

Welcome to **What's new in Microsoft 2025 Release Wave 1**

Thursday, 27th March 2025

We will kick off shortly

Item	N / U	Deadline	Benefits / Observations
Exchange integration for relationship intelligence		Abr/2025	Effective April 2025, the native Exchange integration for relationship intelligence is deprecated. If you want Dynamics 365 Sales to use emails and meetings from Exchange to generate insights, enable server-side synchronization for Exchange . Otherwise, insights are generated only using emails and data stored in Dynamics 365.
Copilot for email in side pane		Jan/2025	Effective January 2025 (app/solution version 9.2.24124.0010), composing and sending email using Copilot side pane isn't supported and is being removed in a phased manner. This effects the users who have enabled the email copilot preview. However, you can use the Copilot email assist feature to compose and send emails through the rich text editor .
Case and knowledge suggestions in smart assist are deprecated		Jun/2025	Starting June 02, 2025, we'll no longer support case and knowledge suggestions via smart assist in Customer Service. We recommend that you make Copilot available to your customer service representatives .
Customer Service Hub app to be removed for new organizations with Enterprise licenses in February 2025		Feb/2025	Effective February 2025, the Customer Service Hub app will no longer be available for all new organizations with Enterprise licenses. We'll continue to support the application for all existing organizations and new customers with license types other than Enterprise (for example, Customer Service Professional licenses). We recommend that existing customers migrate to Customer Service workspace. More information: Migrate to Customer Service workspace from removed or deprecated apps
Dynamics 365 Field Service Plugin for Microsoft Copilot (Teams app) - January 15, 2025		Jan/2025	The Dynamics 365 Field Service Plugin for Microsoft Copilot is no longer available after January 15 for users of the Field Service app in Microsoft Teams. You can use Copilot in Field Service through the side pane chat , which doesn't require extra licenses, to chat about work order information.
Deprecation of Train with examples to transform examples to Power Fx formulas		Feb/2025	Effective February 19, 2025, the Train with examples feature to transform examples to Power Fx formulas is deprecated and no longer supported. We recommend using Transform natural language to Power Fx formulas .
Deprecation of Snowflake connector [Deprecated]		May/2025	The Snowflake (Deprecated) connector will be discontinued on May 26, 2025. A new and improved version with additional features is now available. For more details, visit the new Snowflake (Preview) connector reference article. We strongly encourage you to switch soon to take advantage of the upgrades.
Deprecation of Ask a virtual agent		Mar/2025	Effective March 11, 2025, the Ask a virtual agent feature in Power Apps is deprecated and no longer supported. We recommend using Copilot in Power Apps for assistance when creating an app. For general help in Power Apps, select Help (question mark icon in the upper right) > Support > Problem.
Deprecation of bring-your-own-key (BYOK) Dataverse service		Jan/2026	Starting January 6, 2026, we will discontinue support for the bring-your-own-key (BYOK) feature. Customers are encouraged to transition to customer-managed keys (CMK) , an enhanced solution that offers improved functionality, broader support for data sources, and better performance.



What's new in Dynamics 365 CE



Sales

Sales updates 1/2



Item	N / U	Deadline	Benefits / Observations
Integrate with Exchange using server-side-synchronization	New	Feb/2025	We are upgrading our Exchange infrastructure to enhance support for Dynamics 365 Sales Premium features such as Relationship analytics and Who knows whom. With this release, Exchange data integration will shift to server-side synchronization (SSS), enabling more granular control over email sync settings. This boosts reliability and provides users with greater flexibility in managing the timing and scope of their email synchronization.
Stay updated with action items from customer conversations	New	Mar/2025	Sellers often juggle multiple leads and opportunities, making it challenging to stay organized and respond to various customer requests. This complexity can lead to missed follow-ups and delays in the sales process, ultimately hindering their ability to close deals. Our latest update addresses these issues by automatically capturing essential follow-up actions from conversations. By suggesting next steps such as sending emails or scheduling meetings, it empowers sellers to focus on engaging with customers rather than managing tasks. This increased efficiency enhances productivity and fosters a smoother sales process, allowing sellers to meet customer expectations more effectively.
Maximize sales performance with the most impactful work	New	Mar/2025	This feature directly addresses these issues by surfacing the most impactful leads within the seller's workflow, explaining the reasoning behind prioritization, and providing the next best action. This streamlined process enhances lead qualification and empowers sales teams to execute necessary actions efficiently, improving overall sales performance and increasing the likelihood of meeting targets.
Boost qualified pipeline with sales qualification agent	Updated	Mar/2025	The sales qualification agent in Dynamics 365 Sales now eliminates the human toil by autonomously researching information about every lead from CRM data and public web sources, making a recommendation on whether that lead should be qualified and pregenerating an email with highly personalized talking points to grab the prospect's attention. To ensure that you never miss the best moves to build a qualified pipeline, the agent surfaces the most important actions you should take on your leads in a new UI that follows you across lead and opportunity grids. With the agent, you can now spend more time meeting customers and less time triaging leads.
Boost response rate by automating follow-up communications	New	Apr/2025	Sellers know that sending follow-up emails significantly increases their chance of getting a reply, booking a meeting, and accurately qualifying a lead. However, they often miss out on follow-ups due to insufficient time, competing tasks, lack of a reminder, and so on. The sales qualification agent automates follow-ups with leads, nudging if there is no response, reminding if they're out of the office, and facilitating a meeting when positive intent is detected.

