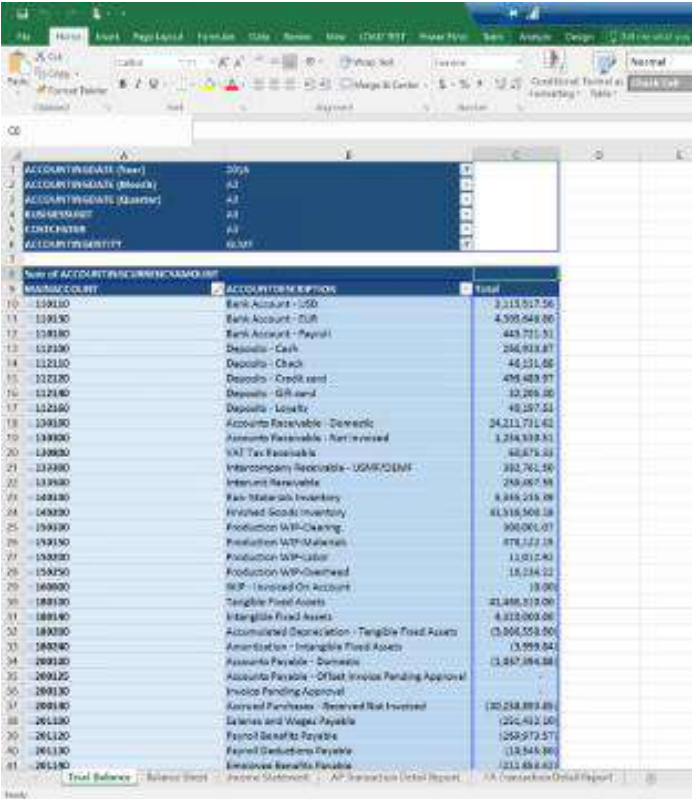
Finance – Business performance

Item	N / U	Deadline	Benefits / Observations
Generative help in business performance planning application		Sep/2024	Business performance planning is the extended planning and analysis application that Dynamics 365 finance and operations users will leverage to do financial budget planning and forecasting. With Copilot generative answers, users will be able to ask questions about product features and functionality and get quick and summarized responses from Microsoft Learn content.
Track change management with copilot capabilities		Sep/2024	Providing a comprehensive view of the changes made to a plan allows managers not only to understand how the changes will impact the plan, but also ensures accuracy.

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.



Finance – Business performance



Item	N / U	Deadline	Benefits / Observations
Create drivers and formulas in Business performance planning	Updated	Oct/2024	With driver-based planning capabilities, decision-makers have access to financial forecasts that are directly tied to operational drivers. This connection between financial outcomes and business activities enables more informed and strategic decision-making. This feature enables the user to create powerful calculation logic and method with identified key driver to easily generate financial outcomes scenarios, eliminating the need for manual setup in Power BI, streamlining the process while keeping track of the change made to those drivers across multiples scenarios.
Empower users with generative help and guidance	Updated	Oct/2024	With the help of Copilot, users can get assistance without leaving business performance analytics. Users can ask Copilot questions about the application and receive responses without needing to manually find an answer themselves, saving time for our end-users and potentially their company's IT support division as well.

Finance – Business performance

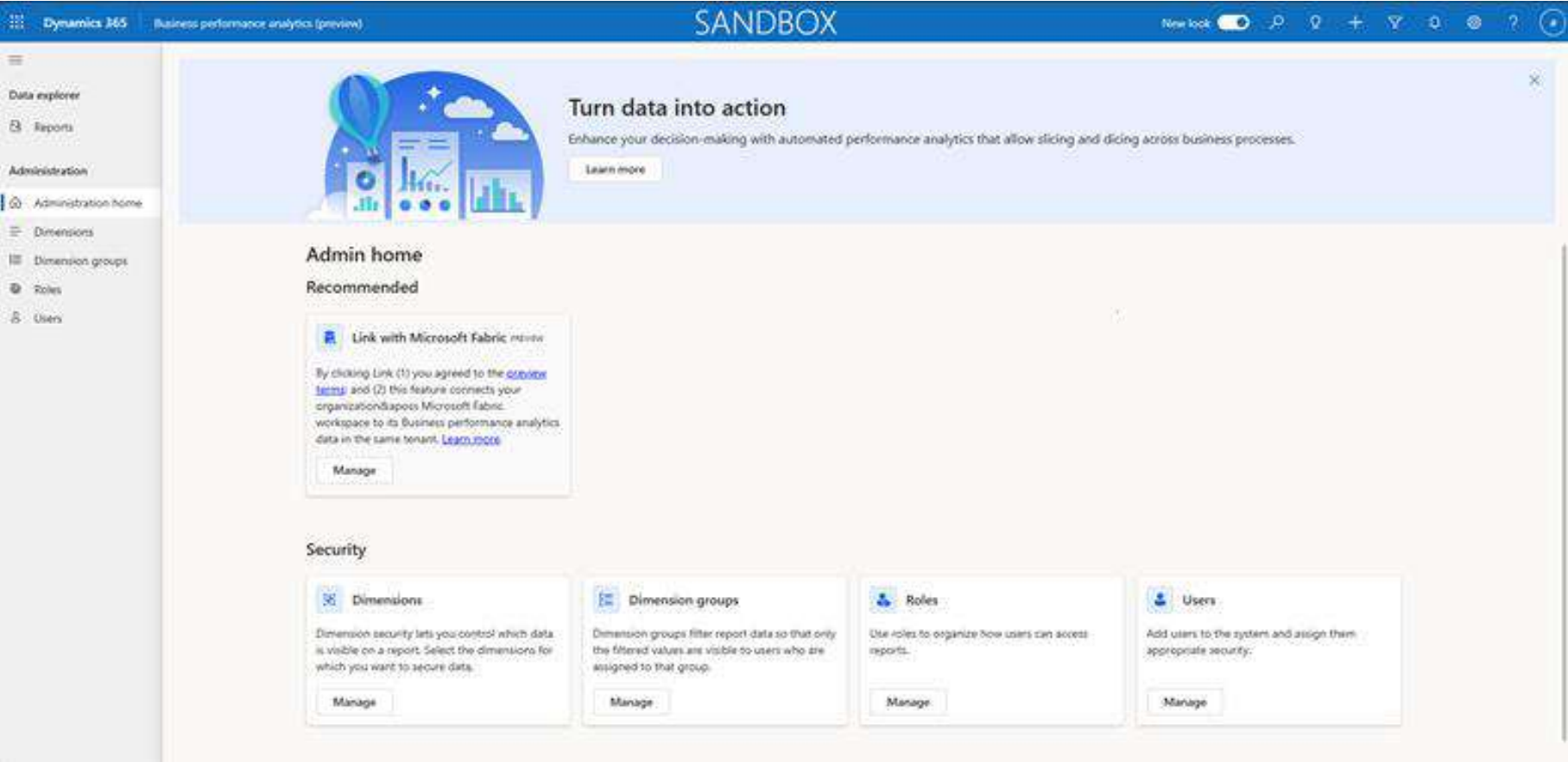


Item	N / U	Deadline	Benefits / Observations
Provide actionable insights that drive strategic decisions and operational efficiency	Updated	Oct/2024	Business performance analytics is the key to unlocking your organization's full potential. By systematically collecting, analyzing, and interpreting data 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.

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Finance – Business performance

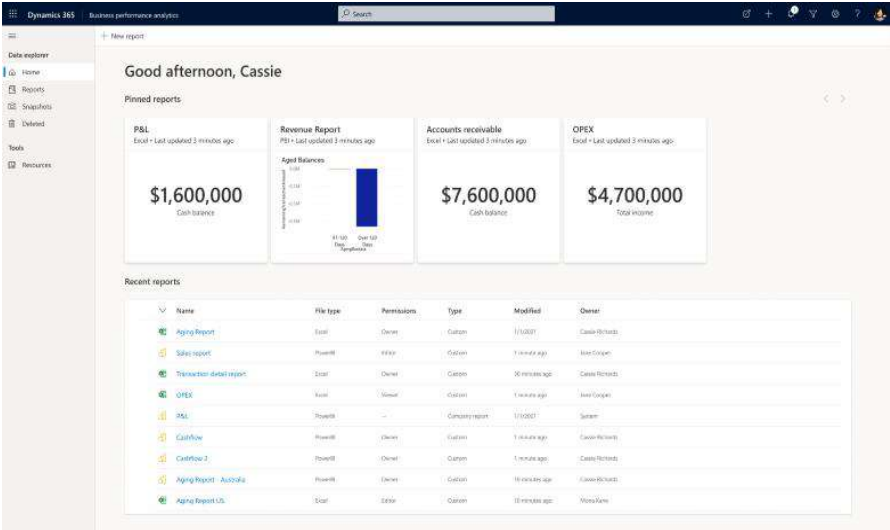
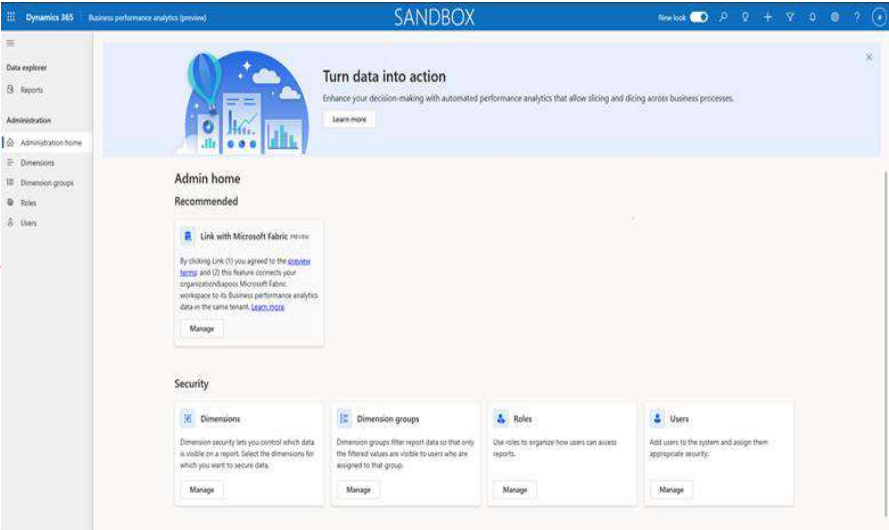
Item	N / U	Deadline	Benefits / Observations
Set dimensional row level security in Business performance analytics	Updated	Oct/2024	Dimensional row-level security in Business performance analytics provides significant business value by offering precise control over data access and enhancing compliance. 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 – Business performance



Item	N / U	Deadline	Benefits / Observations
Try the reporting, analytics, and insights hub	Updated	Oct/2024	The Business performance analytics reporting hub provides substantial business value by centralizing access to prebuilt reports like Balance Sheet, Profit and Loss, and Sales Transaction Details, enhancing efficiency and collaboration. With seamless integration with tools like Power BI and Excel, secure sharing, automatic data refresh, and precise access control, the hub streamlines reporting processes, supports data-driven decision-making, and drives operational excellence.
Use Procure to Pay data models to report and gain insights	Updated	Oct/2024	The Procure to Pay data model in Business performance analytics enhances your procurement processes by streamlining reporting, ensuring accurate payment processing, and providing detailed financial visibility. This feature helps reduce errors, improve efficiency, and offer valuable insights into spending and vendor performance, ultimately driving better financial management and strategic decision-making.
Use the Order to Cash data model to gain insights and analyze sales transactions	Updated	Oct/2024	The Order to Cash data model in Business performance analytics streamlines sales reporting and analytics, ensuring accurate invoicing and payment processing while providing comprehensive financial visibility. By offering detailed data on sales orders, picking lists, packing slips, invoices, payments, and the accounts receivable subledger, the Order to Cash model enhances revenue management, reduces operational costs, and improves customer relationships. Incorporating various dimensions across the order-to-cash value chain, this feature drives operational excellence and business growth.



Finance – Globalization Studio

Item	N / U	Deadline	Benefits / Observations
Expand localization for LATAM countries - Bolivia	Updated	Oct/2024	Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.
Expand localization for LATAM countries - Ecuador	Updated	Oct/2024	Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.
Import vendor electronic invoices in Germany	Updated	Oct/2024	Importing vendor electronic invoices enables global and local customers who deploy Dynamics 365 Finance in Germany to automate receiving of incoming invoices in electronic format and to meet federal requirements in this area being mandated starting from 01 January 2025.
Convert Excel business documents to PDF	Updated	Oct/2024	This feature enables local PDF conversion for Excel business documents. It allows Local Business Data conversion along with more reliability of the conversion overall.
Expand localization for LATAM countries – Colombia	Updated	Aug/2024	We continue to extend the scope of the supported countries in LATAM to address the needs of multiple global and local customers. Out-of-the-box localization for Colombia is available for preview. While the country localization will provide the following capabilities, not all of them might be available for preview.
Expand localization for LATAM countries – Guatemala	Updated	Aug/2024	Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

Finance – Globalization Studio



Item	N / U	Deadline	Benefits / Observations
Expand localization for LATAM countries – Paraguay	Updated	Aug/2024	Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.
Expand localization for LATAM countries – Uruguay	Updated	Aug/2024	Important Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

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.

US-001 : Contoso Retail San Diego

Summary

Status

The customer has 23 posted invoices totaling 660,090 USD, with 89,000 USD outstanding. In supply chain management, 23 delivered orders amount to 261,196 USD, with 150,000 USD not yet invoiced.

Outlines

Invoice 000070 with an outstanding balance of 784 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.

General

Customer	Name	Customer group	Organization (DEMO)	Job code	Order reference
Invoice	Customer Retail San Diego	RT	Number of shipments	1000	Invoice number
100-000	Search name	Distribution group	Organization address	Language	Item ID
Top	Customer Retail San D	Payment priority	2001	Invoice date	Invoice date

Address

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

Journal list

Journal no.	Name	Description	Posted	Posted on	Log	In use by	Modified
00043	WFAPIVW	WF AP Invoice					SABA
00043	APInvoice	AP Invoice					akardis
00043	WFAPIVW	WF AP Invoice					Admin

Ledger daily journal workflow - Approve

Comment

Summary by Copilot

Overview

Submitted by April on 6/10/2024 04:12:51 PM with comment: "Need supplier". Due date is 04-12-2024 04:05:44 PM. Rejected by Julia with comment: "Missing attachment". Delegated to Cassie with comment: "Different department". You are the final approver.

Outlines

There have been instances where the workflow has been stopped for errors. "Release reason is mandatory." It is suggested the setup is not correct.

Potential risks of failure

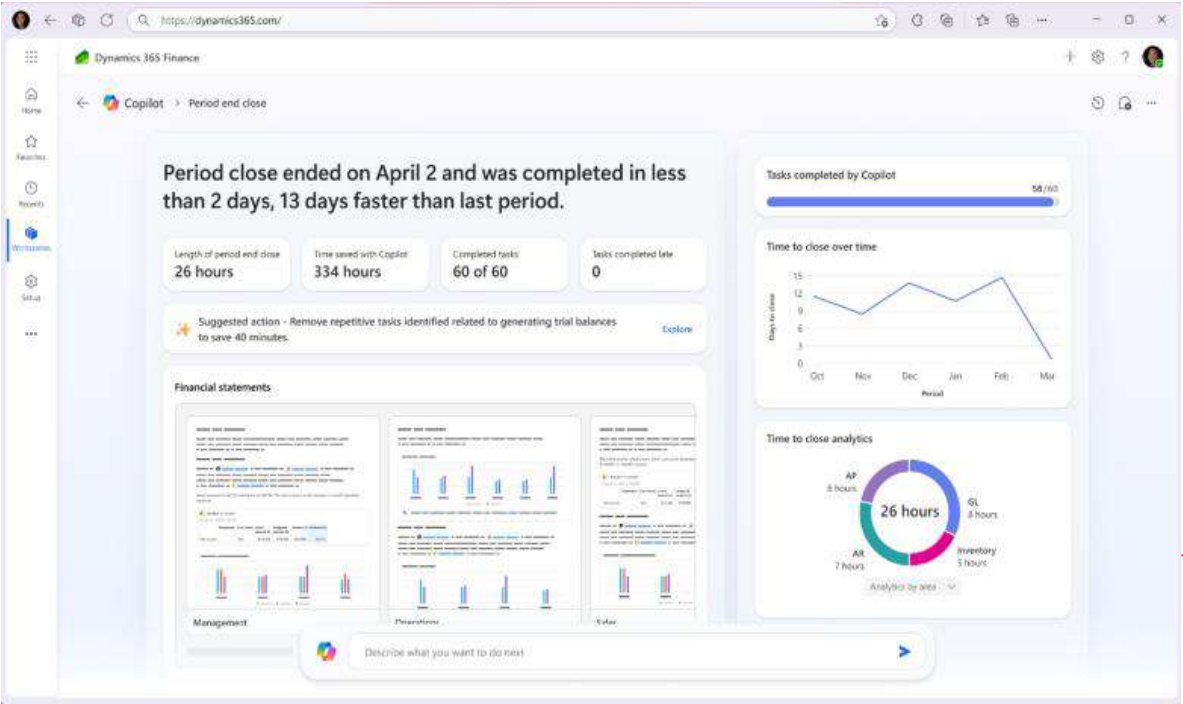
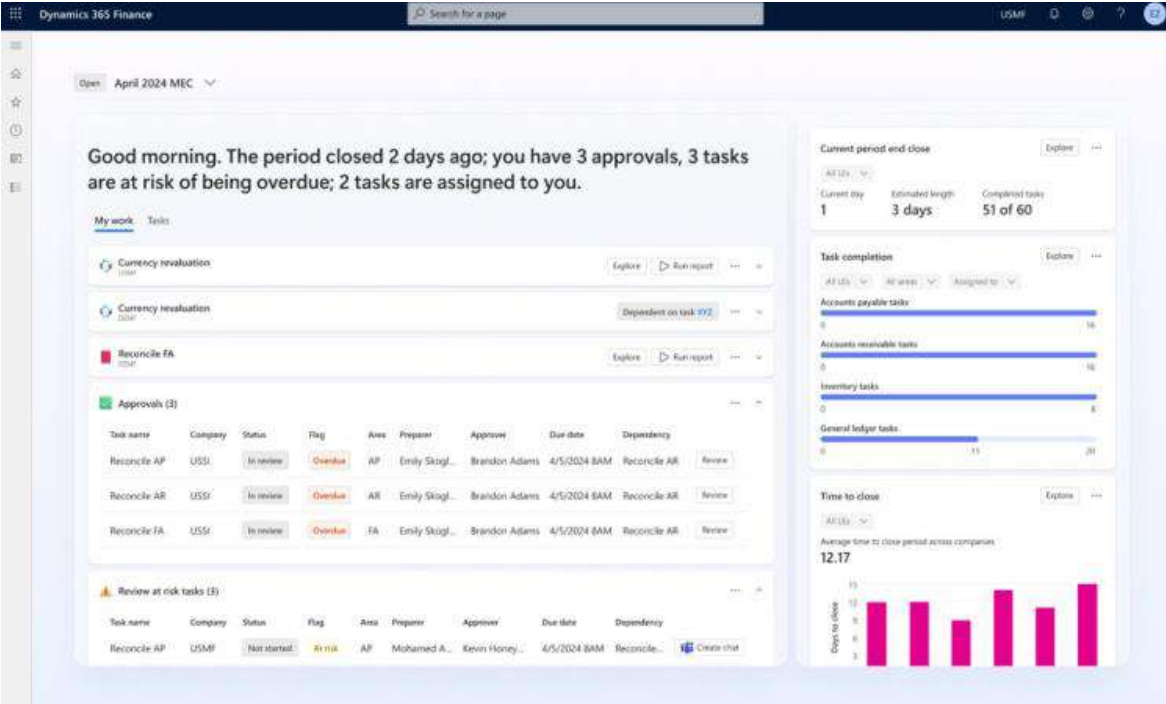
You have rejected this workflow type 3 times with comments about attachments missing. Please use appropriate content to describe the appropriate before using Copilot.

Approve Cancel

Finance - Copilot



Item	N / U	Deadline	Benefits / Observations
Try immersive homepage and redesigned workspace for financial period close	Updated	Nov/2024	New immersive homepages and redesigned workspaces for period-end close gives visibility into the end-to-end workflows that occur around period end. Each immersive experience will provide the ability to pivot on data in the manner required by your organization or task across legal entities. AI will be used to determine immersive homepage content, providing insight into daily/period end task efficiency for tasks completed by Copilot or manually by finance team members, while also recommending how to improve the overall period end process.



Power Apps – Copilot

Item	N / U	Deadline	Benefits / Observations
Use Copilot to facilitate Finance and Operations workflows in Visual Studio		Oct/2024	There is a big productivity increase to be harvested for X++ developers. Dev Div have published numbers of more than 40% of published C# code was written by Copilot, and we would like to provide similar help to X++ developers. One of the other benefits is that It helps shortening the ramp up time for new developers, which has always been a problem for the business. We're aiming for the same kind of flow as canvas apps and Dataverse have today where natural language can be used to describe certain workflows.
Back up and restore unified environments		Sep/2024	This feature provides backup and restore capabilities for your organization. This helps you protect your organization's data in case of a power outage or other disruptions.
Convert sandbox to production for unified environments	Updated	Dec/2024	By leveraging a single command and API, customers can seamlessly transition their entire environment, including Dataverse, customer engagement-based, and ERP-based applications, from sandbox to production. This streamlined process enhances operational efficiency and reduces downtime during critical go live activities.
Deploy and manage unified production environments	Updated	Dec/2024	Customers can now manage their production environments as part of a unified experience in Power Platform admin center for all Dynamics 365 apps.
Deploy and manage unified sandbox environments	Updated	Dec/2024	Customers can now manage their sandbox environments as part of a unified experience in Power Platform admin center for all Dynamics 365 apps. This provides a consistent and single set of lifecycle operations that an admin can perform across all their artifacts.



Project Operations

Project Operations - Optimize project operations



Item	N / U	Deadline	Benefits / Observations
Enable audit of project manager field in project entity	Updated	Aug/2024	Track changes to the project manager of a project and verify when this field has been updated. All other types of customizations on the project manager field will be disabled.
Enable bulk resource reconciliation APIs	Updated	Aug/2024	With the dynamic nature of project delivery, organizations are constantly balancing changes in scope and project timelines that have a direct impact on when work needs to be delivered. To align capacity accurately and quickly within an organization, resource managers and project managers need tools to make bulk updates to help them ensure their resource capacity is accurate.
Utilize repaired precision feature with certain values	Updated	Aug/2024	We are adjusting the way we handle precision for values coming from Project for the web to properly address precision issues across assignments, bookings, resource requirements and time entry.
Increase limit to 1,500 tasks per project	Updated	Jul/2024	Customers running large, complex projects across various industry verticals often require detailed project plans to sequence and assign their work with a level of granularity designed to mitigate project risks and to drive clarity in each work package. While task checklists provide a means by which program managers can append additional detail, they are not schedule-impacting and aren't always a suitable alternative.
Cost rate defaulting in project estimation scenarios	Updated	Aug/2024	Currently in Dynamics 365 Project operations users can only see the markup cost based on the mark up price configuration on a price list in actuals. The markup cost was not reflected in the project estimates, quote line details (QLD), contract line details (CLD), and project budgets. This resulted in a confusion for users because they could see different prices in actuals when compared to estimates, QLD, CLD and budgets.

Project Operations - Optimize project operations



Item	N / U	Deadline	Benefits / Observations
Enable delegation of time entries to other team members	Updated	Aug/2024	There might be scenarios when you, as a team member, are not able to log time because of limited access to external services. For example, while working from a secure, client location, when taking time off for personal reasons. These missed time entries could lead to loss of pay and delayed invoicing if not addressed promptly. This can be addressed with the ability to delegate time entries to one or more team members who can log time on your behalf during a specified date range.
Use progress billing for resource and nonstock scenarios	Updated	Dec/2024	Progress billing allows users to maintain progress billing rules in Project Operations non-stock/resource-based scenarios. They can maintain the progress % for the contracts and system allow them to create invoices based on the progress completed.
Visualize date effective overrides on the price list	Updated	Aug/2024	Project Managers and users who are responsible for setting the price list for roles, materials, and categories can add a date-effective price override where the price would change starting from a certain date until the end of the price list effective date. However, users do not have an easy way of looking at all price overrides across roles, materials, and categories in the price list grid itself. To see these, they must click each price to find out if there was a date-effective price override applied to the price. This is a click-intensive user experience.
Add time zone agnostic fields for project and project tasks		Sep/2024	This feature gives you the option to use a field that stores start and end dates on projects and project tasks in a time zone agnostic manner. Currently times are converted to GMT before being saved, and issues can arise when the conversion moves this to a different day. These issues will be solved by using the time zone agnostic fields that are not converted to GMT when stored.

Project Operations - Optimize project operations



Item	N / U	Deadline	Benefits / Observations
Cost rate defaulting in project estimation scenarios		Sep/2024	Currently in Dynamics 365 Project operations users can only see the markup cost based on the mark up price configuration on a price list in actuals. The markup cost was not reflected in the project estimates, quote line details (QLD), contract line details (CLD), and project budgets. This resulted in a confusion for users because they could see different prices in actuals when compared to estimates, QLD, CLD and budgets.
Enable bulk resource reconciliation APIs	Updated	Sep/2024	With the dynamic nature of project delivery, organizations are constantly balancing changes in scope and project timelines that have a direct impact on when work needs to be delivered. To align capacity accurately and quickly within an organization, resource managers and project managers need tools to make bulk updates to help them ensure their resource capacity is accurate.
Enable delegation of time entries to other team members		Sep/2024	There might be scenarios when you, as a team member, are not able to log time because of limited access to external services. For example, while working from a secure, client location, when taking time off for personal reasons. These missed time entries could lead to loss of pay and delayed invoicing if not addressed promptly. This can be addressed with the ability to delegate time entries to one or more team members who can log time on your behalf during a specified date range.
Enable on-account transactions created by project category		Sep/2024	Organizations may have requirements to categorize and report on revenue from different sources. By enabling on-account transactions to have an additional field of category, it allows for different financial accounts to be used and reported on.
Improve performance for resource booking generation		Sep/2024	We're improving the resource booking creation, optimization, and performance in Project Operations.

Project Operations - Optimize project operations



Item	N / U	Deadline	Benefits / Observations
Optimize resource requirement generation		Sep/2024	This feature optimizes generation of resource requirements based on multiple tasks that take place on the same day for a resource role.
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 - Optimize project operations



Item	N / U	Deadline	Benefits / Observations
Use progress billing for resource and nonstock scenarios		Sep/2024	Progress billing allows users to maintain progress billing rules in Project Operations non-stock/resource-based scenarios. They can maintain the progress % for the contracts and system allow them to create invoices based on the progress completed.
Use time zone agnostic fields in resource planning		Sep/2024	The time zone agnostic feature enhances an organization's ability to create resource requirements and bookings with accurate dates that are independent of time zone differences.
Visualize date effective overrides on the price list		Sep/2024	Project Managers and users who are responsible for setting the price list for roles, materials, and categories can add a date-effective price override where the price would change starting from a certain date until the end of the price list effective date. However, users do not have an easy way of looking at all price overrides across roles, materials, and categories in the price list grid itself. To see these, they must click each price to find out if there was a date-effective price override applied to the price. This is a click-intensive user experience.
Copy quotes and contracts across legal entities	Updated	Oct/2024	When quotes and contracts are created, a legal entity is associated with these records for customers who deploy the resource and non-stocked scenarios. When a copy is required, it may need to be recreated in a new legal entity to reflect an alternate delivery model.

Project Operations - Optimize project operations

Item	N / U	Deadline	Benefits / Observations
Support cost plus pricing for resource time	Updated	Oct/2024	Many professional services organizations derive their bill rates as a function of the associated cost rate of a resource. Empowering organizations to derive these prices directly in Project Operations saves time, provides flexibility, and eliminates the need for external tracking sheets sometimes used to perform these calculations.
Use one grid for material and expense estimates	Updated	Oct/2024	Replacing the grid within expense and material estimates provides a clean experience when creating and editing estimates. The enhanced grid experience provides easy filtering, deletion, and lookup functionality. This change ensures extensibility and improves performance.

