

# Microsoft Dynamics 365 and Microsoft Copilot for business functions: 2024 release wave 2 plan

Article • 09/20/2024

The Dynamics 365 and Microsoft release plan for the 2024 release wave 2 announces the latest updates to customers as features are prepared for release. You can browse the release plan [online](#) (updated throughout the month), view it in the [Release planner](#), or download the information as a [PDF](#) file, which is updated with every publish. The plan for 2024 release wave 2 covers new features for Dynamics 365 releasing from **October 2024** through **March 2025**.

[Download the 2024 release wave 2 PDF for Dynamics 365](#) or select the option at the bottom of the table of contents.

The Microsoft Power Platform features coming in the 2024 release wave 2 have been summarized in a separate [release plan](#) as well as a downloadable [PDF](#).

The Microsoft Cloud for Industry features coming in the 2024 release wave 2 have been summarized in a separate [release plan](#) as well as a downloadable [PDF](#).

## 2024 release wave 2 overview

The 2024 release wave 2 for Dynamics 365 brings new innovations that provide you with significant capabilities to transform your business. The release contains hundreds of new features across Dynamics 365 applications, including Sales, Customer Service, Contact Center, Field Service, Finance, Supply Chain Management, Project Operations, Finance and operations cross-app capabilities, Human Resources, Commerce, Business Central, Remote Assist, Customer Insights - Data, and Customer Insights - Journeys, as well as Copilot for business features in Copilot for Sales, Copilot for Service, and Copilot for Finance.

### Sales

[Dynamics 365 Sales](#) continues to enhance customer understanding and boost sales through data, intelligence, and user-friendly experiences. In this release, we are focused on including natural language Copilot for summarizing information, creating a new full screen Copilot Home with curated insights and role-specific actions, and using AI-powered insights to find leads.

[Microsoft Copilot for Sales](#) continues to deliver and enhance cutting-edge generative AI capabilities for sellers by enriching Copilot in M365 capabilities with sales specific workflows, data, and actions. We will focus on using AI-powered insights to create leads, deepen the integration into Copilot for Microsoft 365, and use natural language capabilities to allow sellers to ask data-related questions of their CRM.

## Service

[Dynamics 365 Customer Service](#) will continue to empower agents to work more efficiently through new Copilot capabilities such as proactive prompting, ability to access data from external systems securely with plugins, email enhancements, and AI-infused routing.

[Microsoft Copilot for Service](#) is now generally available, bringing new capabilities to enhance user experiences. These features will be integrated across Outlook, Teams, M365 Chat, and Copilot embedded in third-party CRMs.

[Dynamics 365 Contact Center](#) will add new features for voice, messaging, Copilot, AI-infused routing, and contact center operations including out of box support for additional CRMs.

[Dynamics 365 Field Service](#) enables a shift from reactive to proactive and predictive service, empowering digital transformation and innovative business models. Using Copilot, frontline workers will be able to retrieve critical information and initiate mixed reality remote assist calls within Teams through Copilot. Managers will be able to create, update, and manage work orders effortlessly across web, Outlook, and Teams interfaces.

## Finance and Supply Chain

[Dynamics 365 Finance](#) continues its journey of leading in autonomous finance, using AI to transform common end-to-end financial processes. This release focuses on in-app copilot capabilities, immersive persona-based user experiences, expanding country coverage, electronic invoicing enhancements, Business performance analytics and planning enhancements, and autonomous reconciliation capabilities.

[Microsoft Copilot for Finance](#) is expanding data reconciliation capabilities in Excel with assisted data sanitization and preparation routines. Extending variance analysis capabilities with support from additional data sources and enabling collaboration on findings with stakeholders will also be a focus in the upcoming wave. Additionally, the Teams integration will facilitate collections calls with suggested scripts and automated recording of action items in the financial system.



[Dynamics 365 Supply Chain Management](#) is advancing along the path of an autonomous supply chain by integrating intelligence, automation, and analytics into every facet of business procedures, thereby improving user productivity and enhancing organizational adaptability. In this update, the spotlight is on improving order promising capabilities for manufacturers. Demand planning is upgraded to incorporate forecasting with external signals, and the inclusion of Copilot weaves insights and analyses directly into workflows, identifying trends and irregularities, while also allowing for specific data inquiries at the cell level. Additionally, Traceability Copilot keeps track of actual products in production and compiles a comprehensive historical record of related activities.

[Dynamics 365 Project Operations](#) is focused on enhancing usability, performance, and scalability in key areas such as project planning, invoicing, time entry, and core transaction processing. The spotlight is on AI assisted core functionality improvements in estimation, proposal generation, journals, approvals, and contract management, with added mobile capabilities and scale improvements to handle larger projects and invoices at an increased scale.

[Finance and operations cross-app capabilities](#) will continue to invest in capabilities applying to Dynamics 365 Finance, Supply Chain Management, Commerce, Human Resources, and Project Operations. We are infusing Copilot experiences across applications, including natural language chat, embedded AI, and intelligent process automation, and enabling extensibility for Copilot scenarios. We will also bring more value and insights to finance and operations apps data and enhancements to ensure continued enterprise-grade security and compliance at scale.

[Dynamics 365 Human Resources](#) continues to build intelligence, develop automation and analytics around the hire to separate process, increase user productivity, and empower business agility. We are enhancing recruiting with AI-driven assessments and offer management, improving experiences for employees and HR business partners in benefits and performance management, and advancing analytics, insights and planning through Business performance planning and analytics capabilities.

## Commerce

[Dynamics 365 Commerce](#) is leveraging the power of AI to empower retailers to streamline their operations and drive increased customer loyalty and conversions. With Copilot, retail managers, sales associates and merchandisers will gain new AI-powered insights into customer buying patterns and preferences, recommendations for positioning and selling products, and business intelligence on store performance. Improvements to the self-checkout POS make customer checkouts more efficient and user experience updates to Store Commerce app streamline daily tasks for faster, efficient sales and service.

## SMB

[Dynamics 365 Business Central](#) is focused on maintaining service reliability performance and security standards. We'll continue enhancing productivity by optimizing core processes with Copilot, expand to cover over 170 countries and offer enhanced reporting with 80+ Power BI reports. Additionally, integration with Dynamics 365 Field Service will be expanded, along with new financial management features. We will also enhance development tools and governance, along with improved data privacy and compliance management.

## Remote Assist

[Dynamics 365 Remote Assist](#) will bring significant improvements to the quality of Mixed Reality annotations in Teams mobile for both iOS and Android users. The update will enhance the accuracy of MR ink on irregular and complex surfaces, making it easier for remote experts and technicians to collaborate seamlessly. Mixed Reality annotations in Teams mobile will be generally available in the next wave, along with ongoing investments in stability, performance optimization, and usability improvements across HoloLens 2 and iOS and Android applications.

## Customer Insights

[Dynamics 365 Customer Insights - Data](#) empowers every organization to unify and enhance customer data, leveraging it for insightful analysis and intelligent actions. This release enables you to streamline data integration by using Dataverse and Fabric, attach your data in OneLake to Customer Insights, accelerate time to insights with data in Data Lake format, increase control when attaching to data in Dataverse, and seamlessly generate insights from marketing interaction data.

[Dynamics 365 Customer Insights - Journeys](#) brings the power of AI to redefine the workflow for marketers, enabling them to be more productive than ever before. Businesses can optimize every interaction with their customers with end-to-end journeys across departments and channels. With this release you will have more flexibility and control when it comes to journeys, managing your web forms and tailoring Copilot for your business.


## Key dates for the 2024 release wave 2

These release plans describe functionality that may not have been released yet. Delivery timelines and projected functionality may change or may not ship (see [Microsoft](#)

[policy](#) .

Here are the key dates for the 2024 release wave 2.

 [Expand table](#)


Milestone	Date	Description
Release plans available	July 16, 2024	Learn about the new capabilities coming in the 2024 release wave 2 (October 2024 - March 2025) across Dynamics 365, Microsoft Power Platform, and Microsoft Cloud for Industry.
Early access available	August 12, 2024	Test and validate new features and capabilities that will be part of 2024 release wave 2, coming in October, before they are enabled automatically for your users. You can view the Dynamics 365 <a href="#">2024 release wave 2 early access features</a>  now.
Release plans available in additional languages	August 2, 2024	The Microsoft Power Platform, Dynamics 365, and Microsoft Cloud for Industry release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	October 1, 2024	Production deployment for the 2024 release wave 2 begins. <a href="#">Regional deployments will start on October 1, 2024.</a>

Just like the previous release waves, we continue to call out how each feature will be enabled in your environment:

- **Users, automatically:** These features include changes to the user experience for users and are enabled automatically.
- **Admins, makers, or analysts, automatically:** These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

You can get ready with confidence knowing which features will be enabled automatically.

We've done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We're looking forward to engaging with you as you put these new services and capabilities to work, and we're eager to hear your feedback as you dig in to the 2024 release wave 2 plans.

Let us know your thoughts. Share your feedback in the [Microsoft Dynamics 365 community forums](#) . We will use your feedback to make improvements.

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# Feedback

Was this page helpful?



# Get started with this release wave

Article • 07/16/2024

Watch the latest demos for key capabilities and review release plans for additional details and timelines.

## ⓘ Note

Check out our new [release planner](#) <sup>↗</sup> and share your feedback on this new interactive experience.

## 2024 release wave 2

October 2024 – March 2025

### Sales

[See what's new and planned](#)

[Watch latest videos](#)

### Microsoft Copilot for Sales

[See what's new and planned](#)

### Customer Service

[See what's new and planned](#)

[Watch latest videos](#)

### Field Service

[See what's new and planned](#)

[Watch latest videos](#)

### Finance

[See what's new and planned](#)

[Watch latest videos](#)

# Supply Chain Management

[See what's new and planned](#)

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# Project Operations

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# Human Resources

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# Commerce

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# Business Central

[See what's new and planned](#)

# Customer Insights Data

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# Customer Insights Journeys

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# Feedback

Was this page helpful?

# Change history

Article • 09/25/2024

This topic is updated when a feature's release date changes or when a feature is added or removed.

## Dynamics 365 Sales

### Release date changed

 Expand table

Feature	Change	Date updated
<a href="#">Stay efficient with the Copilot overview page</a>	Public preview date moved to Feb 2025.	Aug 22, 2024

## Microsoft Copilot for Sales

### Features removed from release plan

 Expand table

Feature	Reason	Date removed
Monitor and alert sellers on adherence to playbook	Deprioritized and will not be delivered.	Sep 06, 2024
Improve customer understanding with seller coaching	Deprioritized and will not be delivered.	Sep 06, 2024
Manage customer objections in real time	Deprioritized and will not be delivered.	Sep 06, 2024
Summarize and save notes into CRM directly from OneNote	Moved to a future release wave.	Sep 04, 2024
Get Copilot for Sales extension in Teams Copilot chat	Merged this feature with the <a href="#">Converse with your Sales AI assistant using SalesChat</a> feature.	Aug 28, 2024



# Dynamics 365 Customer Insights - Data

## Release date changed

[Expand table](#)

Feature	Change	Date updated
Generate insights from marketing interactions	Public preview date moved to Nov 2024 General availability date moved to Feb 2025	Aug 30, 2024
<a href="#">Use Microsoft OneLake as a data source</a>	Public preview date moved to Feb 2025.	Aug 19, 2024

## Features removed from release plan

[Expand table](#)

Feature	Reason	Date removed
Simplify and centralize data sources using Dataverse	Moved to a future release wave.	Jul 26, 2024
Generate insights from marketing interactions	Moved to a future release wave.	Jul 26, 2024

# Dynamics 365 Customer Insights - Journeys

## Features added to release plan

[Expand table](#)

Feature	Date added
<a href="#">Easily set up and execute pre- and post-event communications</a>	Aug 05, 2024
<a href="#">Maximize event capacity with waitlist registrations</a>	Aug 05, 2024
<a href="#">Export your data to your own storage for custom reporting</a>	Aug 05, 2024

## Release date changed

[Expand table](#)

Feature	Change	Date updated
<a href="#">Wait on segment membership to trigger the next step in a journey</a>	Public preview date moved to Nov 2024. General availability date moved to Feb 2025.	Jul 19, 2024

## Features removed from release plan

[Expand table](#)

Feature	Reason	Date removed
Optimize engagement and increase conversion rates with email content experimentation	Moved to a future release wave.	Jul 29, 2024
Boost customer confidence with branded content links	Deprioritized and will not be delivered.	Jul 26, 2024
Tailor Copilot to your business with custom tables and fields	Moved to a future release wave.	Jul 25, 2024
Create brand-consistent emails with templates and Copilot	Deprioritized and will not be delivered.	Jul 18, 2024

## Dynamics 365 Customer Service

### Features added to release plan

[Expand table](#)

Feature	Date added
<a href="#">Enable agent authentication for plugins</a>	Aug 13, 2024
<a href="#">Manage cases efficiently with enhanced case controls</a>	Jul 09, 2024
<a href="#">Prioritize cases with improved case grids</a>	Jul 09, 2024

# Microsoft Copilot for Service

## Features removed from release plan

[Expand table](#)

Feature	Reason	Date removed
Introduce CRM connectivity to ServiceNow in Outlook and Teams	Moved to a future release wave.	Aug 05, 2024

# Dynamics 365 Contact Center

## Release date changed

[Expand table](#)

Feature	Change	Date updated
<a href="#">Monitor agent assignments in Application Insights</a>	Public preview date updated to Feb 2025. General availability date moved to Nov 2024.	Sep 05, 2024

## Features removed from release plan

[Expand table](#)

Feature	Reason	Date removed
Use customer intent to predict skills in routing	Deprioritized and will not be delivered.	Jul 17, 2024

# Dynamics 365 Field Service

## Features removed from release plan

[Expand table](#)

Feature	Reason	Date removed
Initiate a Remote Assist in Teams call from the Field Service mobile app	Moved to a future release wave.	Jul 24, 2024

## Dynamics 365 Finance

### Features removed from release plan

[Expand table](#)

Feature	Reason	Date removed
Use document types for financial journals	Deprioritized and will not be delivered.	Aug 19, 2024

## Microsoft Copilot for Finance

### Release date changed

[Expand table](#)

Feature	Change	Date updated
<a href="#">Analyze variances in Excel with supplementary data sources</a>	Public preview date moved to Feb 2025. Removed general availability date.	Sep 05, 2024
<a href="#">Collaborate and share out of variance analyses in Excel</a>	Public preview date moved to Feb 2025. Removed general availability date.	Jul 24, 2024

## Dynamics 365 Business Central

### Features added to release plan

[Expand table](#)

Feature	Date added
<a href="#">Experience enhancements to chat with Copilot</a>	Sep 06, 2024
<a href="#">Get external notifications when job queue entries fail</a>	Aug 29, 2024
<a href="#">Display errors and messages in Copilot prompt dialogs</a>	Aug 23, 2024
<a href="#">Raise awareness of Copilot actions on Card, Document, and ListPlus pages</a>	Aug 23, 2024

## Release date changed

 Expand table

Feature	Change	Date updated
<a href="#">View item availability in Field Service work orders</a>	Public preview date updated to Oct 2024. General availability date moved to Nov 2024.	Sep 11, 2024
<a href="#">Use new service providers in the e-documents framework</a>	Public preview date moved to Nov 2024. General availability date moved to Dec 2024.	Aug 15, 2024
<a href="#">Package resources in extensions and access from AL</a>	Public preview date moved to Dec 2024. General availability date moved to Dec 2024.	Aug 14, 2024
<a href="#">Chat with Copilot to learn how to use installed add-on apps</a>	Public preview date moved to Jan 2025. General availability date moved to Feb 2025.	Aug 05, 2024

## Features removed from release plan

 Expand table

Feature	Reason	Date removed
<a href="#">Create sales lines easily with Copilot</a>	Merged this feature with the <a href="#">Create sales lines easily with Copilot</a> feature.	Jul 18, 2024

## Feedback

Was this page helpful?

 Yes

 No

# 2024 release wave 2 features available for early access

Article • 09/20/2024

This topic lists the features that can be enabled for testing in your environment beginning **August 12, 2024**.

Features from the following apps are available as part of early access:

- Dynamics 365 Sales
- Dynamics 365 Customer Insights - Journeys
- Dynamics 365 Customer Service
- Dynamics 365 Field Service
- Finance and Operations cross-app capabilities
- Dynamics 365 Finance
- Dynamics 365 Project Operations
- Dynamics 365 Human Resources
- Dynamics 365 Supply Chain Management
- Dynamics 365 Business Central

The features from these apps update the existing user experiences. You can opt in early to enable these features in your environment. This will allow you to test these features and then adopt them across your environments. For information on how to enable these features, go to [Opt in to 2024 release wave 2 updates](#).


## Important

Other early access features may impact your users. To learn more about these features visit:

- [Power Platform 2024 release wave 2 features available for early access](#)

## Dynamics 365 Sales

For a complete list of the Dynamics 365 Sales features, go to [What's new and planned for Dynamics 365 Sales](#).

 Expand table

Feature	Enabled for	Early access	General availability
<a href="#">Get new features faster with monthly channel</a>	Users, automatically	✓ Aug 12, 2024	Oct 2024
<a href="#">Get 360-degree view with account AI-generated summary</a>	Users, automatically	✓ Jul 29, 2024	Oct 2024
<a href="#">Analyze opportunities with grouping and aggregating</a>	Users, automatically	✓ Aug 12, 2024	Oct 2024
<a href="#">Customize lead qualification for a seamless experience</a>	Users, automatically	✓ Jul 29, 2024	Oct 2024

## Dynamics 365 Customer Insights - Journeys

For a complete list of the Dynamics 365 Customer Insights - Journeys features, go to [What's new and planned for Dynamics 365 Customer Insights - Journeys](#).

 Expand table

Feature	Enabled for	Early access	General availability
<a href="#">Generate leads that link to an existing contact</a>	Users, automatically	Feb 2025	Mar 2025

## Dynamics 365 Customer Service

For a complete list of the Dynamics 365 Customer Service features, go to [What's new and planned for Dynamics 365 Customer Service](#).

 Expand table

Feature	Enabled for	Early access	General availability
<a href="#">Manage cases efficiently with enhanced case controls</a>	Users, automatically	✓ Aug 12, 2024	Oct 2024
<a href="#">Prioritize cases with improved case grids</a>	Users, automatically	✓ Aug 12, 2024	Oct 2024
<a href="#">Compose emails using improved</a>	Users,	-	Oct 2024



Feature	Enabled for	Early access	General availability
<a href="#">attachment experience</a>	automatically		
<a href="#">Use proactive prompts and insights generated by Copilot</a>	Users, automatically	-	Nov 2024

## Dynamics 365 Field Service

For a complete list of the Dynamics 365 Field Service features, go to [What's new and planned for Dynamics 365 Field Service](#).