Sales updates 2/2



Item	N / U	Deadline	Benefits / Observations
Expand qualified pipeline with leads from service interactions	New	Apr/2025	The sales qualification agent in Dynamics 365 Sales bridges this gap by automatically identifying new leads from existing accounts and customers by aggregating their service interactions and case history. For example, a customer reaching out to support after hitting a service limit could indicate a need for an upgrade, or frequent inquiries about a premium feature might signal interest in an upsell. By leveraging these insights, you can drive revenue growth and strengthen customer relationships.
Increase pipeline quality with intent-to-buy analysis	New	Apr/2025	With the support of the sales qualification agent, sellers can automate this task of reading each reply and classifying the intent. The agent can parse replies to automatically identify budget, need, timing, or other purchase criteria and separate out support queries to redirect to your support teams. This allows sellers to act swiftly on warm leads while ensuring the leads that are low on purchasing intent are automatically routed to the right marketing nurture or customer support channels, optimizing both the seller's time and the customer's experience.
Provide your own tone of voice across all email communications	New	Apr/2025	Sellers have their own tried-and-true selling techniques, including a unique tone of voice to use in email outreach to leads. This is important to improve email engagement from leads because it allows sellers to personalize outreach with an effective tone that differentiates them from other sellers. The sales qualification agent will now generate emails in the seller's own tone of voice, so they draft more consistent communications that lead to better response rates and qualification outcomes.
Improve qualification rate by grounding agent in external data sources	New	Apr/2025	You can now fine-tune the sales qualification agent by defining custom instructions that mimic the intuition of the best sellers on your team. Enable the Sales qualification agent to make more informed qualification and prioritization decisions by configuring it to use external data sources. While much of this information comes from CRM data, key insights can come from outside the CRM—proprietary tools, public web resources, SharePoint files or internal data estates. By tailoring the agent to your specific data needs, your sellers gain quick access to the insights that matter most, enabling them to spend less time on research and more time engaging in high-value conversations that drive meaningful results.



Copilot for Sales

Ex Sales Copilot

Copilot for Sales 1/2

Item	N / U	Deadline	Benefits / Observations
Improve seller efficiency through digest of meetings and action shortcuts	New	May/2025	<p>This digest will help you save time and effort by compiling a summary of all recent meetings with action items and shortcuts to high value actions such as saving notes to the CRM system, updating CRM entries, and more. You can use this digest to update the CRM system and complete meeting follow-ups, instead of going meeting-by-meeting on your calendar.</p> <p>The digest will:</p> <ul style="list-style-type: none">- Include a brief summary of each meeting and a link to the recap and recording.- Provide shortcuts to actions such as creating follow-up tasks and saving meeting notes to the CRM system for each meeting.- Highlight meetings that you missed where you were mentioned by name.
Use Salesforce record types in Copilot for Sales	New	Jun/2025	<p>Adapt the Microsoft 365 Copilot for Sales forms experience for different users and different situations using the same record types configured in Salesforce. You won't have to see fields and picklist values that aren't relevant to you, thereby streamlining data entry, improving data quality, and increasing the efficiency and productivity when working to create, view, and edit objects.</p>
Easily save meetings notes to CRM following Teams meetings	New	Mar/2025	<p>update your CRM directly from the post-meeting Microsoft Teams recap page. Select the Sales button to see sales-related insights. Select Save to CRM to update your CRM by performing the following actions:</p> <ul style="list-style-type: none">- Save the AI-generated meeting summary directly to CRM. You can review and edit the summary prior to saving.- Link the meeting summary to an out-of-the-box entity or custom entity of your choice. <p>Meeting summaries are saved to the description field of the appointment in CRM for the sales team to access.</p>
Extend email drafts with file links from third-party systems	Updated	Mar/2025	<p>By providing the capability to add content from third-party systems, you can add the relevant file links from external systems with the capability of the connector plugin without having to navigate to these systems for content.</p>