Dynamics 365Project Operations

HomeRecentPinned

CustomersCustomersContactsProductsPrice listsSalesLeadsOpportunitiesQuotesProject contractsTransactionsApproved timeApproved expensesJournalsActualsBillingRetainers and Advon...Available retainers an...Fixed price milestonesProduct billing backo...Time and material tel...InvoicesSales

New quote lineQuote line

SummaryDetailsChargeable rolesChargeable categoriesCustomersRelated

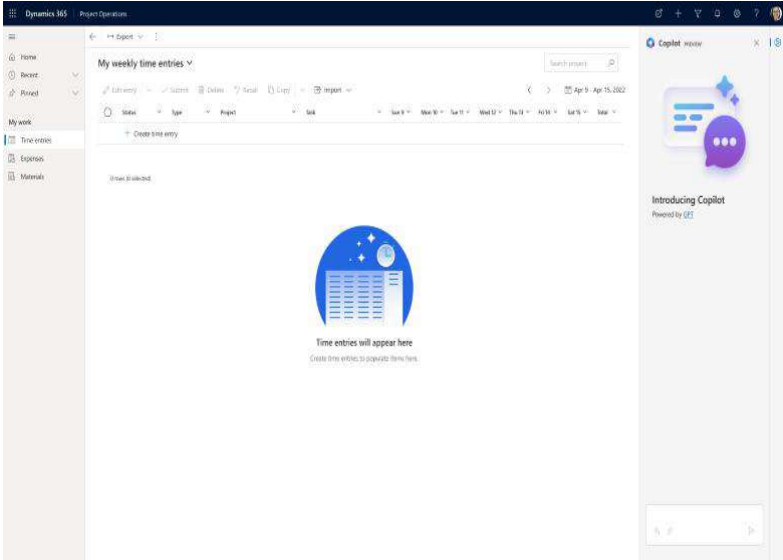
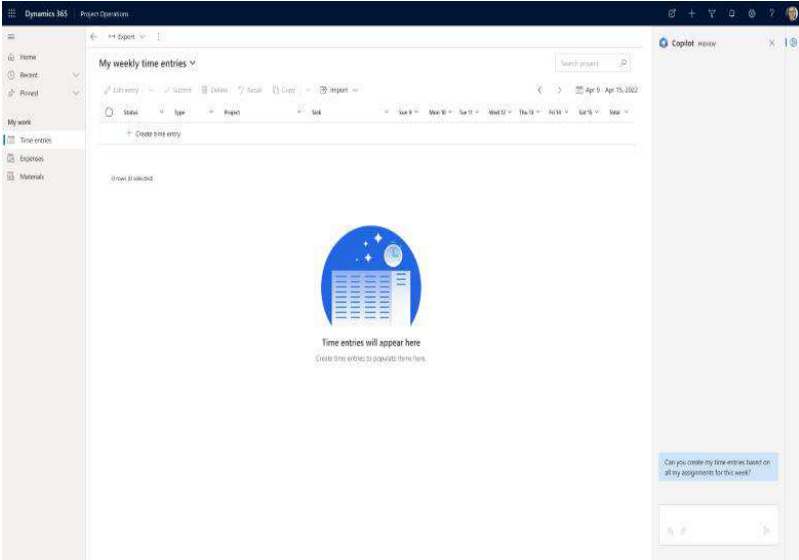
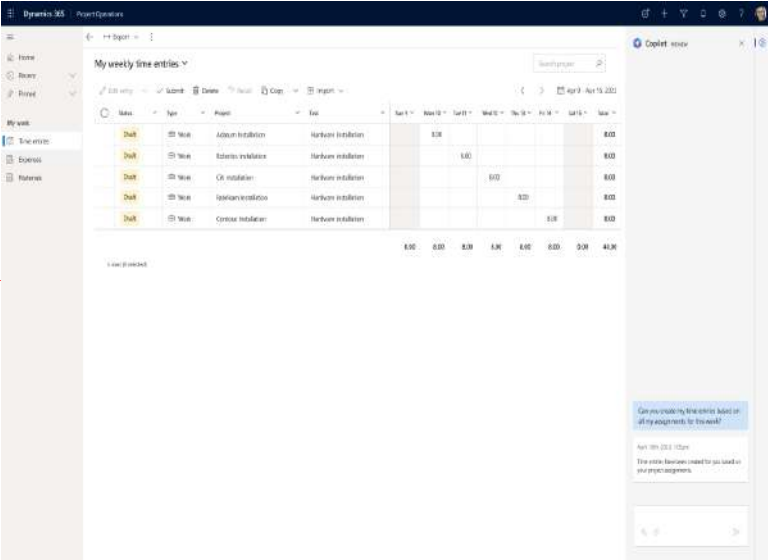
Product typeProject-based serviceQuote for CommisNameCompsa quote lineBilling methodTime and materialPricing methodCost plus pricingProjectItem Installation Add-on

Included tasksIncluded timeIncluded expenseIncluded materialIncluded fee

Quoted amount\$0.00Estimated taxMarkup percentage20% pricingQuoted amount after taxCustomer budget

Project Operations - Copilot in Project Operations

Item	N / U	Deadline	Benefits / Observations
Use copilot enhancements to tailor project status reports		Sep/2024	Through this enhancement, project managers gain flexibility to tailor report sections according to their specific business needs and cater to diverse audiences. This feature ensures reports align with the unique requirements of each project.
Use Copilot for time entry		Sep/2024	Introducing Copilot for time entry, powered by generative AI that simplifies how you log time.





Supply Chain Management

Supply Chain - Inventory and logistics

Item	N / U	Deadline	Benefits / Observations
Add transactions when recalculating weighted average	Updated	Jul/2024	Gain greater control over the recalculation process by choosing whether to exclude or include specific types of transactions as needed. This can help ensure report accuracy and regulation compliance for some regions. Additionally, this feature can help save time and increase efficiency by streamlining the recalculation process and reducing the need for manual intervention.
Sync external changes through Inventory Visibility	Updated	Jul/2024	Businesses integrating Dynamics 365 Supply Chain Management with external inventory systems typically need to synchronize inventory updates between systems, create order and journal records in Supply Chain Management, and aggregate data to optimize performance. Inventory Visibility now provides out-of-the-box functionality that supports all these operations, thereby minimizing implementation efforts while improving system performance. The resulting solution also lets you trace inventory transactions back to the original source documents and run historical inventory analyses based on the synchronized data.
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 - Inventory and logistics

Item	N / U	Deadline	Benefits / Observations
Enable efficient, accurate demand planning with Copilot		Aug/2024	Copilot provides demand planners with in-product guidance, forecast insights, and the ability to explore trends, anomalies, and influencing factors using natural language. This helps demand planners in Dynamics 365 Supply Chain Management to make informed decisions, improve forecast accuracy, and optimize supply chain operations.
Query and manage inventory without site or warehouse info		Sep/2024	Dynamics 365 Supply Chain Management supports large organizations that manage many different sites and warehouses. As a result, the system makes use of site and warehouse information when querying inventory, adjusting inventory, making soft reservations, and making allocations. In some business scenarios (such as in-store sales), users know and use warehouse information. However, in other scenarios (such as e-commerce, in-basket reservations), users may need to query or update inventory at the product level, without having accurate warehouse information. This feature allows the Inventory Visibility service for Supply Chain Management to support business scenarios both where users know the site and warehouse and where they don't.
Enable quality control for goods-in-transit orders		Sep/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.
Reproduce business documents that include product bundles		Sep/2024	Dynamics 365 Supply Chain Management now preserves detailed product-bundle information in its database, which means that you'll be able to reprint original sales order confirmations and invoices even after the related sales order has been deleted or archived and purged. You'll also be better able to exchange order confirmations and invoices electronically.
Sync external changes through Inventory Visibility	Updated	Sep/2024	Businesses integrating Dynamics 365 Supply Chain Management with external inventory systems typically need to synchronize inventory updates between systems, create order and journal records in Supply Chain Management, and aggregate data to optimize performance. Inventory Visibility now provides out-of-the-box functionality that supports all these operations, thereby minimizing implementation efforts while improving system performance. The resulting solution also lets you trace inventory transactions back to the original source documents and run historical inventory analyses based on the synchronized data.

Supply Chain - Procurement



Item	N / U	Deadline	Benefits / Observations
Track time-series inventory in Inventory Visibility	Updated	Sep/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.
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.

Purchase order

Purchase orders

Lines

☒

Select all

☒

Item number: A0001

12.26 CAD

Legal entity: usmf

1 Pcs - 12.26 CAD / Pcs

Purchase order: 00000127

☒

Item number: 1000

899 USD

Legal entity: usmf

1 ea - 899 USD / ea

Purchase order: 00000128

☒

Item number: A0001

12 USD

Legal entity: usmf

1 Pcs - 12 USD / Pcs

Purchase order: 00000128

Complete

Return

Delegate

Request change

Lande Packaging Supplies

Details

Attachments

Timeline

Accounting distribution details

Overview

[View workflow instruction](#)

Vendor account

1002

Purchase order

00000126

Subtotal amount

12

End discount

0

Tax amount

0

Lines (1)

Item number: A0001

12 USD

Legal entity: usmf

1 Pcs - 12 USD / Pcs

Total

12 USD

Approve

Reject

Delegate

Request change

Supply Chain - Planning

Item	N / U	Deadline	Benefits / Observations
Collaborate on supply plans within and across teams		Sep/2024	Master planning is a complex process that considers a wide variety of factors when deciding which goods and materials need to be ordered to keep the business running smoothly. Multiple supply planners, production planners, material managers and other stakeholders are involved in and affected by the process. As a result, users working within and across teams often need to collaborate while entering relevant data and preparing and reviewing each plan. To collaborate effectively, all contributors need access to the same, up-to-date information. Dynamics 365 Supply Chain Management now provides greatly improved support for master planning collaboration because it continuously recalculates your master plans, refreshing them after each edit. All planners and other stakeholders will nearly always see the latest, fully optimized planning results as they evaluate and update each plan.
Calculate capable-to-promise quantities in real time	New	Oct/2024	Give customers realistic dates for when you can promise specific goods. For each sales line, you can provide a date that takes account of existing on-hand inventory, production capacity, and transportation times.

Supply Chain - Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Enable efficient, accurate demand planning with Copilot		Aug/2024	Copilot helps demand planners learn how to work with data to create accurate forecasts in Dynamics 365 Supply Chain Management. It then helps them to create, monitor, and execute demand plans. With Copilot, demand planners can use natural language to explore insights, trends, anomalies, and other factors that affect demand across dimensions.
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.
Keep conversations going with AI-generated follow-ups	New	Oct/2024	Finance and operations apps already offer innovative in-product, AI-based, contextual help with Copilot. Now, you can easily keep the conversation going with a single click, by selecting among a short list of likely follow-up questions that are automatically generated by Copilot based on your previous queries. Just select a question to receive related information without needing to formulate a new query, which makes the process of learning how to use the application more efficient and intuitive.

Supply Chain - Manufacturing and asset management

Item	N / U	Deadline	Benefits / Observations
Decouple production registration from time and attendance	New	Jul/2024	This feature makes it possible for workers to register production work using your manufacturing execution system (MES) without requiring managers to approve workers' time registrations and adjustments. For companies that don't use the time and attendance module of Dynamics 365 Supply Chain Management, this enables a faster workflow and easier setup.
Register time spent working on projects for production	New	Jul/2024	This feature provides an effective way to track time spent on projects without requiring workers to fill out a time sheet every time they start and stop work. Instead, workers can use the production floor execution interface to register their time directly. This capability is especially relevant when doing activities (such as research and trial runs) that aren't directly related to daily production work.
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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.

Select files

Drop files here to upload, or click here to browse

PDF

+ Copy

Cancel

Dynamics 365 Business Central

CRONUS USA, Inc.

FinanceCash ManagementSalesF

Customers: All

10000 Adatum Corporation Robert Townes 0.00 0.00

30000 School of Fine Art Meagan Bond 53,833.52 51,793.67

50000 Relecloud Jesse Homer 8,836 5,75

Details Attachments (3)

Attachments Documents 3

Documents

Show details

Upload files

Open in OneDrive

Share

Download

Open in Excel

Delete Line

Order 106008 pdf

Order 106007 pdf

Order 106006 pdf

Dynamics 365 Business Central

Incoming Documents

NewManageHome

Description Fabrikam Invoice US D365F

Incoming Document Files

Upload main attachment

Upload supporting attachments

Incoming Document

Open in OneDrive

Share

Download

Open in Excel

Delete Line

File Extension pdf pdf pdf

CRONUS USA, Inc. - Sales Order S-ORD101001

Send emailDiscard draftUse Word templateShow source documentPage

Order Confirmation

Hello Adatum Corporation,

Thank you for your business. Your order confirmation is attached to this message.

Order No: S-ORD101001Due Date: May 2, 2024Total USD: 17,773.66

If we receive the payment before 04/10/24, you are eligible for a 2% payment discount.

AttachmentsAdd filesAdd files from default selectionAdd file from source document

File Name: Sales Order S-ORD101001.pdfFile Size: 61 KB

Close

Business Central - Legislation

Item	N / U	Deadline	Benefits / Observations
Automate country of origin listed for item tracking code in Intrastat reporting	Update	Sep/2024	By using this feature, users can add the country of origin to item tracking. This enhancement has the potential to increase productivity by automatically inheriting the country of origin for items in sales documents from corresponding purchases, eliminating the need for manual intervention. This information will be used in Intrastat reporting at a later time.
Achieve sustainability scorecards and goals	Update	Oct/2024	Achieving sustainability scorecards and goals enhances a company's reputation, operational efficiency, and compliance, leading to cost savings and risk mitigation. It attracts investors, customers, and talent while fostering innovation and ensuring long term viability. Sustainability efforts align with regulatory incentives and market demand, creating a competitive advantage and driving growth through responsible resource management and positive stakeholder engagement.
Add attachments when you send electronic documents	Updated	Oct/2024	When you send an electronic document, such as an invoice, you can attach the document as a PDF, which enhances transactional transparency and streamlines auditing processes to increase efficiency and reduce potential disputes.
Enable internal carbon fee calculation in Sustainability	Update	Oct/2024	Motivate your business, or individual business units, to reduce carbon emissions by setting up carbon fees for greenhouse gas emissions.
Navigate the sustainability manager role center with ease	Update	Oct/2024	The Sustainability manager role center enhances operational efficiency by providing quick access to key environmental metrics and compliance data. The streamlined access enables managers to monitor sustainability initiatives in real-time, ensuring timely adjustments to meet regulatory standards and corporate sustainability goals. By reducing the time spent on data retrieval and analysis, this feature allows sustainability managers to focus on strategic decision-making and continuous improvement, ultimately driving more sustainable business practices and enhancing overall organizational performance.
Purchase carbon credits	Update	Oct/2024	Many regions have mandatory emission reduction targets. Purchasing carbon credits allows companies to comply with these regulations when they can't reduce emissions enough through their operations alone.
Record greenhouse gas emissions using purchase invoices	Update	Oct/2024	Recording greenhouse gases using purchase invoices allows businesses to track and reduce their carbon footprint effectively. By integrating environmental data with financial records, companies can identify high-emission activities, make informed sustainability decisions, and enhance their corporate responsibility. The proactive approach not only meets regulatory requirements but also attracts eco-conscious customers, strengthens brand reputation, and can lead cost savings through more efficient resource management.

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 Qtr From

Account Code

10000 · Kontorcentralen A/S

Ship-to Address List

Code Y

CHELTENHAM

HAMBURG

K28ENHAM

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 Grp. EU

VAT Bus. Posting Group EU

Show on Map

Business Central - Application



Item	N / U	Deadline	Benefits / Observations
Enable sustainability features for integrations with APIs		Sep/2024	You can use sustainability features in Business Central with third-party software. For example, you might use data about your greenhouse gas emissions in Business Central to enrich data in another application.
Manage subscription billing and revenue and expense recognition	Updated	Sep/2024	Businesses are finding ways to create recurring revenue streams by selling goods and services on a subscription basis. This release lets you manage subscription contracts in Business Central. The new subscription module lets you spend more time selling and less time organizing and invoicing contracts.
Add invoice and receipt documents to e-documents in bulk	Updated	Oct/2024	The e-documents framework in Business Central is the cornerstone for exchanging electronic documents and the import and export of data that supports operations and finances. In this release wave, it's easier for people in accounts payable to import invoices and receipt documents so they can work with them. This speeds up total processing time and ensures a single point of entry for overhead invoices or other documents that use the e-documents framework.
Archive service management documents	Updated	Oct/2024	Service documents often change and evolve during their lifecycle. The archiving capability gives you control over your service data through audit trails and version control.
Capture data from e-docs with Azure AI Document Intelligence	Updated	Oct/2024	The e-documents framework in Business Central is the cornerstone for the exchange of electronic documents, and the import and export of data that supports operations and finances. When working with vendor invoices and receipts through e-documents, accounts payable departments can streamline their OCR and document capture with native Azure AI Document Intelligence support in Business Central. They can capture data at the invoice line level, so received invoices and receipts are ready for further processing.
Export posted sales invoices to Shopify	Updated	Oct/2024	Buyers can sign in to Shopify and access all their invoices, regardless of whether the invoices were created in Shopify or in Business Central.
Import, export product info using Shopify Metafields	Updated	Oct/2024	Metafields are a flexible way to add and store additional information about a Shopify resource, such as a product or variant. You can synchronize and manage metafield data from Business Central either using the UI or using the extensibility model to map fields, attributes, or related entries in Business Central to metafields in Shopify.

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.
Reconcile payment transactions in Shopify with invoices	Updated	Oct/2024	Integrating Business Central and Shopify lets you easily manage your online sales and payments in one place. You can track the different payment methods, such as gift cards, credit cards, and more, that buyers used during checkout, and create customer ledger and general ledger entries to ensure accurate accounting and reporting.
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

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 YTD BUD

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	-90,601.19
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 – Country and regional

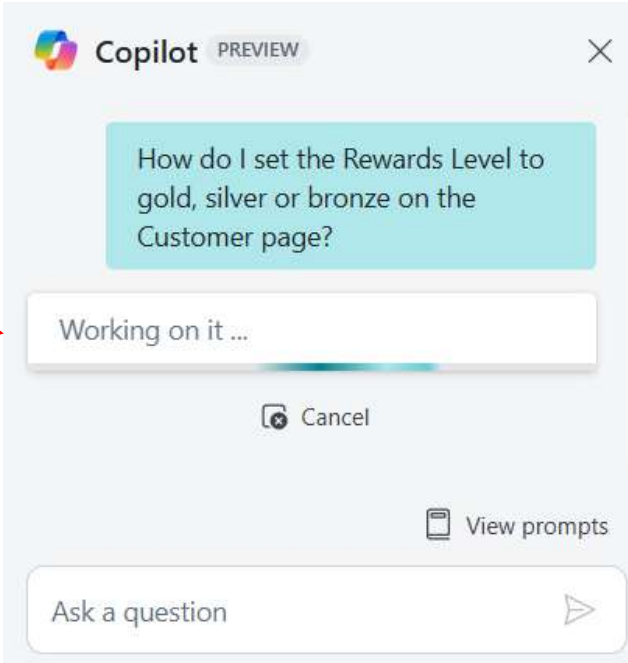


Item	N / U	Deadline	Benefits / Observations
Enable additional countries and regions	Updated	Jul/2024	Additional countries/regions will be enabled to leverage the benefits of Business Central’s cloud-based business management software solution.

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-matched

2 of 14 lines (14.3%)

Statement Ending Bala...

0.00

Copilot matched

2 of 14 lines (14.3%)

Post if fully applied

28.6% of lines are matched. Review match proposals.

Match proposals

Delete Line

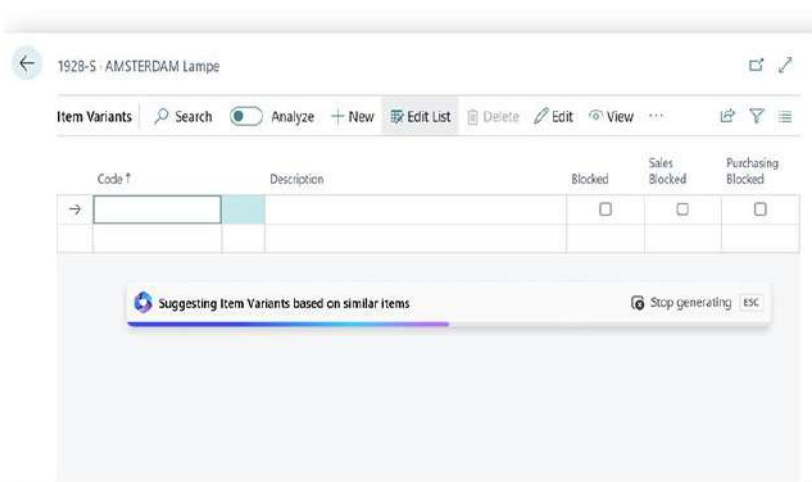
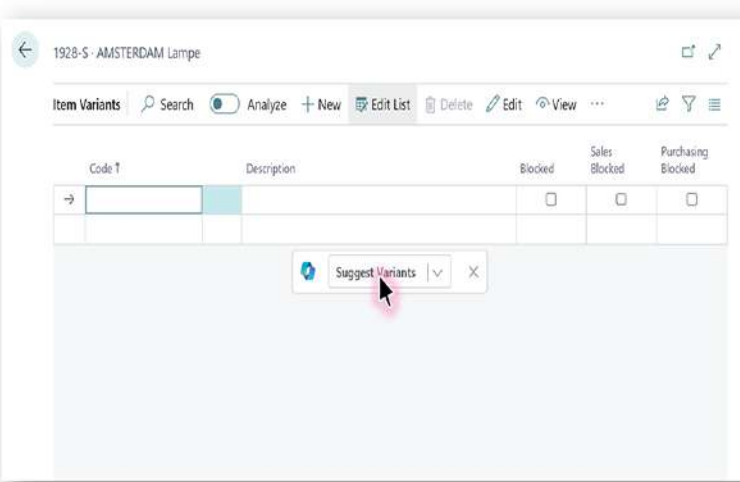
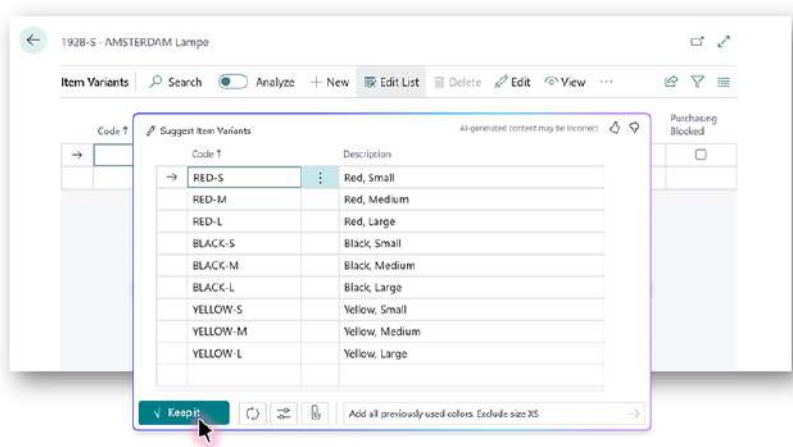
Transaction Date	Description	Amount to Apply	Proposal
→ 7/14/2023	Bank charges JULY	-15.00	Post payment to account 67100 (B... Save...
7/15/2023	Fuel Stop US4	-45.00	Post payment to account 62110 (P... Save...

✓ Keep it

Business Central - Copilot and AI innovation



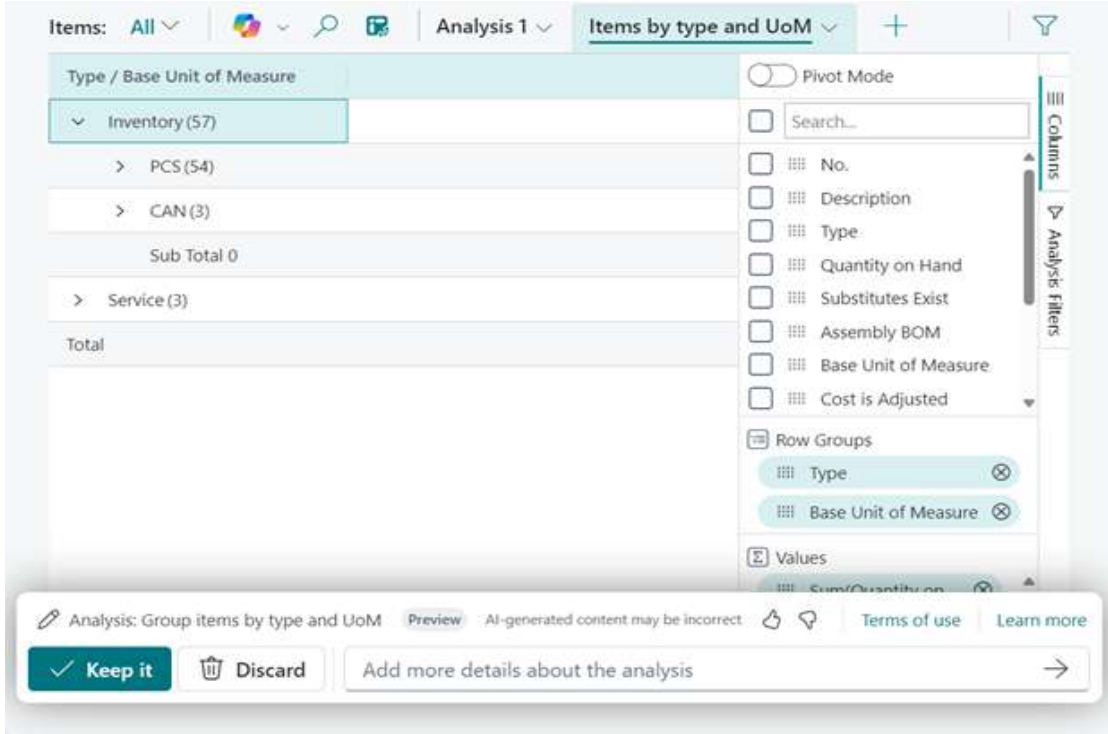
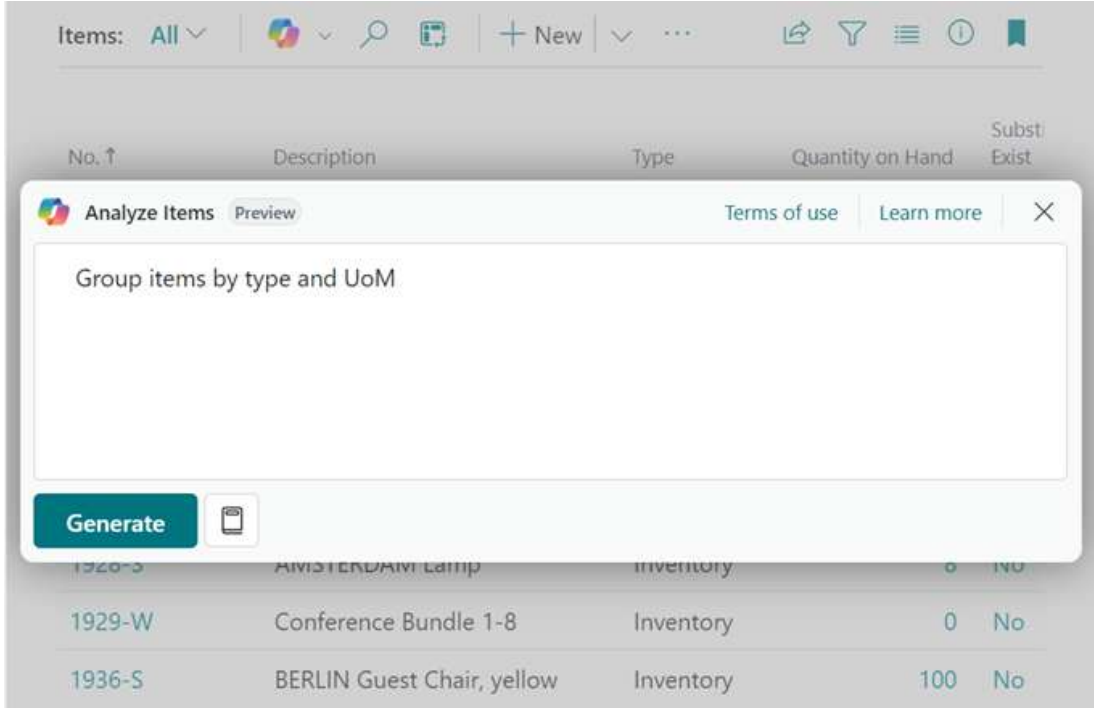
Item	N / U	Deadline	Benefits / Observations
Create product information faster with Copilot	Updated	Oct/2024	In a business landscape that changes fast, companies often need to evolve the portfolio of products they sell. Whether it's adding new products, changing existing products, or adding entire new 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



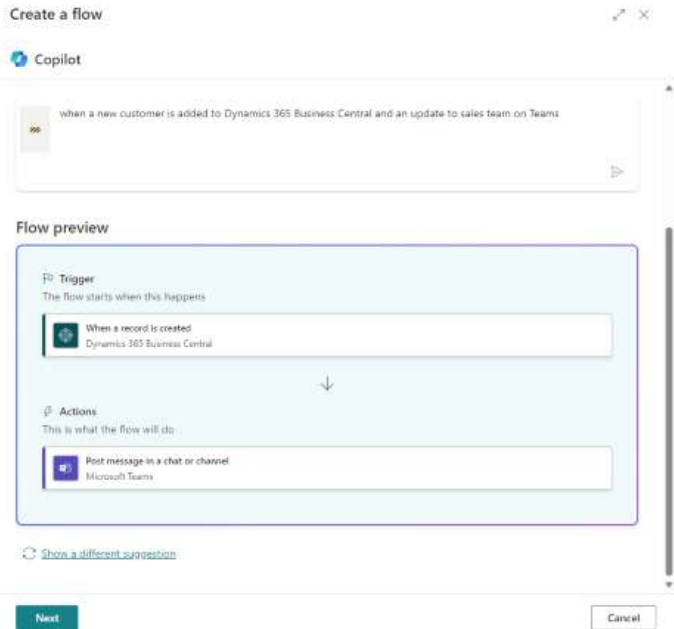
Item	N / U	Deadline	Benefits / Observations
Experience enhancements to Analysis Assist with Copilot	Updated	Oct/2024	Microsoft Copilot in Business Central is the AI-powered assistant that boosts creativity, improves productivity and eliminates tedious tasks. Copilot can help reduce the time it takes 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 - Copilot and AI innovation



Item	N / U	Deadline	Benefits / Observations
Start creating Power Automate flows with Copilot		Aug/2024	Copilot is the AI-powered work assistant that boosts creativity and improves productivity for small and medium-sized organizations. Building Power Automate flows without predefined templates can be a mundane and complicated process. With Copilot in Power Automate, this process is much smoother because flows can be built based on just the natural language input from the user.
Start using Copilot without having to set things up	Updated	Oct/2024	Microsoft Copilot is an integral part of Business Central that helps workers boost creativity, improve productivity, and eliminate tedious tasks. No matter the country or region in which you operate Business Central, Copilot is readily available without requiring any one-time administrative setup.