 Expand table

Feature	Enabled for	Early access	General availability
<a href="#">Transition all users to the new schedule board</a>	Users, automatically	✓ Aug 12, 2024	Oct 2024

## Finance and Operations cross-app capabilities

For a complete list of the Finance and Operations cross-app capabilities features, go to [What's new and planned for Finance and Operations cross-app capabilities](#).

 Expand table

Feature	Enabled for	Early access	General availability
<a href="#">Extend Copilot in finance and operations apps with client actions</a>	Admins, makers, marketers, or analysts, automatically	✓ Apr 26, 2024	Dec 2024
<a href="#">AI actions for finance and operations business logic</a>	Admins, makers, marketers, or analysts, automatically	✓ Jul 15, 2024	Dec 2024

## Dynamics 365 Finance


For a complete list of the Dynamics 365 Finance features, go to [What's new and planned for Dynamics 365 Finance](#).

[Expand table](#)

Feature	Enabled for	Early access	General availability
<a href="#">Analyze data using the Record to Report data model</a>	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024
<a href="#">Provide actionable insights that drive strategic decisions and operational efficiency</a>	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024
<a href="#">Try the reporting, analytics, and insights hub</a>	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024
<a href="#">Set dimensional row level security in Business performance analytics</a>	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024
<a href="#">Use Procure to Pay data models to report and gain insights</a>	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024
<a href="#">Use Order to Cash data model to gain insights and analyze sales transactions</a>	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024
<a href="#">Extend data models in Microsoft Fabric</a>	Users by admins, makers, or analysts	✓ Aug 6, 2024	Oct 2024
<a href="#">Analyze business data in Excel</a>	Users by admins, makers, or analysts	✓ Jul 1, 2024	Oct 2024
<a href="#">Add efficiency with enhanced bank reconciliation report</a>	Admins, makers, marketers, or analysts, automatically	✓ Jun 28, 2024	Oct 2024
<a href="#">Increase the length of invoice numbers</a>	Users by admins, makers, or analysts	✓ Jul 26, 2024	Oct 2024
<a href="#">Improve bank account lifecycle management</a>	Users by admins, makers, or analysts	✓ Jul 31, 2024	Mar 2025
<a href="#">Automatically clear bridged transactions</a>	Admins, makers, marketers, or analysts, automatically	✓ Apr 1, 2024	Oct 2024
<a href="#">Manage advanced bank reconciliation with matching rule enhancement</a>	Admins, makers, marketers, or analysts, automatically	✓ Apr 1, 2024	Oct 2024
<a href="#">Save time with automated cash application</a>	Admins, makers, marketers, or analysts, automatically	✓ Apr 1, 2024	Oct 2024

## Dynamics 365 Project Operations

For a complete list of the Dynamics 365 Project Operations features, go to [What's new and planned for Dynamics 365 Project Operations](#).

 Expand table

Feature	Enabled for	Early access	General availability
<a href="#">Enable flexibility when determining financial dimension defaults</a>	Users by admins, makers, or analysts	✓ Jun 7, 2024	Mar 2025
<a href="#">Copy quotes and contracts across legal entities</a>	Users by admins, makers, or analysts	✓ Feb 29, 2024	Oct 2024
<a href="#">Support cost plus pricing for resource time</a>	Users by admins, makers, or analysts	✓ Feb 16, 2024	Oct 2024
<a href="#">Use one grid for material and expense estimates</a>	Users by admins, makers, or analysts	✓ Mar 8, 2024	Oct 2024

## Dynamics 365 Human Resources

For a complete list of the Dynamics 365 Human Resources features, go to [What's new and planned for Dynamics 365 Human Resources](#).

 Expand table

Feature	Enabled for	Early access	General availability
<a href="#">Use recruiting for service-centric organizations</a>	Users by admins, makers, or analysts	✓ Jul 17, 2024	Dec 2024

## Dynamics 365 Supply Chain Management


For a complete list of the Dynamics 365 Supply Chain Management features, go to [What's new and planned for Dynamics 365 Supply Chain Management](#).

 Expand table

Feature	Enabled for	Early access	General availability
<a href="#">Add transactions when recalculating weighted average</a>	Users by admins, makers, or analysts	✓ Jul 29, 2024	Mar 2025

# Dynamics 365 Business Central

For a complete list of the Dynamics 365 Business Central features, go to [What's new and planned for Dynamics 365 Business Central](#).

 Expand table

Feature	Enabled for	Early access	General availability
<a href="#">Complete bank account reconciliation faster with Copilot</a>	Users, automatically	✓ Nov 9, 2023	Oct 2024

## Feedback

Was this page helpful?

 Yes

 No

# Plan and prepare for Dynamics 365 Sales in 2024 release wave 2

Article • 09/20/2024

## 📌 Important

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Sales**.

## Overview

<https://aka.ms/ReleaseHighlight/2024W2/CustomerExperience> ↗

Dynamics 365 Sales is a market-leading sales application designed to help businesses manage their sales processes, improve customer engagement, and drive revenue growth.

In 2024 release wave 2, we're focused on the following capabilities:

- Natural language copilot experiences that allow sellers to summarize information across multiple entities and find the most impactful work.
- A new "full screen" Copilot Home page that provides curated insights and actions specific to the role of the user, seller, or sales manager.
- Helping sellers find high-quality leads using AI-powered insights.
- Empowering sales managers with insights about their sales pipeline.

📡 [↗](#) Updates to Dynamics 365 Sales 2024 release wave 2

## Investment areas



## **Administration and extension experiences**

The administration and extension experiences within Dynamics 365 Sales are powerful features that empower sales teams to tailor and elevate the application's functionality to meet their business needs. Administrators play a pivotal role in shaping the application's behavior by configuring settings, overseeing security roles, and seamlessly integrating with external services, ensuring that the application aligns with their organizational requirements.

Extensibility experiences offer a versatile toolkit for sales operations teams and administrators, enabling them to customize out-of-the-box capabilities and craft custom solutions. These capabilities encompass the creation of plugins, workflows, and web resources, allowing users to extend the out-of-the-box capabilities of the Dynamics 365 Sales solution. This level of customization not only enhances the application's adaptability but also provides the means to address unique business challenges, ensuring a more tailored and efficient experience for all users.

## **Copilot and AI innovation**

Sellers spend a lot of time managing complex customer relationships and many sales teams struggle to scale seller experiences. Seller productivity in terms of time management and efficiency is key to success. Copilot is an AI assistant that helps sales teams be more productive and efficient in their daily work. It has a chat interface that sellers can use to get a quick summary of their opportunity and lead records, catch up on updates, prepare for meetings, and read the latest news about their accounts.

## **Seller experiences**

Seller experiences focus on features and tools that are meticulously designed to cater to the unique needs and challenges faced by sellers in their daily lives. These seller-centric solutions empower sales professionals to efficiently manage customer data, monitor deal progress, facilitate team collaboration, engage with customers, enhance sales conversations, and deliver timely value to expedite deal closures.

The primary objective of these offerings is to streamline and simplify the day-to-day tasks of sellers, enabling them to operate with heightened efficiency and effectiveness. By leveraging these capabilities, sellers can not only navigate their professional responsibilities more seamlessly but also discover avenues to optimize their time and resources, ultimately resulting in increased productivity and a greater number of successful deal closures.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Sales** below:

[Check out the release plan](#)



# For application administrators

## User-impacting features to the user experience enabled automatically

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

## Features that must be enabled by application administrators

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.





## Get the most out of Sales

[Expand table](#)

Helpful links	Description
<a href="#">Release plan</a>	View all capabilities included in the release.
<a href="#">Licensing</a>	Improve your understanding of how to license Sales.
<a href="#">Product documentation</a>	Find documentation for Sales.
<a href="#">User community</a>	Engage with Sales experts and peers in the community.



Helpful links	Description
<a href="#">Upcoming events</a> 	Find and register for in-person and online events.
<a href="#">Product trials</a> 	Get started with Sales.

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## Feedback

Was this page helpful?



# What's new and planned for Dynamics 365 Sales

Article • 09/24/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Administration and extension experiences

Administration and extension options to configure and extend the capabilities in Dynamics 365 Sales.

 Expand table

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Get new features faster with monthly channel</a>	Users, automatically	-	✓ Aug 12, 2024	Oct 2024

## Copilot and AI innovation

Supercharge sales productivity through integrated data, enrichment, workflows, insights, and next-generation AI capabilities.

 Expand table

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Elevate your sales pitch using Copilot email assistance</a>	Users by admins, makers, or analysts	✓ Jun 16, 2023	-	Oct 2024
<a href="#">Stay efficient with the Copilot overview page</a>	Users by admins, makers, or analysts	Mar 2025	-	Jul 2025
<a href="#">Leverage manager dashboards to coach sellers</a>	Users by admins, makers, or analysts	✓ Feb 15, 2024	-	Mar 2025
<a href="#">Streamline sales process with sales document summary</a>	Users by admins, makers, or analysts	-	-	Nov 2024
<a href="#">Get 360-degree view with account AI-generated summary</a>	Users, automatically	-	✓ Jul 29, 2024	Oct 2024
<a href="#">Work efficiently using AI-powered action suggestions</a>	Users by admins, makers, or analysts	Sep 2024	-	Nov 2024

## Seller experiences

Enable sellers to manage their pipeline, prioritize and guide sales activities, and optimize engagements with seamlessly integrated productivity experiences.

 [Expand table](#)

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Analyze opportunities with grouping and aggregating</a>	Users, automatically	-	✓ Aug 12, 2024	Oct 2024
<a href="#">Customize lead qualification for a seamless experience</a>	Users, automatically	-	✓ Jul 29, 2024	Oct 2024

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.

- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

---

## Feedback

Was this page helpful?

Yes

No

# Administration and extension experiences

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

The administration and extension experiences within Dynamics 365 Sales are powerful features that empower sales teams to tailor and elevate the application's functionality to meet their business needs. Administrators play a pivotal role in shaping the application's behavior by configuring settings, overseeing security roles, and seamlessly integrating with external services, ensuring that the application aligns with their organizational requirements.

Extensibility experiences offer a versatile toolkit for sales operations teams and administrators, enabling them to customize out-of-the-box capabilities and craft custom solutions. These capabilities encompass the creation of plugins, workflows, and web resources, allowing users to extend the out-of-the-box capabilities of the Dynamics 365 Sales solution. This level of customization not only enhances the application's adaptability but also provides the means to address unique business challenges, ensuring a more tailored and efficient experience for all users.

---

## Feedback

Was this page helpful?

 Yes

 No


# Get new features faster with monthly channel

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	 Aug 12, 2024	Oct 2024

## Business value

Organizations that rely on semiannual releases for major changes may find that it limits the speed of innovation and delays access to newer features. With this feature, the Sales Hub app will be enabled for monthly release channel, allowing it to be updated every month. This frequent update cycle ensures that the Sales Hub app receives the latest, generally available features as quickly as possible, enabling you to stay at the forefront of innovation and continuously improve your workflows.

## Feature details

With this feature, the out-of-the-box Sales Hub app shipped by Microsoft is enabled to use the monthly channel instead of the semiannual channel. This change allows you to get new features every month instead of having to wait for the semiannual releases. To learn more about features shipping in the monthly channel, go to [Monthly channel release notes for model-driven apps](#).

Release channel configuration provides three options: **Auto**, **Monthly**, and **Semiannual**. Currently, **Auto** is set as the default value for the Sales Hub app. With 2024 release wave 2, the release channel for the Sales Hub app is being changed from **Auto** to **Monthly**. If you want to continue using the semiannual channel, you can set the app release channel

to **Semiannual** before October 2024. If you'd like to enable the monthly channel for other model-driven apps, you need to set it manually.

Monthly channel admin settings](media/monthly-channel-resized.png "Monthly channel admin settings") -->

---

## Feedback

Was this page helpful?

 Yes

 No



# Copilot and AI innovation

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Sellers spend a lot of time managing complex customer relationships and many sales teams struggle to scale seller experiences. Seller productivity in terms of time management and efficiency is key to success. Copilot is an AI assistant that helps sales teams be more productive and efficient in their daily work. It has a chat interface that sellers can use to get a quick summary of their opportunity and lead records, catch up on updates, prepare for meetings, and read the latest news about their accounts.

---

## Feedback

Was this page helpful?

 Yes

 No

# Elevate your sales pitch using Copilot email assistance

Article • 08/23/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	 Jun 16, 2023	-	Oct 2024

## Business value

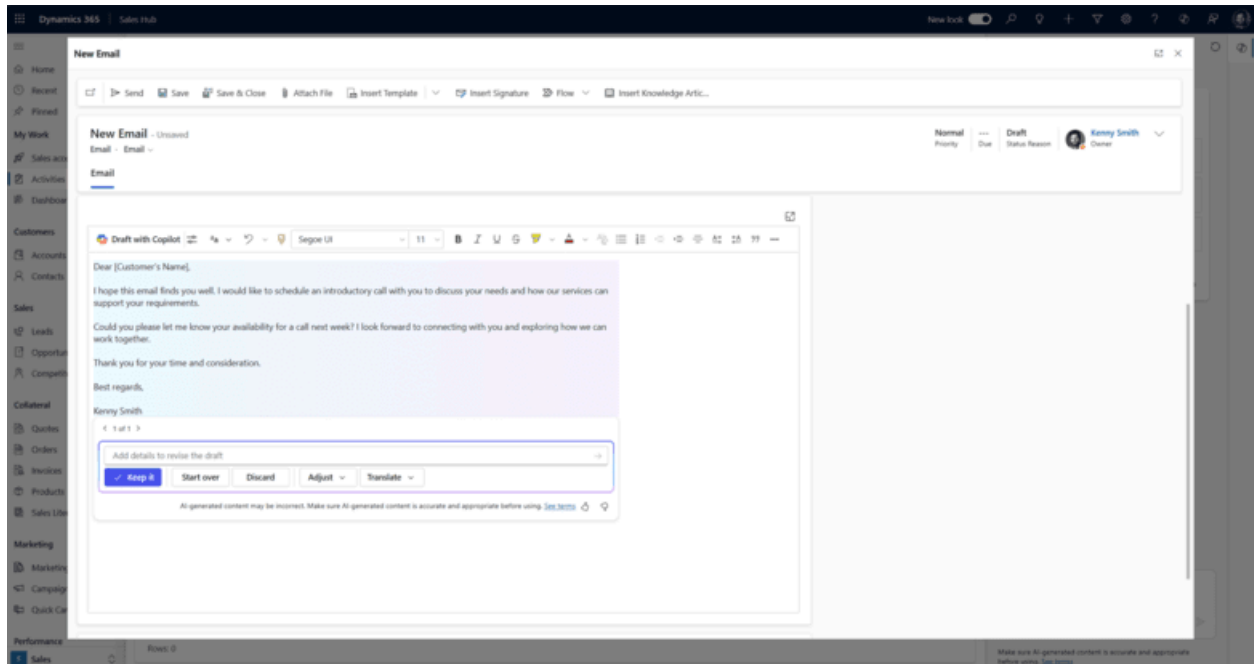
As a seller, you often struggle with writing effective emails to communicate with your customers. You may face challenges such as not knowing how to structure your emails, which information to include or exclude, or how to strike the right tone. This can lead to poor customer engagement, lost sales, and damage to their brand image. Though organizations try to use templates, most of the emails sent cannot be standardized and thus templates are not very useful in such scenarios.

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.

## Feature details

Copilot lets you spend less time composing emails. With this feature, you can:

- Select a predefined category or enter your 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.



## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

## See also

[Elevating email efficiency using Copilot in Dynamics 365 Sales and the rich text editor](#)   
(blog)

[Compose and send email messages using Copilot](#) (docs)

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?




# Get 360-degree view with account AI-generated summary

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	 Jul 29, 2024	Oct 2024

## Business value

In the fast-paced world of sales, you often work on multiple accounts simultaneously. It can be challenging to stay on top of all your accounts and gather relevant information efficiently. 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.

You no longer need to spend excessive time shifting through scattered information or manually compiling account details. You can quickly access a comprehensive overview of each account, prioritize your work effectively, and engage with customers in a more personalized and targeted manner.