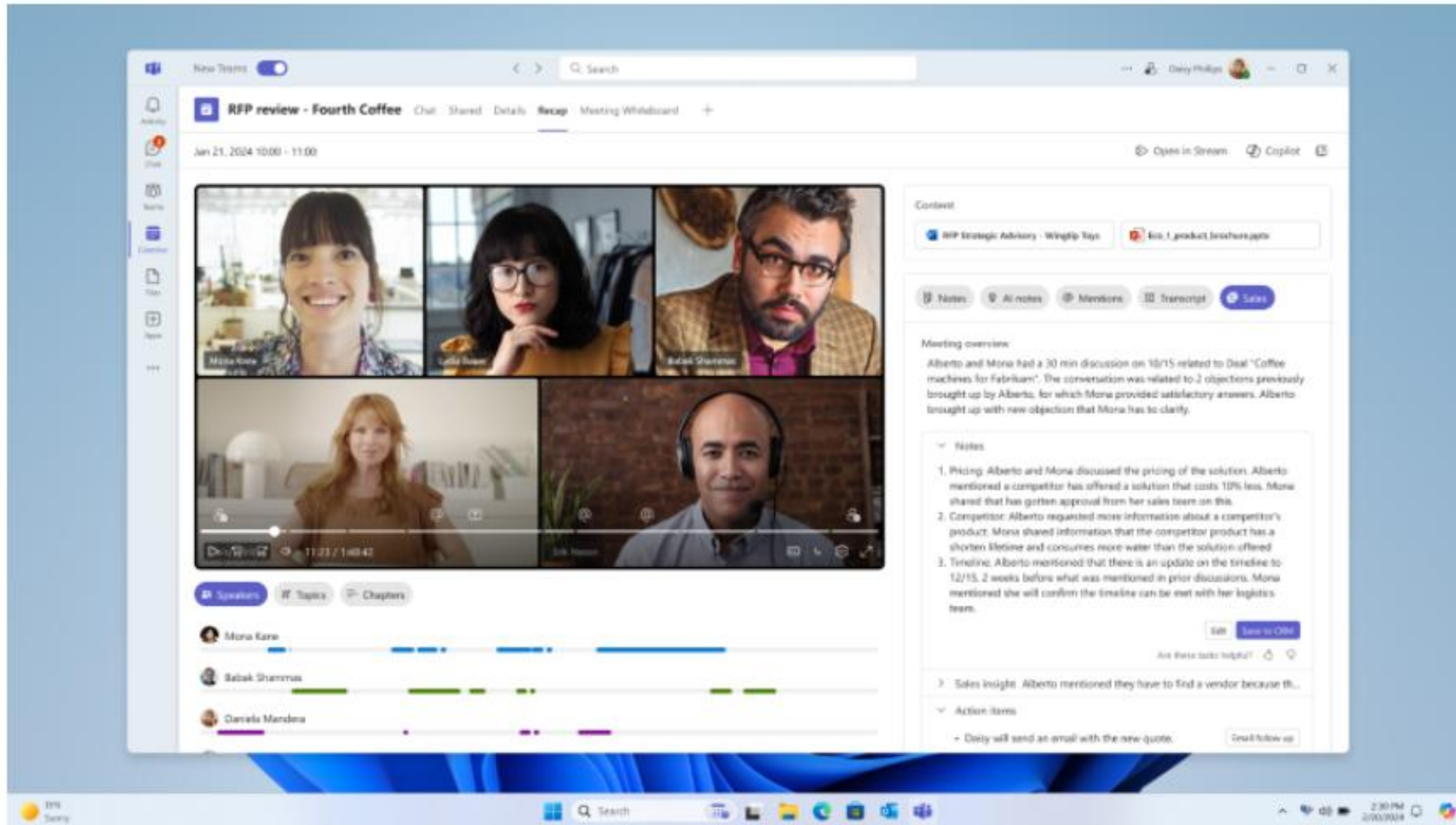
Copilot for Sales - 2/2



Item	N / U	Deadline	Benefits / Observations
Experience streamlined insights with focused cards for improved navigation and usability	New	Jun/2025	Insights should be presented in a way that's easy to navigate with minimal wasted time so you can quickly use the insights and focus on meaningful next best actions to achieve sales goals. With this feature, you can experience value the moment you start navigating through focused cards with minimal clutter, which streamline your workflow and make it easier to find the information you need. By simplifying navigation and enhancing usability, this feature saves you time, reduces effort, and allows you to focus on making informed decisions faster.
Share records when composing emails in Outlook	Updated	Jan/2025	You will be able to leverage the existing Outlook forward slash (/) support to show a dialog box with recently used Copilot for Sales CRM records. As you interact with Copilot for Sales, those records will be added to the available list to be shown within Outlook emails for quick access. Once selected, a rich adaptive card shows the CRM record information for quick access.
Prepare for meetings with Copilot for Sales meeting prep agent	Updated	Mar/2025	With Copilot for Sales, you can now receive tailored insights for each type of meeting. This way you can prepare quickly and effectively for any situation. Copilot for Sales provides the following tailored insights: <ul style="list-style-type: none">- Profile updates: For initial interactions with a customer, Copilot for Sales provides insights tailored to the customer's profile, account, and qualification criteria.- Deal-related insight: When engaging with a customer with an open opportunity, Copilot for Sales provides insights related to objections, pending action items, and the key stakeholders needed to accelerate the deal.