Copilot & AI capabilities

[Learn about Copilot](#)

By allowing data movement, you agree to data being stored and processed by the Azure OpenAI Service outside of your environment's geographic region or compliance boundary.

Allow data movement ☒

[Where is Azure OpenAI Service Located?](#)

Business Central - Copilot and AI innovation



Item	N / U	Deadline	Benefits / Observations
Suggest number series with Copilot		Aug/2024	Getting started fast on new implementation and recurring maintenance of certain aspects of Business Central setup saves companies time and money. Copilot can reduce the time it takes to set up initial number series and make their maintenance quick and painless. For example, when updating year or month based numbering many draft and posted documents in Business Central.
Automate tests for your Copilot extensions with the Business Central Test Toolkit	Updated	Oct/2024	As our partner community brings generative AI capabilities to market and matures their offerings, partners need new engineering tools and practices to help them succeed in the AI era. Data-driven test automation is vital to ensure AI systems are accurate against diverse inputs, preserve the trust and safety of our customers and their data, and are resilient to changes in AI model versions. The developer tools for Copilot in Business Central are an end-to-end toolkit covering development, deployment, administration, feedback loops, and now test automation.

Generate No. Series with Copilot

Preview

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Learn more

X

Create number series for purchase module

Generate

Change the purchase invoice number to PI-10001

Preview

AI-generated content may be incorrect

Terms of use

Learn more

No. Series proposals

Delete Line

Series Code ↑	Description	Starting No.	Increment-by No.	Ending No.	Warning No.
→ PP-INV	Invoice	PI-10001	1	PI-99999	PI-95000
PP-INV+	Posted Invoice	PI-10001	1	PI-99999	PI-95000

Keep itRegenerateCancel

Business Central - Governance and administration



Item	N / U	Deadline	Benefits / Observations
Encrypt data at-rest with customer-managed encryption key		Aug/2024	This capability will allow customers to meet their data and privacy policy according to the standard privacy guidelines.
Migrate record links and notes with cloud migration tooling	Update	Sep/2024	Business users often attach links and notes to records in Business Central to add context and extra information. For businesses transitioning from on-premises to cloud environments, this feature ensures that these links and notes on records are included in the cloud migration without the need for the external tooling. This feature saves valuable time and reduces the risks of error with manual data transfer.
Control partner access per environment	Update	Sep/2024	Business Central customers with multiple environments are often working with many partners to support each environment. With this feature, customer administrators can now easily and efficiently control partner access to environments. This feature simplifies partner management by allowing administrators to assign partner tenants to each environment.
Get notified about issues with job queue background processing	Update	Oct/2024	Sometimes tasks, reports, or batch processes can take a long time to complete. To keep people productive in the meantime, companies often use Business Central's ability to run processes in the background. If something goes wrong and an important background process stops, or isn't scheduled for some reason, being notified of the issue can help you react quickly to resolve it.
Manage environment updates more flexibly	Update	Oct/2024	With extended periods for major releases and optional minor updates, administrators have more flexibility to update environments in a way that suits their needs. Businesses have more time to prepare for updates and plan them for less busy periods.
Get list of manageable environments for Microsoft Entra apps	Update	Dec/2024	Using a new admin center API endpoint, Microsoft Entra apps authorized in the admin center can get a list of environments for which the app is authorized. This capability reduces the manual overhead associated with maintaining environment lists and facilitates the automation of repetitive administrative tasks, enhancing operational efficiency for partners.
Manage per-tenant extensions in admin center	Update	Dec/2024	Having a unified user interface and API for managing per-tenant extensions (PTEs), alongside AppSource apps makes it easier and faster for administrators to deploy and maintain extensions across different environments and tenants.
View app compatibility with future versions in admin center	Update	Dec/2024	By reporting the compatibility between the base application and other apps installed on an environment in the admin center, administrators can better prepare for changes and avoid potential problems during upgrades.

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.

Business Central - Development



Item	N / U	Deadline	Benefits / Observations
Remove friction when working with external app dependencies		Set/2024	For resellers who develop per-tenant extensions for customers, or for publishers who create AppSource apps, it isn't uncommon for them to build on the work by other publishers, and thereby take a dependency on these. However, in order to develop or test, they need access to the AppSource apps they depend on. Today, this involves a tedious manual process where resellers and publishers with dependencies must contact publishers owning the applications they depend on and ask for symbols to develop against or runtime packages to test with. This is not only required once, but continuously as new versions of the Business Central first-party applications and the publishers' applications versions emerge, making the whole process tedious, time-consuming, and error-prone. In this version we plan to unblock developing and compiling against external applications in containers and test in online sandboxes.
Extend AL interfaces	Updated	Oct/2024	The support for extensible interfaces in programming languages offers significant business value by enabling creation of flexible and adaptable extensions that can evolve over time to meet changing business needs. They enable developers to add new functionalities without altering the core system, which can save time and resources while reducing the risk of introducing errors into the existing codebase. They are a key component in modern software engineering, providing the agility and flexibility needed to drive innovation and maintain a competitive edge in today's fast-paced business environment.

```
interface IFoo
{
    procedure Foo();
}

interface IBar
{
    procedure Bar();
}

interface IFooBar extends IFoo, IBar
{
    procedure FooBar();
}

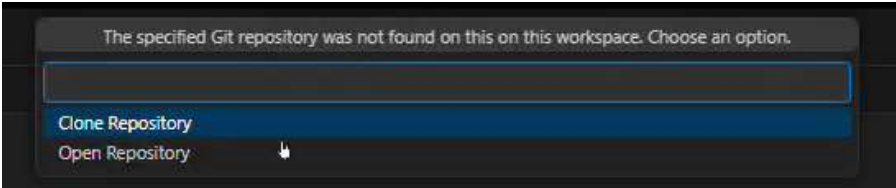
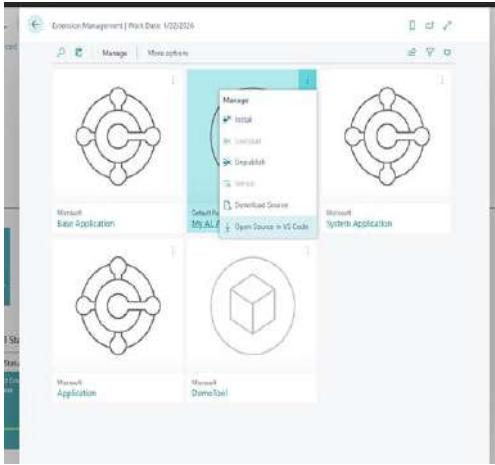
codeunit 50100 TheImplementor implements IFooBar
{
    // Must implement IFoo, IBar, IFooBar
}
```

Business Central - Development



Item	N / U	Deadline	Benefits / Observations
Extend and customize profiles from other extensions	Updated	Oct/2024	One of the current extensibility gaps is the lacking ability to extend profiles. This implies that partners have been forced to copy profiles defined in other extensions whenever they needed to do some changes for them. In this release, it's now possible to define profile extension objects.
Package resources in extensions and access from AL	Updated	Oct/2024	Often features require some data, for example to initialize and set up. Until now, it has only been possible to add such data and consume from AL through the use of labels or code. In this release, we're adding the ability to include resources in extensions and access these from AL.
Pull extension source from GitHub when opening Visual Studio Code from the web client	Updated	Oct/2024	A year ago, you got the power to open a Visual Studio Code project from within the web client. This removed all the hassle of creating projects so you could launch configurations and download symbols yourself. This is a great tool for exploring functionality and troubleshooting, whether it's in sandboxes or production, and it empowers support, consultants, and developers. However, what if access to extension code is blocked by IP resource exposure protection, but the source is in your GitHub repo? Or maybe you want to proceed with authoring your own code, such as hotfixing one of your apps or pulling the latest source version for changes or development? In 2024 release wave 2, this feature will make that possible.

```
1 profileextension MyProfileExt extends "0365 SALES"
2 {
3   Caption = 'Profile Extension Caption';
4   ProfileDescription = 'Profile Extension Description';
5   Enabled = true;
6   Promoted = true;
7   RoleCenter = 9027;
8   Customizations = SalesOrderCustomization, SalesQuoteCustomization;
9 }
```



Business Central - Development



Item	N / U	Deadline	Benefits / Observations
Restore extensions if publishing from Visual Studio Code fails	Updated	Oct/2024	If publishing an extension from within Visual Studio Code fails, the publishing process tries to restore any previously installed extensions, that were uninstalled and unpublished as part of the failed publishing. If a full restore fails, the developer is informed about which extensions could be restored and which ones failed, providing the developer with a better overview
Run code action for 'with' for file, project, or workspace	Updated	Oct/2024	The code action to convert 'with' statements to explicit records has only been only available for individual 'with' statements. However, most apps have many, many uses spread across the codebase, leading to a lot of unnecessary manual work to convert code. With this release, the code action to convert 'with' usage can now be run on the whole Document, the active Project as well as the complete Workspace level.
Set up easier in-client performance profiling with rules	Updated	Oct/2024	Three releases ago we launched the in-client profiler, a very powerful tool for investigating performance issues across extensions. Since then, profiling has become essential to identify application performance problems for customers, partners, and support, and it's the main performance troubleshooting tool for partners. However, due to its current nature of being an interactive capture, acquiring a performance profile requires well-defined repro steps and collaboration across stakeholders. To make it easier and faster for customers, consultants, pro developers, partners and Microsoft support to capture a profile, and thereby lower manual collaboration and time-to-mitigate, this release will add the additional support for capturing performance profiles automatically and noninteractively in the background, based on well-defined rules triggering capture. Captured profile details can then be analyzed afterwards.

The first screenshot shows the 'Profiler Schedules' page in Dynamics 365 Business Central. It displays a table of scheduled profiler runs. The second screenshot shows the 'User's activity in the web client' page, which displays a list of activities for a specific user. The third screenshot shows the 'Profiler Schedules' page, displaying a list of scheduled profiler runs.

Business Central - Development



Item	N / U	Deadline	Benefits / Observations
Type testing and casting operators for interfaces	Updated	Oct/2024	The contractual behavior of interfaces has been a limiting factor with regards to update and future extensibility. Adding casting will greatly increase the usefulness of interfaces in AL. In this version, we introduce support for type testing and casting interfaces in the AL language. Two new operators, 'is' and 'as', have been added to facilitate these operations. The 'is' keyword checks if an interface is of a specific type, which is useful for ensuring type safety within code. The 'as' keyword, on the other hand, attempts to cast an interface to another interface. These operators improve the extensibility and usefulness of interfaces in AL and align with the broader programming practice of ensuring that systems are built with future growth and adaptability in mind, allowing for seamless updates and maintenance.
Use improved features for report documents	Updated	Oct/2024	Developers and power users can use more of the features that Word provides for document layouts. These improvements reduce time spent on designing layouts for documents and let more power users work with document layouts.
Use the ternary operator when coding in the AL language	Updated	Oct/2024	The ternary operator ? : known from other programming languages streamlines conditional operations in code, enhances readability and reduces verbosity. It's particularly useful for simple conditions, promoting code clarity and intent-focused programming. By allowing variable initialization within the same line, it ensures proper assignment and minimizes code length. With this release, AL now also supports the ternary operator.

```
procedure TestInterface(intf: Interface IFoo)
begin
    if intf is IBar then
        Message('I also support IBar');
    end;
```

```
procedure TestVariant(v: Variant)
begin
    if v is IBar then
        Message('I support IBar');
    end;
```

```
procedure CastInterface(intf: Interface IFoo): Interface IBar
begin
    exit(intf as IBar); // Throws an error if 'intf' doesn't implement 'IBar'
end;

procedure CastInterface(v: Variant): Interface IBar
begin
    exit(v as IBar); // Throws an error if 'v' doesn't implement 'IBar'
end;
```

```
1 codeunit 50122 TernaryOperator
2 {
3     0 references
4     procedure Example()
5     var
6         myExpression: Boolean;
7         myVar: Text;
8     begin
9         // Using if-then-else
10        if myExpression then
11            myVar := 'True'
12        else
13            myVar := 'False';
14        // Using the ternary operator
15        myVar := myExpression ? 'True' : 'False';
16    end;
17 }
18 }
```

Business Central - Development



Item	N / U	Deadline	Benefits / Observations
Use the 'this' keyword for codeunit self reference	Updated	Oct/2024	A new 'this' keyword is introduced as known from other languages. The keyword supports passing the current object as arguments to methods, which until now has only been possible with less optimal workarounds. In addition, the use of the this keyword improves readability for bigger methods where it can be difficult to see if a variable is global or local scope.



What's new in Dynamics 365 CE

DEPRECATED

Deprecations / Replacements

Item	N / U	Deadline	Benefits / Observations
Assistant card templates		Aug/2024	Effective August 1, 2024, templates to create new assistant cards won't be available. The existing cards that are created using the templates continue to work as-is. You can continue to use the Microsoft Power Automate flow to create your custom cards. Learn more .
Snapshots in sales forecasting		Jun/2024	Effective June 30, 2024, the snapshot capability in sales forecasting will be deprecated and you'll no longer be able to enable snapshots for new forecast configurations. Existing forecast configurations with snapshots will continue to work as-is until October 31, 2024. Post that, all the snapshots and related charts such as deal flow, trend chart, and forecast grid history will be removed. As an alternative, you can use the Forecast API to set up daily data sync to pull forecast data.

Customer Insights - Data

Item	N / U	Deadline	Benefits / Observations
Enhanced company data enrichment		Apr/2024	Replaced by alternative solutions: LeadSpace enrichment or Dun & Bradstreet enrichment .
HERE enrichment		Apr/2024	Replaced by alternative solutions: Azure Maps enrichment .
Account engagement enrichment for Dynamics 365 Customer Insights - Data		May/2024	Features in public preview are continuously being evaluated based on the balance between customer value and cost of maintaining the service.

Customer Service



Item	N / U	Deadline	Benefits / Observations
WeChat, SMS (Telesign), Telegram custom messaging, and Kik custom messaging channels will be deprecated		Oct/2024	The following channels will be deprecated and removed in Omnichannel for Customer Service on October 8, 2024: • WeChat • SMS (Telesign) • Telegram custom messaging • Kik custom messaging After October 8, 2024, the channels will no longer be accessible for you or your customers in your Omnichannel for Customer Service environment. Alternative channel integration options are available. Contact Microsoft Support if you need help.
Google's Business Messages channel is deprecated		Jul/2024	The channel for Google's Business Messages in Omnichannel for Customer Service is deprecated and removed. Google previously announced that it would discontinue Business Messages on July 31, 2024. Alternative channel integration options are available. Contact Microsoft Support if you need help.
Diagnostics in unified routing is deprecated		May/2024 Oct/2024	The diagnostics feature in unified routing is deprecated as of May 09, 2024, and will be removed on October 15, 2024. We recommend that you use Conversation diagnostics in Azure Application Insights to get diagnostics information. You can delete your routing diagnostics-related data from Dataverse using the steps in Manage routing diagnostics data. Contact Microsoft Support if you need help.
Omnichannel for Customer Service on Unified Service Desk is deprecated and will be removed in October 2025		Apr/2024 Oct/2025	Effective April 4, 2024, Omnichannel for Customer Service on Unified Service Desk is deprecated. Support is available until April 2025. The app will be removed from all environments by October 2025.

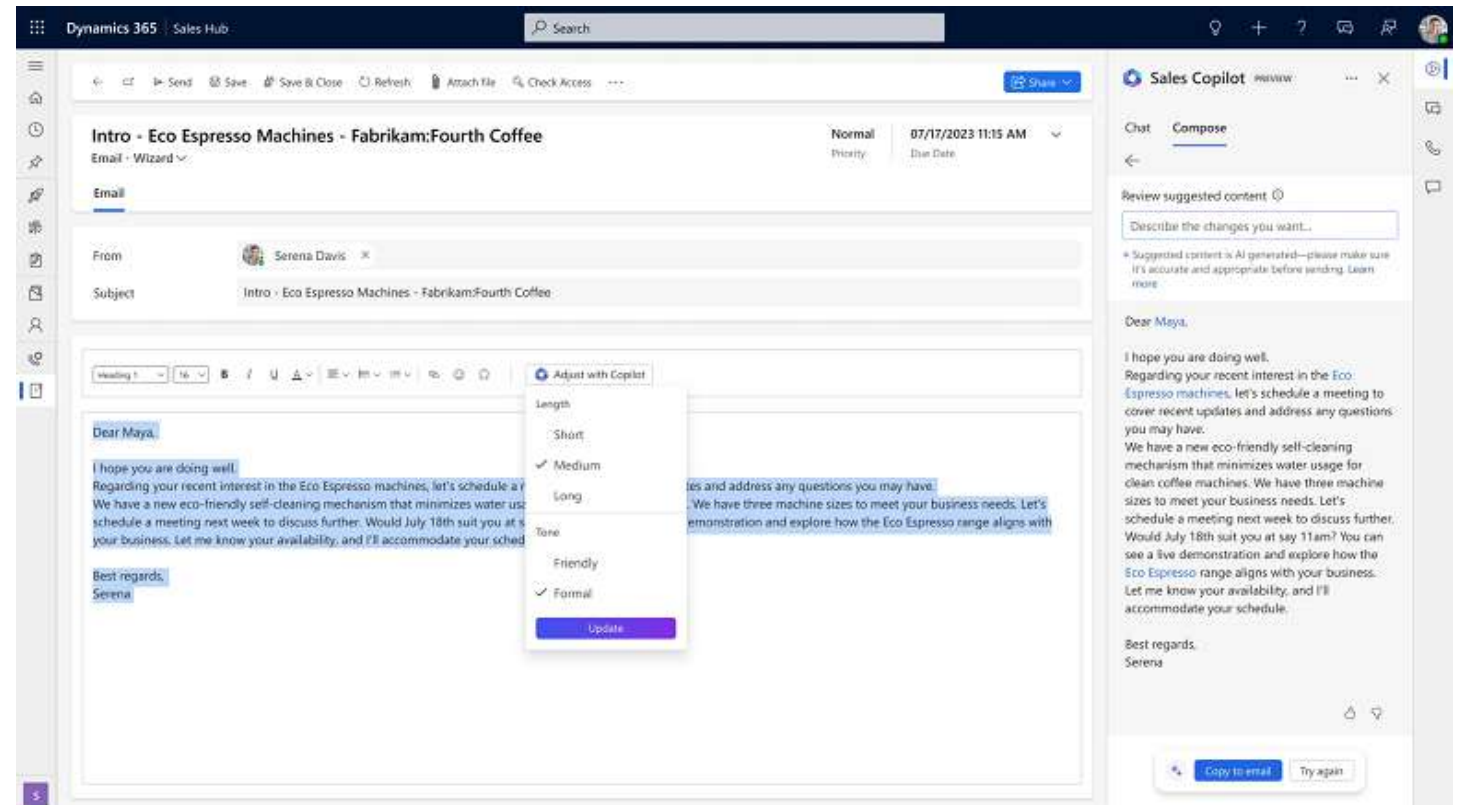
Item	N / U	Deadline	Benefits / Observations
Hierarchy control in model-driven apps is deprecated		Oct/2024 Apr/2025	Effective October 2024, the hierarchy control, which is used to define and query hierarchically related data in model-driven apps, is deprecated. The control will continue to work in existing apps until April 2025, at which time it will be removed from the product. The hierarchy control allows users to visualize relationships between records for a table. This is applicable for any table that has a self-referential relationship.
Schema for DLP activity logging		Jul/2024	The schema DLP activity logging is deprecated and won't be available starting in July 2024. You can use the new schema available at Activity category: Data policy events.
Schema for Lockbox audit events		Jul/2024	The schema for Lockbox audit events is deprecated and won't be available starting in July 2024. You can audit Customer Lockbox events using the new schema available at Activity category: Lockbox operations.
Power Pages - Enhanced link creation in design studio		Jul/2024	In July 2024, we're introducing improvements to the way text, image, and button links are created in Power Pages design studio. The Link to a URL field will accept any type of link, including mailto and tel links. Additionally, there will be a new option to choose whether the link opens in a new window or the current one. For more information: Important upcoming changes and deprecations in Power Pages Microsoft Learn



Sales

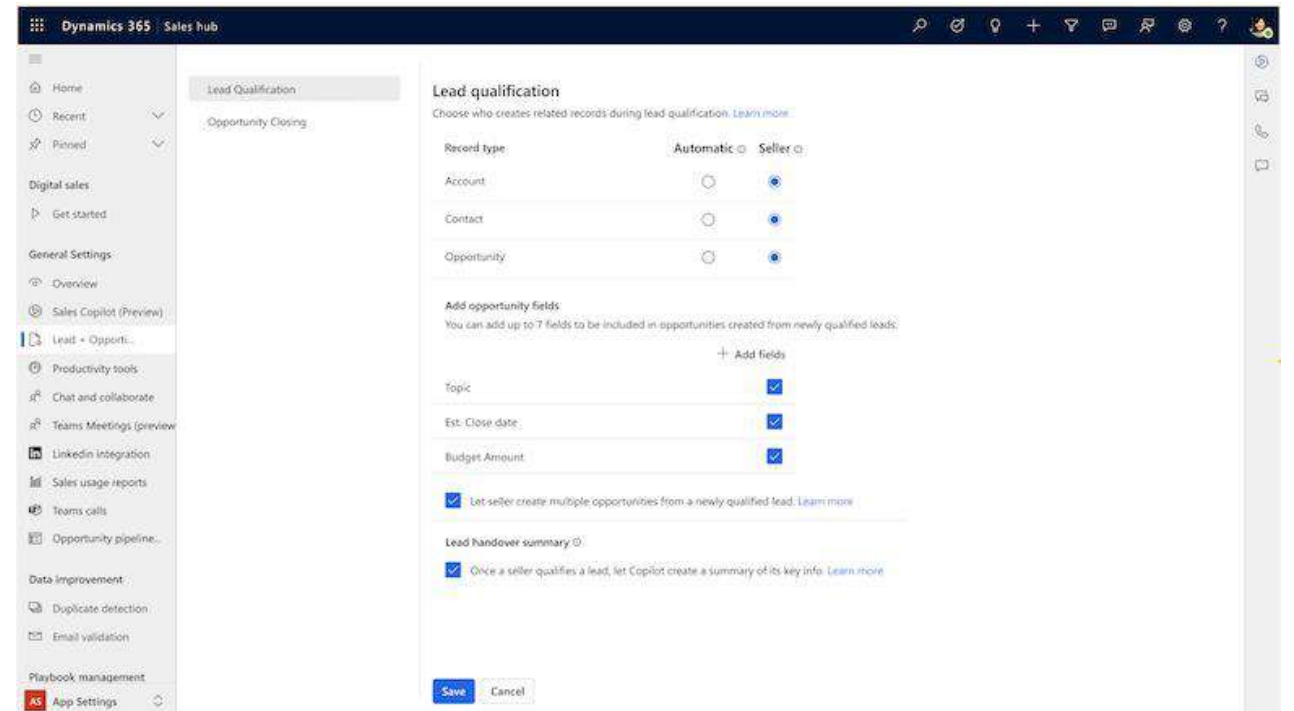
Sales - Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Summarize lengthy emails using Copilot in Dynamics 365 Sales	Updated	Apr/2024	With this feature, as a sales professional, you will be able to: - Review detailed summaries for emails exceeding 1,000 characters. - Efficiently share feedback by copying and pasting the generated summary.
Elevate your sales pitch using Copilot email assistance	Updated	Apr/2024	Copilot lets you spend less time composing email. With this feature, you can: - Select a predefined category or enter your own text and Copilot will suggest content with specific prompts and actions. - Adjust the tone and length of the email. - Customize the suggested content before you send it.



Sales - Seller experiences

Item	N / U	Deadline	Benefits / Observations
Analyze opportunities with grouping and aggregating	Updated	Oct/2024	This upgraded pipeline view allows you to further streamline your sales strategies. You can now group opportunities dynamically based on critical factors such as account name, seller name, or closing date/month. This functionality enhances your ability to segment and target specific areas of your pipeline, ensuring a more personalized and effective approach to each opportunity.
Customize lead qualification for a seamless experience	Updated	Oct/2024	Streamlined lead qualification in Dynamics 365 Sales empowers you to fine-tune the qualification process, aligning it precisely with your organization's unique needs and sales criteria. This agile configuration eliminates back-and-forth interactions and saves valuable time, promoting swift, informed lead evaluation.



Sales – Sales engagement and execution



Item	N / U	Deadline	Benefits / Observations
Assign leads, opportunities to sellers based on individual capacity		Sep/2024	As a sales manager, you can ensure that your sellers are always working on the top-priority leads by enforcing their capacity limits as per business needs. With this feature, you can: Implement sales strategy effectively by automatically assigning the most important leads to your sellers. Maximize seller productivity by limiting the number of low-priority leads that can be owned by a seller.
Notify sellers and sales managers after assignment rule execution		Aug/2024	As a sales manager or admin, you can configure notification settings as: A global setting to enable seller notification on successful assignment. A rule-level configuration to send notifications and regular notifications to specific users about assignment failures. A rule-level configuration to notify sellers on successful assignment.

Dynamic 365

Sales > Sales insights settings > Global settings

Overview

Sales acceleration

Workplace

Sequences

Work assignment

Assistant studio

Home

Insight cards

Optimize ranking

Productivity intelligence

Auto capture

Email engagement

Notes analysis

Connections insights

Relationship analytics

Talking points

Who knows whom

Predictive models

Lead scoring

Opportunity scoring

Premium forecasting

Work assignment

Group records into segments and prioritize them as per your sales strategy. Define assignment rules for leads and opportunities sequences and guide sellers with their next steps. [Learn more](#)

Record type Leads (7)

Created by me

View segment

Add assignment rule

Priority	Segment name	Status	Assignment rules	Connected sequence
1	Leads from Spain			

All inbound leads in Spain

Active

1 rules

Sequence named

| 2 | Leads from Australia |

All inbound leads in Australia

Active

2 rules

Sequence named

| 3 | Leads from New York |

Segment description

Active

3 rules

Sequence named

| 4 | Leads from London |

Segment description

Inactive

None

Sequence named

Add assignment rule

Set rule conditions to automatically assign leads or opportunities to the relevant sellers or teams. [Learn more](#)

Ignore priority

Not use rule

Leads from Spain

+ Add conditions

Consider records created in the last

120 hours

3 Assign these (leads/opportunities) to sellers or a team

Any seller

4 Distribute (leads/opportunities) by

Round robin

Load balancing

Assign if a seller is available within

24 hours

Assign records based on seller capacity

5 Notification

Notify seller when a new lead is assigned

Notify following people when lead is not assigned

Choose user

Vishal Suresh

Vinod Desai

Save

Cancel

Dynamic 365

Sales Hub

Overview

Sales acceleration

Workplace

Sequences

Work assignment

Assistant studio

Home

Insight cards

Productivity

Conversation intelligence

Insights (preview)

Auto capture

Email engagement

Notes analysis

Relationship insights

Overview

Analytics and health

Who knows whom

Predictive models

Lead scoring

Opportunity scoring

Premium forecasting

Work assignment settings

Set up and manage your sales teams and sellers, including their roles, capacity, availability and attributes, and enable them to receive leads and opportunities via

Eligible security roles

These are used in assignment rules to match records to sellers.

Field Service

Commission

Forecast user

130

Manage

Seller attributes

These are used in assignment rules to match records to sellers.