## Feature details

As an admin, you can:

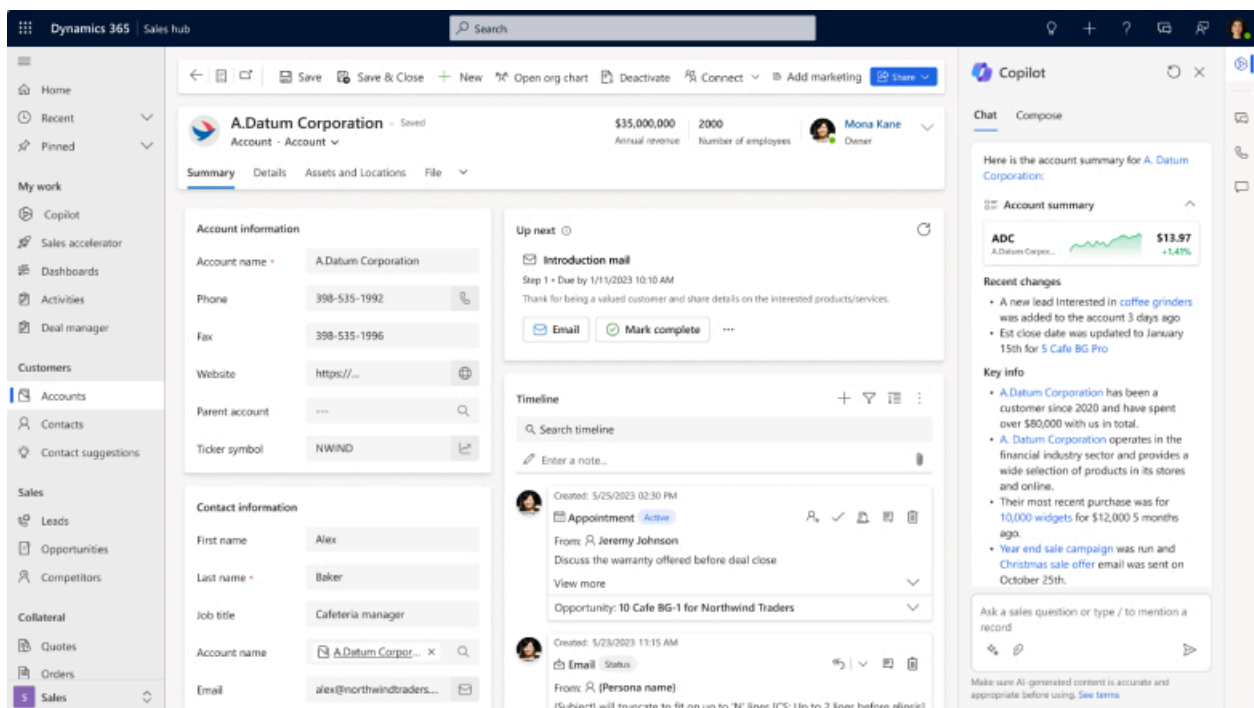
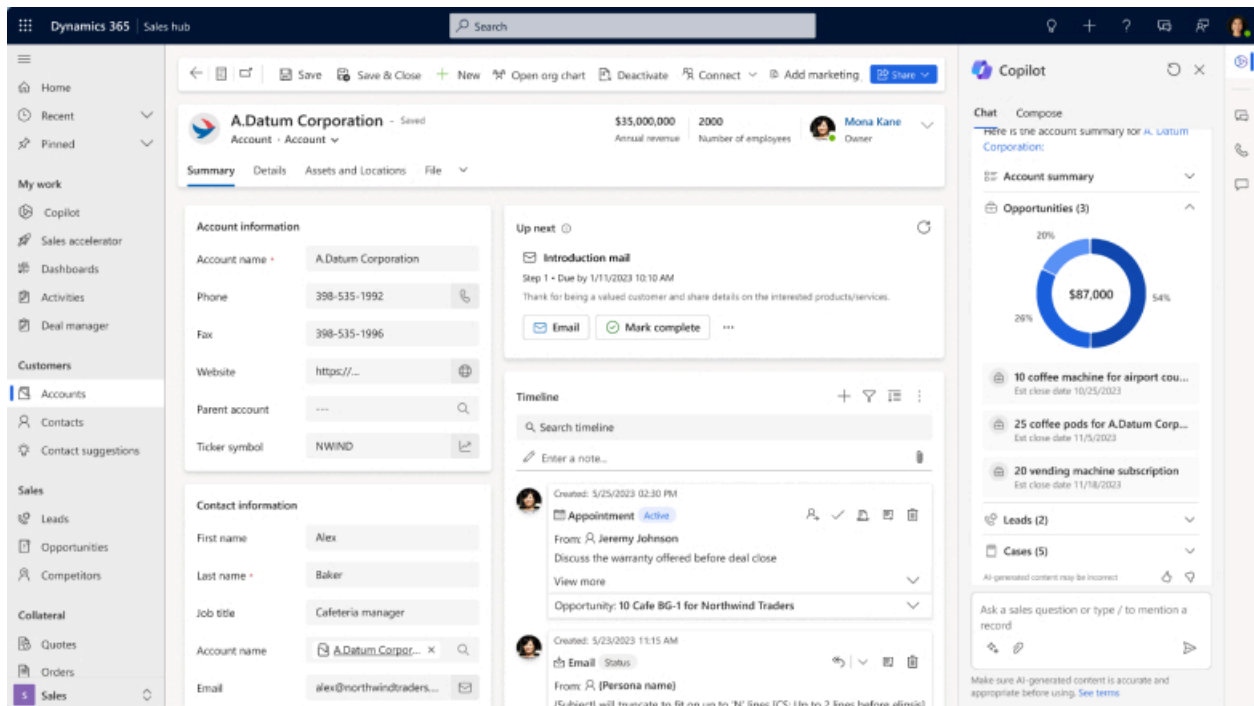
- Enable Copilot Account summary for any Dynamics 365 application.
- Configure the entities and fields to use for creating the account summary.

As a seller, you can:

- Get a 360-degree view of your account, which is built using all the data associated with the account.
- View a summary of the associated opportunities.
- Know about the associated leads.
- Learn the latest news about the account.

The screenshot shows the Dynamics 365 Sales Hub interface for the account "A.Datum Corporation". The account summary includes an annual revenue of \$35,000,000 and 2,000 employees. The contact information for Alex Baker, a Cafeteria manager, is displayed. The "Up next" section shows an introduction email due on 1/11/2023. The timeline includes an appointment with Jeremy Johnson. The Copilot chat sidebar on the right provides a summary of the account and lists 5 cases: 1 in progress, 1 researching, and 1 on hold. A donut chart visualizes the case status distribution.

This screenshot shows the same Dynamics 365 Sales Hub account page for "A.Datum Corporation". The account and contact information are identical to the first screenshot. However, the Copilot chat sidebar now displays 2 leads: Mona Kane (Hot) and David Balac (Cold). The donut chart in the sidebar is updated to reflect these 2 leads. The rest of the account details and timeline remain the same.



## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- Sweden

- Qatar
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

## See also

[Summarize an account](#) (docs)

 **Note:** The author created this article with assistance from AI. [Learn more](#)

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## Feedback

Was this page helpful?

 Yes

 No



# Leverage manager dashboards to coach sellers

Article • 09/25/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	 Feb 15, 2024	-	Mar 2025

## Business value

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.

## Feature details

Managers can stay in touch with their field and sellers using the new manager insights dashboard for conversation intelligence.

In addition to the existing conversation intelligence dashboard functionality, as a sales manager, you'll be able to view:

- Customer sentiment correlation with keyword and competitor mentions.
- Conversation style correlation to deal outcomes.
- Conversational KPIs over time.
- Holistic view of sellers' performances, as well as insight into conversation patterns that close deals.
- Messaging performance in the field and customer perceptions of the competitive landscape.

- Sales-oriented filters such as call time and length, seller, connected record, connected record status, campaign, and more.

## See also

[Analyze your sellers' conversation data with Power BI \(docs\)](#)

---

## Feedback

Was this page helpful?

# Stay efficient with the Copilot overview page

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Mar 2025	-	Jul 2025

## Business value

The Copilot full-page view in Dynamics 365 Sales helps you excel in sales. Offering real-time insights and effortless natural language chat functionality, it empowers you to efficiently manage sales activities, nurture customer relationships, and drive sales success. This immersive interface provides an expanded workspace, enhancing the focus on productive conversations with Copilot.

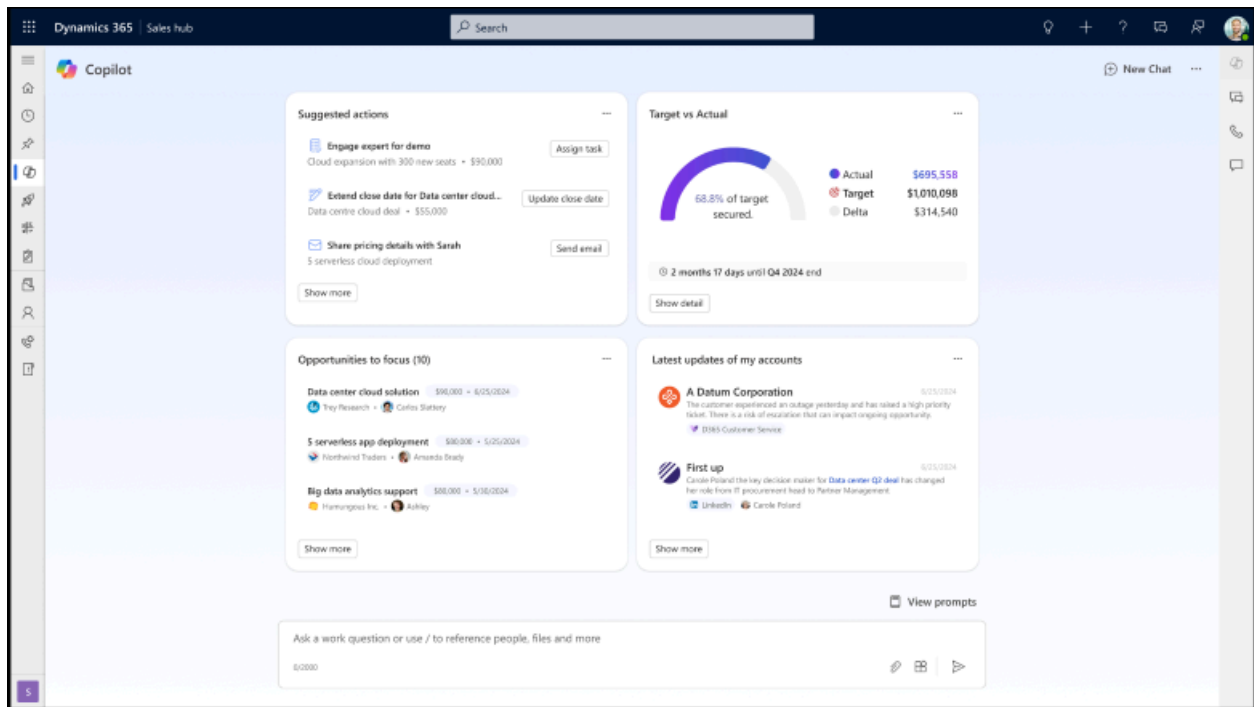
You can seamlessly access insights from various records and prioritize your actions intelligently. The natural language chat with AI-powered Copilot facilitates deeper insights and quick access to customer details, deal information, meeting schedules, and more. Furthermore, you can easily track your performance using charts through natural language, while an embedded calendar assists in planning and managing your day effectively.

## Feature details

As a seller, you can:

- Follow suggested actions to stay ahead in your work.
- View goal information and how much you have achieved.
- Find key opportunities to focus on.

- Prepare for upcoming sales meetings.
- Stay on top with real-time insights across different entities.
- Chat with Sales Copilot in an immersive wide-screen experience.



## Feedback

Was this page helpful?

# Streamline sales process with sales document summary

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Nov 2024

## Business value

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.

## Feature details

As a seller, you can:

- Get a summary of the documents associated with your contact, opportunity, lead, and account.
- Use the summary to understand the budget, authority (decision maker), need, and timeline based on various documents.
- Get recommendations about the next best action based on your last activity.

# Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- United States
- 

## Feedback

Was this page helpful?

 Yes

 No

# Work efficiently using AI-powered action suggestions

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Sep 2024	-	Nov 2024

## Business value

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. This capability aims to:

- Improve your productivity by elevating your decision-making capability with key information and guidance.
- Stay on top of all active customer conversations with insights and action suggestions.
- Reduce the conversion time for opportunities and leads.
- Seamlessly update and maintain the latest changes on key records.

## Feature details

As an admin, you can enable the feature for sellers to get action recommendations.

As a seller, you can:

- View insights and action recommendations for the following use cases:
    - Email follow-ups for active customer collaborations.
    - Action recommendations from concluded meetings.
    - Suggestions to keep records updated with key changes.
    - Guidance to start engagement for newly assigned opportunities.
  - Access the recommended action options across multiple touchpoints within the Dynamics 365 apps at a record and aggregated view level.
- 

## Feedback

Was this page helpful?

 Yes

 No



# Seller experiences

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

Seller experiences focus on features and tools that are meticulously designed to cater to the unique needs and challenges faced by sellers in their daily lives. These seller-centric solutions empower sales professionals to efficiently manage customer data, monitor deal progress, facilitate team collaboration, engage with customers, enhance sales conversations, and deliver timely value to expedite deal closures.

The primary objective of these offerings is to streamline and simplify the day-to-day tasks of sellers, enabling them to operate with heightened efficiency and effectiveness. By leveraging these capabilities, sellers can not only navigate their professional responsibilities more seamlessly but also discover avenues to optimize their time and resources, ultimately resulting in increased productivity and a greater number of successful deal closures.

---

## Feedback

Was this page helpful?

 Yes

 No


# Analyze opportunities with grouping and aggregating

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	 Aug 12, 2024	Oct 2024

## Business value

The opportunity pipeline view in Dynamics 365 Sales now offers an even more empowering experience for opportunity management. By placing you, the seller, at the center of your workflows, it enables you to view your entire pipeline with new-found clarity, gather context quickly, take actions efficiently, and work in a manner that truly suits your needs.

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.

In addition to the improved grouping capabilities, Dynamics 365 Sales now facilitates the aggregation of numeric values. You can effortlessly assess the total estimated revenue within your pipeline or within specific grouped segments. This feature equips you with invaluable insights into the financial potential of your opportunities, making it easier to prioritize and focus on deals that contribute significantly to the bottom line.

## Feature details

As a seller, you can:

- Group opportunities by account name, seller name, closing date/month, or any other relevant field.
- Aggregate numeric values such as estimated value and actual revenue in the editable grid.

## See also

[Group and aggregate opportunities \(docs\)](#)

---

## Feedback

Was this page helpful?

Yes

No

# Customize lead qualification for a seamless experience

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	 Jul 29, 2024	Oct 2024

## Business value

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.

As a sales professional, you can benefit from insightful Copilot lead summaries, which provide clear and concise lead overviews for informed decision-making. The ability to create multiple opportunities from a single lead maximizes sales potential, while enhanced collaboration allows for opportunity assignments among team members. Furthermore, redundant data entry is eliminated as fields of the generated opportunities are prepopulated, boosting your productivity and ensuring focused efforts on high-value sales activities.

## Feature details

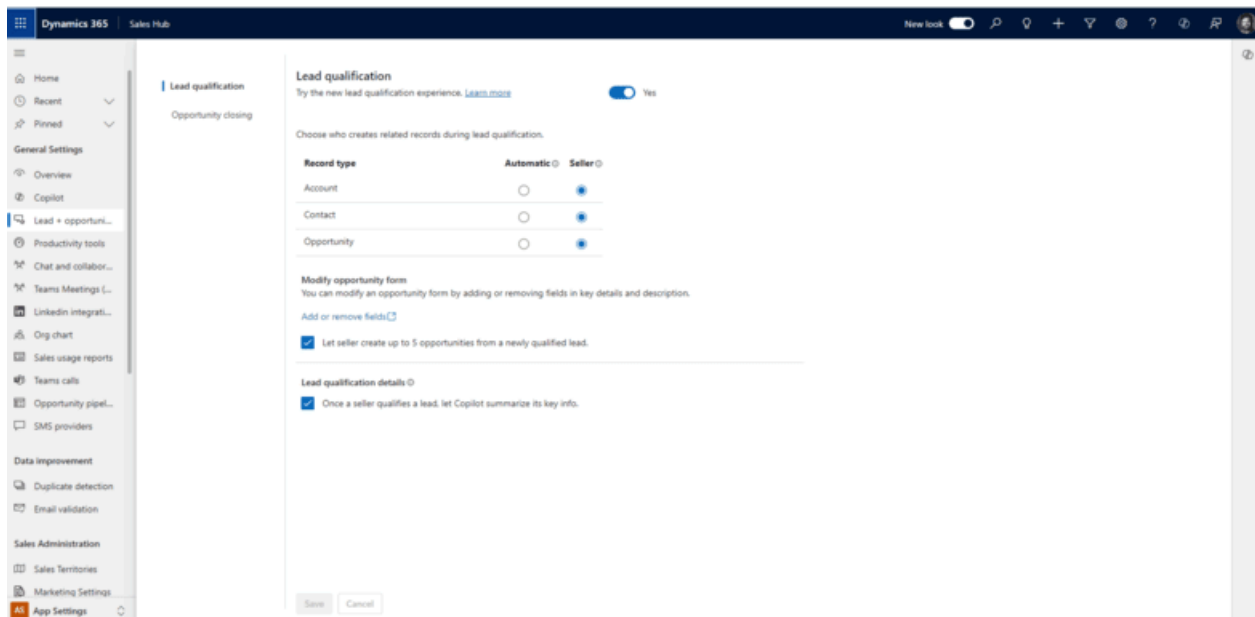
As an administrator, you can:

- Configure the lead qualification process to ensure that leads are thoroughly evaluated.
- Enable Copilot to generate a lead qualification summary.

- Configure the creation of multiple opportunities from a single lead.

As a seller, you can:

- Assign newly generated opportunities to other sellers, fostering collaboration and maximizing sales team efficiency.
- View the AI-generated lead qualification summary after a lead is qualified.
- Choose to create multiple opportunities from a single lead.



## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan

- France
- Korea

## See also

[Customize the lead qualification experience \(docs\)](#)

---

## Feedback

Was this page helpful?

 Yes

 No

# Plan and prepare for Microsoft Copilot for Sales in 2024 release wave 2

Article • 09/20/2024

## Important

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Microsoft Copilot for Sales**.

## Overview

<https://aka.ms/ReleaseHighlight/2024W2/CustomerExperience> 

Microsoft Copilot for Sales is an AI assistant that brings the power of Copilot for Microsoft 365 together with seller-specific insights and workflows, helping sellers save time, focus on the most important activities, generate innovative ideas, build stronger customer relationships, and ultimately close more deals.

In 2024 release wave 2, we're focused on the following capabilities:

- Empowering sales managers with insights about their sales pipeline.
- Helping sellers find high quality leads using AI-powered insights.
- The end-to-end meeting experience for sellers as they talk to customers and leads.
- Deepening the integration of Copilot for Sales into Copilot for Microsoft 365, specifically in Outlook and Teams,
- Suggested next actions for sellers directly in Outlook and Teams.
- Natural language capabilities that allow sellers to ask questions about the data in their CRM.

  Updates to Microsoft Copilot for Sales 2024 release wave 2

## Investment areas



## **Application experiences**

Copilot for Sales is an AI assistant designed to empower sellers with insights, recommendations, actions, and up-to-date CRM data directly from within the Microsoft 365 applications they already use daily. Copilot for Sales is a Copilot-first application built atop Copilot for Microsoft 365. It works with both Dynamics 365 Sales and Salesforce. The cross-application experiences span multiple Microsoft 365 applications and their CRM systems so that sellers can stay productive within the flow of work.

Sellers use different applications for various aspects of their work, such as Outlook for email, Teams for meetings, and Dynamics 365 or Salesforce for CRM. Copilot for Sales connects these applications and enables sellers to do their tasks more efficiently within the same workflow. For example, sellers can update their CRM from Outlook or Teams without switching applications. Copilot for Sales also provides insights from other applications that can help sellers communicate better with their customers, build trust, and close more deals.