Copilot for Sales – Copilot Agents

Copilot for Sales meeting recap



The screenshot displays a Microsoft Teams meeting interface for a meeting titled "RFP review - Fourth Coffee" held on Jan 21, 2024, from 10:00 to 11:00. The interface includes a video gallery with five participants: Mona Kane, Babak Shamsi, Daniela Mendez, and two other individuals. A "Copilot" button is visible in the top right corner of the meeting window. The right-hand pane shows a meeting recap with the following content:

Context

- RFP Strategic Advisory - Wrigley Toys
- File: product_brochure.pdf

Notes

- All notes
- Members
- Transcript
- Sales

Meeting overview

Alberto and Mona had a 30 min discussion on 10/15 related to Deal "Coffee machines for Fabrikam". The conversation was related to 2 objections previously brought up by Alberto, for which Mona provided satisfactory answers. Alberto brought up with new objection that Mona has to clarify.

Notes

- Pricing:** Alberto and Mona discussed the pricing of the solution. Alberto mentioned a competitor has offered a solution that costs 10% less. Mona shared that has gotten approval from her sales team on this.
- Competitor:** Alberto requested more information about a competitor's product. Mona shared information that the competitor product has a shorter lifetime and consumes more water than the solution offered.
- Timeline:** Alberto mentioned that there is an update on the timeline to 12/15, 2 weeks before what was mentioned in prior discussions. Mona mentioned she will confirm the timeline can be met with her logistics team.

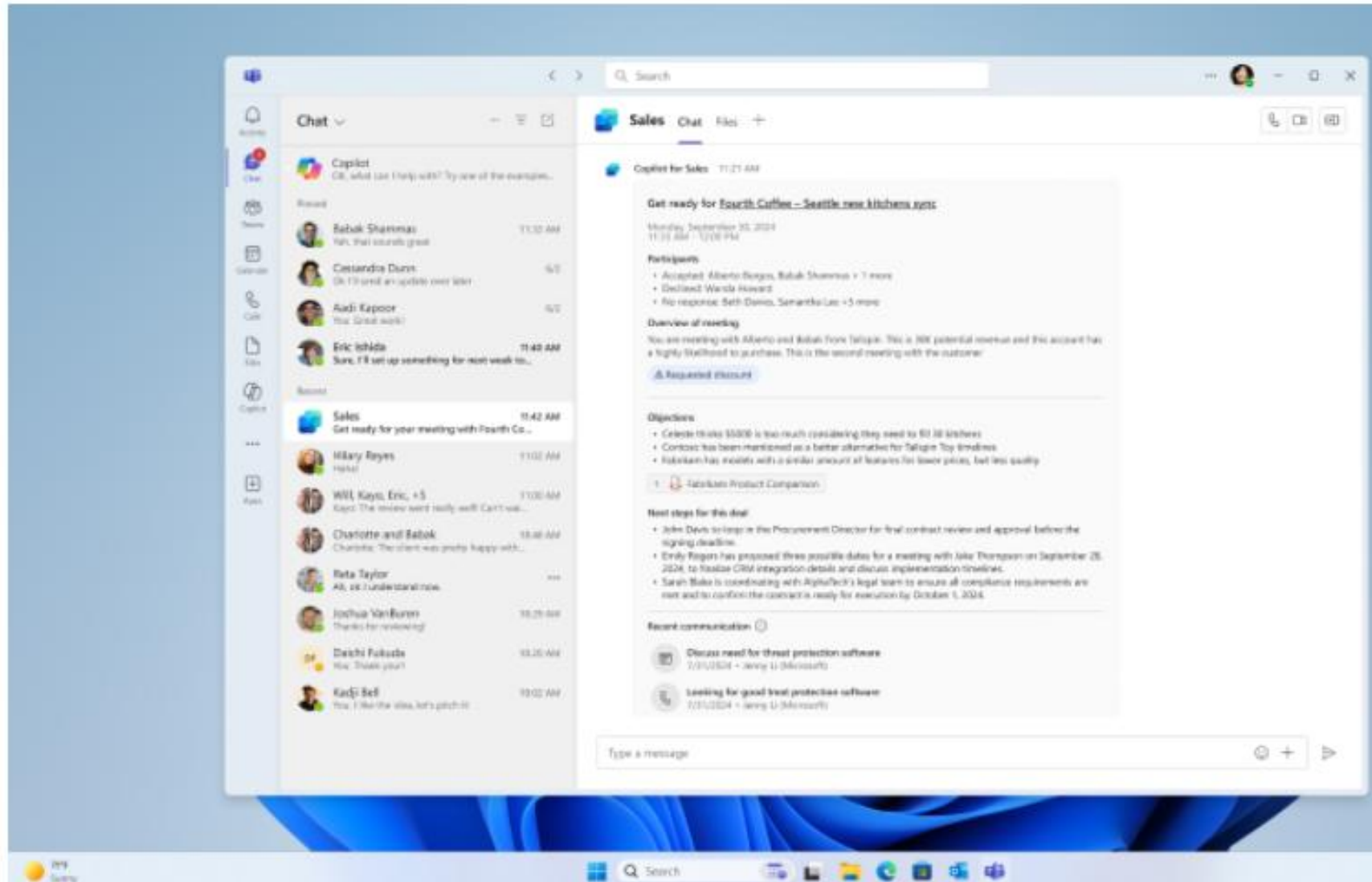
Sales insight: Alberto mentioned they have to find a vendor because th...