Language

Academic G

Manage

Sellers for assignment

Enabled for assignment

Teams	Max capacity	Available Capacity	Currently assigned	Availability (next 7 d
Team 1	10	10	0	Available
Team 2	10	10	0	Available
Team 3	10	10	0	Available
Team 4	10	10	0	Available
Team 5	10	10	0	Available
Team 6	10	10	0	Available
Team 7	10	10	0	Available
Team 8	10	10	0	Available
Team 9	10	10	0	Available
Team 10	10	10	0	Available

Pasquale Mariano

Assign leads and opportunities to this seller

Yes

Set maximum capacity of leads and opportunities for this seller

50

Capacity profiles linked to the seller

Coffee maker limit

Maximum 10 new leads per day, reset...

Airport X, lead limit

Maximum 20 active leads at any given...

Apply attributes to this seller

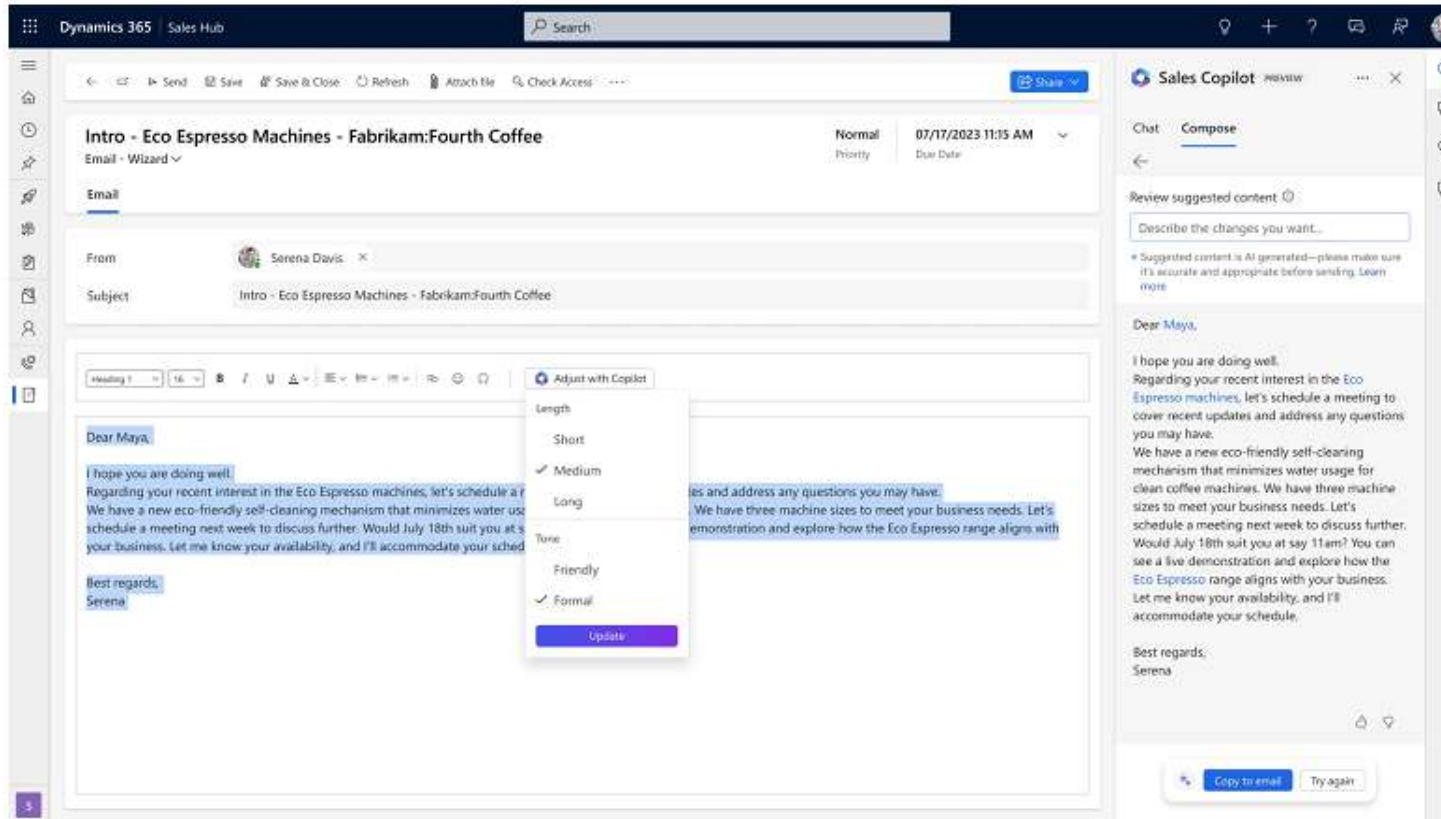
+ Add attributes

Save changes

Cancel

Sales – Copilot and AI innovation

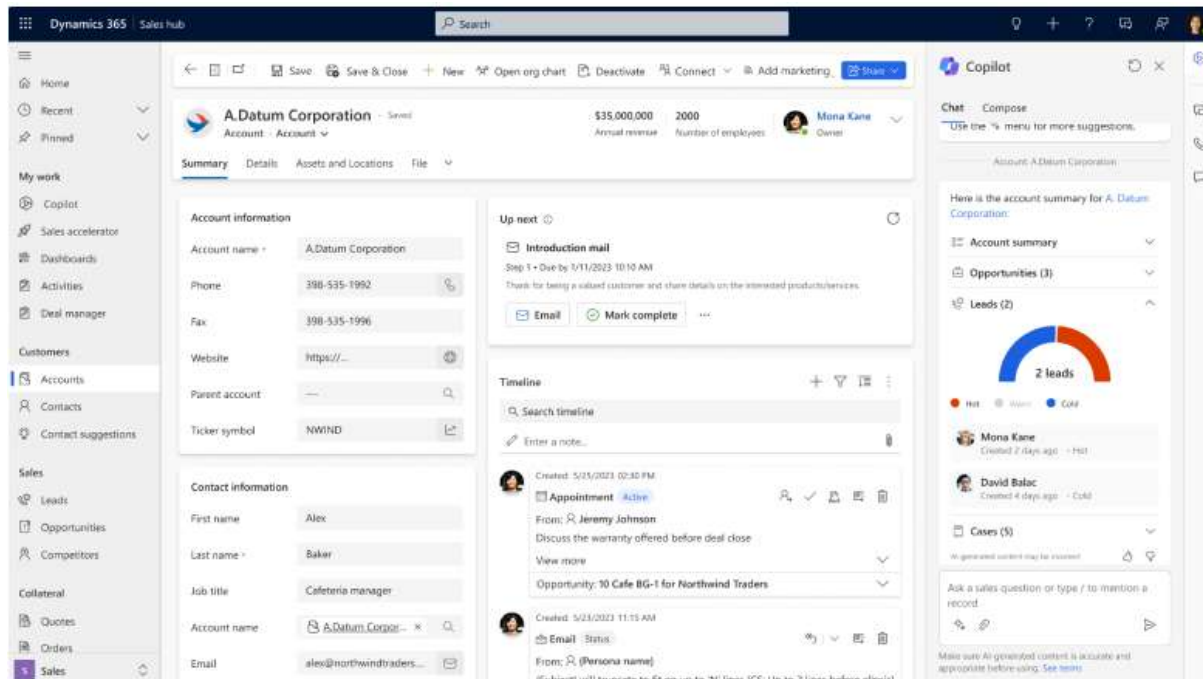
Item	N / U	Deadline	Benefits / Observations
Elevate your sales pitch using Copilot email assistance		Oct/2024	Email assistance can provide tremendous value to you by addressing these challenges. As a language model trained on a vast collection of text, Copilot can generate personalized, high-quality emails that are tailored to meet the specific needs of each customer. By using natural language processing (NLP) algorithms, Copilot can help you craft clear, concise, and compelling emails that resonate with your audience. This can lead to improved customer engagement, increased sales, and enhanced brand reputation. You can adjust the tone and length of the message to better resonate with customers, fostering stronger connections. You can also customize the suggested content before you send it.



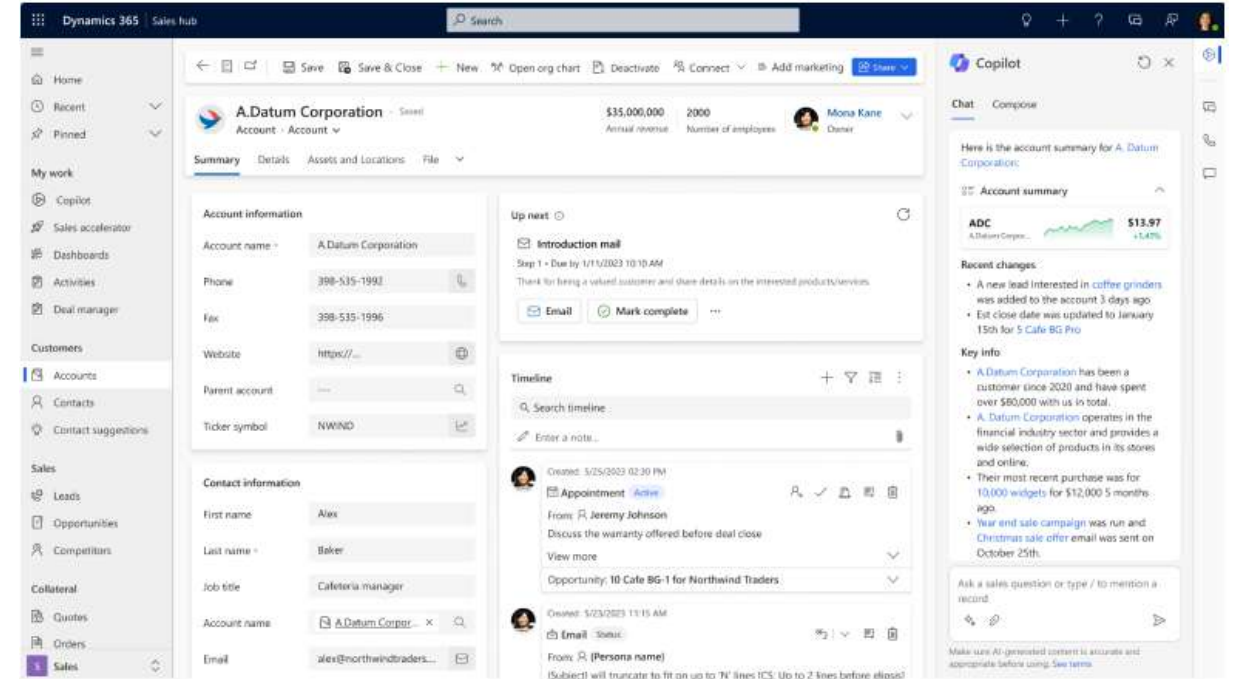
The screenshot shows the Microsoft Dynamics 365 Sales Hub interface. The main window displays an email draft titled "Intro - Eco Espresso Machines - Fabrikam:Fourth Coffee" from Serena Davis. The email body contains a personalized message about eco-friendly espresso machines. A "Sales Copilot" sidebar on the right offers a "Compose" button and a "Review suggested content" section. A "Copy to email" button is visible at the bottom right.

Sales – Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Get 360-degree view with account AI-generated summary	Updated	Oct/24	With the Account summary feature, you can now access a consolidated summary of vital customer data, including buying behavior, associated opportunities, leads, marketing campaigns, and the latest news about an account through the power of AI. This enables you to quickly research an account.



This screenshot shows the Dynamics 365 Sales Hub interface for the account 'A. Datum Corporation'. The left sidebar contains navigation options like Home, Recent, Pinned, My work, Copilot, Sales accelerator, Dashboards, Activities, Deal manager, Customers, Accounts, Contacts, Contact suggestions, Sales, Leads, Opportunities, Competitors, Collateral, Quotes, Orders, and Sales. The main area displays account information (Account name, Phone, Fax, Website, Parent account, Ticker symbol), contact information (First name, Last name, Job title, Account name, Email), and a timeline of activities. A Copilot chat window is open on the right, showing a chat with 'Mona Kane' and a summary of the account.

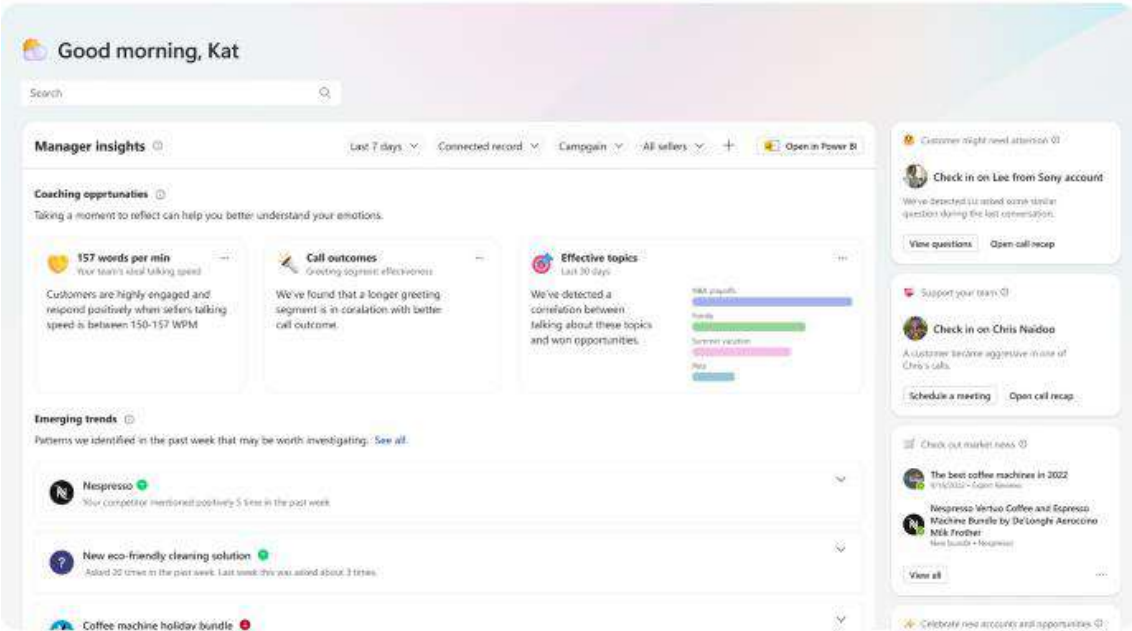


This screenshot shows the Dynamics 365 Sales Hub interface for the account 'A. Datum Corporation', similar to the previous one but with an AI-generated summary. The left sidebar is the same. The main area displays account information, contact information, and a timeline. A Copilot chat window is open on the right, showing a chat with 'Mona Kane' and a summary of the account. The summary includes a chart showing the account's revenue over time and a list of recent changes.

Sales – Copilot and AI innovation

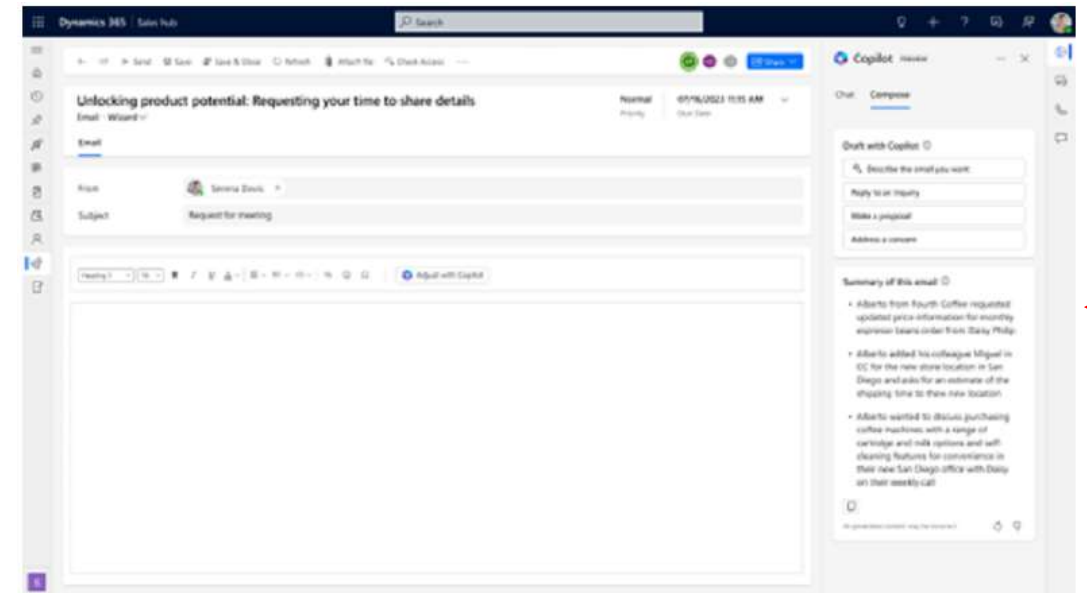


Item	N / U	Deadline	Benefits / Observations
Streamline sales process with sales document summary	Updated	Nov/2024	As a sales professional, you sift through lengthy documents to understand the customer’s needs and preferences across multiple systems. This time-consuming task leads to decreased productivity and potentially missed opportunities. With the ability to automatically summarize important details from lengthy documents including proposals, reports, and agreements, you can save time and focus on building relationships with customers and closing deals. The sales document summarization feature can improve the quality of customer interactions by ensuring that you have a comprehensive understanding of customer needs as per the BANT (Budget, Authority, Need, and Timeline) framework. This feature will be released into the following Microsoft Azure geographic area: United States.
Leverage manager dashboards to coach sellers	Updated	Oct/2024	By analyzing aggregated customer interactions and seller behaviors, sales leaders can determine the effectiveness of their sales strategies, respond to market changes, and coach their sales staff more efficiently.



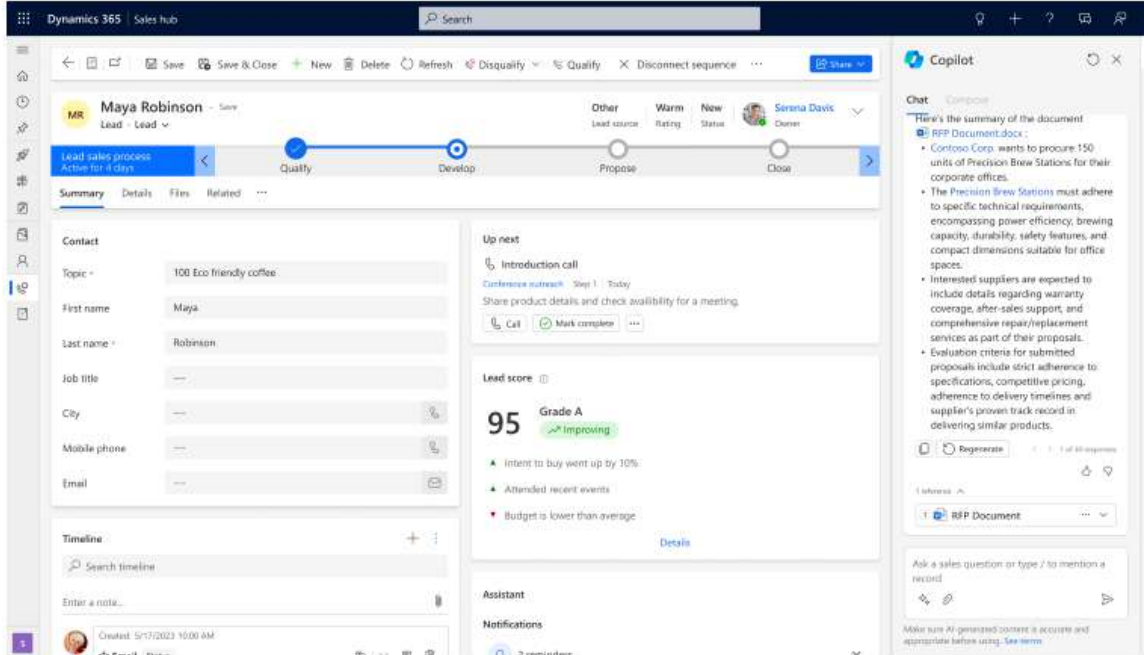
Sales – Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Summarize lengthy emails using Copilot in Dynamics 365 Sales		Oct/2024	As a sales professional, you can use Copilot in Dynamics 365 Sales which offers a unique business value by being equally invaluable for sending and receiving email communication. When summarizing lengthy email threads, it saves valuable time and energy by condensing complex discussions into concise and easily understandable summaries. This streamlines the communication process, allowing teams to quickly grasp the key points and make informed decisions. By facilitating efficient comprehension, Copilot in Dynamics 365 Sales enhances productivity and enables effective collaboration within the organization.
Work efficiently using AI-powered action suggestions	Updated	Oct/2024	As a seller, you invest significant time and effort to stay informed about all your conversations and monitor developments within active sales processes. You visit multiple applications or contact team members to stay on top of all the active discussions and try to find optimal approaches for engaging with business decision-makers to take the assigned sales process forward. The actionable insights generated by Copilot in Dynamics 365 Sales help you plan and execute your daily tasks, thereby increasing the likelihood of attaining short and long-term goals.



Sales – Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Get enriched lead summary with information from Customer Insights		Aug/24	With this enhancement, Copilot in Dynamics 365 Sales can: Leverage profile information from Dynamics 365 Customer Insights to enhance lead data. Discover missing information such as phone numbers, email addresses, interests, demographics, and brand associations, enabling more personalized and effective engagement.
Get crucial information summarized from proposals	Updated	Aug/24	As a sales professional, you sift through lengthy proposals to understand the customer's needs and preferences across multiple systems. This is a time-consuming task and leads to decreased productivity and potentially missed opportunities. With the ability to automatically summarize important details from lengthy proposals, you can save time and focus on building relationships with customers and closing deals. The RFP summarization feature can improve the quality of customer interactions by ensuring that you have a comprehensive understanding of customer needs as per the BANT (Budget, Authority, Need, and Timeline) framework.



The screenshot displays the Dynamics 365 Sales hub interface. The main view shows the lead profile for Maya Robinson, including contact details and a timeline. The Copilot chat window on the right provides a summary of an RFP document, highlighting key points such as the customer's requirements for Precision Brew Stations and the evaluation criteria for submitted proposals. A red arrow points from the 'Get crucial information summarized from proposals' row in the table above to the Copilot chat window.

Sales – Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Use Copilot in Dynamic 365 Sales in your preferred language	New	Sep/24	With this enhancement, you can effortlessly access and use Copilot's powerful capabilities in multiple languages, facilitating better communication, understanding, and rapport with customers. This leads to improved customer satisfaction, stronger relationships, and greater ease of use for sellers, ultimately driving sales growth. With this feature, you can use Copilot in Dynamics 365 Sales in the following languages: Chinese (simplified), Czech, Danish, Dutch, Finnish, French, German, Greek, Italian, Japanese, Korean, Norwegian, Polish, Portuguese (Brazil), Russian, Spanish, Swedish, Thai, Turkish.
Work efficiently using AI-powered action suggestions	Updated	Oct/24	As a seller, you invest significant time and effort to stay informed about all your conversations and monitor developments within active sales processes. You visit multiple applications or contact team members to stay on top of all the active discussions and try to find optimal approaches for engaging with business decision-makers to take the assigned sales process forward. The actionable insights generated by Copilot in Dynamics 365 Sales help you plan and execute your daily tasks, thereby increasing the likelihood of attaining short and long-term goals.



Copilot for Sales

Ex Sales Copilot

Copilot for Sales – Microsoft Teams experiences



Item	N / U	Deadline	Benefits / Observations
Share important sales information seamlessly from Outlook to Teams	Updated	Jul/2024	As a seller, you engage with your colleagues in group chats and channels depending on the type of conversation—opting for channels for formal discussions and group chats for more casual interactions. Regardless of the mode of communication, your ultimate goal remains constant. You seek to bring the right people and information into one place to jump-start collaboration. With this experience, we enable you to effortlessly share sales-specific CRM information, email summaries, and opportunity summaries within group chats. This ensures that all team members have access to the necessary information to collaborate effectively.
View sales information with Copilot in Microsoft Teams during meetings		Jun/2024	Copilot for Sales, inside Copilot for Microsoft 365, provides real-time assistance for sellers during Teams meetings. It helps them leverage the suggested content to smoothly incorporate it in their sales pitch without unnecessary distractions. In addition, as a meeting kicks off and throughout the meeting, sellers can get a summary of the deal tied to this meeting, including follow-ups, contacts, and more, so they can get up to speed on previous interactions related to that opportunity.

Copilot for Sales – Microsoft Teams experiences

Item	N / U	Deadline	Benefits / Observations
Collaborate with sales teams using AI-powered planner tasks	Updated	Jul/2024	To mitigate the pain points you and your sales teams face, we propose an intelligent and automated task-creation solution in Teams channels where the Copilot for Sales app is installed. This solution aims to streamline task management, improve collaboration, and enhance productivity for you and your team. Feature Details - Automated prompting: The Copilot for Sales bot in Teams channels automatically scans conversations for relevant discussions and action items. When it identifies potential tasks, it prompts you and other sales team members with a notification, seeking your agreement to create the tasks. - Task creation and assignment: Once you agree, the solution automatically creates Teams tasks (planner tasks) based on the identified action items. A preview of the tasks is shown to you, the user creating the task. The tasks are then assigned to relevant users, ensuring accountability. - Planner app integration in Teams: Sales team members get a centralized view of all the tasks by pinning the planner app to the Teams channel. These tasks can also be accessed from the planner app. This solution works for both Dynamics 365 and Salesforce CRM users.

Teams

General

Wingtip Toys

Wingtip Toys

Alpine Ski House

Contoso Ltd

Digital expansion deal room

Posts

Files

Dynamics 365

Notes

Planner

Start a new post

Post

Question

Video

More

Daisy Phillips

9:30 AM

Let's get moving on this RFP response!

We need to get this RFP response in by the end of the week if we want a chance to close on the deal this quarter. I am going to get a draft started and then we will all update our parts. Please block some time this week to do your part. Amanda, please take a look at the engineering details and fill in any gaps. Erik, make sure the pricing is accurate. Lydia, take a look at the overall doc and make sure nothing seems off. I will research answers to any remaining open questions. Thanks! Let me know when your part is done.

RFP Strategic Advisory - Wingtip Toys

Product Details - Extensive

Copilot for Sales

12:29 PM

Suggested Planner Tasks

Add to plan

Planner

Task name	Assigned to	Due date
Review engineering details	Amanda Brady	9/5/2024
Ensure pricing accuracy	Erik Nason	9/5/2024
Review overall doc and edit a...	Lydia Bauer	9/5/2024

Create tasks

Check content carefully. AI-generated summaries may be missing information or contain inaccurate details.

Daisy Phillips

9:30 AM

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RFP Strategic Advisory - Wingtip Toys

Product Details - Extensive

Sales Copilot

12:29 PM

Suggested tasks

From this post including replies

Task name	Assigned to	Due date
Review engineering details	Amanda Brady	9/5/2023
Ensure pricing accuracy	Erik Nason	9/5/2023
Review overall doc and edit accordingly	Lydia Bauer	9/5/2023
Fill in any empty sections	Daisy Phillips	9/5/2023

Create selected tasks

Check content carefully. AI-generated summaries may be missing information or contain inaccurate details.

Copilot for Sales – Cross application experiences



Item	N / U	Deadline	Benefits / Observations
Access Copilot for Sales usage data via Viva Insights Analyst Workbench	Updated	Sep/2024	You need to access Copilot metrics to earn trust, justify investments, and drive adoption of Copilot for Sales. Using Viva Insights, you'll have access to key Copilot for Sales usage metrics via the Viva Insights Analyst Workbench, where you can use a set of provided Power BI templates or build your own custom reports.
Get Copilot for Sales extension in Teams Copilot chat		Sep/2024	This capability lets you get authoritative answers for sales-related questions directly from your system of productivity in Microsoft 365 apps. With the Copilot for Sales extension in Teams Copilot chat, you get authoritative answers for natural language questions in a dedicated sales canvas that provides a greater sales-specific experience for you. Sales extensions appear as additional copilots in the Copilot app and can be triggered by clicking the extension entry or by @ mentioning the Copilot for Sales plugin in the main Copilot chat canvas.
Prepare for a sales meeting with Copilot in Microsoft Word		Sep/2024	Getting ready for a customer interaction is key for sellers to be successful and reach their quota. With Copilot for Sales, sellers get to generate a detailed meeting preparation report in real time, directly from Copilot in Microsoft Word. Copilot generates a detailed report that brings key information and insights from the CRM, which can be easily shared with colleagues so that the entire sales team is up to date.