## **Microsoft Outlook experiences**

Microsoft Copilot for Sales is an AI assistant designed for sellers. The Microsoft Copilot for Sales app in Outlook provides recommendations and information to help you stay connected to your customers, minimize data entry, and personalize your engagements to close deals faster with higher win rates. Get related information from CRM such as contact details, account history, and opportunities, save activities (such as emails and meetings) to CRM, get an overview of recent interactions with your customers, such as email summaries, meeting notes, and action items, and use AI capabilities to draft emails, summarize conversations, and generate follow-ups. The Microsoft Copilot for Sales experience within Microsoft Outlook is delivered through an integrated app experience and by enriching the Copilot in Microsoft Outlook capabilities with sales-specific skills, data, and actions.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Microsoft Copilot for Sales** below:

[Check out the release plan](#)



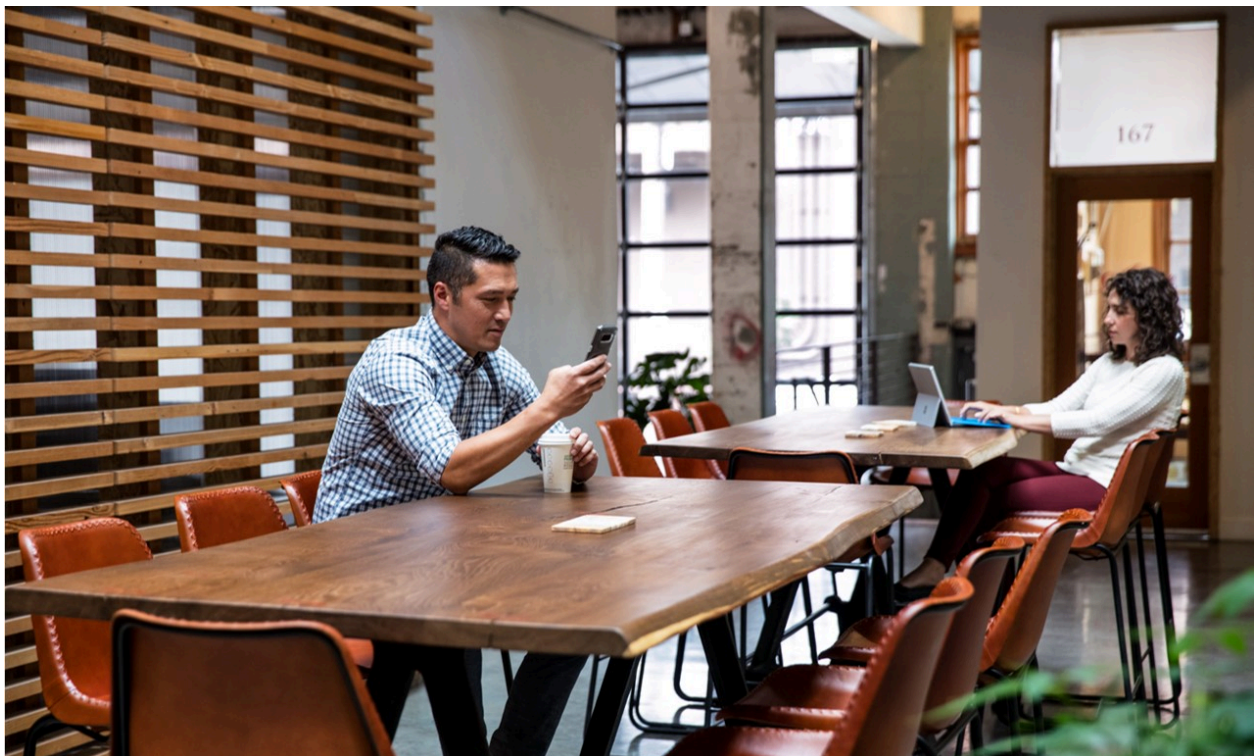
# For application administrators

## User-impacting features to the user experience enabled automatically

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

## Features that must be enabled by application administrators


This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.



# Get the most out of Microsoft Copilot for Sales

[Expand table](#)

Helpful links	Description
<a href="#">Release plan</a>	View all capabilities included in the release.
<a href="#">Licensing</a>	Improve your understanding of how to license Microsoft Copilot for Sales.
<a href="#">Product documentation</a>	Find documentation for Microsoft Copilot for Sales.

Helpful links	Description
<a href="#">User community</a> 	Engage with Microsoft Copilot for Sales experts and peers in the community.
<a href="#">Upcoming events</a> 	Find and register for in-person and online events.
<a href="#">Product trials</a> 	Get started with Microsoft Copilot for Sales.

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## Feedback

Was this page helpful?

 Yes

 No

# What's new and planned for Microsoft Copilot for Sales

Article • 09/24/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Application experiences

Copilot for Sales experiences connect CRM systems across Microsoft 365 surfaces, helping sellers stay productive within the flow of work.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Create opportunities from sales meeting summary</a>	Users, automatically	Nov 2024	Nov 2024
<a href="#">Converse with your Sales AI assistant using SalesChat</a>	Users, automatically	Nov 2024	Feb 2025
<a href="#">Update CRM directly from the post-meeting insights page</a>	Users, automatically	-	Mar 2025
<a href="#">Leverage manager dashboards to coach sellers</a>	Users by admins, makers, or analysts	✓ Feb 15, 2024	Oct 2024

## Microsoft Outlook experiences

Experiences in Microsoft Outlook to empower sellers to efficiently and effectively communicate throughout the sales process.

[Expand table](#)

Feature	Enabled for	Public preview	General availability
<a href="#">Support sellers with Copilot for Sales mobile experience in Outlook</a>	Users, automatically	-	Mar 2025

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

---

## Feedback

Was this page helpful?

Yes

No

# Application experiences

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

Copilot for Sales is an AI assistant designed to empower sellers with insights, recommendations, actions, and up-to-date CRM data directly from within the Microsoft 365 applications they already use daily. Copilot for Sales is a Copilot-first application built atop Copilot for Microsoft 365. It works with both Dynamics 365 Sales and Salesforce. The cross-application experiences span multiple Microsoft 365 applications and their CRM systems so that sellers can stay productive within the flow of work.

Sellers use different applications for various aspects of their work, such as Outlook for email, Teams for meetings, and Dynamics 365 or Salesforce for CRM. Copilot for Sales connects these applications and enables sellers to do their tasks more efficiently within the same workflow. For example, sellers can update their CRM from Outlook or Teams without switching applications. Copilot for Sales also provides insights from other applications that can help sellers communicate better with their customers, build trust, and close more deals.

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## Feedback

Was this page helpful?

 Yes

 No

# Converse with your Sales AI assistant using SalesChat

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Nov 2024	Feb 2025

## Business value

As a seller, you are often overwhelmed—working on 20 or more deals at once, with 400-plus emails and chats per day—and struggle to keep track of what's important across your deals. To simply catch up on action items to advance a deal, you must run through multiple meeting transcripts, emails, CRM notes, and hand-written notes, spending hours in the process.

With SalesChat, you can converse with Copilot in natural language to ask sales-specific questions. SalesChat does the hard work for you and looks across your meeting transcripts, emails, and CRM to summarize results. With SalesChat, you can ask questions such as, "What are my top opportunities?", "What are the action items for this opportunity?", "What are the opportunities that I have not recently engaged with?", and "How did the customers react to the pricing proposal?"

Additionally, SalesChat is available in Teams, so you don't need to go to the CRM to answer sales-specific questions.

## Feature details

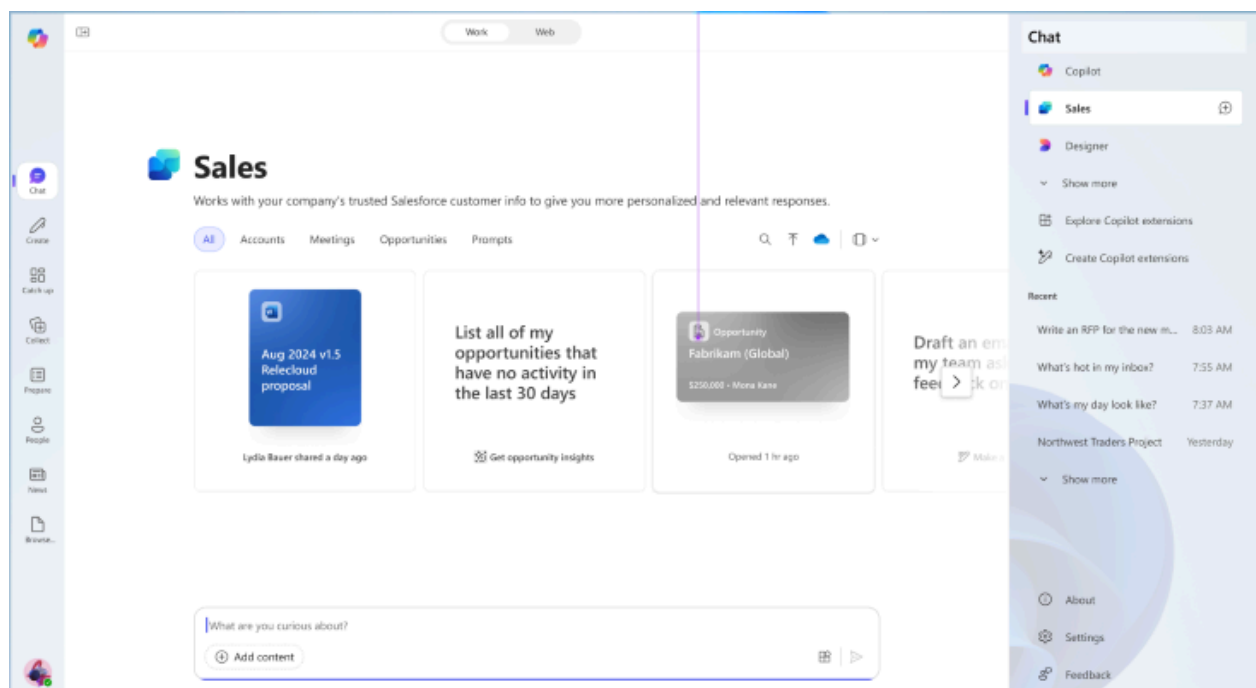
SalesChat is the conversational AI assistant that can answer sales-specific questions, built on top of Microsoft 365 Copilot Chat. SalesChat looks across data in your emails,

meeting transcripts, and CRM to provide a response. SalesChat also supports asking follow-up questions to drill in and fine-tune the response. Finally, SalesChat also understands the specific nuances and phrases used by each company.

Here are some sample prompts that you can use in SalesChat:

- What are action items for Opportunity X?
- What is the buyer sentiment from the last meeting with Account Y?
- What are person Z's objections that are blocking the deal?
- What are the recent interactions related to opportunity X?
- Summarize risks for deals that will close this quarter.
- Help me prepare for my next meeting with Account X.
- Can you recap my last meeting with person Y and highlight their use cases?
- What are key stakeholders saying about pricing for my recent opportunities?

To use this capability, you must have a Copilot for Sales license. Copilot for Sales must be enabled in your Teams Copilot chat, and you must be signed in to a CRM environment in your Copilot for Sales app.



## Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- United States

---

## Feedback

Was this page helpful?



Yes



No



# Create opportunities from sales meeting summary

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Nov 2024	Nov 2024

## Business value

This feature streamlines the process of capturing sales opportunities that emerge from meetings, saving your significant time and effort. By automating the entry of opportunity details, it minimizes the risk of errors and ensures consistency and accuracy, leveraging information directly from meeting summaries. This efficiency boost allows you to focus more on strategic tasks rather than administrative duties. Moreover, integrating this functionality within Teams enhances user experience by keeping all sales activities within a single, familiar platform. Overall, it supports better sales tracking, improved data accuracy, and increased productivity for sellers, aligning with the goals of enhancing CRM connectivity and addressing key scenarios in Copilot for Sales.

## Feature details

This feature enables you to quickly generate a sales opportunity directly from a meeting summary with just a few clicks. Opportunity details such as account name, contact name, amount, stage, and close date are automatically populated based on the meeting summary and connected data. You can edit or add information before saving the opportunity.

This integration enhances CRM connectivity within Teams meeting recaps, allowing sellers to efficiently capture and manage sales opportunities without manual data entry.

The scope includes providing a sales pill within the Teams meeting recap for creating opportunities, with future expansions to include smart suggestions and meeting-to-opportunity connections.

---

## Feedback

Was this page helpful?

 Yes

 No


# Leverage manager dashboards to coach sellers

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Feb 15, 2024	Oct 2024

## Business value

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.

## Feature details

Managers can stay in touch with their field and sellers using the new manager insights dashboard for conversation intelligence.

In addition to the existing conversation intelligence dashboard functionality, as a sales manager, you'll be able to view:

- Customer sentiment correlation with keyword and competitor mentions.
- Conversation style correlation to deal outcomes.
- Conversational KPIs over time.
- Holistic view of sellers' performances, as well as insight into conversation patterns that close deals.
- Messaging performance in the field and customer perceptions of the competitive landscape.

- Sales-oriented filters such as call time and length, seller, connected record, connected record status, campaign, and more.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- US GCC
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea
- US Gov

## See also

[Analyze your sellers' conversation data with Power BI \(docs\)](#)

---

## Feedback

Was this page helpful?

# Update CRM directly from the post-meeting insights page

Article • 09/25/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Mar 2025

## Business value

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.

## Feature details

As a seller, you can update your CRM directly from the post-meeting insights page by performing the following actions:

- Save the AI-generated meeting summary points directly to the CRM record.
- Connect a meeting to the CRM from the meeting summary.
- Create new records in the CRM.
- Get suggestions to update specific CRM records fields.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore

- South Africa
  - Switzerland
  - United Arab Emirates
  - United States
  - Europe
  - Asia Pacific
  - United Kingdom
  - Australia
  - Brazil
  - Canada
  - India
  - Japan
  - France
  - Korea
- 

## Feedback

Was this page helpful?

 Yes

 No

# Microsoft Outlook experiences

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Microsoft Copilot for Sales is an AI assistant designed for sellers. The Microsoft Copilot for Sales app in Outlook provides recommendations and information to help you stay connected to your customers, minimize data entry, and personalize your engagements to close deals faster with higher win rates. Get related information from CRM such as contact details, account history, and opportunities, save activities (such as emails and meetings) to CRM, get an overview of recent interactions with your customers, such as email summaries, meeting notes, and action items, and use AI capabilities to draft emails, summarize conversations, and generate follow-ups. The Microsoft Copilot for Sales experience within Microsoft Outlook is delivered through an integrated app experience and by enriching the Copilot in Microsoft Outlook capabilities with sales-specific skills, data, and actions.

---

## Feedback

Was this page helpful?

 Yes

 No

# Support sellers with Copilot for Sales mobile experience in Outlook

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Mar 2025

## Business value

As a seller, you spend a lot of time in the field meeting with customers and staying up to date on your mobile device. With the core experiences enabled in the Outlook mobile app, you remain on the go with the support of your sales personal assistant.

## Feature details

As a seller, you'll be able to leverage main features including:

- Generative responses
- Email and opportunity summaries
- Tracking Outlook activities to CRM
- Creating and editing contacts

## Feedback

Was this page helpful?

 Yes

 No



# Plan and prepare for Dynamics 365 Customer Service in 2024 release wave 2

Article • 08/16/2024

## Important

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Service**.

## Overview

<https://aka.ms/ReleaseHighlight/2024W2/Service> 

Dynamics 365 Customer Service is a cloud-based solution that uses generative AI across the service journey to help businesses deliver fast, personalized, and consistent service across multiple channels. Advanced routing, case management, knowledge management, Copilot, and embedded Microsoft Teams capabilities maximize agent productivity. Simplified administration and integrated analytics optimize contact center operations.

In 2024 release wave 2, we're focused on the following capabilities:

- Infuse generative AI into customer, agent, and supervisor experiences.
- Improve agent productivity.
- Extend Copilot capabilities.

 [Updates to Dynamics 365 Customer Service 2024 release wave 2](#) 

## Investment areas



## **Agent experiences**

The agent experience is at the heart of Dynamics 365 Customer Service and enhancing agent confidence is the key to improving customer satisfaction. Customer Service provides a powerful agent desktop, with infused generative AI, seamless collaboration capabilities, and productivity tools in a customizable workspace. Our features boost agent effectiveness, enabling them to deliver personalized customer experiences across any channel.

## **Copilot and AI innovation**

Copilot transforms the Customer Service support experience with generative AI. Agents are more productive and deliver a better service experience with Copilot helping them find resources to resolve issues faster, handle cases more efficiently, and automate time-consuming tasks. Copilot harvests knowledge from internal and external sources to draft contextual answers to questions in email and chat conversations. Agents can ask Copilot questions as they conduct research for a case, and they can use Copilot to generate case and conversation summaries in a single click.

## **Unified routing**

The intelligent routing service in Customer Service uses a combination of AI models and rules to assign incoming service requests from all channels, namely case, record, chat, digital messaging, and voice, to the best-suited agents. The assignment rules take into account customer-specified criteria, such as priority and skills. The routing service uses AI to automatically classify, route, and assign work items, and eliminates the need for constant queue supervision and manual work distribution to offer operational efficiencies for organizations. The various features like percent-based routing, overflow management, and routing to preferred agents help optimize the routing of work items to the best-suited agents.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Customer Service** below:

[Check out the release plan](#)

# For application administrators

## User-impacting features to the user experience enabled automatically

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

## Features that must be enabled by application administrators



This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.



## Get the most out of Customer Service

[Expand table](#)

Helpful links	Description
<a href="#">Release plan</a>	View all capabilities included in the release.
<a href="#">Licensing</a>	Improve your understanding of how to license Customer Service.
<a href="#">Product documentation</a>	Find documentation for Customer Service.
<a href="#">User community</a>	Engage with Customer Service experts and peers in the community.

Helpful links	Description
<a href="#">Upcoming events</a> 	Find and register for in-person and online events.
<a href="#">Product trials</a> 	Get started with Customer Service.

---

## Feedback

Was this page helpful?



# What's new and planned for Dynamics 365 Customer Service

Article • 09/20/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Agent experiences

Enable agents to handle multiple interactions, switch between sessions without losing context, and use productivity tools to enhance workflows.

 Expand table

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Manage cases efficiently with enhanced case controls</a>	Users, automatically	-	✓ Aug 12, 2024	Oct 2024
<a href="#">Prioritize cases with improved case grids</a>	Users, automatically	-	✓ Aug 12, 2024	Oct 2024
<a href="#">Compose emails using improved attachment experience</a>	Users, automatically	-	-	Oct 2024

## Copilot and AI innovation

Copilot in Customer Service consists of various generative AI capabilities that expedite resolutions of customer issues and increase customer satisfaction.