Action items

- Daily will send an email with the new quote. [Go to follow up](#)

Copilot for Sales – Copilot Agents

Copilot for Sales meeting prep





Customer Insights - Data

Customer Insights - Copilot and AI innovation



Item	N / U	Deadline	Benefits / Observations
Get responses grounded in customer insights when chatting with Copilot	New	Jul/2025	With Copilot, accessing rich insights about a lead or contact from Customer Insights - Data, like predicted lifetime value, propensity to buy, recent transactions, and interactions, becomes effortless. Agents and sellers can simply ask Copilot for information about specific customers directly in the flow of their work, gaining instant access to relevant data. Even if they're unsure of what data is available or how to discover it, Copilot provides immediate, seamless access, empowering teams to engage more effectively.
Accelerate time to insights with data in Delta Lake format	Updated	Jun/2025	With native support for the Delta Lake data format in Customer Insights - Data, you can now accelerate the time to unify customer data by processing just the incremental changes to your data, allowing you to get results quicker and engage customers with the most up-to-date and timely insights.
Filter rows and columns from source data for better processing	Updated	Jun/2025	Customer Insights - Data allows you to apply row and column filters directly to any source table you ingest, reducing the data scope to just what you need. Filters are applied once on the Tables page, where source tables are separated from output. Select the row or column filter link for any table and set the filters. These filtered tables will then be used across all processes in Customer Insights - Data, including unification, segments, measures, activities, and predictive models.
Target right audience based on signals from earlier campaigns	Updated	Jun/2025	This enables, for example, marketers to generate a segment of loyal customers, based on high predicted lifetime value scores and a high marketing engagement rate. Similarly, sales representatives can gain more accurate insights into purchase intent based on engagement data from current campaigns. Finally, you can easily accomplish retargeting scenarios, advertising to customers on major platforms if they don't engage with your messages, consequently increasing their conversion rates.



Customer Insights - Journey

Customer Insights - Copilot and AI innovation



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Get responses grounded in customer insights when chatting with Copilot	New	Jul/2025	With Copilot, accessing rich insights about a lead or contact from Customer Insights - Data, like predicted lifetime value, propensity to buy, recent transactions, and interactions, becomes effortless. Agents and sellers can simply ask Copilot for information about specific customers directly in the flow of their work, gaining instant access to relevant data. Even if they're unsure of what data is available or how to discover it, Copilot provides immediate, seamless access, empowering teams to engage more effectively.
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Customer Insights - Journey

Customer Insights updates 1/2



Item	N / U	Deadline	Benefits / Observations
Create journeys by using Copilot to describe them	Updated	Apr/2025	<p>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.</p>
Allow individuals to reenter a one-time, dynamic segment journey	Updated	Apr/2025	<p>When marketers design a one-time journey, there's now a checkbox they can select if they want audience members to be able to go through the journey more than once if the audience member qualifies for that lifecycle state multiple times.</p> <p>Prior to this feature, audience members who had been through a one-time journey were deliberately blocked from going through it again. Marketers want the option to allow audience members to repeat a journey if they qualify for its dynamic segment more than once.</p>
Export your data to your own storage for custom reporting	Updated	Apr/2025	<p>Now, in real-time journeys, you can export your Customer Insights - Journeys data to your own storage solution without requiring Fabric, empowering you to conduct custom reporting and analysis that aligns with your existing systems.</p> <p>With data export, you can:</p> <ul style="list-style-type: none"> - Export engagement data, such as email openings, clicks, and bounces from Customer Insights - Journeys. - Securely export Customer Insights - Journeys interaction data directly to your preferred storage. - Use the exported data with your existing reporting systems to create custom reports.
Get insights on email engagement with heatmap analytics	Updated	May/2025	<p>Real-time journeys email insights now offer a clear view of your audience's preferences by illustrating their interactions within your emails. This immediate visual feedback highlights the content that resonates the most, empowering you to adjust your messaging for heightened impact and better conversion rates.</p> <p>Deep-dive into customer interactions with actionable insights that you can leverage to refine your email strategy. Tweak content placement, layout, and design to elevate user engagement:</p> <ul style="list-style-type: none"> - Get a fast and visual way to understand engagement based on your email design. - Understand which email area and links get the most and the least engagement by viewing the click-through rate (CTR), total clicks, and unique clicks. - Filter the heat map based on the email version, journey version, and date.