Copilot for Sales – Application experiences



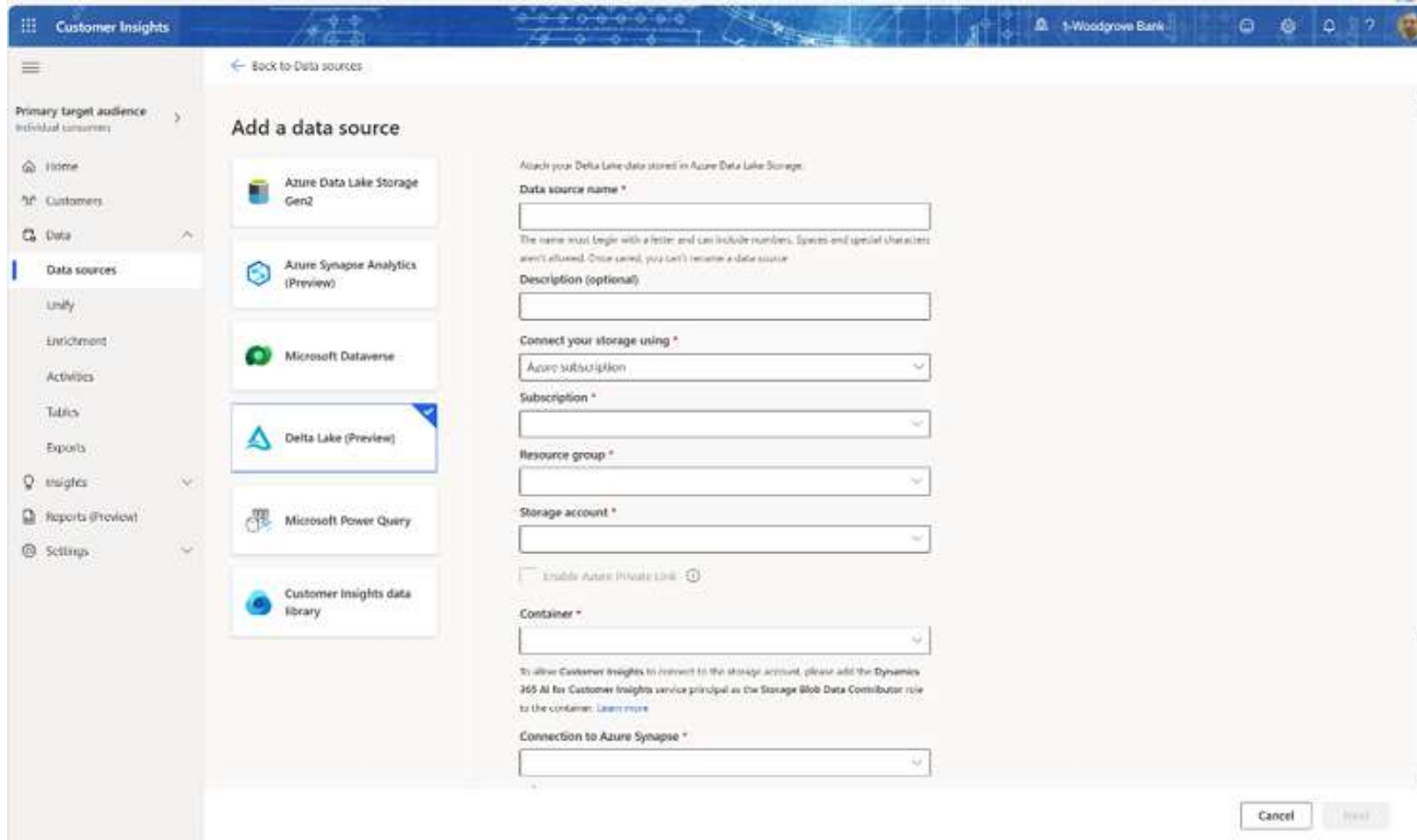
Item	N / U	Deadline	Benefits / Observations
Leverage manager dashboards to coach sellers	Updated	Oct/2024	By analyzing aggregated customer interactions and seller behaviors, sales leaders can determine the effectiveness of their sales strategies, respond to market changes, and coach their sales staff more efficiently.
Update CRM directly from the post-meeting insights page		Oct/2024	Smartly updating the system of record after a meeting, without switching context, saves sellers valuable time and helps sales organizations keep their business data fresh.



Customer Insights

Customer Insights - Real-time data processing

Item	N / U	Deadline	Benefits / Observations
Seamlessly onboard customer data from your Delta Lake with no data integration	Updated	Feb/2024	With this feature, you can: - Attach your data stored in Delta Lake format as a data source in Customer Insights. - Save time, effort and cost by eliminating any transformation pipeline that converts your Delta Lake data into another format for ingestion to Customer Insights - Data. Delta formatted data can be read natively. - Take advantage of Delta Lake incremental processing without any work. Data stored in Delta Lake format doesn't need to be formatted in separate full or upserts folders.



Customer Insights

1-Woodgrove Bank

Back to Data sources

Primary target audience
Individual consumers

Home

Customers

Data

Data sources

Unify

Enrichment

Activities

Tables

Exports

Insights

Reports (Preview)

Settings

Add a data source

Attach your Delta Lake data stored in Azure Data Lake Storage.

Data source name *

The name must begin with a letter and can include numbers. Spaces and special characters aren't allowed. Once saved, you can't rename a data source.

Description (optional)

Connect your storage using *

Azure subscription

Subscription *

Resource group *

Storage account *

☐ Enable Azure Private Link ⓘ

Container *

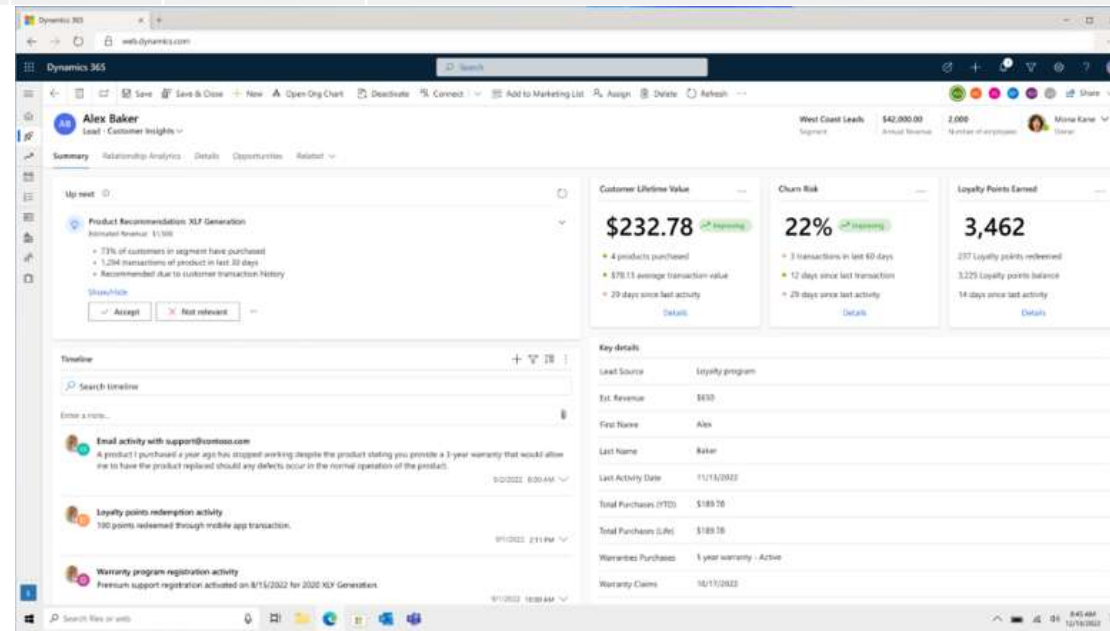
To allow Customer Insights to connect to the storage account, please add the **Dynamics 365 AI for Customer Insights service principal** as the **Storage Blob Data Contributor** role to the container. [Learn more](#)

Connection to Azure Synapse *

Cancel Next

Customer Insights - Unify sales and marketing

Item	N / U	Deadline	Benefits / Observations
Leverage customer insights in other business applications		Feb/2024	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 Customer Insights - Journeys 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.
Share customer profiles and insights via Data Lake		Mar/2024	Share the customer profiles and insights you create in Customer Insights - Data easily and reliably to Azure Blob Storage and Azure Data Lake Storage Gen2. The tables that you select for export are exported with all data fields, metadata, schemas, and mapping details. A common use case for the export of full tables to Azure Data Lake Gen2 are custom-built solutions, which organizations use to further process the data that originates from Customer Insights.



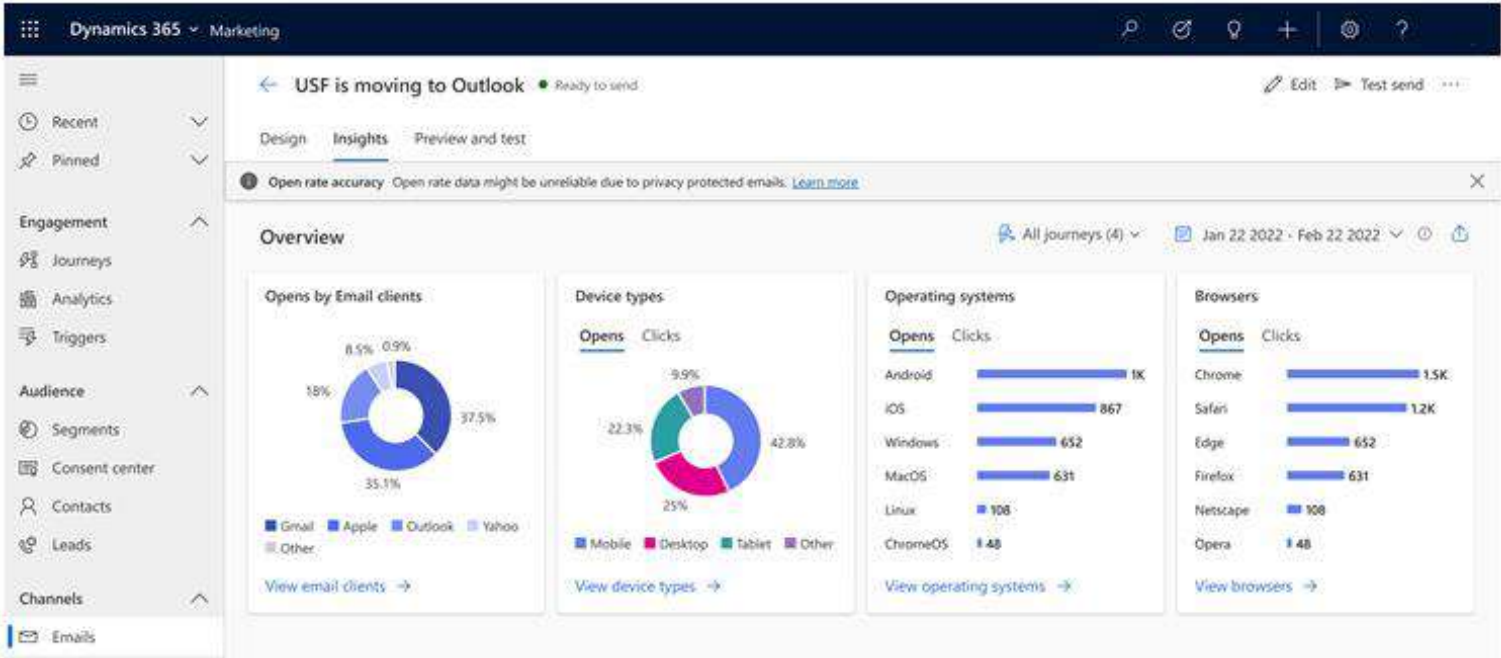


Customer Insights - Journeys

Customer Insights - Journeys - Moments that matter



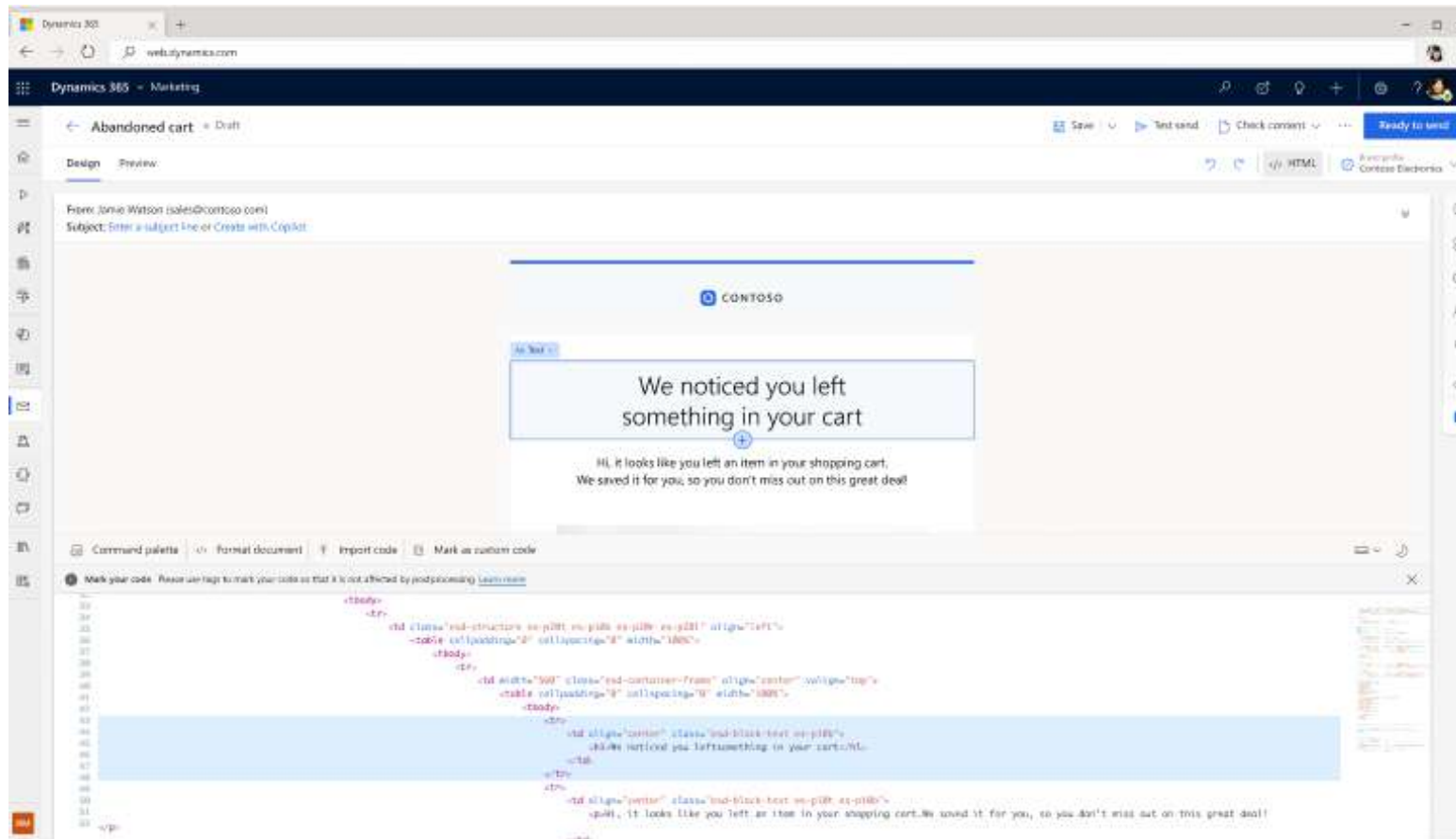
Item	N / U	Deadline	Benefits / Observations
Optimize email content based on customer behavior across devices	Updated	Aug/2024	In real-time journeys email insights, you can now delve into comprehensive device data, including operating systems, browsers, device types, and session details. Leverage the power of detailed engagement analysis across different platforms to fine-tune your marketing strategy. Tailor your email's design and content to align with the devices most used by your audience, ensuring seamless readability for your messages and, ultimately, leading to heightened customer interaction and loyalty.
Improve reliability of insights with advanced bot protection	Updated	Aug/2024	Ensuring the integrity of your data and the efficiency of your operations is paramount. Advanced bot protection in Customer Insights - Journeys empowers your business to thrive by safeguarding your business processes. Improve your business decisions with the confidence of knowing that the data you collect is accurate and represents real human interactions. With bot protection, you not only enhance the quality of your insights but also elevate the customer experience by minimizing disruptions caused by malicious bots.



Customer Insights - Journeys - Moments that matter



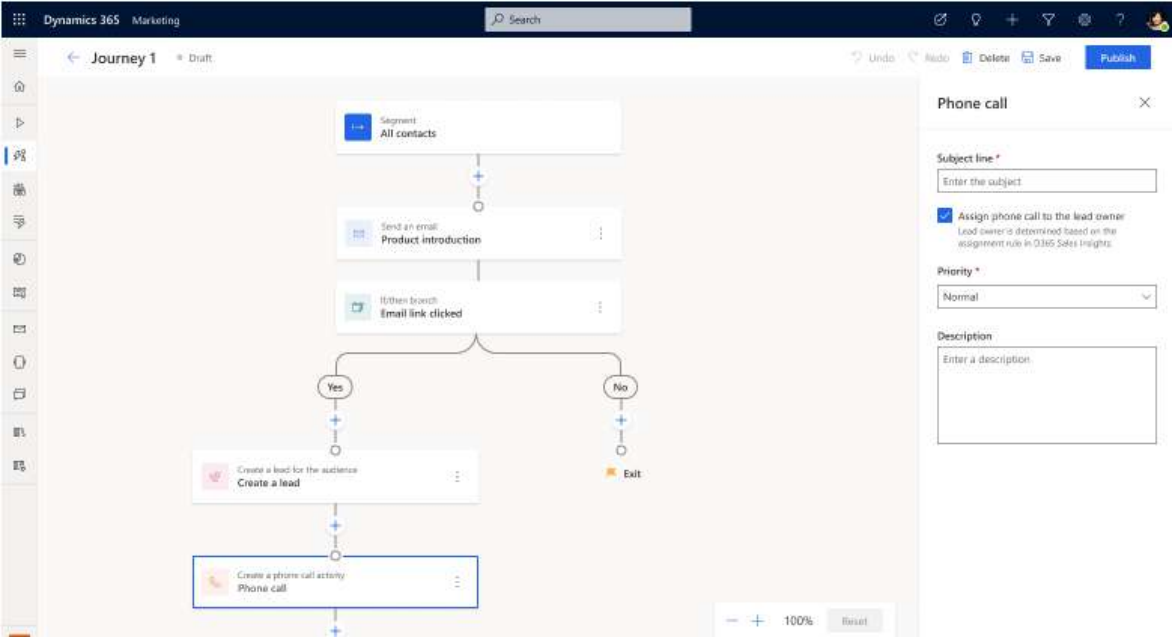
Item	N / U	Deadline	Benefits / Observations
Streamline email creation with real-time HTML edits	New	Jul/2024	Easily customize emails in Dynamics 365 Customer Insights - Journeys with the ability to toggle back and forth between the visual editor and HTML code. Get more control over how you display information by marking the code and seeing how it renders across devices and email clients.



Customer Insights - Journeys - Moments that matter



Item	N / U	Deadline	Benefits / Observations
Automate seamless handoffs between marketing and sales		Sep/2024	Real-time journeys are a key part of nurturing and qualifying leads and opportunities. When your customer has sent the right signals through your direct engagement, the next step is often for your sales team to act. You can now create sales activities such as tasks and phone calls directly from journeys so that leads get individualized attention when they're most likely to engage. You can also create lead or opportunity records based on a customer's interaction with your campaign, ensuring that the sales team has the right information to close leads generated from marketing activities.
Reach customers with greater throughput for trigger-based journeys		Sep/2024	With this release, you can reach customers faster by reacting to customers' behavior in moments that matter with up to 500,000 interactions per hour for trigger-based journeys. This allows you to connect with customers at pivotal moments, making your outreach more timely and relevant and amplifying the effectiveness of each interaction.



Customer Insights - Journeys - Moments that matter



Item	N / U	Deadline	Benefits / Observations
Scale your business with confidence with 300M maximum monthly interactions		Sep/2024	Reach up to 100 million contacts or leads and send up to 300 million messages per month in real-time journeys. Added capacity empowers you to deliver personalized experiences at scale and delight customers in new ways. Additional interactions help you grow your business, whether you're increasing your customer base in new markets, reaching additional geographies, promoting new products, or expanding your prospective customer pipeline to reach higher sales targets.
Improve engagement and compliance with double opt-in	Updated	Oct/2024	Privacy and data protection laws in many regions require double opt-in functionality to help verify customer information. Double opt-in requires users to confirm subscription preferences through a follow-up email after the initial subscription. By confirming subscription preferences a second time, you comply with legal requirements and improve engagement by ensuring that users who've subscribed are intent on receiving future communications. When customers are certain they want to receive email communications, spam complaints and bounce rates are reduced, and your sender reputation is improved.

Marketing

Consent center

Recent

Pinned

Overview

Settings overview

Versions

Quota limit

Feature switch

Email marketing

Domains

Landing pages

Designer feature prot.

Default settings

Customer engagement

Compliance profiles

Audience configurat.

Push notifications

Text messages

Social media accounts

Collaboration

Teams chat

Settings

Contoso Canada

Compliance profile

Details

Consent Purposes

Double opt-in

Related

General

Once enabled double opt-in will be applied to all related live forms. [View related forms](#)

Double opt-in status: Not enabled

Step 1: Form submission configuration

This journey will orchestrate an email that will be sent to the user to confirm their preferences after form submission.

Double opt-in journey: Contoso Canada double opt-in journey

Step 2: Double opt-in confirmation

Specify what message or page user will see after clicking the confirmation button in the email.

Confirmation type: Confirmation message

Confirmation message: Thank you for confirming your preferences! You may leave this page now.

Step 3: Enable double opt-in

Enable the feature and save your changes.

Enabled

What's double opt-in?

Double opt-in sends a user an email to confirm their preferences submitted on forms. An entity (e.g. contact) will not be created before the user clicks the link in the email.

What will happen after double opt-in is disabled?

Double opt-in will be disabled for all forms that use consent elements from this compliance profile.

The journey to send confirmation emails will no longer be triggered by new form submissions. The journey will remain live so that it can process any active confirmation requests.

Previously sent double opt-in confirmation emails will still require user confirmation before they are opted into receive future emails.

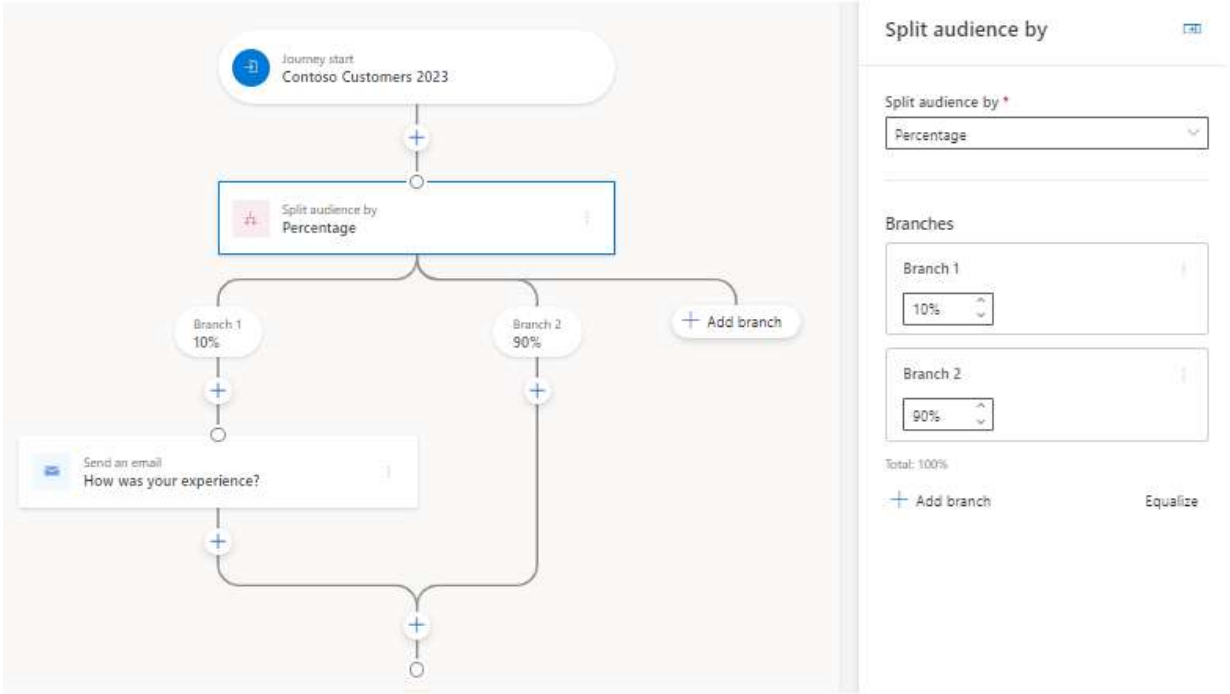
How to disable double opt-in for a form?

Double opt-in can be disabled only for a specific compliance profile. Forms that use consent elements related to the compliance profile will inherit the changes.

Customer Insights - Journeys - Moments that matter



Item	N / U	Deadline	Benefits / Observations
Orchestrate journeys using any marketing interaction	Updated	Oct/2024	Instantly adapt your strategies based on your customers' real-time interactions, ensuring that every message you send hits the right note. By engaging customers based on their interactions, you can significantly ramp up your chances of conversion with greater personalization. For example, you can branch and orchestrate journeys based on customer interactions with emails such as "email link clicked" or "email blocked."
Split audience into groups to deliver unique customer experiences	Updated	Nov/2024	The new journey split tile allows you to split your audience into branches to provide a subset of your audience with unique experiences, whether that be a survey, a new type of experience to test, or a first-come promotional offer. You can split your audience by percentages (for cases where you need randomness) or by numbers (for cases where you want to deliver specific experiences to a set number of people).



Customer Insights - Journeys - Moments that matter



Item	N / U	Deadline	Benefits / Observations
Control how fast customers can enter a journey	Updated	Dec/2024	With journey rate limiting, you'll be able to space out message sending over time by setting how quickly you want customers to enter your journey. This feature helps prevent overwhelming downstream operations with a large influx of requests from customers who receive messages from your journey. For example, let's say you have a journey that sends messages to your entire customer base with a call to action to contact your call center. You may want to avoid creating a poor customer experience due to long wait times from an overwhelmed help desk if you send messages at the same time to everyone. Instead, you can now slow down how fast customers enter the journey, avoiding thousands of phone calls at the same time.

▼ Rate limit

Add a rate limit

Rate limits let you control how fast people enter this journey.