[Expand table](#)

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Use proactive prompts and insights generated by Copilot</a>	Users, automatically	-	-	Nov 2024
<a href="#">Enable agent authentication for plugins</a>	Users by admins, makers, or analysts	Oct 2024	-	-

## Unified routing

Intelligent work item classification and omnichannel routing capabilities enable the flexibility and automation of AI-enabled workflows.

[Expand table](#)

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Update queue memberships for agents in real time</a>	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2024

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about

geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#) ↗.

---

## Feedback

Was this page helpful?

 Yes

 No

# Agent experiences

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

The agent experience is at the heart of Dynamics 365 Customer Service and enhancing agent confidence is the key to improving customer satisfaction. Customer Service provides a powerful agent desktop, with infused generative AI, seamless collaboration capabilities, and productivity tools in a customizable workspace. Our features boost agent effectiveness, enabling them to deliver personalized customer experiences across any channel.

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## Feedback

Was this page helpful?

 Yes

 No



# Compose emails using improved attachment experience

Article • 09/05/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	-	Oct 2024

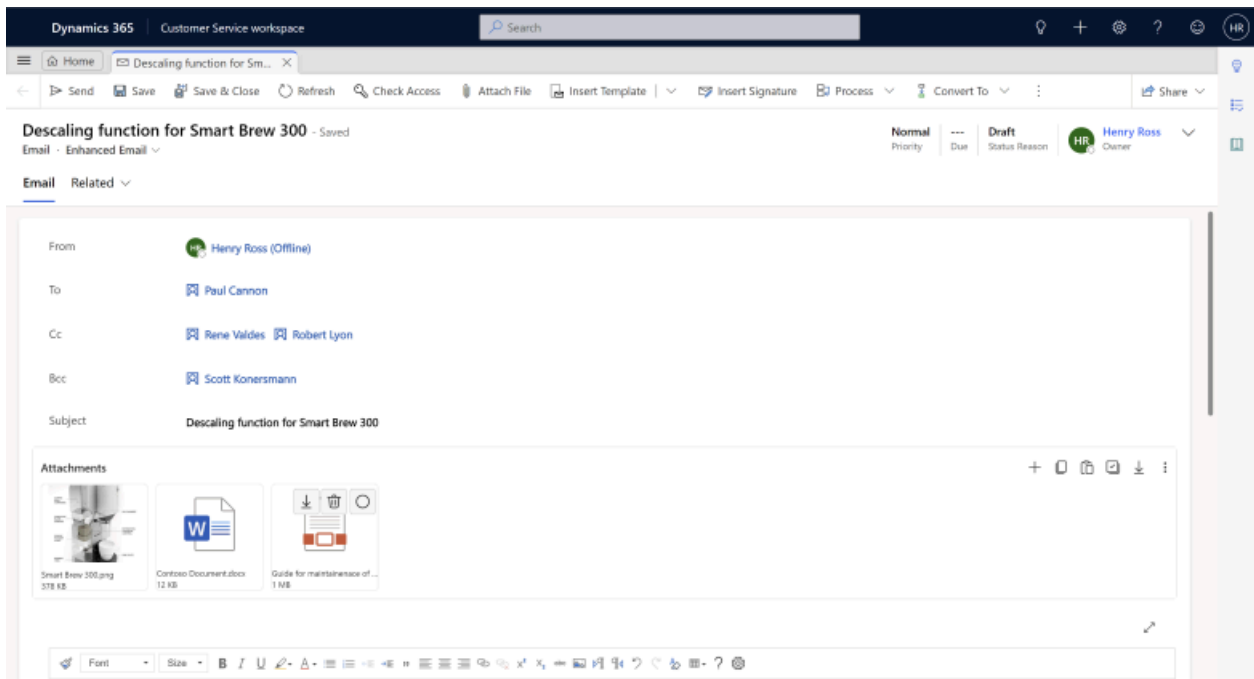
## Business value

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.

## Feature details

With the enhanced email attachment experience, agents can:

- Add attachments by dragging and dropping them to the email.
- Copy attachments from one or more emails and paste it to another email.
- Download and attach email as an attachment to another email.
- Bulk download and deletion of attachments.
- See the attachment size in the appropriate units.
- Toggle between the tile and grid views.
- Export attachment details to Excel.
- Receive reminders to add attachments.
- Add attachments before saving an email.
- Add previously used attachments.



## Feedback

Was this page helpful?




# Manage cases efficiently with enhanced case controls

Article • 08/26/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	 Aug 12, 2024	Oct 2024

## Business value

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.

## Feature details

With this enhancement, the out-of-the-box case form in Customer Service workspace, Case for multisession experience, allows agents to perform the following actions by default:

- Take notes during case creation.
- View and upload multiple attachments directly to the case.
- Access all the attachments related to a case in a consolidated view.

- Quickly get up to speed on the activities due on the case.
- Identify case fields using color-coded icons through the **Option set** wrapper control.

All these capabilities are enabled by default on the out-of-the-box case form, Case for multisection experience in the Customer Service workspace application.

## See also

[Enable enhanced case forms for multisection apps \(docs\)](#)

---

## Feedback

Was this page helpful?


# Prioritize cases with improved case grids

Article • 08/26/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	 Aug 12, 2024	Oct 2024

## Business value

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.

## Feature details

With the improved case grids, agents can do the following:

- View icons for priority and the origin channel, and avatars for the assigned agents.
- View key data such as case age, next SLA breach, IsEscalated, and latest activity in the Enhanced Active Cases view.
- Use quick navigation to the latest activity to respond to the latest communication.

Improvements to the case grid are enabled by default for all customers. Additionally, administrators can enable the editing functionality using the control and allow agents to edit information on the grid directly.

## See also

[Manage cases with case grids](#) (docs)

---

# Feedback

Was this page helpful?

 Yes

 No

# Copilot and AI innovation

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Copilot transforms the Customer Service support experience with generative AI. Agents are more productive and deliver a better service experience with Copilot helping them find resources to resolve issues faster, handle cases more efficiently, and automate time-consuming tasks. Copilot harvests knowledge from internal and external sources to draft contextual answers to questions in email and chat conversations. Agents can ask Copilot questions as they conduct research for a case, and they can use Copilot to generate case and conversation summaries in a single click.

---

## Feedback

Was this page helpful?

 Yes

 No

# Enable agent authentication for plugins

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Oct 2024	-	-

## Business value

Customer Service agents use connector plugins to retrieve information from external data sources, which requires administrator-level authentication or agent-level authentication. Currently, only administrator-level authentication for connector plugins is supported. Adding support for agent-level authentication gives organizations the flexibility to manage authentication at either the agent or administrator level. By enabling agent-level authentication, only the agents who have access to the external data sources can access the data through connector plugins. This permission level also removes the risk of an administrator's credentials becoming stale, which then makes the connector plugins inaccessible to the agents.

## Feature details

In the Customer Service admin center, administrators can enable or disable connector plugins as desired. These plugins are used by Copilot in Dynamics 365 Customer Service. Using a plugin wizard, administrators can set up authentication for either administrators only or agents.

This ability to set up agent authentication provides flexibility for organizations to be able to manage authentication at either the administrator or agent level.



## User authentication

Admin

Use your admin authentication to give agents data access.

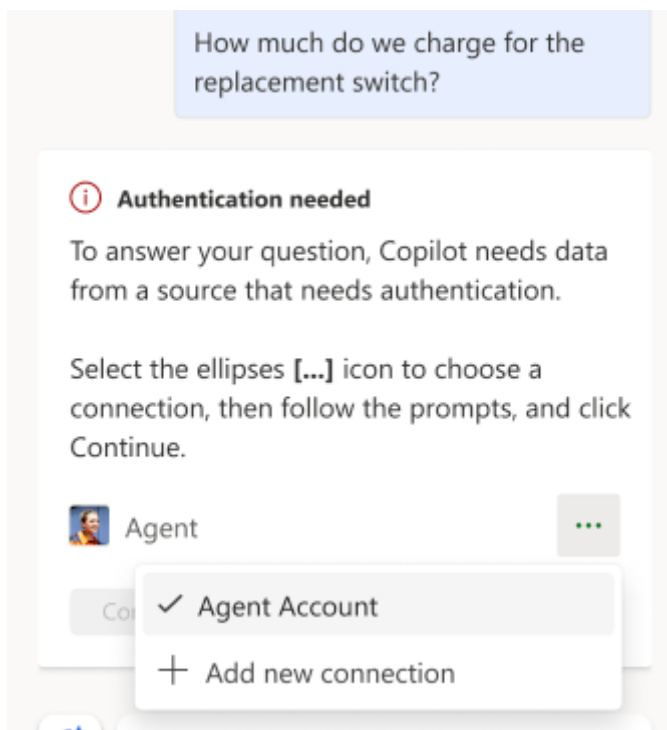
### Select data connection

Select the ellipses [...] icon to choose a connection, then follow the prompts.



Agent

Require agents to authenticate. (Recommended for sensitive or restricted data.)




## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe

- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?

 **Yes**

 **No**

# Use proactive prompts and insights generated by Copilot

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	-	Nov 2024

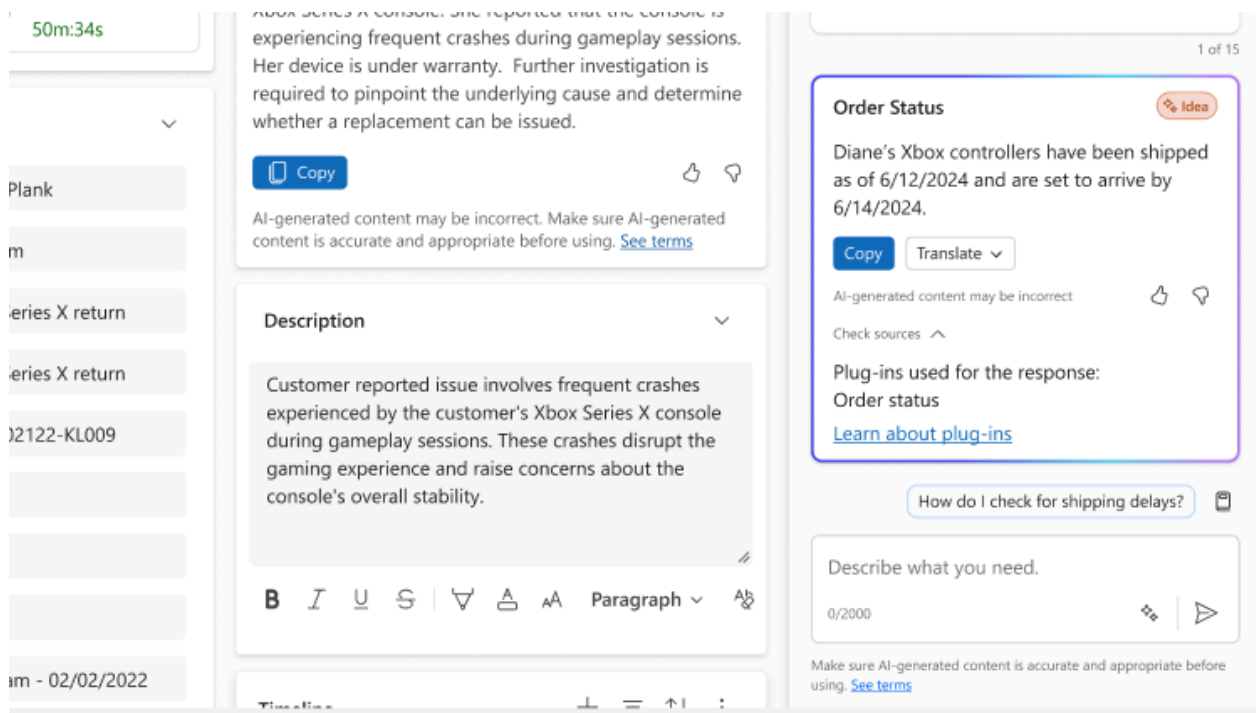
## Business value

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.

## Feature details

Proactive prompting will provide the following benefits for agents:

- Contextual prompt starters at the beginning of a Copilot conversation.
- Follow-up suggested prompts to Copilot responses.
- The ability to discover plugins through suggested prompts.
- The ability to understand case, conversation, and email context.
- Proactively generated insights.



## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

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## Feedback

Was this page helpful?

 Yes

 No

# Unified routing

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

The intelligent routing service in Customer Service uses a combination of AI models and rules to assign incoming service requests from all channels, namely case, record, chat, digital messaging, and voice, to the best-suited agents. The assignment rules take into account customer-specified criteria, such as priority and skills. The routing service uses AI to automatically classify, route, and assign work items, and eliminates the need for constant queue supervision and manual work distribution to offer operational efficiencies for organizations. The various features like percent-based routing, overflow management, and routing to preferred agents help optimize the routing of work items to the best-suited agents.

---

## Feedback

Was this page helpful?

 Yes

 No

# Update queue memberships for agents in real time

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Oct 2024

## Business value

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. These benefits help maintain low customer wait times even during peak traffic periods and avoid unintended work assignments.

## Feature details

Administrators who manage these updates won't have to wait for 15 minutes for an agent's queue membership update to reflect in the system. With the real-time queue membership update, agents can take work in their new record queues immediately after they are added. When you remove agents from queues, they won't receive work from the removed queues, thus reducing the wait time due to reroutes.

---

## Feedback

Was this page helpful?



# Plan and prepare for Microsoft Copilot for Service in 2024 release wave 2

Article • 08/16/2024

## Important



The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Microsoft Copilot for Service**.

## Overview

<https://aka.ms/ReleaseHighlight/2024W2/ContactCenter> 

Microsoft Copilot for Service helps organizations quickly realize the benefits of generative AI by extending their existing investments in CRM and contact center solutions to enhance customer experiences and boost agent productivity. It unlocks an organization's trusted knowledge to accelerate onboarding and case resolution, improve efficiency, and automate tasks for agents in their flow of work—spanning agent desktops of choice, such as Salesforce and the other tools agents already use every day, like Outlook and Teams, with the inclusion of Copilot for Microsoft 365.

Learn more about Microsoft Copilot for Service:

- [Microsoft Copilot for Service](#) 
- [Microsoft Copilot for Service Guided Tour](#) 
- [Microsoft Copilot for Service Documentation](#)

  Updates to Microsoft Copilot for Service 2024 release wave 2

## Investment areas



## **Agent experiences in Microsoft Teams**

Copilot for Service will be introduced across Microsoft apps and products, such as Teams, providing service-specific AI capabilities to help improve your agents' productivity.

Agents working in Teams can use Copilot for Service to browse and update CRM records during a meeting, as well as recap meetings, suggest follow-up action items, and create tasks that can all be saved to CRM systems directly from Microsoft Teams.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Microsoft Copilot for Service** below:

[Check out the release plan](#)

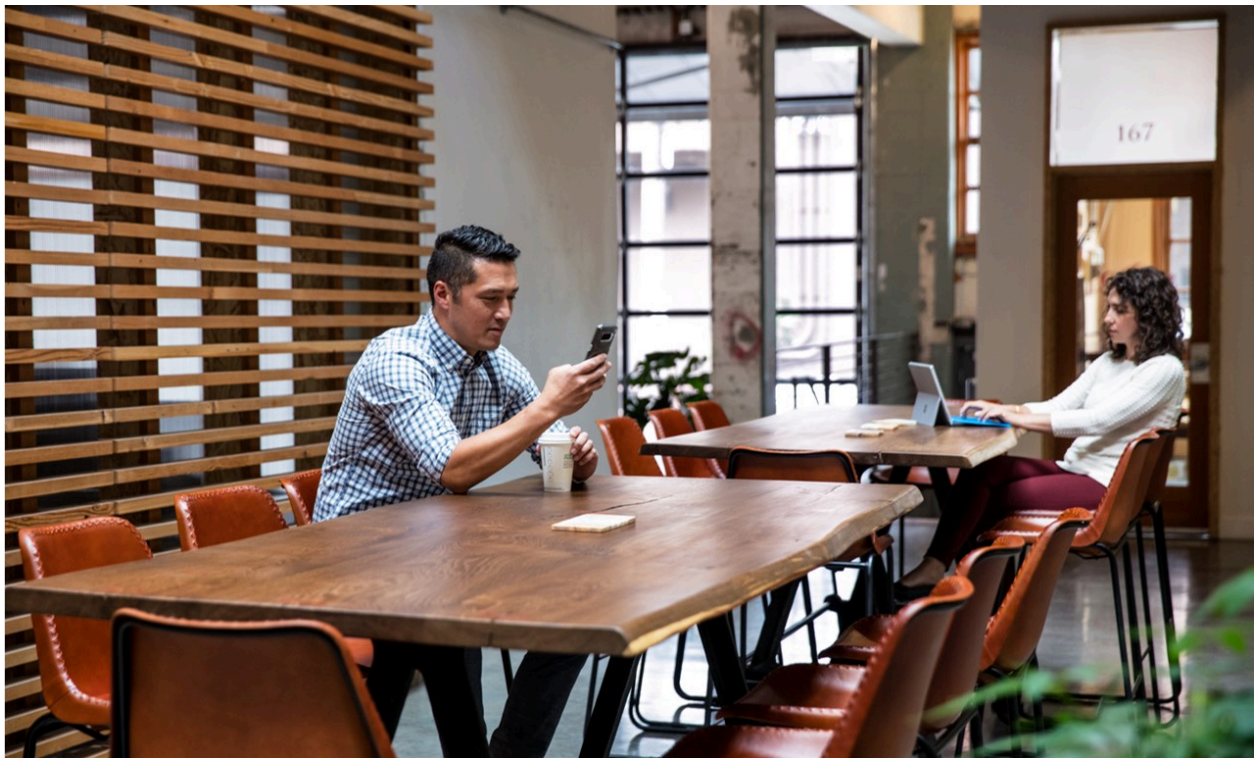
## **For application administrators**

### **User-impacting features to the user experience enabled automatically**

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

### **Features that must be enabled by application administrators**

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.



# Get the most out of Microsoft Copilot for Service

[Expand table](#)

Helpful links	Description
<a href="#">Release plan</a>	View all capabilities included in the release.
<a href="#">Licensing</a>	Improve your understanding of how to license Microsoft Copilot for Service.
<a href="#">Product documentation</a>	Find documentation for Microsoft Copilot for Service.
<a href="#">User community</a>	Engage with Microsoft Copilot for Service experts and peers in the community.
<a href="#">Upcoming events</a>	Find and register for in-person and online events.
<a href="#">Product trials</a>	Get started with Microsoft Copilot for Service.