Customer Insights updates 2/2



Item	N / U	Deadline	Benefits / Observations
Pause and resume journeys to handle unplanned events	New	Apr/2025	Instead of stopping a campaign and adjusting the audience to exclude previously reached customers, you can now pause and resume journeys, allowing you to manage unplanned situations easily and stress-free.
Respect quiet times, engage based on location and time zones	New	Apr/2025	Now in Customer Insights - Journeys, in addition to setting quiet times based on your journey's time zone, you can align quiet times with your customers' time zones and regions, ensuring that they only receive messages and calls during suitable hours. Aligning interactions with local time allows you to adhere to local regulations and respect cultural norms and preferences, fostering customer trust and enhancing the effectiveness of your outreach strategies.
Wait on segment membership to trigger next step in a journey	Updated	Apr/2025	<p>Gain even more control over your customers' experience by waiting for them to become a member of a segment before continuing to the next steps in a journey. This added capability lets you personalize each customer's experience by choosing the correct path and actions relevant to individual customers based on whether they're in a segment. This capability adds to existing if/then capabilities that let you wait for a customer to open an email, click a link, or wait for another trigger to be activated before moving on to the next step in the journey.</p> <p>Create journeys that wait until a customer becomes part of a segment before continuing to the next steps in the journey:</p> <ul style="list-style-type: none">- Choose a segment as the condition for an if/then branching step.- Set the amount of time you want to wait for the customer to become a member of the segment before continuing.- Choose which actions to take if the customer is or is not a member of the segment.
Automate seamless handoffs between marketing and sales	Updated	Apr/2025	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.
Collect extra customer info without updating your data model	Updated	May/2025	Easily gather additional information about your customers by creating any kind of question directly in the form editor without the need to create new custom attributes for your lead or contact entity. For example, you can create fields to ask, "What is your meal preference?" or create contest questions to increase your customer satisfaction and retention.

Customer Insights - Copilot and AI innovation

Create journey with Copilot PROVIDE



You can describe the journey you want to create in the text box. Or try one of these examples to get started


- When a contact registers marketing event, send them reminder emails until they check in the event.
- Targeting the loyalty members, send a promotion email and follow up based on email link clicked.

[See more examples](#)

Describe your customer journey in everyday words

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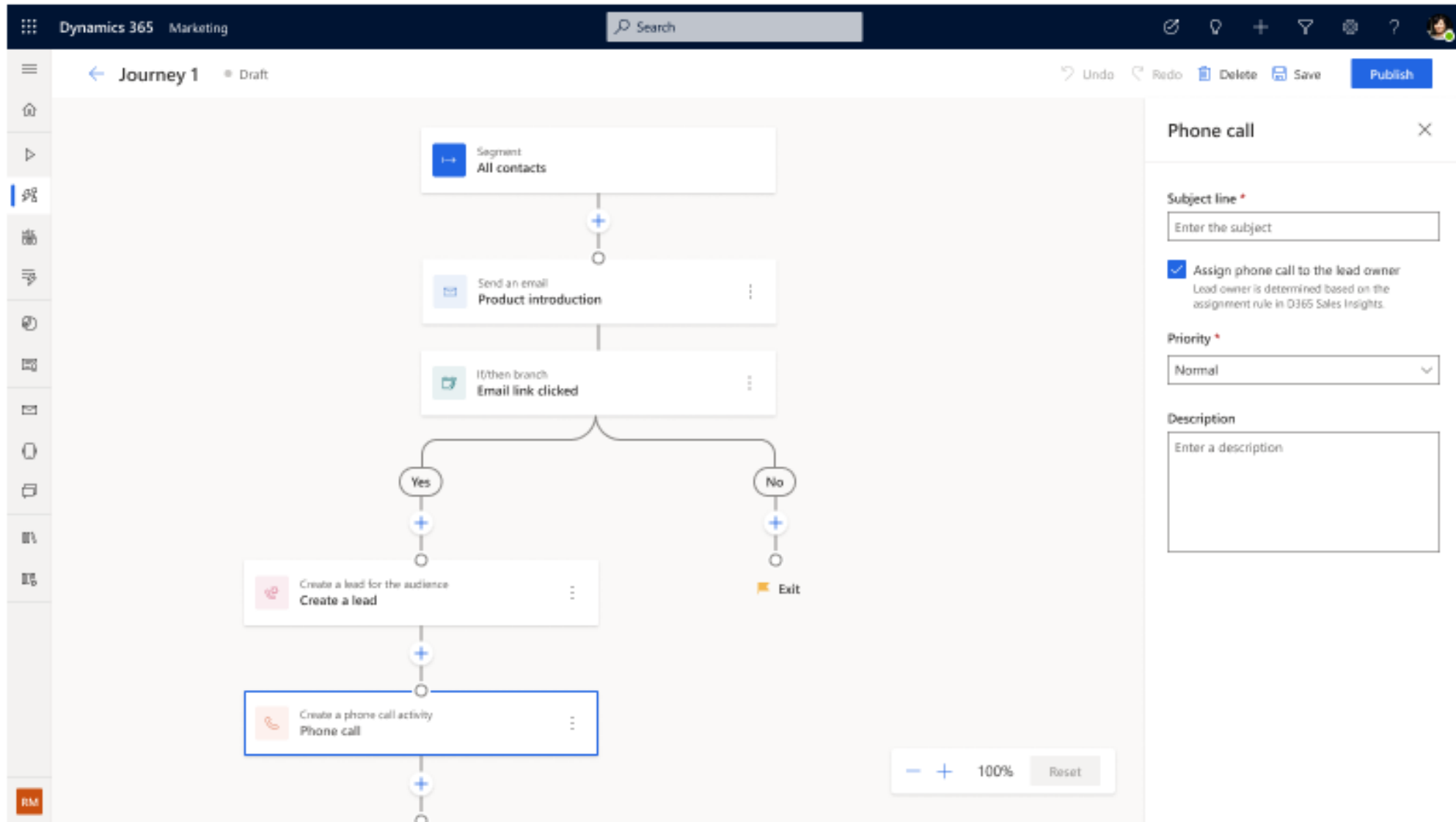
Copilot turns words into a customer journey