☒ Enable rate limit

Maximum rate

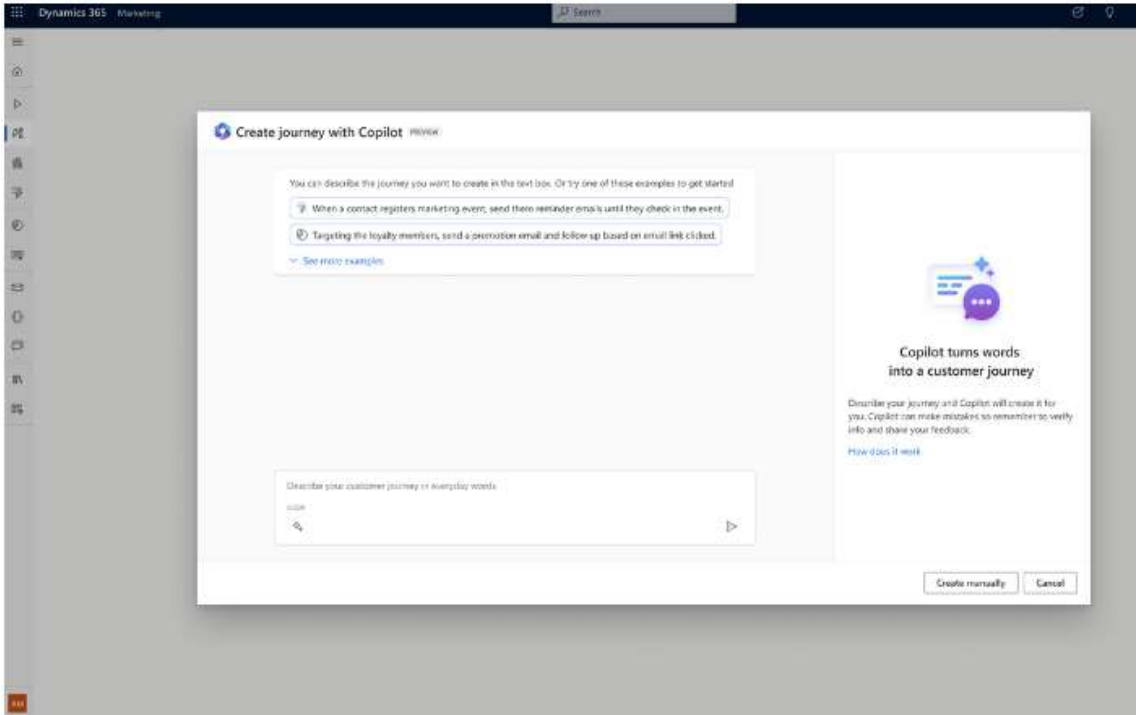
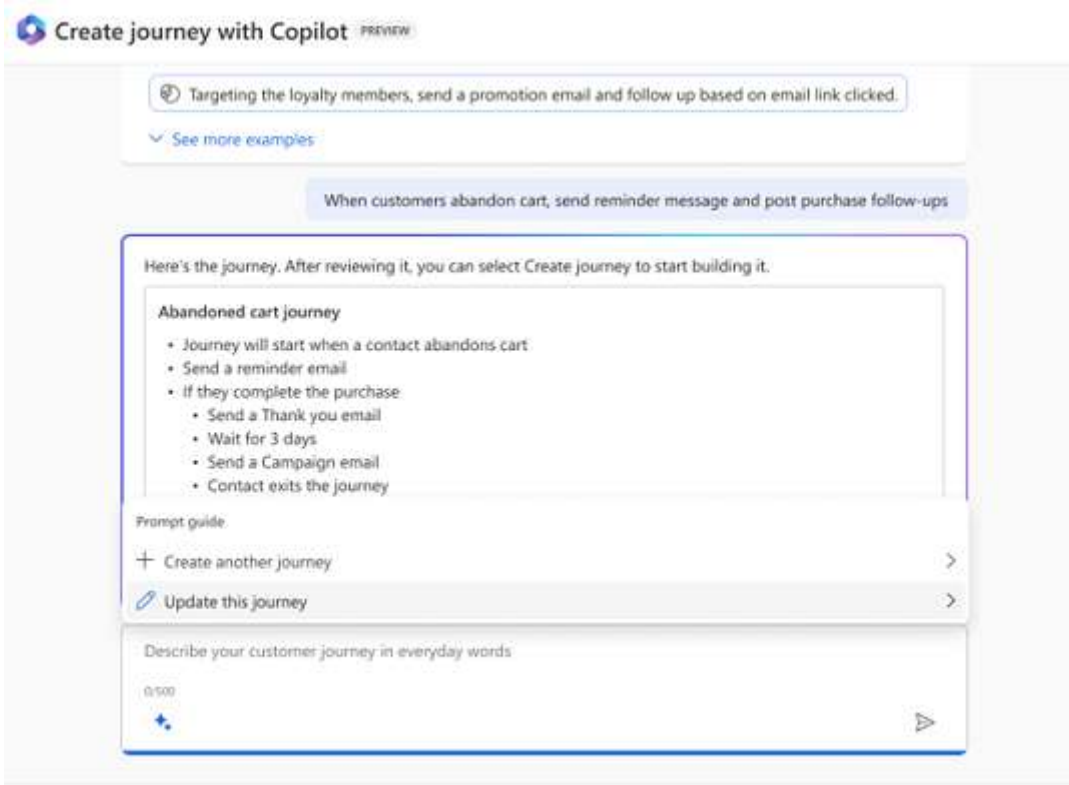
per day

People will enter this journey on these days:

Every day [Review and edit](#)

Customer Insights - Journeys – Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Create journeys by using Copilot to describe them	Updated	Oct/2024	With Dynamics 365 Customer Insights - Journeys, anybody can create journeys in minutes, even if they've never done it before. Simply describe in everyday words what you want to create and rely on generative AI to build the journey for you. This empowers you to do more with less. Instead of spending time getting the mechanics of the journey right, you can now ensure that you're delivering the most personalized experience for your customers by collaborating with your entire team and quickly driving stakeholder alignment. Using the journey creator functionality together with content ideas for email creation, you can now get your customer experience ideas to market in no time.



Customer Insights - Journeys - Unify sales and marketing

Item	N / U	Deadline	Benefits / Observations
Build custom reports using Microsoft Fabric integration	Updated	Jul/2024	Now in real-time journeys, you can effortlessly create custom Power BI reports tailored to your business needs by leveraging Microsoft Fabric capabilities. Harness seamless access to data to gain a complete understanding of your campaigns, lead management, market performance, and customer engagement, enabling you to identify new opportunities.



Customer Insights - Data

Customer Insights - Data - Unify sales and marketing



Item	N / U	Deadline	Benefits / Observations
Increase control when attaching to data in Dataverse	Updated	Aug/2024	Significant improvements to the Microsoft Dataverse connector make it your best option for ingesting any Dataverse data into Dynamics 365 Customer Insights - Data. You can now import the largest Dataverse tables with the highest levels of performance and reliability possible. Select only the tables you want to import, and filter rows to precisely control what data is ingested. Enable incremental processing of data and other great advantages of this updated connector.

Tables

Source

Output

Relationships

Table Name	Data source name	Updated	Data sensitivity ↓	Status	Row filters
▼ User (54)					
careplan	careplan	an hour ago	None	✓ Successful	Filters: 1
careplan	delta101	an hour ago	None	✓ Successful	Filters: 2
CustomersWithPerf...	LakeDB	2 hours ago	None	✓ Successful	Add filters
StarCustomers	LakeDB	2 hours ago	None	✓ Successful	Add filters

Customer Insights - Data – Moments that matter



Item	N / U	Deadline	Benefits / Observations
Accelerate time to insights with data in Delta Lake format		Oct/2024	With native support for Delta Lake storage format in Customer Insights, you can now accelerate processing times even with a higher volume of fast-changing data updates. Get customer profiles and associated insights updated more frequently and react to customer engagements based on the most current information available. This empowers you to create the most relevant and personalized experiences for your customers and the most up-to-date and timely insights for your business users.
Use automation to manage segments and measures		Oct/2024	As your Dynamics 365 Customer Insights usage increases, so does the number of segments and measures. Large numbers of segments and measures can result in longer system refresh times, which delay time-sensitive insights. Customer Insights now automatically deactivates segments and measures based on their usage to ensure your active segments and measures refresh faster. As an admin you get to control the retention period that applies and can support your organization to scale confidently.



Customer Service

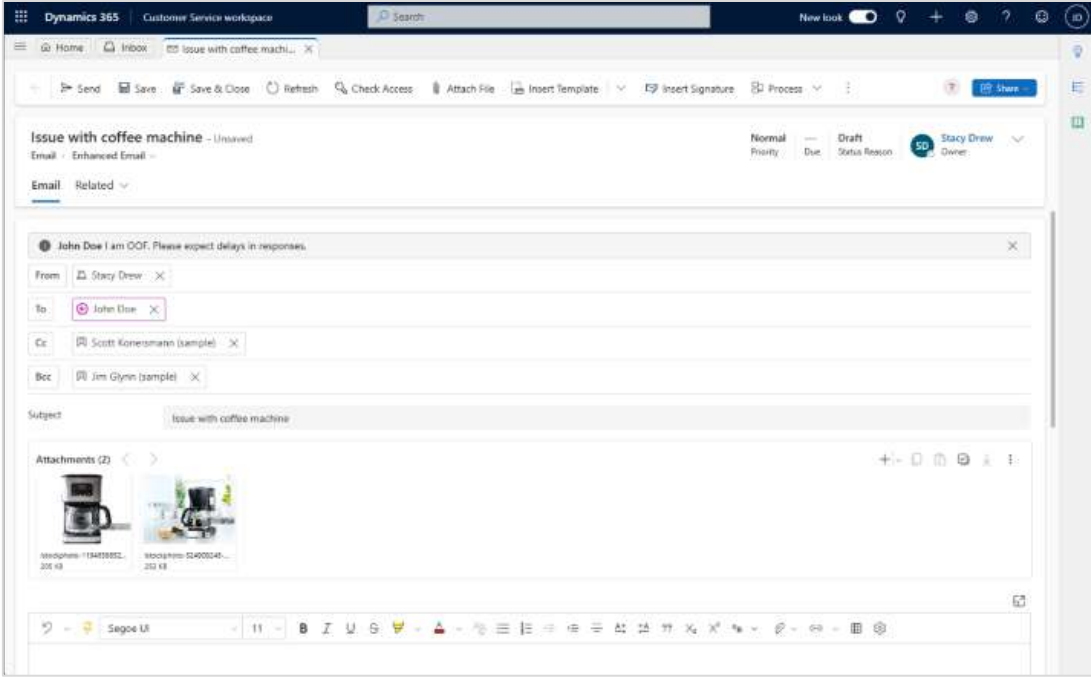
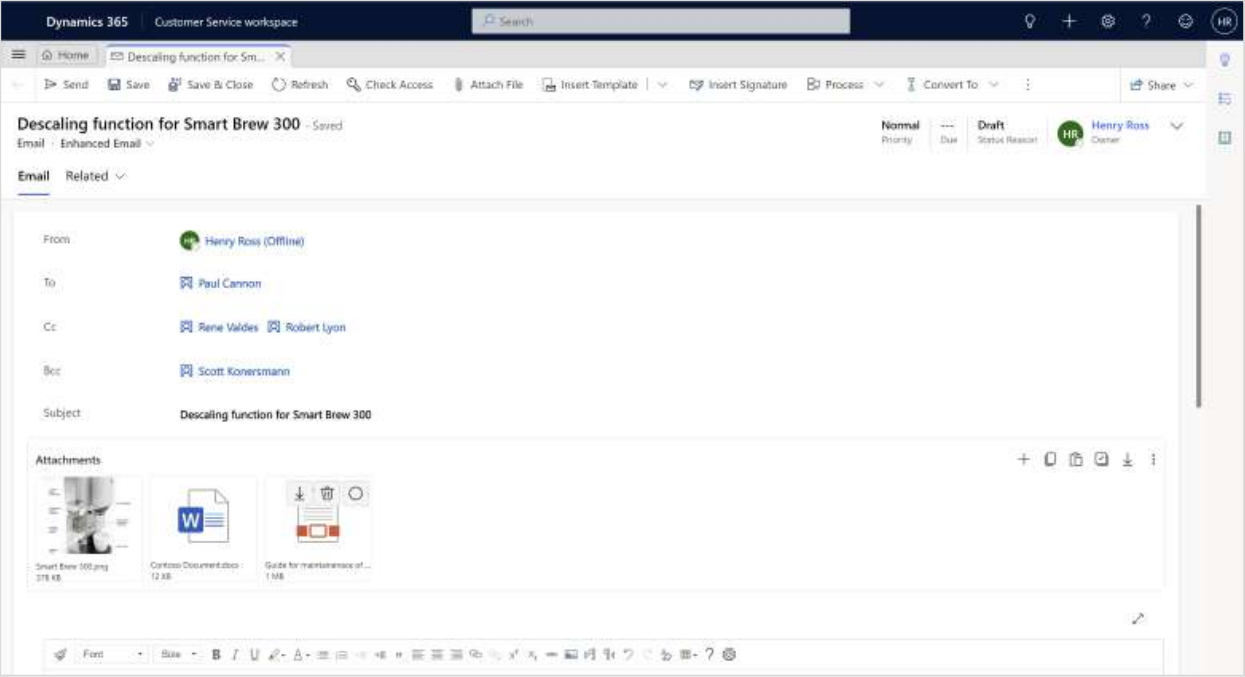
Customer Service - Agent experiences

Item	N / U	Deadline	Benefits / Observations
Manage cases efficiently with enhanced case controls	New	Oct/2024	Agents must upload attachments individually and then search for them in the case timeline in order to open them. Therefore, they require intuitive controls on the case form to easily locate and access the relevant information, allowing them to perform operations efficiently. Enhanced case form controls are added on the default case form, Case for multisession experience in the Customer Service workspace application. This allows agents to easily upload and view multiple attachments, take quick notes, and use color-coded icons for efficient field identification during case creation. These enhancements streamline daily case management tasks, reducing effort and boosting productivity.
Prioritize cases with improved case grids	New	Oct/2024	Case grids displaying agents' active cases with color differentiators for columns like priority and origin, and information like Next SLA, Last Interaction, Is Escalated, and Case age, help them prioritize cases that require the most attention. Agents can also navigate directly to the latest interaction on the case. This improves their overall productivity while working on cases.

Customer Service - Agent experiences



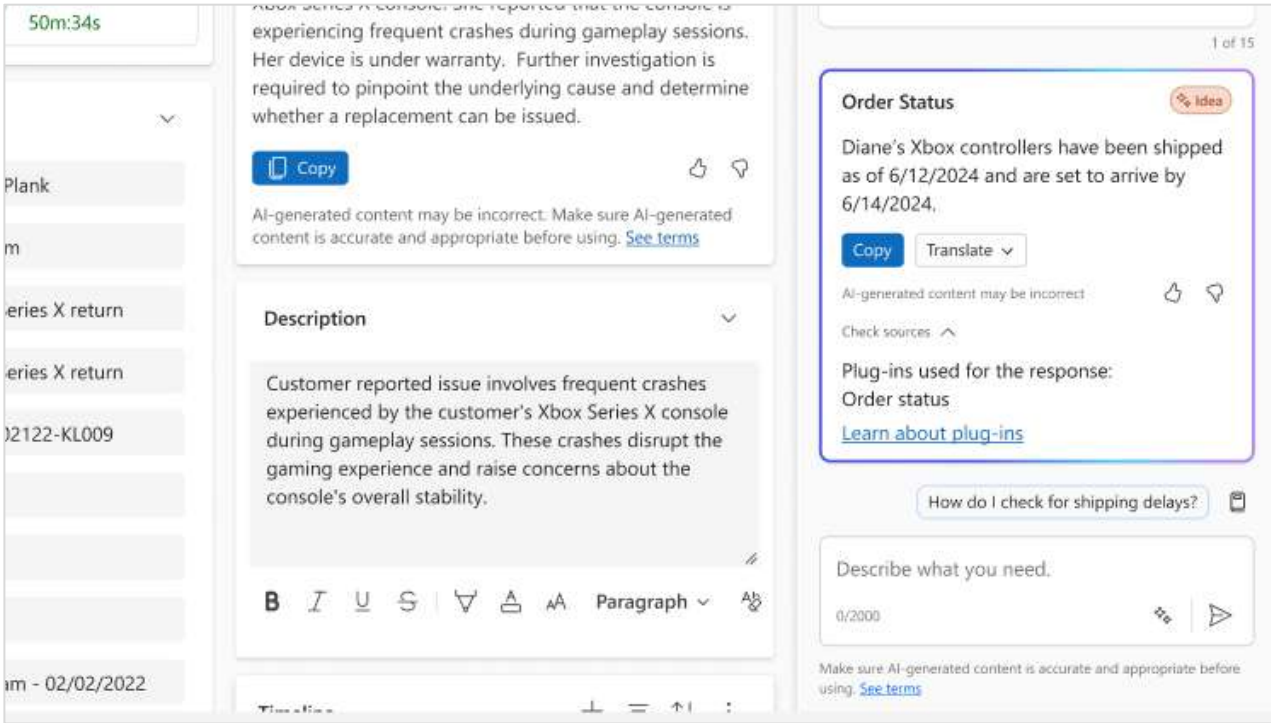
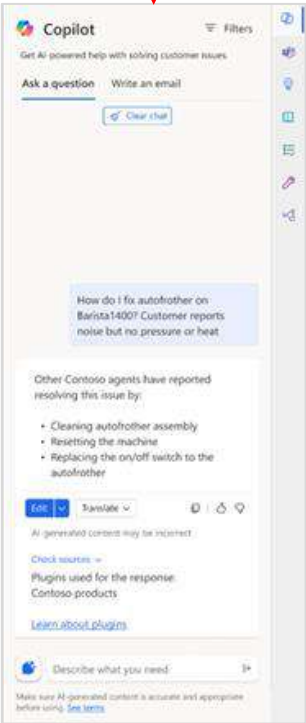
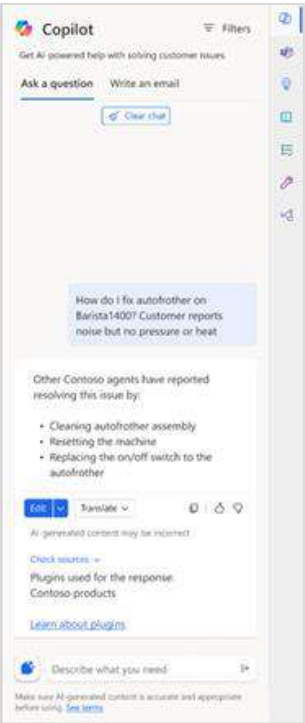
Item	N / U	Deadline	Benefits / Observations
Compose emails using improved attachment experience	Updated	Oct/2024	The enhanced attachment experience allows agents to drag and drop attachments in emails, saving time and increasing their productivity. A reminder is sent to agents if they forget to include an attachment that they've mentioned in the email subject or body.
Compose emails with enhanced recipients handling	Updated	Oct/2024	The enhanced recipient experience offers improved user experience in emails. Recipients can be configured to display email addresses along with their names, drag and drop recipients among TO, CC, and BCC fields, view recipients' presence status and out-of-office messages, and bulk resolve email addresses to Dynamics 365 records.



Customer Service - Copilot and AI innovation



Item	N / U	Deadline	Benefits / Observations
Extend Copilot with plugins	Updated	Oct/2024	Your customer service representatives rely on data and information from a wide variety of systems. Now, you can connect Dataverse to Copilot through plugins and let your agents securely access data from these systems using Copilot.
Enable Copilot plugins to connect with external systems	Updated	Oct/2024	Your customer service representatives rely on data and information from a wide variety of systems. Now, you can connect external systems to Copilot through plugins and let your agents securely access data from these systems using Copilot.
Use proactive prompts and insights generated by Copilot	Updated	Oct/2024	Proactive prompting enables agents to discover and prompt Copilot effortlessly, without the need for manual typing. This will save agents time and improve the quality of their overall experience.



Item	N / U	Deadline	Benefits / Observations
Update queue memberships for agents in real time		Oct/2024	When a contact center experiences a surge in conversations, admins and supervisors are suddenly faced with a staffing shortage. To handle these surges, they need to quickly add or redistribute the workforce between channels and lines of business represented by queues. With this enhancement, the queue membership updates made by admins will happen faster. This ensures that new agents can take work in their new queues as soon as they are added, and when you remove agents from queues, they won't receive work from the old queue while the membership changes. These benefits help maintain low customer wait times even during peak traffic periods and avoid unintended work assignments.
Use overflow for lengthy wait times for work items		Sep/2024	When contact centers face sudden spikes in customer queries in queues, agents might not be available to respond quickly. To improve customer satisfaction, overflow handling helps customers who wait for a long time by taking actions like automatically transferring work items to other queues.

Overflow handling

Define and rank overflow conditions and actions to stop work items from entering a queue when it's overflowing and to manage queued items during an overflow. [Learn more](#)

> Before work items are queued

1 condition-action pair set

< When work items are queued (preview)

1 condition-action pair set

Add condition-action pair

1

Condition:

Wait time in queue exceeds

5

Minutes

Action:

Select an action

Transfer to a different queue



Copilot for Service

Copilot for Service - Agent experiences in Microsoft Teams



Item	N / U	Deadline	Benefits / Observations
Provide meeting summary and follow-ups to create CRM tasks	Updated	Oct/2024	As agents are talking to customers, they can now save time on documenting the discussion and action items. Copilot for Service will now provide meeting summaries and action items in integration with the Teams recap, providing all the service-specific follow-up items. Agents can also create CRM tasks right from the Teams recap section. Geographic areas: United States



Contact Center

Contact Center - Administrator experiences



Item	N / U	Deadline	Benefits / Observations
Configure embedded experience for other CRM solutions		Oct/2024	This feature allows organizations with multiple lines of business needs to be able to configure the embedded experience so that their agents can connect with their customers without navigating away from their workspace.

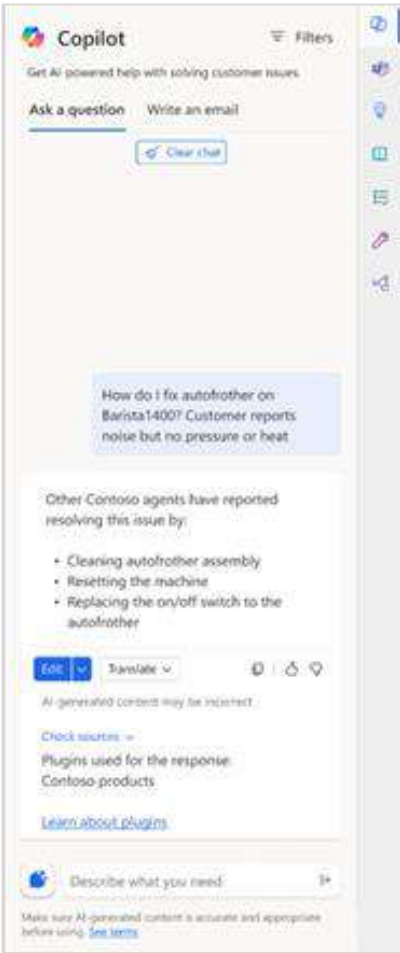
Contact Center - Agent experiences



Item	N / U	Deadline	Benefits / Observations
Search for a customer in the outbound dialer	Updated	Oct/2024	Placing a call has become easier for agents with the option to search for a customer in the outbound dialer and open the customer record from the call history.

Contact Center - Extensibility

Item	N / U	Deadline	Benefits / Observations
Extend Copilot with plugins		Oct/2024	Your customer service representatives rely on data and information from a wide variety of systems. Now, you can connect Microsoft Dataverse to Copilot through plugins and let your agents securely access data from these systems using Copilot.



Contact Center - IVR capabilities

Item	N / U	Deadline	Benefits / Observations
Customers can opt out of recording when they talk to IVR		Nov/2024	This feature helps businesses make sure that they're legally compliant by avoiding the storage of sensitive and personal user information in call recordings based on customer choice. It is particularly useful in regions where obtaining consent from the caller before recording the call is a legal requirement.
Manage calls when bot handling fails	New	Nov/2024	You can ensure a seamless customer experience by maintaining call continuity during system failures. Administrators can customize responses and transfer strategies, minimizing disruption, and enhancing customer satisfaction.
Use multilingual IVR bots		Nov/2024	multilingual Copilot Studio bot can help reduce the total cost of ownership through easier maintenance and faster deployment. It can enhance CSAT by allowing seamless language switching, eliminating the need for multiple bots or language-specific phone numbers.
Configure IVR to switch languages based on dialed number		Nov/2024	You can use a single IVR bot for multiple languages. The bot distinguishes between languages based on the phone number the customer dials, eliminating the need for creating multiple bots.

Contact Center - Omnichannel customer experiences



Item	N / U	Deadline	Benefits / Observations
Play prerecorded audio during bot processing delays	Updated	Oct/2024	You can play prerecorded audio messages to avoid customer call drop-offs when a bot is taking time to process customer requests.
Use SLA-based automated actions on conversations		Oct/2024	Businesses can set up automatic actions on messaging conversations based on time-based SLA to improve CSAT and booster agent productivity
Hide transcripts for voice calls	Updated	Oct/2024	By hiding transcripts for voice calls even when the transcription feature is turned on, you can reduce distractions and clutter for your agents.
Monitor work item lifecycle in Application Insights	Updated	Oct/2024	Customers require real-time monitoring of system health to investigate issues proactively and ensure operational continuity. By integrating Dynamics 365 Contact Center with Application Insights, organizations can access self-serve information to monitor operational telemetry, troubleshoot issues, and understand the root cause to guide their mitigation plan.
Transfer calls to Teams users through VOIP	New	Sep/2024	You can now take full advantage of the experts you may have on Teams, with or without phone numbers. You'll also pay less to have them on the call.

Contact Center - Unified routing

Item	N / U	Deadline	Benefits / Observations
Use first-in, first-out order in custom prioritization		Dec/2024	Messaging channels like persistent chat, Facebook, and WhatsApp provide the flexibility of a single conversation thread that can be asynchronously accessed by users and agents. Supervisors managing these channels can reduce the time to reply to a new interaction in these long-running conversations. With this enhancement to first-in, first-out prioritization, when customers resume interaction on an existing conversation, they will be prioritized based on the time the conversation was resumed instead of the time the conversation started. This ensures that customers who have resumed their conversations now have a shorter wait time irrespective of the age of the conversations.
Update queue memberships for agents in real time		Oct/2024	When a contact center experiences a surge in conversations, admins and supervisors are suddenly faced with a staffing shortage. To handle these surges, they need to quickly add or redistribute the workforce between channels and lines of business represented by queues. With this enhancement, the queue membership updates made by admins will happen faster. This ensures that new agents can take work in their new queues as soon as they are added, and when you remove agents from queues, they won't receive work from the old queue while the membership changes. These benefits help maintain low customer wait times even during peak traffic periods and avoid unintended work assignments.
Prioritize existing conversations in asynchronous channels	New	Sep/2024	Messaging channels like persistent chat, Facebook, and WhatsApp provide the flexibility of a single conversation thread that can be asynchronously accessed by users and agents. Supervisors managing these channels want to reduce the time to reply to a new interaction in these long-running conversations. With this enhancement to first-in-first-out prioritization, when customers resume interactions on an existing conversation, they will be prioritized based on the time the conversation was resumed instead of the time the conversation was initiated. Customers who resumed their conversations will now have a shorter wait.

Contact Center - Unified routing



Item	N / U	Deadline	Benefits / Observations
Use overflow for lengthy wait times for work items	New	Sep/2024	hen contact centers face sudden spikes in customer queries in queues, agents might not be available to respond quickly. To improve customer satisfaction, overflow handling helps customers who wait for a long time by taking actions like automatically transferring work items to other queues.

Overflow handling

Define and rank overflow conditions and actions to stop work items from entering a queue when it's overflowing and to manage queued items during an overflow. [Learn more](#)

> Before work items are queued

1 condition-action pair set

< When work items are queued (preview)

1 condition-action pair set

Add condition-action pair

1

Condition:

Wait time in queue exceeds

5

Minutes

Action:

Select an action

Transfer to a different queue



Field Service

Field Service - Boost technician productivity

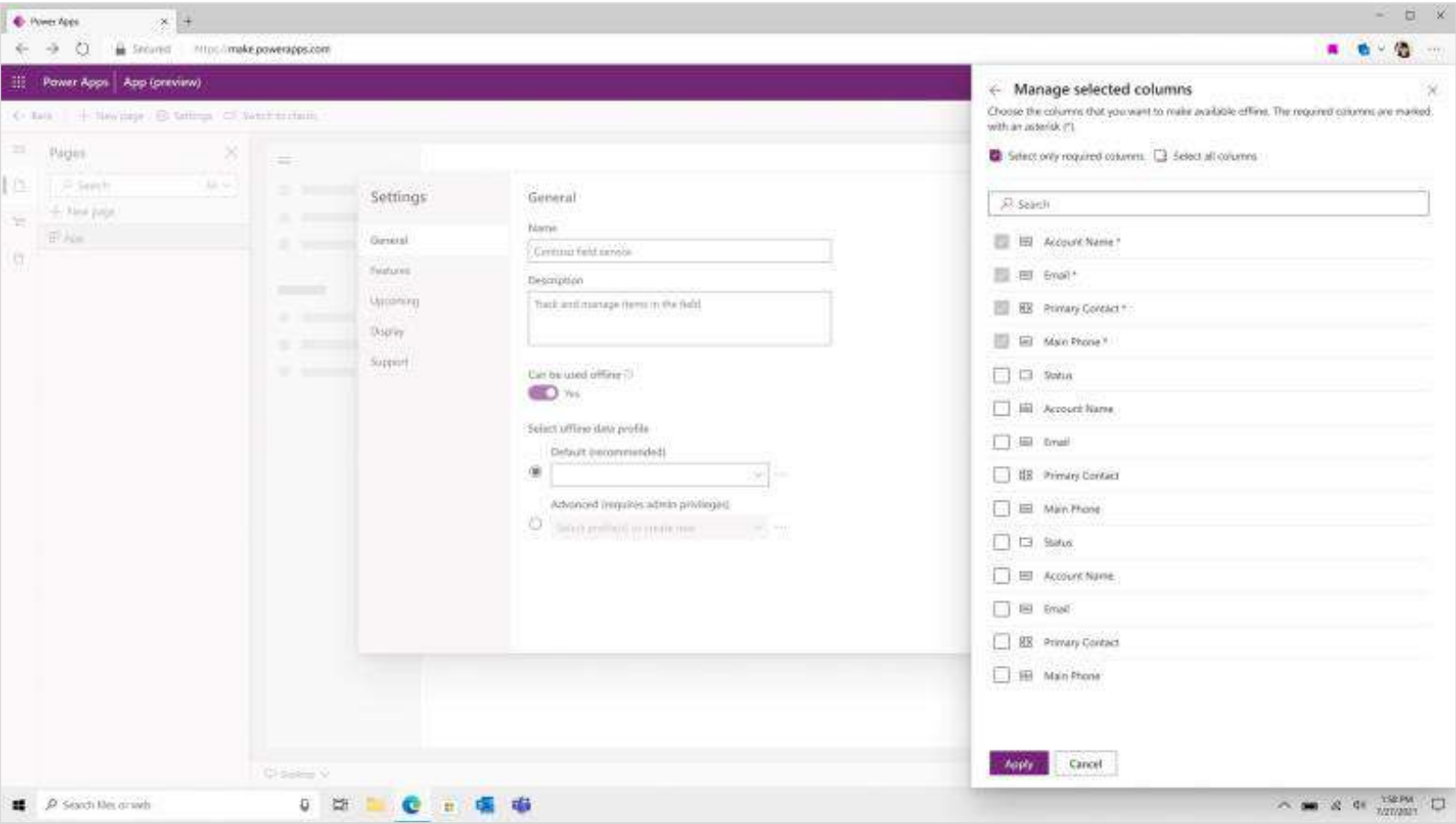


Item	N / U	Deadline	Benefits / Observations
Use Remote Assist mixed reality annotations in Microsoft Teams	Updated	Oct/2024	First-time fix rates are a key business and operational metric for service organizations. When a service technician is stuck on a work order because they may not have the required knowledge or experience with that issue, they can quickly initiate a call with another technician or support specialist in the back office to guide them through the issue and its resolution.
View your mobile offline sync data with Application Insights	Updated	Oct/2024	Ensuring a seamless experience both with and without device connectivity is crucial for an effective frontline workforce. Field Service offers mobile offline capabilities to address this need. To create optimized offline profiles, you need insights into the offline performance and device data. Using Application Insights, you get the necessary data to answer essential questions about offline mobile usage, which helps with enhanced troubleshooting and user experience optimization.