## Feedback

Was this page helpful?

Yes

No

# What's new and planned for Microsoft Copilot for Service

Article • 09/13/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Agent experiences in Microsoft Teams

Give your agents access to generative AI in their existing flow of work and across the tools they already use every day, such as Teams.

 [Expand table](#)

Feature	Enabled for	Public preview	General availability
<a href="#">Provide meeting summary and follow-ups to create CRM tasks</a>	Users by admins, makers, or analysts	-	Mar 2025

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are

enabled automatically.

- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

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## Feedback

Was this page helpful?

Yes

No

# Agent experiences in Microsoft Teams

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Copilot for Service will be introduced across Microsoft apps and products, such as Teams, providing service-specific AI capabilities to help improve your agents' productivity.

Agents working in Teams can use Copilot for Service to browse and update CRM records during a meeting, as well as recap meetings, suggest follow-up action items, and create tasks that can all be saved to CRM systems directly from Microsoft Teams.

---

## Feedback

Was this page helpful?

 Yes

 No

# Provide meeting summary and follow-ups to create CRM tasks

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Mar 2025

## Business value

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.

## Feature details

Capabilities that will be enabled through this feature:

- Service-specific summary and follow-up items will be provided in the Teams recap if the user has used Copilot for Service in the meeting.
- CRM tasks can be created from the follow-up items right from the Teams recap, helping agents take the next actions right away.
- Access to the call's recording and transcript will be available to agents.
- The meeting summary can be saved back to the CRM system.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- United States
- 

## Feedback

Was this page helpful?





# Plan and prepare for Dynamics 365 Contact Center in 2024 release wave 2

Article • 08/16/2024

## Important

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Contact Center**.

## Overview

<https://aka.ms/ReleaseHighlight/2024W2/ContactCenter> 

Dynamics 365 Contact Center is a Copilot-first, cloud-based contact center that brings unparalleled intelligence and improved customer experience to every engagement channel in a CRM system of your choice. It enables organizations to engage customers in their channel of choice, deliver effortless self-service to improve containment powered by generative AI, accelerate agent-assisted service with embedded Copilot capabilities, and enable smoother operations for supervisors through a 360-degree view of each customer.

For 2024 release wave 2, we are focused on:

- Enabling Agent capabilities such as knowledge harvesting from conversational data, intent assist for dynamic self-service and AI-driven conversation routing
- Providing proactive outbound omnichannel engagement assisted by Copilot
- Enhancing extensibility for out-of-the-box integrations with ServiceNow and Zendesk

  Updates to Dynamics 365 Contact Center 2024 release wave 2

## Investment areas



### **Administrator experiences**

The modern administration experience provides a consistent setup experience that unifies the management of Dynamics 365 Contact Center, unified routing, and omnichannel activities. The admin center app consolidates all administrator experiences that are relevant to customer support into a single app. It provides an intuitive and guided experience to enable rapid first-time and incremental setup, as well as proactive health checks to make sure that the system is set up correctly and works as expected.

### **Agent experiences**

The agent experience is at the heart of Dynamics 365 Contact Center and enhancing agent confidence is the key to improving customer satisfaction. Dynamics 365 Contact Center provides a powerful agent desktop, with infused generative AI, seamless collaboration capabilities, and productivity tools in a customizable workspace. Its features boost agent effectiveness, enabling them to deliver personalized customer experiences across any channel.

### **IVR capabilities**

Conversational IVRs enable enterprises to increase containment, improve customer satisfaction and reduce cost by letting customers self-serve using their voice. Dynamics 365 Contact Center IVRs are powered by Microsoft Copilot Studio.

### **Omnichannel customer experiences**

The omnichannel capabilities in Dynamics 365 Contact Center enable organizations to instantly connect and engage with their customers via channels like live chat, SMS, voice, Microsoft Teams, and social channels. By providing a seamless agent experience and valuable conversation insights across channels, the omnichannel features enable organizations to deliver a true, all-in-one contact center.

### **Unified routing**

The intelligent routing service in Dynamics 365 Contact Center uses a combination of AI models and rules to assign incoming service requests from all channels, namely chat, digital messaging, and voice, to the best-suited agents. The assignment rules take into account customer-specified criteria, such as priority and skills. The routing service uses

AI to automatically classify, route, and assign work items, and eliminates the need for constant queue supervision and manual work distribution to offer operational efficiencies for organizations. The various features like percent-based routing, overflow management, and routing to preferred agents help optimize the routing of work items to the best-suited agents.

To learn more about the entire set of capabilities being delivered during this release wave, check out the release plan for Dynamics 365 Contact Center below:

[Check out the release plan](#)

## For application administrators

### User-impacting features to the user experience enabled automatically

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.







### Features that must be enabled by application administrators

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.



# Get the most out of Dynamics 365 Contact Center

 Expand table

Helpful links	Description
<a href="#">Release plan</a> 	View all capabilities included in the release.
<a href="#">Licensing</a> 	Improve your understanding of how to license Dynamics 365 Contact Center.
<a href="#">Product documentation</a> 	Find documentation for Dynamics 365 Contact Center.
<a href="#">User community</a> 	Engage with Dynamics 365 Contact Center experts and peers in the community.
<a href="#">Upcoming events</a> 	Find and register for in-person and online events.
<a href="#">Product trials</a> 	Get started with Dynamics 365 Contact Center.

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## Feedback

Was this page helpful?

 Yes

 No

# What's new and planned for Dynamics 365 Contact Center

Article • 09/20/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Administrator experiences

An intuitive, modern administration experience is key to quickly setting up Dynamics 365 Contact Center and using its features.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Monitor agent assignments in Application Insights</a>	Users by admins, makers, or analysts	Feb 2025	Apr 2025
<a href="#">Configure embedded experience for other CRM solutions</a>	Users by admins, makers, or analysts	-	Oct 2024

## Agent experiences

Enable agents to handle multiple interactions, switch between sessions without losing context, and use productivity tools to enhance workflows.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Search for a customer in the outbound dialer</a>	Users by admins, makers, or analysts	✓ Apr 8, 2024	Oct 2024
<a href="#">Use copilots to get customer feedback</a>	Users by admins, makers, or analysts	Nov 2024	Apr 2025

## IVR capabilities

Use Copilot-based interactive voice response (IVR) capabilities for providing self-service to your customers.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Edit business rules for omnichannel bots</a>	Users by admins, makers, or analysts	-	Nov 2024
<a href="#">Customers can opt out of recording when they talk to IVR</a>	Users by admins, makers, or analysts	-	Mar 2025
<a href="#">Manage calls when bot handling fails</a>	Users, automatically	-	Nov 2024
<a href="#">Use multilingual IVR bots</a>	Users by admins, makers, or analysts	-	Nov 2024
<a href="#">Configure IVR to switch languages based on dialed number</a>	Users by admins, makers, or analysts	-	Nov 2024
<a href="#">Mask sensitive data and prevent unauthorized access</a>	Users by admins, makers, or analysts	-	Mar 2025

## Omnichannel customer experiences

Omnichannel engagement enables instant connectivity between agents and customers and gives supervisors real-time visibility into operational efficiency.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Support for new locales in the IVR bot</a>	Users by admins, makers, or analysts	-	Mar 2025
<a href="#">Integrate biometric authentication and fraud prevention</a>	Users by admins, makers, or analysts	Mar 2025	Jun 2025
<a href="#">Use SLA-based automated actions on conversations</a>	Users by admins, makers, or analysts	-	Oct 2024
<a href="#">Hide transcripts for voice calls</a>	Users, automatically	✓ Jul 29, 2024	Oct 2024
<a href="#">Broaden region coverage of voice channel</a>	Users by admins, makers, or analysts	Mar 2025	Mar 2025
<a href="#">Monitor work item lifecycle in Application Insights</a>	Users by admins, makers, or analysts	✓ Aug 23, 2023	Oct 2024

## Unified routing

Intelligent work item classification and omnichannel routing capabilities enable the flexibility and automation of AI-enabled workflows.

 Expand table



Feature	Enabled for	Public preview	General availability
<a href="#">Use overflow for lengthy wait times for work items</a>	Admins, makers, marketers, or analysts, automatically	-	Feb 2025
<a href="#">Use first-in, first-out order in custom prioritization</a>	Admins, makers, marketers, or analysts, automatically	-	Dec 2024
<a href="#">Update queue memberships for agents in real time</a>	Admins, makers, marketers, or analysts, automatically	-	Oct 2024

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:



- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#) . For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#) .

---

## Feedback

Was this page helpful?

 Yes

 No



# Administrator experiences

Article • 08/16/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

The modern administration experience provides a consistent setup experience that unifies the management of Dynamics 365 Contact Center, unified routing, and omnichannel activities. The admin center app consolidates all administrator experiences that are relevant to customer support into a single app. It provides an intuitive and guided experience to enable rapid first-time and incremental setup, as well as proactive health checks to make sure that the system is set up correctly and works as expected.

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## Feedback

Was this page helpful?

 Yes

 No

# Configure embedded experience for other CRM solutions

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

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.

## Feature details

The embedded experience allows agents to chat with customers directly from any third-party customer relationship management (CRM) system. Administrators can configure the embedded experience to work with any third-party CRM solution that an organization chooses to integrate with.

---

## Feedback

Was this page helpful?

 Yes

 No

# Monitor agent assignments in Application Insights

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2025	Apr 2025

## Business value

Insights on assignments enable you to quickly diagnose and identify any assignment configuration issues, address any errors or gaps promptly, maintain SLAs, increase agent productivity, reduce customer wait time, and manage customer satisfaction.

## Feature details

This feature provides you with detailed information on the assignment of conversations in Application Insights. It helps you understand and diagnose the automated assignment process by answering questions like why a conversation wasn't assigned despite having available agents, why it wasn't assigned to a specific agent, or why a certain agent was selected. With this level of visibility, you can self-detect inefficiencies and build insights that inform the changes you need to apply to your assignment rules for achieving the optimal customer outcome.

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?

# Agent experiences

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

The agent experience is at the heart of Dynamics 365 Contact Center and enhancing agent confidence is the key to improving customer satisfaction. Dynamics 365 Contact Center provides a powerful agent desktop, with infused generative AI, seamless collaboration capabilities, and productivity tools in a customizable workspace. Its features boost agent effectiveness, enabling them to deliver personalized customer experiences across any channel.

---

## Feedback

Was this page helpful?

 Yes

 No


# Search for a customer in the outbound dialer

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Apr 8, 2024	Oct 2024

## Business value

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.

## Feature details

The enhanced outbound dialing experience enables agents to:

- Place a call by searching for a customer contact or account from the outbound dialer.
- Open the customer record from the call history.

For more information, watch our [Outbound dialer enhancements in Dynamics 365 Customer Service video](#).

## See also

[Call a customer](#) (docs)

---

## Feedback

Was this page helpful?



Yes



No

# Use copilots to get customer feedback

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Nov 2024	Apr 2025

## Business value

Traditional customer feedback management takes a long time (days/weeks) to close the loop with action on feedback provided. Different tools are used to capture customer feedback across different channels within your contact center. With AI, we have an opportunity to enable real-time feedback, with automated and personalized feedback loops to help our customers unlock immense business values. This feature unifies the process of configuring the surveys across channels while using the generative AI capabilities of Copilot studio bots.

## Feature details

With this feature, you can:

- Use Microsoft Copilot Studio-based bots to gather customer feedback and configure contextual actions depending on the feedback.
  - Unify and centralize the process of configuring surveys across all channels - messaging, voice, and custom channels.
  - Use predefined templates to create surveys.
  - Allow supervisors to view and review feedback summarized into actionable insights.
-



# Feedback

Was this page helpful?

# IVR capabilities

Article • 08/16/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Conversational IVRs enable enterprises to increase containment, improve customer satisfaction and reduce cost by letting customers self-serve using their voice. Dynamics 365 Contact Center IVRs are powered by Microsoft Copilot Studio.

---

## Feedback

Was this page helpful?

 Yes

 No

# Configure IVR to switch languages based on dialed number

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Nov 2024

## Business value

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.

## Feature details

You can create a single bot that can handle multiple languages in Microsoft Copilot Studio. When you assign phone numbers in the voice channel in Customer Service, you can select a language that will be primary based on the phone number. This feature eliminates the need for multiple bots by linking languages to dialed numbers.

---

## Feedback

Was this page helpful?

 Yes

 No

# Customers can opt out of recording when they talk to IVR

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Mar 2025

## Business value

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.

## Feature details

In many countries, including the European Union, recording consent is mandatory. Administrators can activate opt-in to call recording for customer interactions with the IVR. However, a customer has to explicitly consent to being recorded. If the customer opts out, Microsoft Copilot Studio messages the system to halt recording, delete the audio, and stop capturing dialog for the call.

---

## Feedback

Was this page helpful?

 Yes

 No

# Edit business rules for omnichannel bots

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Nov 2024

## Business value

The ability to build and configure rules for an Interactive Voice Response (IVR) copilot within Power Apps allows business administrators to implement call flow changes dynamically, without modifying the copilot logic. This in turn leads to drastic time savings, eliminating testing and deployment cycles within Microsoft Copilot Studio.

This feature is particularly beneficial for enterprises looking to make rapid adjustments in response to environmental factors such as natural disasters or power outages, as well as financial shifts like market fluctuations or policy amendments. It empowers administrators to act decisively in various scenarios, ensuring business continuity and customer satisfaction.

## Feature details

Using Power Apps, enterprise customers can leverage Dataverse tables to configure dynamic key values for their Copilot application. Such examples include store locations, transfer numbers, broadcast messages, and lines of business. Through management of these bot rules, business administrators can enhance operational agility and swiftly adapt the IVR flow to their imminent business needs. Using Power Apps circumvents the need for direct modifications to the bot's logic, which in turn eliminates the time associated with standard testing and deployment procedures.

Customers can set up their Power Apps integration with Copilot Studio in a few simple steps:

1. Create and configure your Dataverse table in Power Apps.
2. Create an application in Power Apps to support administration of your data.
3. Set up an action in Copilot Studio to connect your Dataverse table to your copilot.

Once the customer's application is established, business administrators can directly add, update, and delete key data values and seamlessly publish to the live copilot environment. The data associated with the copilot will be cached to ensure there is no latency or disruptions to the end users.

 **Note:** The author created this article with assistance from AI. [Learn more](#)

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## Feedback

Was this page helpful?

 Yes

 No

# Manage calls when bot handling fails

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Nov 2024

## Business value

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.

## Feature details

Administrators have the flexibility to define the customer experience during unforeseen bot issues. Instead of abruptly ending the call with a busy tone, which is jarring for the caller, the application can gracefully manage the situation.

The application plays a courteous message such as, "We apologize, our application is currently experiencing technical difficulties. Please try your call again later," or "We are facing some issues at the moment. Allow me to connect you with a representative who can assist," guiding callers to the right course of action.

By default, this feature is activated upon the creation of the voice channel, ensuring immediate readiness. Administrators can personalize the message, aligning it with the organization brand identity and customer engagement strategy. This customization can replace the standard message to reinforce the brand's voice and enhance the overall customer experience.

Some of the options include:

- Play a custom prompt message, transfer the call to an external number, and disconnect.
- Play a custom prompt message and disconnect.
- Play a prompt message and transfer to a queue.
- Directly transfer the call to a queue.

ⓘ **Note:** The author created this article with assistance from AI. [Learn more](#)

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## Feedback

Was this page helpful?

 Yes

 No



# Mask sensitive data and prevent unauthorized access

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Mar 2025

## Business value

To safeguard sensitive data isn't just a necessity, but a mandate for contact centers. As the custodians of customer trust, contact centers are pioneering the use of innovative methods to protect customer data at every stage—acquisition, transmission, and storage.

- **Enhanced customer trust:** By employing state-of-the-art methods to protect customer data, we demonstrate our commitment to privacy, thereby enhancing customer trust and loyalty.
- **Regulatory compliance:** Our platform helps contact centers adhere to industry regulations related to data protection, reducing the risk of non-compliance penalties.
- **Secure environment:** By deterring unauthorized access, we provide a secure environment for agents and supervisors, enabling them to focus on delivering excellent customer service.

## Feature details

This feature provides the following configuration capabilities to prevent unauthorized access and create a secure environment for agents and supervisors to address customer needs.

- **Administrative control:** Administrators can define rules for handling sensitive data items and establish masking rules. These rules can be applied for data storage, during IVR sessions, and agent sessions. Currently, admins can now write 20 regular expressions. The RegEx masking rules will be applicable to IVR transcripts and real-time transcripts that are displayed to the agents. In addition to RegEx masking rules, admins can also configure sensitive data redaction rules for whole call recordings. The recordings will be processed after the call ends via a "Redaction Copilot" that will ingest the recording and return a new version of the recording with sensitive information redacted.
- **Service-wide application:** Sensitive data will be masked in transcriptions and logs, and redacted from call recordings.
- **Audit trails:** Auditing features to track changes to sensitive data rules and access to Dataverse entities that host sensitive data.

 **Note:** The author created this article with assistance from AI. [Learn more](#)

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## Feedback

Was this page helpful?

 Yes

 No

# Use multilingual IVR bots

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Nov 2024

## Business value

A 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.

## Feature details

To handle calls originating in any language, you can configure a single multilingual bot in Copilot Studio and assign it to a common phone number for all users in your contact center. Based on the caller's language preference, the bot logic can switch bot language to the caller's preferred language. This feature eliminates the need for multiple bots and improves CSAT by supporting multiple languages with one phone number.

---

## Feedback

Was this page helpful?

 Yes

 No

# Omnichannel customer experiences

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

The omnichannel capabilities in Dynamics 365 Contact Center enable organizations to instantly connect and engage with their customers via channels like live chat, SMS, voice, Microsoft Teams, and social channels. By providing a seamless agent experience and valuable conversation insights across channels, the omnichannel features enable organizations to deliver a true, all-in-one contact center.

---

## Feedback

Was this page helpful?

 Yes

 No

# Broaden region coverage of voice channel

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2025	Mar 2025

## Business value

The availability of the voice channel in newer geographical regions will help businesses cater to their customers in these regions.

## Feature details

The voice channel will be available in the United Arab Emirates and Government Community Cloud Moderate (GCC-M) regions. In GCC-M, the voice channel will be available via Direct Routing.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- United Arab Emirates
- US GCC

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?