Describe your journey and Copilot will create it for you. Copilot can make mistakes so remember to verify info and share your feedback.

[How does it work](#)

[Create manually](#) [Cancel](#)

Customer Insights - Copilot and AI innovation



The screenshot displays the Dynamics 365 Marketing interface for a Journey Builder. The main workspace shows a flowchart for 'Journey 1' (Draft) with the following steps:

- Segment:** All contacts
- Send an email:** Product introduction
- If/then branch:** Email link clicked
 - Yes:** Create a lead for the audience (Create a lead)
 - No:** Exit
- Create a phone call activity:** Phone call

The 'Phone call' configuration panel on the right includes the following fields:

- Subject line:** Enter the subject
- Assign phone call to the lead owner**
Lead owner is determined based on the assignment rule in D365 Sales Insights.
- Priority:** Normal
- Description:** Enter a description

At the bottom right of the canvas, there is a zoom control showing 100% and a Reset button.



Customer Service

Customer Service - Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Automate case lifecycle tasks with Case Management Agent	Updated	Mar/2025	Case Management Agent automates case details during live chats and from incoming emails, saving time for customer service representatives and reducing conversation wrap-up time. It also sends follow-up emails and resolves cases automatically, improving agent efficiency and satisfaction by eliminating manual administrative tasks. Moreover, it identifies experts automatically and prompts customer service representatives to collaborate with them directly through Teams chat, providing a seamless experience through automatic summarizing of case context. Collaboration summaries are integrated into the application, enhancing the knowledge base and minimizing the need for future collaborations.
Insert Copilot prompts in email templates	New	Apr/2025	You can accelerate email responses with intelligent template prompts. Copilot prompts in email templates automatically populate email templates with the prompt content, reducing service representative workload and ensuring consistent, accurate customer communication.
Use Copilot Studio agents for customer surveys	Updated	Apr/2025	Traditional customer feedback management takes a long time (days/weeks) to close the loop with action on feedback provided. Additionally, different tools are used to capture customer feedback across different channels within Dynamics 365 Customer Service. In the era of AI, we have an opportunity to reimagine customer feedback management in Customer Service, with automated and personalized feedback loops to help our customers unlock immense business values. This feature unifies the process of configuring these surveys across channels while leveraging the generative AI capabilities of Copilot Studio bots, as well as how the feedback collected is presented to supervisors.
View customer sentiment indicators on email	New	Apr/2025	Agents can view the customer's sentiment for an incoming email, improving response quality and allowing them to manage escalations effectively.
Update knowledge base using Customer Knowledge Management Agent	Updated	Mar/2025	Customer Knowledge Management Agent automatically turns untapped case and case-related conversation data into knowledge that supports your contact center. Customer Knowledge Management Agent harvests knowledge from cases in real time as service representatives close cases, helping your contact center respond to emerging issues in minutes. That means no more waiting weeks and months for long knowledge lifecycles. With historical article creation, Customer Knowledge Management Agent can help you quickly turn your historical case data (including case-related conversations, emails, case notes, and other details) into ready-to-use knowledge articles.
Use Copilot-powered email template recommendations	New	Apr/2025	Transform customer support communication with intelligent template recommendations that cut response times and eliminate administrative friction. By leveraging AI to precisely match contextual templates, support teams can dramatically reduce manual template searching, accelerate case resolution, and deliver more consistent, accurate customer communications.