Field Service - Boost technician productivity



Item	N / U	Deadline	Benefits / Observations
Select table columns to include in mobile offline sync	Updated	Oct/2024	Makers can now select the columns of tables that are downloaded on mobile devices for offline use. The fewer columns you select, the faster the app downloads the data on the device for usage without connectivity.



Field Service - Copilot and AI innovation



Item	N / U	Deadline	Benefits / Observations
Enhance Copilot experiences in the web app		Oct/2024	Expedite work by using enhanced Copilot experiences. Every member of the back office and frontline workforce can tap into enhanced Copilot side pane experiences to quickly get the information they need to be more efficient on the job.
Summarize work orders with Copilot in Outlook		Nov/2024	With the Outlook add-in for Dynamics 365 Field Service, service managers and frontline workers don't have to leave Outlook and open the Field Service web app or mobile app to get summary of a work order. Stay in your flow of work and boost your productivity and efficiency with contextual information right in your preferred communication app.

Hi Kat,

Welcome to Copilot for Field Service. Ready to explore? Select one of the suggestions below to get started...

Act

Navigate to work orders

Analyze

How many bookings were overdue in the past 30 days?

Ask

How many work orders do I have scheduled today?

You can ask questions about work orders, accounts, resources, bookings and more!

Outlook

Home View Message Insert Format Options Help

Quick steps

Read/Unread

Field Service

Work order summary

Hi Claudia,

Here is a summary:
The work order is for Margie's Toilet and involves performing regular maintenance. The work order is scheduled to start on 6/27/2024 at 8:00 AM and end at 12:00 PM, with a duration of 4 hours. The service tasks include lubricating a customer metal grill, repairing the surface, and repairing a damaged frame. The note from the customer requests that technicians park their vehicle on the far side of the property and be cautious of loose debris from a storm.

Regular maintenance

Claudia Mazzanti

Hi Lane,

I just wanted to check on the status of the regular maintenance scheduled for Margie's toilet. Can you give me a brief update on what things stand now?

Thanks,
Claudia

Lane McConnell

Hi Claudia,

I'm writing to inform you that the work order for the regular maintenance has been created. I have included the notes as per your request: technicians should park their vehicles on the far side of the property and be cautious of loose debris from a recent storm.

The team will schedule this work order and provide you with updates accordingly.

Thanks,
Lane

Lane McConnell

Good morning

Field Service - Optimize resource scheduling



Item	N / U	Deadline	Benefits / Observations
Improve usability and performance of the schedule board	Updated	Nov/2024	With improved usability and performance, technicians and dispatchers can manage schedules more efficiently, leading to increased productivity and employee satisfaction.
Transition all users to the new schedule board	Updated	Oct/2024	The new schedule board brings improved accessibility, usability, and performance while laying the foundation for new capabilities for multi-day scheduling and intelligent interactions.

Days of the Week

#1 Ideas Portal

Week numbers

#4 Ideas Portal

3 Dot Menu

#Accessibility Win

Day Line on Daily+

#Customer Voice
#Accessibility Win

Schedule Board improvements
(Usability and Modernization)

Reorder tabs

#Customer Voice

Fluent Modernization

- Improved colors
- Consistency with FS web/mobile

#Customer Voice #Accessibility Win



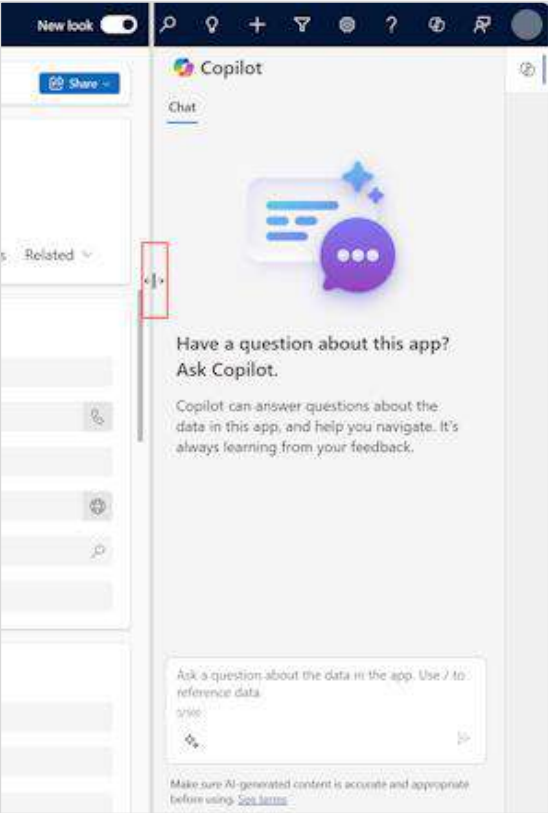
What's new in Power Platform



Power Apps

Power Apps - Building modern apps

Item	N / U	Deadline	Benefits / Observations
Act on your data efficiently with new grid features	Updated	Oct/2024	Users can view and act on data more efficiently with new grid features in model-driven apps. The features allow you to group and aggregate data, reorder columns, set column width, and complete other tasks with ease.
Allow users to resize side panes	New	Oct/2024	This feature allows users to resize side panes in Power Apps. Users can resize side panes wider to see more supporting content, so they can be more effective and efficient.
Hide the legacy app for admins	Updated	Oct/2024	Admins should only use modern, model-driven apps by hiding the legacy, model-driven app. This ensures that admins have the full product experience.



Power Apps - Building modern apps

Item	N / U	Deadline	Benefits / Observations
Select columns downloaded on mobile devices	Updated	Oct/2024	You can now select the columns of tables that are downloaded on mobile devices for offline use. The fewer columns you select, the faster the app downloads the data on the device for usage without connectivity.
Select records faster with look-up control	Updated	Oct/2024	This feature allows Power Apps end users to select records quickly and easily when using the look-up control. This modification aims to make users more productive while entering data into the system.
Show recent and pinned records in the multi-session sitemap	New	Oct/2024	User productivity is improved with availability of recent and pinned records in multi-session apps.

Accounts

Recent records

Adventure Works (sample)
someone3@example.com

Alpine Ski House (sample)
someone8@example.com

Blue Yonder Airlines (sample)
someone5@example.com

City Power & Light (sample)
someone6@example.com

Coho Winery (sample)
480...

+ New Account

Advanced lookup

Look for Parent Account

Dynamics 365

Customer Service workspace

Product damaged (sample)

Set As Default

Refresh All

Recent

Pinned

Customer Service Agent ...

Service

Dashboards

Cases

Queues

Activities

nt Dashboard

Case Number

sample)

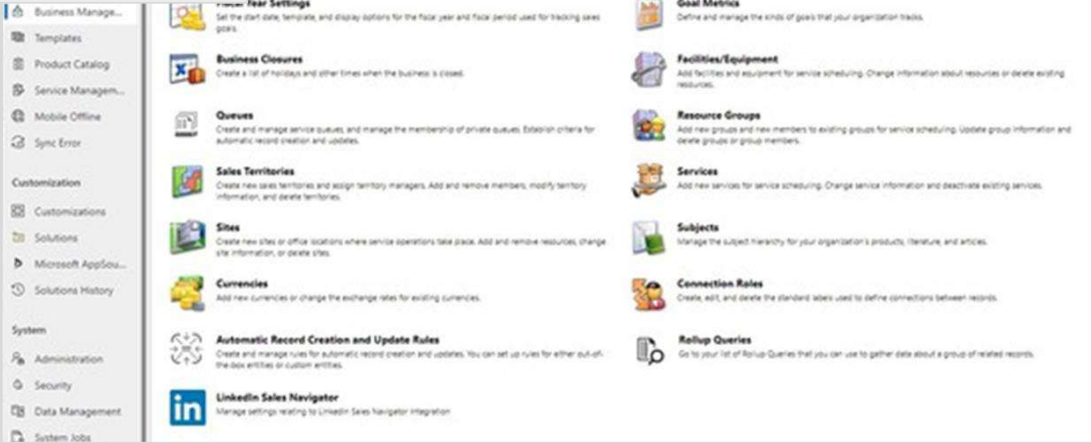
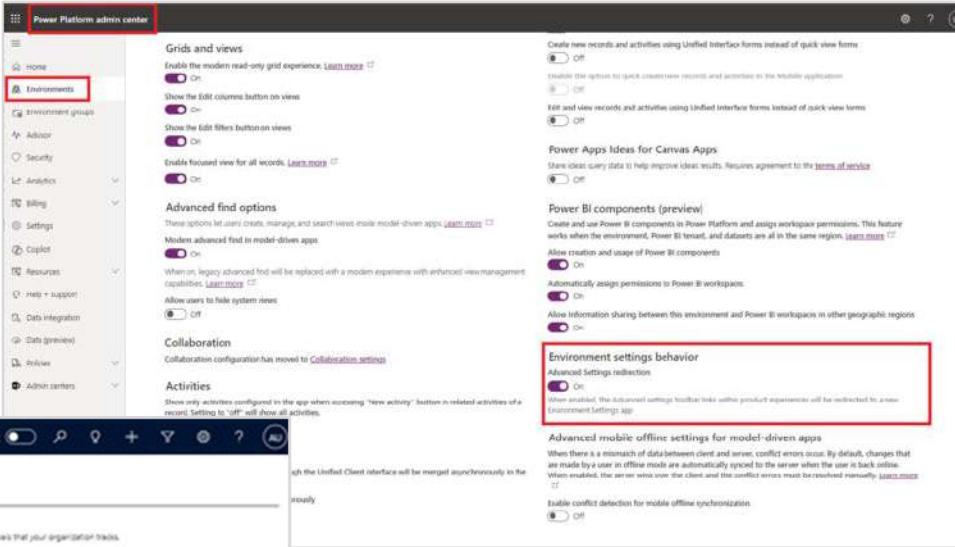
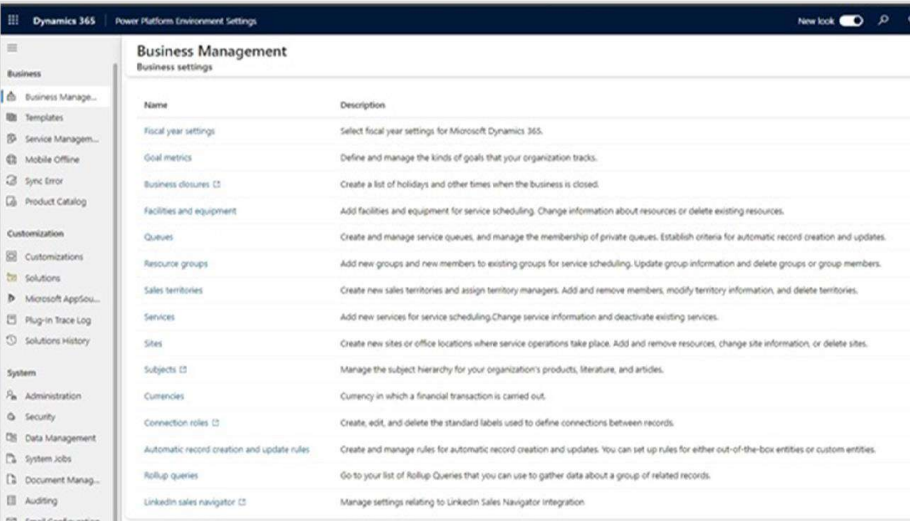
CAS-01033-F1W1...

Power Apps - Building modern apps

Item	N / U	Deadline	Benefits / Observations
Update existing model-driven apps monthly	New	Oct/2024	Existing model-driven apps will use the monthly release channel, which allows them to be updated every month. Monthly channel releases let apps get the latest, generally available features the product offers as quickly as possible.
Use modern chart dialogs instead of classic dialogs	New	Oct/2024	Users working with charts have modern dialogs, which are faster and provide more accessible experiences.
Use the modern, refreshed look in model-driven apps	New	Oct/2024	The modern, refreshed look for model-driven apps is always on for users of the monthly release channel. The updated look makes model-driven apps easier to use so that users can accomplish their goals quickly and efficiently.

Power Apps - Building modern apps

Item	N / U	Deadline	Benefits / Observations
Use the Power Platform Environment Settings app	Updated	Oct/2024	The Power Platform Environment Settings app provides a modern, performant, accessible, secure, and extensible settings management experience. This app is intended to provide a single, unified experience for application developers to create settings for their applications.



Power Apps - Building modern apps



Item	N / U	Deadline	Benefits / Observations
Work together in real time to create canvas apps	Updated	Dec/2024	Previously, multiple makers were blocked from editing an app at the same time. With coauthoring makers can author and edit a canvas app in real-time. This experience accelerates the app development process and saves time by allowing multiple makers to collaborate and build apps quickly. Additionally, this capability enhances debugging, code reviews, and training when multiple makers are required.

Settings

General

Display

Updates

Support

Updates

Search

New Preview Experimental Retired

These features are being made available on a preview basis so that you can test and [provide feedback](#). Some changes may occur. Do not use in production apps. [See preview terms](#).

Coauthoring

Allows multiple people to edit the app in the same session. Some editing features may be limited while this feature is on. [Learn more](#)

On

Enable improved data table control selection and Value property

Enable inserting the new data table control. This control provides the new field selection experience aligned with the form control. It also provides a new Value property which allows expressions to provide formatting and calculated values.

On

Optimize for Microsoft Teams meetings

Enable this app to be used during live calls in Microsoft

Power Apps | Kudos App (Editing)

Environment Canvas Collab Test

Back Insert Add data New screen

Text fx "Text"

Tree view

Screens Components

Search

New screen

App

Landing Screen

Settings

ButtonCanvas1

GetStarted

Image

Title

Properties

Button

ButtonCanvas1

Display Advanced

General

Text

Tutorial

Accessible label

No value

Visible

On

Behavior

Display mode

Edit

Size and position

Position

70 812

Size

210 43

Width height

Customer Queue

TELLERS

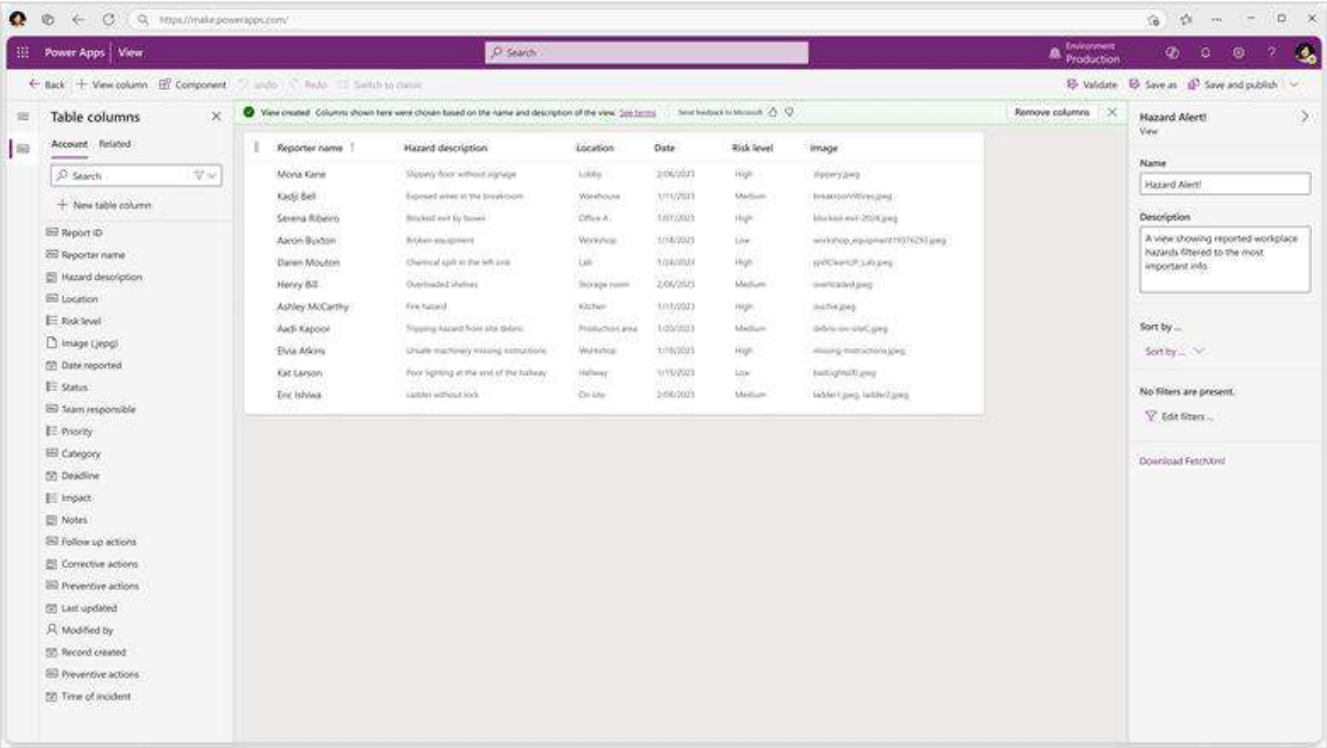
Match

Match

Power Apps - Copilot for Power Apps makers and users

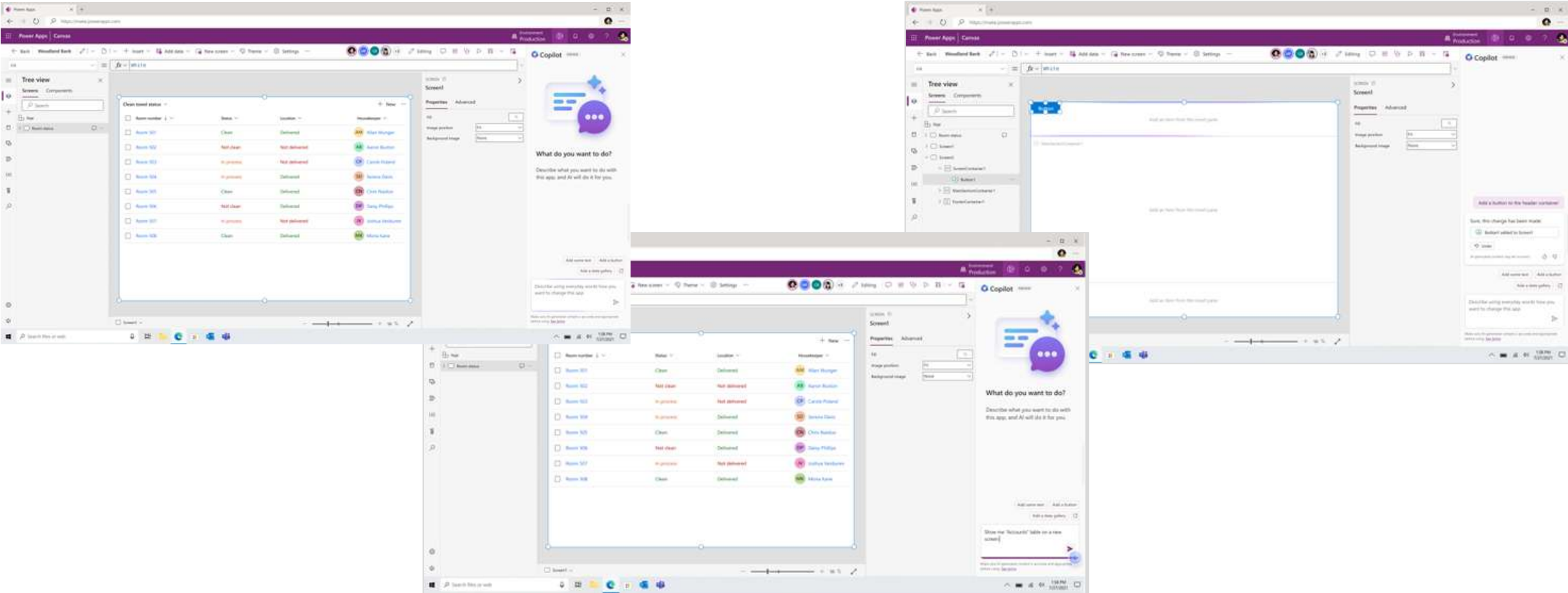


Item	N / U	Deadline	Benefits / Observations
Review column suggestions from Copilot in model-driven apps	Updated	Sep/2024	Copilot proactively suggests relevant columns for makers when they are building new forms and views for model-driven apps. This feature allows makers to get started quickly, helps increase their creativity, and lets them be more productive when building key components of their model-driven apps.
Visualize and work with complex data using copilot	Updated	Sep/2024	Makers will be able to create tables from scratch using various data sources including Excel files, SharePoint lists, or conversation with the assistance of copilot in the new data model visual editor. Multiple tables can be created at the same time with relationships set up leveraging smart inference capability of copilot. Created tables and relationships will be visualized in ERD (entity relationship diagram) view to help makers better understand the data model. Makers can also invoke copilot inline to create new tables, update schema, or seek for suggestions to improve their data model.



Power Apps - Copilot for Power Apps makers and users

Item	N / U	Deadline	Benefits / Observations
Use Copilot to build and edit apps in Power Apps Studio	Updated	Oct/2024	Since Copilot's release, there's been an increasing number of customers requesting the copilot feature to help build apps, particularly in areas like UI design and formula creation. In response to this demand, we've incorporated further capabilities to enable copilot to build apps based on natural language input. This will simplify the app development process and increase the chances of success.



Power Apps - Enable enterprise scale



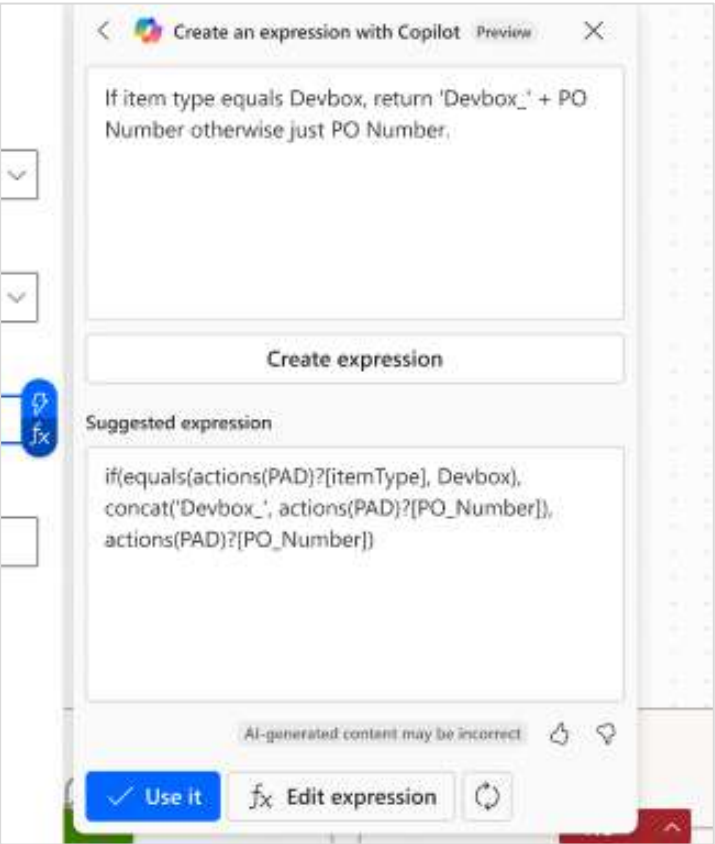
Item	N / U	Deadline	Benefits / Observations
Enhance delegation for Updatelf and Removelf		Oct/2024	Customers can ensure that their apps are more efficient and can execute actions that affect more than 500/2000 records correctly.
Manage your source code for canvas apps	Updated	Oct/2024	Developers can now view the underlying code to understand app functionality and source control and align with healthy and robust ALM practices allowing the app to scale at enterprise level.



Power Automate

Power Automate - Cloud flows

Item	N / U	Deadline	Benefits / Observations
Cloud flows are automatically defined in Dataverse solutions		Sep/2024	Cloud flows defined in Dataverse solutions simplify administration and application lifecycle for customers by allowing use of concepts like environment variables, connection references, solutions, and more. These also help deliver delightful maker experiences like drafts and publishing, versioning, and more.
Create a flow on a file in Teams	Updated	Sep/2024	This feature allows you to create a flow on a file in Teams using one of the templates that are available to be done to a file. You can also use AI to create your flow from scratch.
Create and edit expressions with Copilot		Sep/2024	Makers can create, edit, and fix their Power Automate expressions by invoking Copilot.



Power Automate - Cloud flows

Item	N / U	Deadline	Benefits / Observations
Mark input parameters in manual trigger with new options	New	Sep/2024	Makers can mark parameters in manual trigger as either optional, dropdown, or multi-select.
Receive intelligent license recommendations for admins	Updated	Sep/2024	This feature simplifies the license assignment process for admins and enables a governed self-serve mechanism for premium features access. Admins don't always know who needs a license and why. They need to understand which users are using Power Automate and require a premium license. They can rely on Power Automate intelligent license recommendations to provide them with a list of users who will benefit from having a premium license.

Manually trigger a flow

AA

Name

Please enter your input

AA

Family Name

Please enter your input

+ Add an input

Add a drop-down list of options

Add a multi-select list of options

☒ Make the field optional

Delete

Manually trigger a flow

AA

Name

Please enter your input

AA

Family Name

Please enter your input

+ Add an input

Manually trigger a flow

Parameters

Settings

Code View

About

AA

Input

Please enter your input

Delete

+ Add an input

Modern designer- No optional/dropdown/multiselect options for input parameters

Power Automate - Cloud flows

Item	N / U	Deadline	Benefits / Observations
Use undo and redo while you build cloud flows in the designer		Sep/2024	You can confidently build flows with Copilot, or experiment knowing that you can undo any of your actions.
Use your own encryption key for encrypting data at-rest for existing environments		Sep/2024	This capability allows you to meet your data and privacy policy according to your company's or industry's privacy guidelines.
View two action properties panes simultaneously		Sep/2024	Makers can view two action properties panes simultaneously, facilitating copying and moving values, comparing the properties across two actions, and taking a screenshot of the flow.
Use workflows on calendar events in Teams and Outlook	Updated	Oct/2024	You can boost productivity with calendar-related templates to get ideas for scenarios you might be interested in.
Connect to other environments from the Microsoft Dataverse connector	Updated	Nov/2024	Users can create flows that combine data and perform operations across different Microsoft Dataverse databases.
Monitor performance for cloud and desktop flow activities in Automation Center	Updated	Nov/2024	You can use a central consolidated view to monitor and understand the executions across cloud and desktop flows.
Be more productive with Power Automate and Excel desktop		Dec/2024	The new Automate work button in Excel Online makes it easier than ever to automate tasks and run processes from Excel running on Windows desktop and Mac devices. This allows users to automate repetitive tasks, reduce errors, and boost productivity with just a few clicks, all without leaving Excel, which makes it easy to respond to customers' needs and improves satisfaction.
Create Power Automate flows in Excel		Dec/2024	Makers can quickly create useful flows from the Automate tab in Excel. Excel is one of the most popular data tools in the world, with hundreds of millions of people using it for work and personal purposes across various industries. It has advanced features for teamwork, simplicity, flexibility, and automation. Power Automate simplifies the automation of tasks and processes from Excel.