Yes



No

# Hide transcripts for voice calls

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	 Jul 29, 2024	Oct 2024

## Business value

By hiding transcripts for voice calls even when the transcription feature is turned on, you can reduce distractions and clutter for your agents.

## Feature details

By using the administrator toggle, you can allow agents to hide the transcript for the voice call by default. When agents are in a call, they can choose to show or hide the transcript. The agent gets the last-used setting when they accept a new call.

## See also

[Call controls](#) (docs)

---

## Feedback

Was this page helpful?

 Yes

 No

# Integrate biometric authentication and fraud prevention

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2025	Jun 2025

## Business value

Modernize customer experience, reduce average handling time, mitigate fraud losses, and improve operational efficiency with seamless biometric authentication and intelligent fraud detection.

## Feature details

Authentication is often a tedious step of the customer experience. Traditional methods such as knowledge-based and two-factor authentication are slow and inconvenient for customers and contact center agents. Meanwhile, business losses associated with fraud are an increasing threat in many industries. Fraudsters often circumvent contact center security by impersonating real customers or socially engineered agents. Organizations are looking for solutions that can seamlessly authenticate and help prevent fraud, but vendor options are scarce and often difficult to connect with existing systems.

The interoperation of Nuance Gatekeeper with the voice channel in Customer Service enables organizations to improve customer satisfaction and contact center efficiency through voice biometric authentication and intelligent fraud prevention.

The use cases are as follows:



- Voice authentication for customers from directly within the Customer Service agent UI, enabling fast, secure, personalized service.
- Fraud prevention capabilities alert agents about known fraudsters and spoofing attempts, and allow agents to flag conversations for further investigation by a fraud analyst.
- Supervisors can monitor conversations flagged as suspicious or fraudulent.
- Integrated reporting for fraud analysis.

The benefits are as follows:

- Improve agent productivity and reduce costs by minimizing the time spent on authentication during each call.
- Modernize the customer experience and improve CSAT by delivering fast, personalized service without interrogating customers.
- Reduce losses caused by fraud. Fraudsters have developed patterns to conceal their identity and socially engineer contact center agents toward completing transactions that are fraudulent.

 **Note:** The author created this article with assistance from AI. [Learn more](#)

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## Feedback

Was this page helpful?

 Yes

 No


# Monitor work item lifecycle in Application Insights

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Aug 23, 2023	Oct 2024

## Business value

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.

## Feature details

Work item lifecycles will now be available to organizations through Application Insights to monitor and take corrective actions in the event of any runtime issues that might arise. This lifecycle data will help diagnose issues, potentially enabling organizations to quickly put mitigations in place and ensure smooth operations of their contact centers.

## See also

[Conversation diagnostics](#) (docs)

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## Feedback

Was this page helpful?



Yes



No

# Support for new locales in the IVR bot

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Mar 2025

## Business value

Build self-service bots for speakers of en-AUS, en-IN, and ca-ES languages. The interactive voice response (IVR) has capabilities such as automated speech recognition, discussion transcription, and text-to-speech for the specified languages, thereby expanding your customer reach.

## Feature details

Dynamics 365 Contact Center's IVR now supports en-AUS, en-IN, and ca-ES locales. You can configure these languages in Copilot Studio bots for telephony in the omnichannel. The IVR offers capabilities such as speech recognition, transcription, and can handle inquiries in the specified languages.

 **Note:** The author created this article with assistance from AI. [Learn more](#)

## Feedback

Was this page helpful?

 Yes

 No

# Use SLA-based automated actions on conversations

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

Businesses can set up automatic actions on messaging conversations based on time-based SLA to improve CSAT and booster agent productivity

## Feature details

To boost agent productivity, administrators can configure the following capabilities for conversations that come through messaging channels:

- Send an auto-reply to a customer to engage them again if they're unresponsive after a certain period.
- Close conversations automatically after the configured minutes of idle time, which is indicated by no customer responses, so that agent capacity becomes free to help other customers waiting in the queue.
- Send follow-up messages to customers to remind them to connect back to make progress on their support conversations.
- Reduce average handle time for agents.

---

## Feedback

Was this page helpful?

# Unified routing

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

The intelligent routing service in Dynamics 365 Contact Center uses a combination of AI models and rules to assign incoming service requests from all channels, namely chat, digital messaging, and voice, to the best-suited agents. The assignment rules take into account customer-specified criteria, such as priority and skills. The routing service uses AI to automatically classify, route, and assign work items, and eliminates the need for constant queue supervision and manual work distribution to offer operational efficiencies for organizations. The various features like percent-based routing, overflow management, and routing to preferred agents help optimize the routing of work items to the best-suited agents.

---

## Feedback

Was this page helpful?

 Yes

 No

# Update queue memberships for agents in real time

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Oct 2024

## Business value

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. These benefits help maintain low customer wait times even during peak traffic periods and avoid unintended work assignments.

## Feature details

Administrators who manage these updates won't have to wait for 15 minutes for an agent's queue membership update to reflect in the system. With the real-time queue membership update, agents can take work in their new voice and messaging queues as soon as they are added to them. When you remove agents from queues, they won't receive work from the removed queues, thus reducing the wait time due to reroutes.

---

## Feedback

Was this page helpful?

 Yes

 No





# Use first-in, first-out order in custom prioritization

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Dec 2024

## Business value

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.

## Feature details

The first-in-first-out prioritization for live channels is based on conversation start time. However, conversations that come from asynchronous messaging channels like persistent chat, Facebook, WhatsApp, and SMS can be paused or kept in a waiting state, allowing the customer to respond on their own schedule while preserving the conversation continuity. Organizations want to ensure that the customers get a quick response when they resume the conversation. Now conversations will be prioritized by the latest interaction time. This means for new conversations the start time is still considered the interaction time. With this enhancement, for conversations that are

resumed from the waiting state, the resume time will be considered in the first-in, first-out order by of the custom prioritization rule.

---

## Feedback

Was this page helpful?

 Yes

 No

# Use overflow for lengthy wait times for work items

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Feb 2025

## Business value

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.

## Feature details

With overflow for work items in a queue, administrators can:

- Set a clear and reasonable wait time limit for work items before they are marked for overflow.
- Define a contingency plan for work items that exceed the wait time limit, such as transferring them to another queue with more agents who can address the customer request.

## 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		

## See also

[Handle queue overflow \(docs\)](#)

## Feedback

Was this page helpful?

Yes

No

# Plan and prepare for Dynamics 365 Field Service in 2024 release wave 2

Article • 08/16/2024

## Important

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Field Service**.

## Overview

<https://aka.ms/ReleaseHighlight/2024W2/Service> 

Dynamics 365 Field Service is an industry-leading field service management application that allows companies to transform their service operations with processes and experiences to manage, schedule, and perform. Field Service helps connect people, places, and things to deliver customer-centric experiences.

It includes work order management, resource scheduling, asset management capabilities, and frontline worker tools. Field Service allows organizations to move from paper-based reactive service to delivering proactive and predictive world-class service, empowering digital transformation and allowing innovative business models such as outcome-based service.

In the 2024 release wave 2, we bring the next generation of Copilot-first, modern, task-oriented experiences across all Field Service personas and app areas.

- Frontline workers can leverage Copilot to retrieve information from company information including documents, and initiate remote assistance calls using mixed reality right from within Teams.
- Managers can create, manage, and update work orders through Copilot from within the web interface, Outlook, and Teams.
- Copilot allows dispatchers to swiftly book frontline workers using the power of AI with Copilot.

In addition to infusing Field Service with AI, we also enable organizations to more effectively manage operations with seamless integrations with Teams, Outlook, and Viva Connections.

Get ready for the power of Dynamics 365 Field Service and elevate your service operations to deliver world-class service.

 [Updates to Dynamics 365 Field Service 2024 release wave 2](#)

## Investment areas



### **Boost technician productivity**

Service technicians and frontline workers are the essence of any field service organization. They're the vanguard of providing excellent customer service by fixing the customers' issues. It's critical that frontline workers have the best digital tools that enable them to engage with their peers, the back office, and customers while staying on top of their field duties. Empowering technicians and frontline workers to perform better service and achieve high first-time fix rates is a core objective of Field Service.

The core of the technician experience is via the Field Service Mobile app. With its rich set of features that work in offline conditions, the Field Service Mobile app is the trustworthy companion for frontline workers.

### **Copilot and AI innovation**

Copilot transforms the Field Service experience for both managers and frontline workers. Managers are more productive and deliver a better service experience with Copilot helping them manage and schedule work across their workforce. Frontline workers can spend more time focusing on fixing issues with Copilot helping to find and update critical information. Copilot helps keep users in the flow of work across interfaces on the web, mobile, and Microsoft 365, allowing managers and frontline workers to ask questions, update information, and streamline their process across Microsoft 365 apps and Field Service.

### **Optimize resource scheduling**

Resource management and scheduling optimization are at the heart of field service management. Resource scheduling enables service organizations to triage unscheduled work orders and cases efficiently and schedule the nearest matching technicians to

deliver service to their customers. The schedule board offers scheduling capabilities for dispatchers, project managers, and resource managers in different views and extensibility capabilities for partners to tailor functionality to their needs.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Field Service** below:

[Check out the release plan](#)

## For application administrators

**User-impacting features to the user experience enabled automatically**

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

**Features that must be enabled by application administrators**







This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.



**Get the most out of Field Service**



 Expand table

Helpful links	Description
<a href="#">Release plan</a> 	View all capabilities included in the release.
<a href="#">Licensing</a> 	Improve your understanding of how to license Field Service.
<a href="#">Product documentation</a> 	Find documentation for Field Service.
<a href="#">User community</a> 	Engage with Field Service experts and peers in the community.
<a href="#">Upcoming events</a> 	Find and register for in-person and online events.
<a href="#">Product trials</a> 	Get started with Field Service.

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## Feedback

Was this page helpful?

 Yes

 No

# What's new and planned for Dynamics 365 Field Service

Article • 09/20/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Boost technician productivity

Dynamics 365 Field Service empowers frontline workers with new features to boost productivity and new mobile experiences.

[Expand table](#)

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Use Remote Assist mixed reality annotations in Microsoft Teams</a>	Users by admins, makers, or analysts	✓ Apr 17, 2024	-	Oct 2024
<a href="#">Select table columns to include in mobile offline sync</a>	Admins, makers, marketers, or analysts, automatically	✓ Jun 18, 2024	-	Oct 2024
<a href="#">View your mobile offline sync data with Application Insights</a>	Users by admins, makers, or analysts	✓ Jul 18, 2024	-	Oct 2024

## Copilot and AI innovation

Use copilot capabilities in Dynamics 365 Field Service for frontline managers, dispatchers, and technicians.

[Expand table](#)

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Enhance Copilot experiences in the web app</a>	Admins, makers, marketers, or analysts, automatically	-	-	Nov 2024
<a href="#">Configure Copilot summaries in Field Service</a>	Users by admins, makers, or analysts	✓ Apr 17, 2024	-	Dec 2024
<a href="#">Summarize work orders with Copilot in Outlook</a>	Users by admins, makers, or analysts	-	-	Nov 2024
<a href="#">Summarize work orders with Copilot in the mobile app</a>	Users by admins, makers, or analysts	✓ Dec 15, 2023	-	Dec 2024
<a href="#">Get assistance with AI-powered work order recaps</a>	Users by admins, makers, or analysts	✓ Aug 9, 2023	-	Dec 2024

## Optimize resource scheduling

Dynamics 365 Field Service resource scheduling features include key enhancements on manual and automated scheduling.

[Expand table](#)

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Improve usability and performance of the schedule board</a>	Users by admins, makers, or analysts	-	-	Nov 2024
<a href="#">Transition all users to the new schedule board</a>	Users, automatically	-	✓ Aug 12, 2024	Oct 2024

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#) <sup>↗</sup>. For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#) <sup>↗</sup>.

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## Feedback

Was this page helpful?

Yes

No

# Boost technician productivity

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Service technicians and frontline workers are the essence of any field service organization. They're the vanguard of providing excellent customer service by fixing the customers' issues. It's critical that frontline workers have the best digital tools that enable them to engage with their peers, the back office, and customers while staying on top of their field duties. Empowering technicians and frontline workers to perform better service and achieve high first-time fix rates is a core objective of Field Service.

The core of the technician experience is via the Field Service Mobile app. With its rich set of features that work in offline conditions, the Field Service Mobile app is the trustworthy companion for frontline workers.

---

## Feedback

Was this page helpful?

 Yes

 No


# Select table columns to include in mobile offline sync

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	 Jun 18, 2024	-	Oct 2024

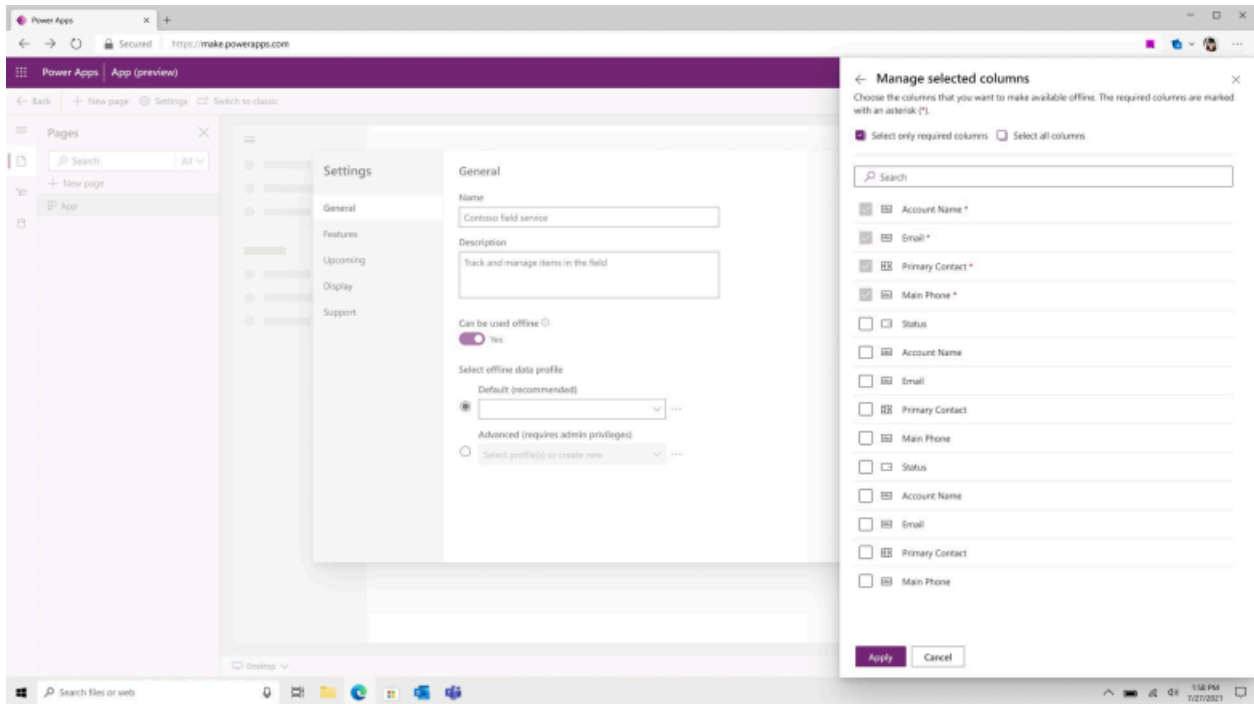
## Business value

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.

## Feature details

While configuring your mobile offline profile, you can now selectively choose which columns are downloaded for each offline-enabled Dataverse table.

- Updated mobile offline profile configuration interface shows how many columns are selected along with the ability to select individual columns for each table.
- The system shows which columns are required by the application.
- Users can select columns required for unique business scenarios or customizations.



## See also

[Optimize columns included within the offline profile \(docs\)](#)

## Feedback

Was this page helpful?

Yes

No


# Use Remote Assist mixed reality annotations in Microsoft Teams

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	 Apr 17, 2024	-	Oct 2024

## Business value

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.

## Feature details

Frontline workers can now get remote assistance via video call with 3D spatial annotations, right within Teams mobile. Users no longer need to switch apps to use Remote Assist when they are collaborating within Teams on their mobile devices.

This feature is currently available on iOS devices and we plan a fast follow for Android devices.

## See also

[Use Teams mobile to annotate in a user's environment](#) (docs)

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# Feedback

Was this page helpful?

# View your mobile offline sync data with Application Insights

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	 Jul 18, 2024	-	Oct 2024

## Business value

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.

## Feature details

Use new data available in Application Insights to build reports and dashboards for your organization.

Within Application Insights, you can get data to report on:

- Offline-sync statistics per user, including first sync, delta sync, sync duration, and payload size.
- Sync success or failure rate including sync errors.
- End-user mobile device make and model.

## See also

## Feedback

Was this page helpful?



# Copilot and AI innovation

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

Copilot transforms the Field Service experience for both managers and frontline workers. Managers are more productive and deliver a better service experience with Copilot helping them manage and schedule work across their workforce. Frontline workers can spend more time focusing on fixing issues with Copilot helping to find and update critical information. Copilot helps keep users in the flow of work across interfaces on the web, mobile, and Microsoft 365, allowing managers and frontline workers to ask questions, update information, and streamline their process across Microsoft 365 apps and Field Service.

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## Feedback

Was this page helpful?

 Yes

 No

# Get assistance with AI-powered work order recaps

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	 Aug 9, 2023	-	Dec 2024

## Business value

AI-powered work order recaps help service managers quickly access a summary of the work order and its related data, boosting efficiency and improving customer satisfaction.

## Feature details

Work order recaps highlight important information about a work order such as notes, products, services, tasks, activities, and more to help users catch up without having to dig through all the information in a work order. At any point, a user can ask Copilot in Field Service to generate a recap and avoid clicking through the user interface to get caught up.

meline Related ▾

**Copilot** PREVIEW ⓘ

This work order was created on Tue Aug 27 when Mica Pereira reported unusual noise from the HVAC ductwork.


Several notes have been added with photos from the customer showing where the problem is heard. There is also a note from Mona Kane that outlines the suspected cause as the recirculator fan and recommends diagnosis starts there.

Please review before using to ensure this AI-generated content is accurate, complete, and appropriate.  
[Learn more](#) [Terms](#)

👍 🗨

Regenerate recap

**Booking**

 David So  
HVAC Technician

📅 Jul 27, 2023


## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- US GCC
- US GCC High
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

## See also

[Summarize records with Copilot in Field Service \(docs\)](#)

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?