Customer Service - Service representative experiences



Item	N / U	Deadline	Benefits / Observations
Automatically restore sessions after a browser refresh	Updated	Apr/2025	When service representatives refresh their browser windows while in Customer Service workspace, they expect all previously opened sessions and tabs to reappear. Current functionality requires that users reopen their sessions and tabs one by one. This usability improvement saves time and allows service representatives to be more productive.
Configure session limits for multisession apps	Updated	Jun/2025	Admins can configure a maximum number up to nine sessions that their customer service representatives can have open at one time. Different industries, businesses, and even workforce management philosophies have unique best practices about the correct number of sessions their service representatives should work on concurrently. Session limit configuration provides your administrators with a systematic way to facilitate these best practices.
Configure timeout rules override in SLA-based automatic actions	New	Apr/2025	In scenarios where a service representative might be on leave, needs more response time, or transfers a conversation to a different queue, the service representative should be able to change the flow of the rules for automatic actions.
Create personalized case views in the inbox	New	Apr/2025	Personalized case views let your service representatives create case views that work best for them in the inbox. These customized case views can help your representatives increase their productivity and organize their work more efficiently.
Inbox view is on by default for service reps	New	Apr/2025	The inbox is a single view where customer service representatives can see all of their work items in a consolidated location. This experience will be enabled by default for out-of-the-box and newly created representative profiles.

Real-time creation

- Let Copilot use information from current cases to create knowledge articles. [Manage rules](#)
Knowledge articles will be drafted as soon as a case is resolved.

Creation from historical cases

- Let Copilot use information from historical cases to create knowledge articles. [Manage rules](#)
Knowledge articles will be created in bulk once a day. Only the most recent 1000 cases from your rule definitions will be considered.

 In progress

[View creation process log](#)

Source attributes

Select the case fields that Copilot can consider while creating knowledge articles for real time and historical harvesting. [Manage attri](#)



Copilot for Service

Copilot for Service - Copilots embedded in CRM systems



Item	N / U	Deadline	Benefits / Observations
Embed case summary customizations in your CRM system	New	Sep/2025	This feature lets admins customize case summaries so that they include only the relevant fields from their third-party CRM systems. This flexibility improves case summary accuracy, customer service representative efficiency, and alignment with organizational workflows.
Enhance Copilot responses with additional sources in 3rd-party CRM systems	New	Sep/2025	The ability to integrate the Knowledge Hub in Copilot for third-party CRM systems such as Salesforce and ServiceNow helps enhance service representative response quality. By using multiple knowledge sources, service representatives can provide faster and more accurate resolutions without the need to ingest content into a single system. This feature reduces manual effort and helps increase service representative productivity.



Field Service

Field Service - Boost technician productivity



Item	N / U	Deadline	Benefits / Observations
Access online data with your offline-first application	Updated	Apr/2025	<p>Frontline workers face variable network conditions while working on remote job sites. They need a reliable offline-enabled application that can work seamlessly with or without network connectivity. By using the offline-enabled Field Service mobile application, data the technicians can access is limited by the mobile offline profile configured for their environment.</p> <p>However, the unpredictable nature of frontline workers' day-to-day activities often requires broader data access than what is defined in their mobile offline profile. With this feature, frontline workers can access online data when the network is available, giving them full access to the data stored in Dataverse.</p>
Select table columns to include in mobile offline sync	Updated	Apr/2025	<p>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.</p>
Use inspection builder to create inspections from existing files	Updated	Mar/2025	<p>Empower your workforce to follow protocols, collect data efficiently, and use checklists to enhance first-time fix rates. The data collected can help boost operational visibility, enabling organizations to optimize processes and elevate customer satisfaction.</p>
Improve schedule assistant matching across locations	New	Apr/2025	<p>This feature allows businesses to efficiently match resources with requirements on a calendar day basis, without requiring precise time slot matches as typically demanded by schedule assistant. Companies can ensure that projects across different locations are staffed with the best available resources worldwide, improving project delivery times and overall customer satisfaction.</p>
Improve schedule board usability and performance	Updated	Apr/2025	<p>With improved usability and performance, technicians and dispatchers can manage schedules more efficiently, leading to increased productivity and employee satisfaction.</p>
Optimize schedules with the Scheduling Operations Agent	Updated	Mar/2025	<p>In this release, the Scheduling Operations Agent for Dynamics 365 Field Service enables dispatchers to quickly and easily optimize schedules for technicians as conditions change throughout the workday, significantly improving their productivity. Dispatchers can ask Copilot to optimize and address issues such as traffic delays, double bookings, or last-minute cancellations that often result in conflicts, gaps, or idle time in a technician's schedule. You can instruct Copilot to achieve the desired business objective, such as to maximize technician usage or work order priority while also considering factors like skillset match, territories, and promised time windows.</p>

Thank you!



dynamics365team@alfapeople.com



DK: +45 70 20 27 40
DE: +49 5221 28 44 00
CH: +41 43 355 30 60