Power Automate - Copilot for Power Automate



Item	N / U	Deadline	Benefits / Observations
Maximize your productivity with generative answers	Updated	Sep/2024	Copilot provides you with the ability to ask product related questions using natural language and receive prompt, precise answers, eliminating the need for time-consuming searches and waiting for support responses. This feature increases your productivity and allows you to have uninterrupted focus while developing your flows. Geographic areas: United States
Streamline workflow creation with the next best action		Sep/2024	A new AI-powered suggestion feature in Power Automate for desktop provides you with the next best action for your workflow creation, by constantly analyzing your workflow and suggesting the most appropriate action. By leveraging this feature, you can automate repetitive tasks quicker and more efficiently, thus freeing up time to focus on higher valued work. Geographic areas: United States
Transform scripting using AI-driven natural language		Sep/2024	You can enhance efficiency and save valuable time and resources by using natural language and AI to generate the code in the scripting actions in Power Automate for desktop. This added capability allows you to describe your desired scripts and have AI automatically generate the necessary code for you. By doing so, you can streamline your flows automation and reduce the time and the effort required to write code for simple tasks, such as running PowerShell, VB, CMD scripts or executing SQL statements. Geographic areas: United States
Use natural language to create a flow in Teams	Updated	Sep/2024	This feature helps you create a flow in Teams if the Workflows app doesn't have a template that fits your scenario. To use this feature, type in a prompt to describe what you want the flow to do, and then the feature generates your flow for you. You no longer need to start from scratch.
Generate flow description using AI	Updated	Dec/2024	You can now create a flow description by the press of a button without having to open the flow and read the actions inside it. Geographic areas: United States
Use Copilot to analyze automation activity	Updated	Dec/2024	Improve your monitoring story by simply asking the copilot in natural language about past flow runs, machines and other related data. This feature will provide advanced operational visibility, without the need to build and deploy custom reports with a predefined set of queries and reports. The copilot may derive insights you wouldn't have uncovered otherwise. Geographic areas: United States

Power Automate - Desktop flows

Item	N / U	Deadline	Benefits / Observations
Create a reusable collection of UI elements		Sep/2024	UI elements are now designed for central maintenance and can be distributed among various desktop flows, as well as among different users or teams. This centralization of UI element collections enhances management, allows for greater reusability, and ensures the dependability of UI elements tailored to specific applications within desktop flows.
Power Fx integration with Power Automate for desktop		Sep/2024	You can now create automation flows through scripting using Power Fx. Power Fx enables the full spectrum of development from no-code makers without any programming knowledge to pro-code for the professional developers. It enables diverse teams to collaborate and save time and effort.
Use CyberArk credentials in desktop flow connections	Updated	Sep/2024	You can now use credentials stored in CyberArk Central Credential Provider when connecting to Windows sessions on desktop flow machines.
Connect your own virtual network with hosted machine group	Updated	Nov/2024	Users can run desktop flows using a hosted machine group connected to their own virtual network (VNet) in order to execute RPA jobs that require access to on-premises networks.
Monitor, manage your automations and related assets	Updated	Dec/2024	The automation center provides comprehensive automation monitoring experiences across Power Automate flows, infused with the power of AI and Copilot. It provides in-depth monitoring and troubleshooting capabilities for both experienced makers and citizen developers, as well as members of the Center of Excellence.
Use Copilot to analyze cloud flow runs	Updated	Dec/2024	Copilot in automation center provides a multi-skill experience enabling users to ask questions about cloud flow and desktop flow activity, work queues, and even features of Power Automate. With Copilot, unlock a deeper understanding of cloud flow trends, statuses, and performance by simply asking questions in natural language.
Use Copilot to analyze desktop flow runs	Updated	Dec/2024	The automation center is available in the Power Automate portal and offers a comprehensive automation monitoring experience infused with the power of AI. Maximize efficiency and focus on high-impact desktop flow automation with Copilot's insightful analysis of desktop flow run history.

Power Automate - Desktop flows



Item	N / U	Deadline	Benefits / Observations
Use Copilot to analyze work queue data	Updated	Dec/2024	The automation center is available in the Power Automate portal and offers a comprehensive automation monitoring experience infused with the power of AI. With Copilot's ability to answer questions about work queue statuses and handling times, you can enhance processing throughput and resiliency as well as understand and prevent SLA breaches.
Use Copilot to ask Power Automate product questions	Updated	Dec/2024	Use Copilot's comprehensive understanding of Power Automate to explore new possibilities and potentially optimize your workflows. Boost your productivity by getting answers to your questions regarding features like conditions, approvals, and flow recovery.

Power Automate - Process mining



Item	N / U	Deadline	Benefits / Observations
Scale faster with Process Mining thin client app	Updated	Nov/2024	The current Power Automate Process Mining app requires you to download the process model to the client computer. This download puts specific requirements on the hardware resources on the client computer. To unblock your resources, you can use the Azure Process Intelligence Analytic Service instead. With this service, you can use a lightweight desktop app with a process intelligence engine without the need to download the process model. The functionality of the thin desktop application offers features that are identical to the previous full desktop app. This allows you to scale faster, it supports larger process models, and doesn't put specific requirements on your computers.



AI Builder

AI Builder - AI governance and administration



Item	N / U	Deadline	Benefits / Observations
Admins can enable or disable extension credits for AI Builder		Sep/2024	Admins can choose who can request credit extension in Power Platform admin center. In Tenant settings, admins can select if admins can request a credit extension, and separately, if makers can request a credit extension. This allows customers to better control how AI Builder credits are consumed.
Monitor usage of AI Builder models including GPT outputs		Sep/2024	Companies can monitor usage and performance of models with preconfigured monitoring reports. This facilitates the adoption of AI Builder in production scenarios.
Try out AI Builder with the Power Apps developer plan		Oct/2024	Try out AI Builder capabilities on developer environments before committing to AI capacity. You get 20,000 credits every month that you can use within your developer environment. This is a great way to explore the possibilities of AI Builder.

AI Builder - Extend copilot capabilities with AI



Item	N / U	Deadline	Benefits / Observations
Experience advanced options in prompt builder		Sep/2024	You can benefit from several advantages from using GPT-4: a larger context window, more current knowledge, and more capable reasoning. When you open prompt builder, you can adjust these settings, which allows you to get results that can meet your expectations with fewer attempts with various prompts.

AI Builder - Prompt builder



Item	N / U	Deadline	Benefits / Observations
Define GPT output formats in JSON with prompt builder		Sep/2024	Use GPT prompt builder to structure information in specific formats and go beyond basic text processing.
Add enterprise knowledge to GPT prompts with Dataverse	Updated	Nov/2024	Companies can couple their unique enterprise knowledge data with GPT requests, enabling makers to tailor GPT outputs for specific enterprise use cases. Makers can perform specific scenarios like data summarization and data classification leveraging GPT.



Copilot Studio

Copilot Studio - Speech and IVR



Item	N / U	Deadline	Benefits / Observations
Use IVR with Omnichannel for Customer Service		Oct/2024	Native voice integration in Microsoft Copilot Studio will dramatically improve the experience of building voice-enabled bots for customers using the voice channel in Omnichannel for Customer Service . Including voice responses and analysis in your bot can increase the ways your customers interact with your business. Voice integration can provide faster, more efficient resolutions to common questions, improving your deflection rate and customer satisfaction scores.



Dataverse

Dataverse - Build your low code hyperscale backend on Dataverse



Item	N / U	Deadline	Benefits / Observations
Enhance security by automating role compliance checks	Updated	Sep/2024	The security roles risk assessment tool enhances your business security by ensuring compliance with baseline policies. It automates risk detection, flags noncompliant roles, and provides options for role owners to adjust privileges or request custom profiles. This proactive approach safeguards sensitive data, reduces vulnerabilities, and ensures regulatory compliance, ultimately strengthening your business's security posture and operational efficiency.
Experience adaptive scalability for Power Platform data flows	Updated	Oct/2024	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.

Dataverse - Data workspace



Item	N / U	Deadline	Benefits / Observations
Assisted mapping for standard dataflows	Updated	Oct/2024	Ingest data into existing Microsoft Dataverse tables faster and with higher confidence by using the assisted mapping feature. The assisted mapping feature within standard dataflows uses AI to provide recommendations on which existing Dataverse table you should ingest your new data into. Once a table is selected, this feature also provides column mapping suggestions based on the semantic meaning of the column names and column data types. Lastly, it helps improve data quality through alerting the user to any column type mismatches prior to publishing the dataflow.
Build apps with insights in Fabric using virtual tables		Sep/2024	When you link Microsoft Dataverse to Microsoft Fabric, Dataverse data is available for you to work with Fabric tools. You can combine your data from Dynamics 365 and Dataverse with data in Fabric sourced from your own data warehouses, devices, sensors or linked from other clouds via shortcuts. You can not only join and aggregate, but also apply AI and machine learning to detect patterns and trends. Insights you find aren't useful unless you can drive action with those insights. Now, the insights you find in Fabric, such as KPIs and aggregated data are available back in Power Apps so that makers can build apps and act without having to make copies or use non-Microsoft tools.
Insights in Microsoft Fabric are available in Power Apps		Sep/2024	When you link Microsoft Dataverse to Microsoft Fabric, Dataverse data is available for you to work with Fabric tools. You can combine your data from Dynamics 365 and Dataverse with data in Microsoft Fabric sourced from your own data warehouses, devices, sensors or linked from other clouds using shortcuts. You can not only join, aggregate, but also apply AI and machine learning to detect patterns and trends. Insights you find aren't useful unless you can drive action with those insights. Now, the insights you find in Fabric, such as KPIs and aggregated data are available back in make.powerapps.com so that makers can build apps and act without having to make copies or use third party tools.
Maintain security role privileges for better ALM solution import		Sep/2024	Support the application lifecycle management process where security role privilege updates are honored after managed solution import.
Accelerate value with better email validation		Oct/2024	Makers can leverage more out of the data as an asset from the smarter data layer in Microsoft Dataverse. For example, when makers create a column using email data type in Dataverse, any model-driven apps and canvas apps using the email column will receive automatic validation, which is helpful in guiding end-users to enter better email data.

Dataverse - Data workspace



Item	N / U	Deadline	Benefits / Observations
Bypass business logic for hassle free migration	Updated	Oct/2024	By enabling this capability, IT admins, makers, or developers can bypass plug-ins at the request level prior to the migration start. So, you can rapidly migrate your data without having to deal with workflow execution.
Prevent data exfiltration with user level controls	Updated	Oct/2024	Data exfiltration protection by securing application access to an environment with user level controls. Granular control through security roles assignment where an app can be run by users who have the approved security role assignments. This allows certain groups of users to run pre-authorized apps in the environment.

Dataverse - Extend your copilots with knowledge and actions



Item	N / U	Deadline	Benefits / Observations
Enable copilot using Microsoft 365 substrate data		Sep/2024	Makers can build copilots that have Microsoft 365 substrate data as knowledge for more relevant and accurate grounded responses.
Enable management of plug-ins in Microsoft Copilot Studio	Updated	Oct/2024	Copilot Studio provides a one-place solution for building and extending Copilots from Microsoft and custom copilots. Makers can create plug-ins that can be published for various copilots.
Use Dataverse AI functions to enhance data quality	Updated	Dec/2024	Makers enhance the data quality so their users can efficiently process or respond to customer feedback and inquiries by using the generative AI functions in AI Builder, Power Apps, canvas apps, low-code plugins, Power Automate, and model-driven apps.

Dataverse - Improved enterprise experiences in Power Platform



Item	N / U	Deadline	Benefits / Observations
Restore deleted records within a specified timeframe	Updated	Dec/2024	Restore any deleted table records yourself. This saves you the engineering support and the wait time formerly needed to recover deleted record data.
Build faster with Power Platform catalog enhancements	Updated	Oct/2024	Customers can continue to publish and acquire more useful and organization specific templates from the catalog beyond just Power Apps and Power Automate, with embedded experiences in Copilot Studio as well as Power Pages. Usability updates for ratings and reviews to see quality of catalog items, and improved issue detection and remediation to provide visibility on submissions and acquisitions will continue to improve the experience for the catalog.



Governance and Administration

Governance and Administration - Application lifecycle management



Item	N / U	Deadline	Benefits / Observations
Associate dev environments in a default deployment pipeline	Updated	Oct/2024	Admins can instantly enable their makers within development environments to begin using a designated pipeline for scalable, healthy ALM.
Create or edit pipelines with the deployment hub		Nov/2024	Pipelines in Power Platform will no longer require the Deployment Pipeline Configuration model-driven app to set up and edit pipelines. All capabilities will be brought over to the Power Platform admin center and embedded in select maker portal experiences. Enabling in-product, pipeline management creates opportunities for greater customer adoption. Onboarding is extensively easier for organizations, since they won't have to install our current package to be ready to use pipelines. To edit pipelines or link additional developer environments, (for example, as part of environment routing) no one will have to leave the maker portal experience to configure a new stage in the model-driven app.

Governance and Administration - Enterprise scale administration



Item	N / U	Deadline	Benefits / Observations
Use a modern UI when using Access team templates	Updated	Dec/2024	Admins get to use a modern, updated user interface (UI) when using Access team templates in the Power Platform admin center. The updated UI meets accessibility standards and provides an intuitive experience.
Use the Power Platform for Admins connectors	New	Sep/2024	This new version of the management connector for administrators will always be at parity with the latest version of the Power Platform API . This way, customers can easily use the connector to manage their tenants and environments at scale without building software around our REST API.
Use management connector in Power Automate and Logic Apps		Oct/2024	This new version of the management connector for administrators will always be at parity with the latest version of the Power Platform API . This way, customers can easily use the connector to manage their tenants and environments at scale without building software around our REST API.

Governance and Administration - Licensing and capacity



Item	N / U	Deadline	Benefits / Observations
Monitor and manage copilot capacity	New	Sep/2024	This feature helps admins monitor and manage their copilot capacity. This includes ensuring compliance, optimizing investments, and adapting flexibly to fluctuating demands and market conditions.

Governance and Administration - Monitoring operational health



Item	N / U	Deadline	Benefits / Observations
Get insights into currency and storage consumption	Updated	Oct/2024	This feature helps admins to optimize their investments, ensure compliance with Microsoft licensing terms, and plan for any additional expenditures effectively.

Governance and Administration - Security and compliance

Item	N / U	Deadline	Benefits / Observations
Enhance network security with connectors		Sep/2024	With this feature, customers can enhance their risk mitigation approach by allowing Power Platform connectors to connect to private, endpoint-enabled resources in Azure or resources within their virtual network.
Instantly revoke users and enforce restrictions		Sep/2024	With this feature, you'll be able to revoke users instantly and enforce IP restrictions. This feature uses continuous access evaluation (CAE) while complying with Azure Active Directory (Azure AD), part of Microsoft Entra, identity policy for user revocation and conditional access IP enforcement policy.
Permit or deny guest access to an environment	Updated	Dec/2024	When this environment setting is configured by an admin, guests can be stopped from establishing connections to data sources in that environment, prevented from performing any maker actions, and stopped from using any apps or flows that were shared to them. This security is implemented within the Power Platform admin center without having to use controls like conditional access or continuous access evaluation.
Share system views with security role	Updated	Nov/2024	Using role-based views simplifies the usability of a business line app when multiple users with different needs are introduced. For example, team leads or supervisors working in the case table have different system view needs than a case service rep. Standard system views like My Cases and My Cases Closed Today, just create clutter for the supervisors. So, multiple apps are being created for a cleaner experience.
Turn sharing off for Microsoft Copilot Studio	New	Oct/2024	Sharing limits is a new type of guardrail only available in Managed Environments. This feature lets admins turn off sharing so that a maker can't share their Copilot with an individual or a security group. This feature can be applied at the Managed Environment-level, in addition to being applied as a rule to an environment group.
Turn sharing off for solution-aware cloud flows		Sep/2024	Sharing limits is a new type of guardrail only available in Managed Environments. This feature lets admins turn off sharing so that a maker can't make an individual or security group a co-owner on a flow. This feature can be applied at the Managed Environment-level, in addition to being applied as a rule to an environment group.
Enhance shared access signature calls to include IP restrictions	Updated	Oct/2024	With this feature, customers can enhance their security for shared access signature calls by restricting usage of these calls with IP restrictions that are configurable in the Power Platform admin center.

Governance and Administration - Security and compliance

Item	N / U	Deadline	Benefits / Observations
Monitor and protect data with Microsoft Purview		Oct/2024	Microsoft Dataverse customers can monitor data, protect information, minimize compliance risks, and meet regulatory requirements in a unified experience powered by Microsoft Purview.
Manage security posture in Power Platform admin center	Updated	Nov/2024	Power Platform security configurations will be easy to discover and use with clear guidance and insights in the main admin workflows.
Use managed identities for Dataverse plug-ins	Updated	Nov/2024	Power Platform managed identities allow publishers of Dataverse plug-ins to securely connect to Azure resources without having to store or expose credentials. Managed identities eliminate the need for developers to manage these credentials.

Governance and Administration - Unified experience for Power Platform and finance and operations apps

Item	N / U	Deadline	Benefits / Observations
Back up and restore unified environments		Sep/2024	This feature provides backup and restore capabilities for your organization. This helps you protect your organization's data in case of a power outage or other disruptions.
Convert sandbox to production for unified environments	Updated	Dec/2024	By leveraging a single command and API, customers can seamlessly transition their entire environment, including Dataverse, customer engagement-based, and ERP-based applications, from sandbox to production. This streamlined process enhances operational efficiency and reduces downtime during critical go live activities.
Deploy and manage unified production environments	Updated	Dec/2024	Customers can now manage their production environments as part of a unified experience in Power Platform admin center for all Dynamics 365 apps.
Deploy and manage unified sandbox environments	Updated	Dec/2024	Customers can now manage their sandbox environments as part of a unified experience in Power Platform admin center for all Dynamics 365 apps. This provides a consistent and single set of lifecycle operations that an admin can perform across all their artifacts.

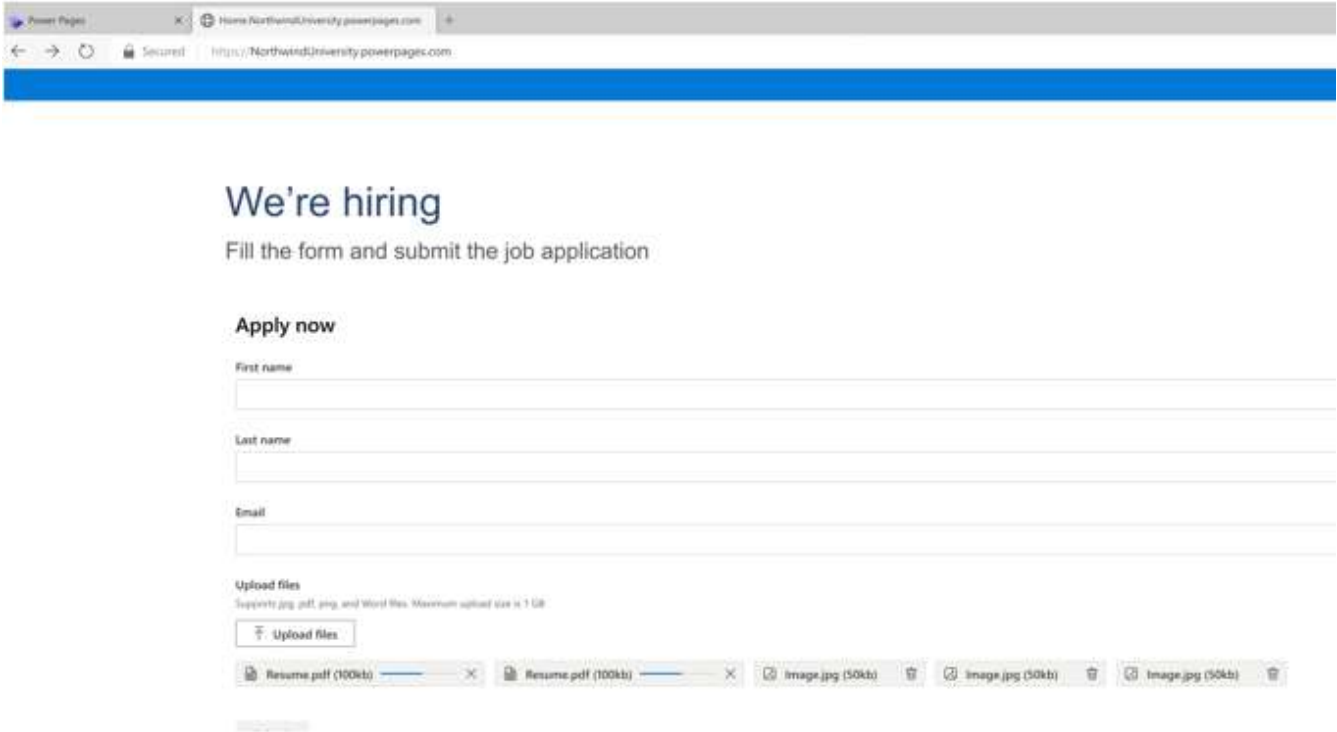


Power Pages

Power Pages - Design studio



Item	N / U	Deadline	Benefits / Observations
Upload files up to 10 GB in Microsoft Azure Blob Storage with Power Pages	Updated	Jul/2024	One of the biggest requests from our customers was to increase the file size limit. Businesses can now take advantage of expanded file size limits for uploads. End users can now enjoy smooth file upload experiences in addition to large file support.



Power Pages – Power Pages Copilot



Item	N / U	Deadline	Benefits / Observations
Site copilot for website users	Updated	Jul/2024	Site copilot, a generative answers chatbot, allows site users to ask questions and get conversational answers grounded in the website's structured (data and schema) and unstructured (multi-line text) content immediately based on their access permissions.

Power Pages – Professional developer experiences



Item	N / U	Deadline	Benefits / Observations
Use Site Checker from Microsoft Power Platform CLI		Aug/2024	This feature allows pro-developers to run Power Pages Site Checker from Microsoft Power Platform CLI, allowing them to identify potential issues and fix them before they release the site.

Power Pages – Administration and governance



Item	N / U	Deadline	Benefits / Observations
Use the security view to see critical site details	Updated	Sep/2024	Admins can get a view of the security posture of all their websites in the tenant and take appropriate actions, such as disabling certain integrations where needed or reaching out to makers to improve site security by using the right configurations.

Site with integrations		
Integrations	Sites	Action
Power BI visualization	10	Review
SharePoint	6	Review
Power BI embedded service	5	Review

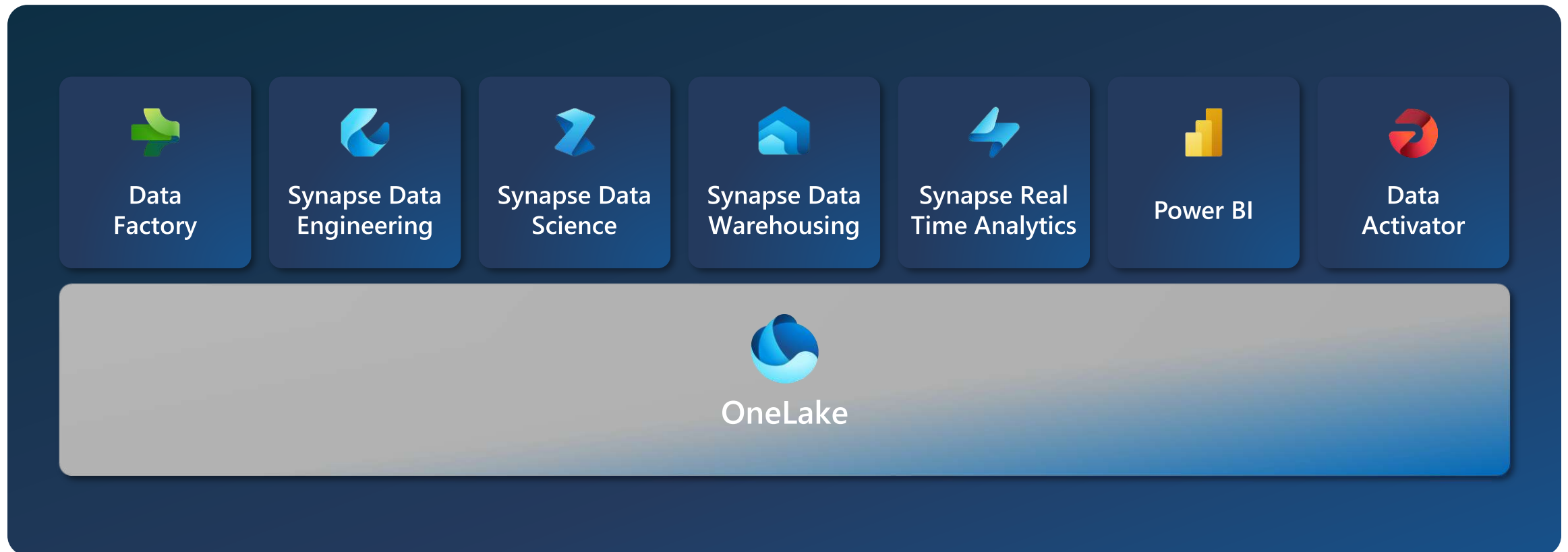


Microsoft Fabric

Microsoft Fabric

The unified data platform for the era of AI

Microsoft Fabric offers a unified suite of analytical experiences that streamline data management. It enables you to use your data for a competitive advantage today and prepare for future AI innovations. Microsoft Fabric offers data factory, data engineering, data warehousing, data science, real-time intelligence, and business intelligence, all on a lake-centric SaaS platform for simplified analytics. Your teams can instantly process, analyze, and collaborate with data without having to focus on configuration or management of the underlying infrastructure. Fabric's open foundation with built-in governance enables you to connect to various clouds and tools while maintaining data trust. Microsoft Fabric also provides transparent cost control to optimize expenses.



Microsoft Fabric



Item	N / U	Deadline	Benefits / Observations
Admin and Governance: Usage and adoption in admin monitoring		Q4 2024	Fabric tenant administrators need access to detailed audit logs and summarized views, to track usage and adoption growth, support audits, and ensure compliance. Analytical views built on the audit logs can help you understand user actions. You can govern Fabric by identifying specific trends, patterns, and activities.
OneLake: OneLake data access roles general availability		Q4 2024	OneLake data access roles build upon the existing capabilities of OneLake's security model to increase the granularity at which security can be applied within a Fabric data item. This feature adds an inheritable RBAC (role-based access control) model that simplifies user and permissions management for data in OneLake. You can define security roles that grant read access to specific folders in OneLake and assign them to users or groups. The access permissions determine what folders users see when accessing the lake view of the data, either through the lakehouse UX, notebooks, or OneLake APIs.
Fabric UI/shared experiences: Fabric APIs Phase II		Q3 2024	In line with Fabric alignment, we are finalizing the public APIs for the Deployment pipelines on the Fabric platform, following the initial batch of APIs released in May 2024. While the May release provided the ability to retrieve existing deployment pipeline details and stages, the upcoming release will introduce APIs for their modification, workspace addition/removal, access control, and administrative tasks.
Fabric UI/shared experiences: Add job capacity information in Monitor Hub		Q3 2024	Capacity plays a signification role on Fabric for customer billing. The capacity would be a common column for all the item types.
Synapse Data Engineering: High concurrency in pipelines		Q3 2024	In addition to high concurrency in notebooks, we'll also enable high concurrency in pipelines. This capability will allow you to run multiple notebooks in a pipeline with a single session.
Synapse Data Engineering: Public monitoring APIs		Q4 2024	The public monitoring APIs would allow you to programmatically retrieve the status of Spark jobs, job summaries, and the corresponding driver and executor logs.
Synapse Data Science: Copilot for Data Science and Data Engineering		Q3 2024	This feature is designed to improve productivity of users in Notebooks, looking to apply data science or data engineering tasks. With a number of new improvements in this release, we aim to help users in Microsoft Fabric notebooks to get even more value from Copilot and get started using Coplot with more ease.

Item	N / U	Deadline	Benefits / Observations
Data Factory: Copilot for Data Factory (Dataflow)		Q3 2024	Copilot for Data Factory (Dataflow) empowers customers to express their requirements using natural language when creating data integration solutions with Dataflows Gen2.
Data Factory: Fast Copy support in Dataflow Gen2		Q3 2024	We're adding support for large-scale data ingestion directly within the Dataflow Gen2 experience, utilizing the pipelines Copy Activity capability. This enhancement significantly scales up the data processing capacity of Dataflow Gen2 providing high-scale ELT (Extract-Load-Transform) capabilities.



Power BI

Item	N / U	Deadline	Benefits / Observations
Deliver subscriptions to a OneDrive and SharePoint location		Q3 2024	With the ability to deliver Power BI and paginated report subscriptions to a OneDrive or SharePoint location, users can now view reports that are too large to be delivered to their inboxes. Accessing these reports from OneDrive or SharePoint locations makes finding reports easy too. Users can also keep all the historical reports that they need.
Copilot for measure descriptions		Q3 2024	Use Fabric Copilot for Power BI to create descriptions for your semantic model measures. The description property is important documentation for your measures, as only the measure name and description are available to those who are making reports from your semantic model. Fabric Copilot can make your semantic model documentation easier by generating measure descriptions for you. This is when you create the measure and when you update the DAX formula of a measure, at each stage Copilot can quickly generate or update the measure description, helping you maintain your documentation and maintaining your workflow.
Copilot for DAX query generation		Q3 2024	DAX query authors can use Copilot for DAX query generation to write, edit, or explain DAX queries on their model data. Ask what data you want to see returned and Copilot will give you the DAX query. Copilot can also be used to add a column or formatting to an existing DAX query, even finding the column in your data. Finally, Copilot can explain what a DAX query is doing or tell you more about specific DAX functions. This is a huge productivity boost in authoring DAX queries.
Customize content access request messages for Power BI organizational apps		Q4 2024	This feature will allow setting a custom entry point for each Power BI organizational app to an organization's internal access management system from Power BI Access Request messages. This feature will be especially useful for organizations that rely on security groups to control access to content.

Thank you!



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