 **Yes**

 **No**

# Configure Copilot summaries in Field Service

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	 Apr 17, 2024	-	Dec 2024

## Business value

With work order summaries generated by Copilot, service managers, dispatchers, and technicians can quickly get an overview and understanding of the key points of the work to be done. Organizations now have more control to include specific data in the summaries for their users, which can lead to more useful and actionable summaries.

## Feature details

Copilot in Dynamics 365 Field Service lets makers configure the Copilot summary of work orders and bookable resource bookings to meet the specific business needs of their organization.

- Makers can choose which tables and columns Copilot uses to generate the summary in natural language.
- After configuring the summary, you can generate a preview summary from an existing record with real data before saving the configuration.



### Summary configuration Saved

Bookable resource booking

Configure summary ?  On


**What information do you want to include?**

Edit the recommendations below to configure the information in the AI generated summary. Your configured summary may not match the default summary provided by Microsoft. For more succinct summaries, select only the most essential information.

Record type <small>?</small>	Data field <small>?</small>
<input type="checkbox"/> Bookable Resource Booking <small>×</small>	<input type="checkbox"/> Start Time <small>×</small> <small>🗑️</small>
<input type="checkbox"/> Bookable Resource Booking <small>×</small>	<input type="checkbox"/> End Time <small>×</small> <small>🗑️</small>
<input type="checkbox"/> Booking Status <small>×</small>	<input type="checkbox"/> Name <small>×</small> <small>🗑️</small>
<input type="checkbox"/> Work Order <small>×</small>	<input type="checkbox"/> Display Address <small>×</small> <small>🗑️</small>
<input type="checkbox"/> Work Order <small>×</small>	<input type="checkbox"/> Work Order Number <small>×</small> <small>🗑️</small>

**Sample summary (optional)**

To test the summary, select a specific record to get sample data.

Sample data ?  🗑️ 

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- US GCC
- US GCC High
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France

- [Korea](#)

## See also

[Summary configuration](#) (docs)

---

## Feedback

Was this page helpful?

Yes

No

# Enhance Copilot experiences in the web app

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Nov 2024

## Business value

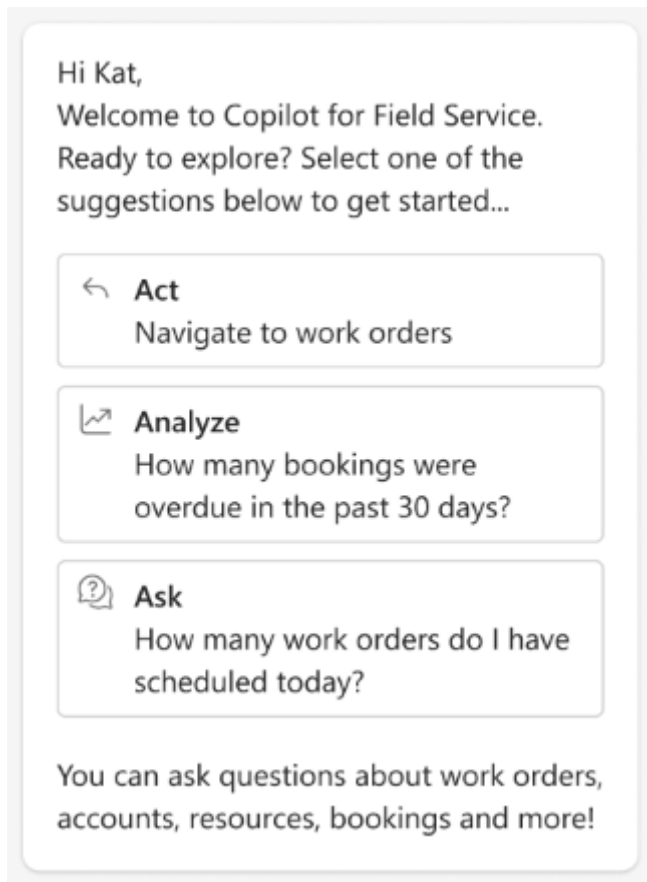
Expedite work by using enhanced Copilot experiences. Every member of the back office and frontline workforce can tap into enhanced Copilot side pane experiences to quickly get the information they need to be more efficient on the job.

## Feature details

Usability improvements for Copilot in Field Service help your team of technicians, dispatchers, and service managers adopt and use these capabilities in their existing workflows.

Copilot provides direct access to the wealth of data stored within Microsoft Dataverse, including key tables from Field Service like work orders and bookings. This guarantees that field service teams always have the most up-to-date information at their fingertips

This release improves the prompt experience and includes work order prompt guides that teach your workforce how to use copilot to accelerate retrieving work order information.



For example, when on a work order record, the prompt guide suggests prompts like "How many work orders do I have scheduled today?" or "How many work orders have been high priority in the last 30 days?".

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- US GCC
- US GCC High
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil

- Canada
  - India
  - Japan
  - France
  - Korea
- 

## Feedback

Was this page helpful?

 Yes

 No

# Summarize work orders with Copilot in the mobile app

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

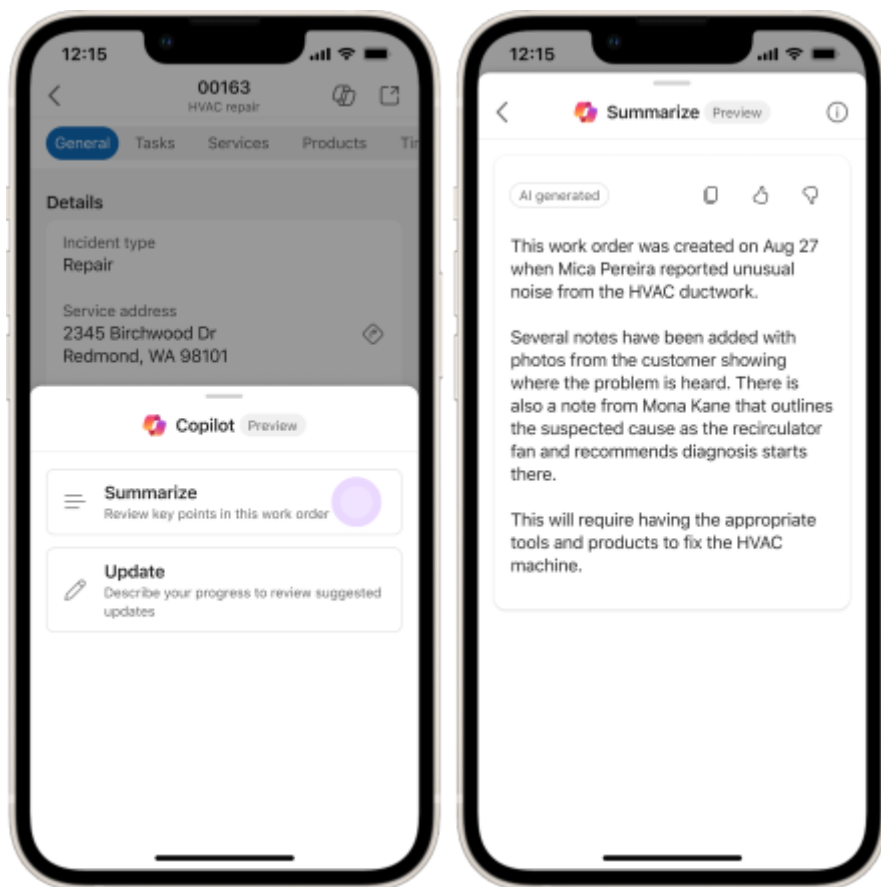
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	 Dec 15, 2023	-	Dec 2024

## Business value

The reimagined technician experience enables frontline workers to use Copilot to help plan their work. Copilot in Field Service provides technicians with a quick summary of their work orders with key details, so they don't have to spend time finding that information across multiple forms and tabs. It reduces the number of interactions and time spent in the mobile app, which helps technicians be more productive.

## Feature details

Technicians get the ability to summarize their work orders with Copilot within the Field Service mobile application. The summary provides them with meaningful context of the work they are about to perform. It can include notes, diagnostic information, key events in the work order lifecycle, and recommendations.



## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- US GCC
- US GCC High
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France

- Korea

## See also

[Work order recaps in the mobile app \(docs\)](#)

---

## Feedback

Was this page helpful?

Yes

No



# Summarize work orders with Copilot in Outlook

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Nov 2024

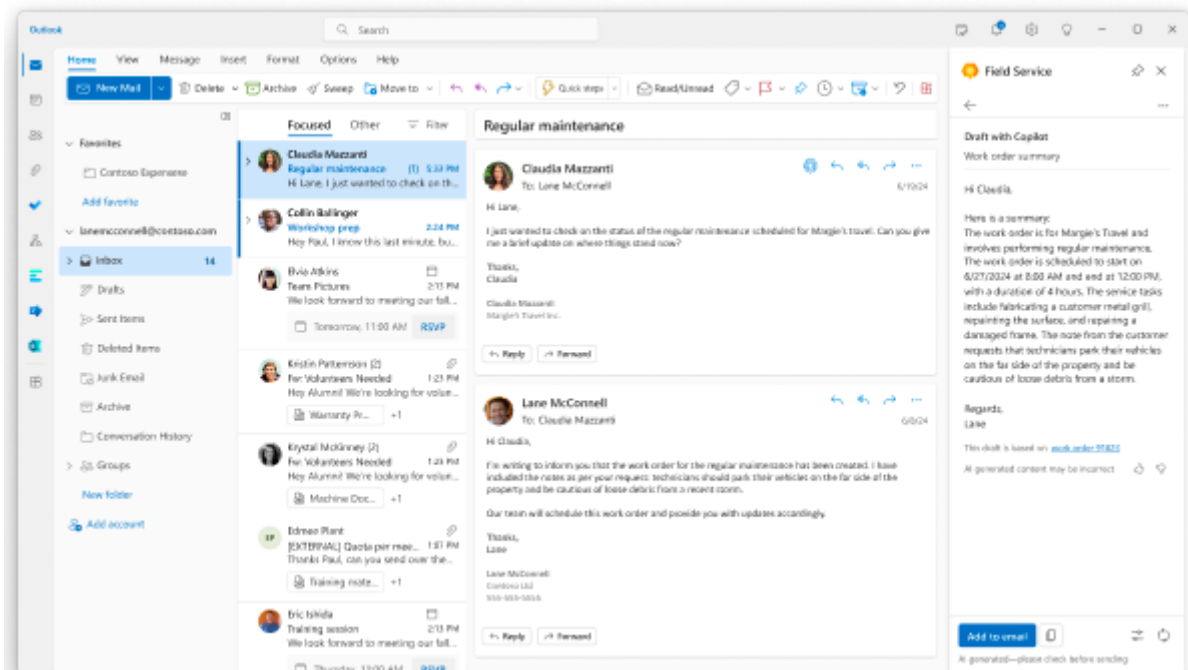
## Business value

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.

## Feature details

The Dynamics 365 Field Service for Outlook add-in enables Copilot to create a summary about a work order that captures all the important information required for service managers and frontline workers to understand the context of the work order they're dealing with.

The work order summary in Outlook is identical to the summary in the Field Service web app and on the mobile app. By default, Copilot provides summaries based on a predefined list of tables and columns that Microsoft maintains. Administrators can change the summary configuration to meet their business needs.



The default summary includes the following data fields from work orders and related records:

- Booking information
- Activity details
- Notes from the work order and bookings
- Work order product details
- Work order service details
- Work order service tasks
- Asset information and work order history

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- US GCC
- US GCC High
- United States
- Europe
- Asia Pacific
- United Kingdom

- Australia
  - Brazil
  - Canada
  - India
  - Japan
  - France
  - Korea
- 

## Feedback

Was this page helpful?

 Yes

 No

# Optimize resource scheduling

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Resource management and scheduling optimization are at the heart of field service management. Resource scheduling enables service organizations to triage unscheduled work orders and cases efficiently and schedule the nearest matching technicians to deliver service to their customers. The schedule board offers scheduling capabilities for dispatchers, project managers, and resource managers in different views and extensibility capabilities for partners to tailor functionality to their needs.

---

## Feedback

Was this page helpful?

 Yes

 No

# Improve usability and performance of the schedule board

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	Nov 2024

## Business value

With improved usability and performance, technicians and dispatchers can manage schedules more efficiently, leading to increased productivity and employee satisfaction.

## Feature details

- **Enhanced user experience:** The improved schedule board architecture signifies a shift from extJS to React, which allows for a more responsive user interface, leading to a more intuitive and satisfying user experience for technicians and dispatchers.
- **Improved performance:** An efficient diffing algorithm and a virtual Document Object Model (DOM) result in improved update and load times. The schedule board loads faster and reacts instantly to user interactions, even under heavy load.
- **Future-proof:** The new architecture is up to date with the latest advancements in web technology, which improves maintenance and upgradability.
- **Usability and modernization improvements:** The updated schedule board will bring highly requested customer asks such as a working-days-of-the-week selector, week numbers, ability to reorder tabs per user, day line visibility, and accessibility improvements.

## Note

The update from extJS to React will break any unsupported customizations such as DOM manipulations.

**Days of the Week**  
Board view settings  
Time zone: (GMT) Coordinated Universal Time  
Working time: 12:00 AM - 12:00 AM (+24h)  
Working days: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday  
#1 Ideas Portal

**Week numbers**  
18/2023 - 18/2023  
Wednesday - 5/1/2024 (Week 18)  
10 AM 11 AM 12 PM  
#4 Ideas Portal

**3 Dot Menu**  
Mona Kane  
0m booked 0%  
#Accessibility Win

**Day Line on Daily+**  
May 2023  
#Customer Voice  
#Accessibility Win

**Schedule Board improvements**  
(Usability and Modernization)

**Reorder tabs**  
Anil's Tab : Brians : Brun  
Board settings  
Reorder tabs  
Delete  
Abraham Wizzal  
#Customer Voice

**Fluent Modernization**  
- Improved colors  
- Consistency with FS web/mobile  
#Customer Voice #Accessibility Win

## Feedback

Was this page helpful?

Yes

No


# Transition all users to the new schedule board

Article • 08/26/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	 Aug 12, 2024	Oct 2024

## Business value

The new schedule board brings improved accessibility, usability, and performance while laying the foundation for new capabilities for multi-day scheduling and intelligent interactions.

## Feature details

The legacy schedule board has been deprecated since April 1, 2023. Starting October 1, 2024, the legacy schedule board will be permanently disabled, and all users will be redirected to the new schedule board experience.

Users who previously accessed the schedule board through a hardcoded URL will need to [change the URL in the site map](#) to `/main.aspx?pagetype=entitylist&etn=msdyn_scheduleboardsetting`.

The hardcoded URL to access the legacy schedule board will no longer be supported.

## See also

[Feature deprecations for Universal Resource Scheduling](#) (docs)

---

# Feedback

Was this page helpful?



# Plan and prepare for Dynamics 365 Finance in 2024 release wave 2

Article • 09/20/2024

## Important


The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Finance**.

## Overview

<https://aka.ms/ReleaseHighlight/2024W2/ERP> 

As finance roles move more from transactional to strategic, we will rely on next-generation AI to transform common finance activities and responsibilities to give more time back to finance users, save costs, and provide valuable insights for faster decision making. Our vision is to bring an autonomous financial application to our users, ensuring that they have full visibility, evidence, and autonomy as they navigate a complex and competitive world where regulations are constantly change, and companies are looking at new ways to grow globally while maintaining costs and increasing cash flow.

In this release, we are enhancing our end-to-end financial processes with in-app copilot capabilities, persona based, immersive user experiences, expanded country coverage, electronic invoicing enhancements, and autonomous capabilities to save users time on the most common tasks. Supported with our enhancements in our business performance planning and analytic capabilities, we will help organizations address data management, reporting, planning and insight challenges to achieve complete visibility across their entire organization.

 [Updates to Dynamics 365 Finance 2024 release wave 2](#)

## Investment areas



## **Business performance**

The business performance suite of capabilities brings together analytics, planning, and insights as an extensible solution on a single platform to continuously plan, act, and analyze your financial and operational data. This wave in business performance provides additional capabilities to our offering that enables you to work smarter, adapt faster, and perform better by taking quick actions to experience business agility.

## **Core financials**

Our core financials investments focus on bringing additional enhancements to core financial capabilities, enhancing end-to-end business processes across ERP, increasing automation, reporting and analytics, and reducing financial close time.

## **Globalization Studio**

Customers run our solution globally and must meet multiple tax compliance and other local requirements (localization). We provide out-of-the-box localizations and continuous regulatory compliance for multiple countries and regions around the globe and in multiple languages, extended by partners. Our no-code/low-code Globalization Studio services automate complex tax scenarios and allow partners and customers to easily extend localizations. As a result, customers run our solution in over 200 countries and regions.

Our investments into Globalization Studio focus on expanding the out-of-the-box country coverage, enhancing tax automation and scalability, and addressing regulatory tax digitization trends and legislation changes in multiple countries.

We continuously monitor legislations in all out-of-the-box countries and regions and ship multiple regulatory updates per government deadlines. To follow our planned and released regulatory updates, go to [Search for country-specific regulatory updates](#).

For more information on Globalization Studio, go to [Globalization Studio documentation](#).

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Finance** below:

Check out the release plan

## For application administrators

### User-impacting features to the user experience enabled automatically

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

### Features that must be enabled by application administrators





This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.



## Get the most out of Finance

[Expand table](#)

Helpful links	Description
<a href="#">Release plan</a>	View all capabilities included in the release.
<a href="#">Licensing</a>	Improve your understanding of how to license Finance.

Helpful links	Description
<a href="#">Product documentation</a> 	Find documentation for Finance.
<a href="#">User community</a> 	Engage with Finance experts and peers in the community.
<a href="#">Upcoming events</a> 	Find and register for in-person and online events.
<a href="#">Product trials</a> 	Get started with Finance.

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## Feedback

Was this page helpful?

 Yes

 No

# What's new and planned for Dynamics 365 Finance

Article • 09/24/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Business performance

The business performance suite of capabilities brings together analytics, planning, and insights as an extensible solution on a single platform.


 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Analyze data using the Record to Report data model</a>	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024
<a href="#">Manage assets using the Acquire to Dispose data models</a>	Users, automatically	Feb 2025	Mar 2025
<a href="#">Create drivers and formulas in business performance planning</a>	Users by admins, makers, or analysts	Oct 2024	-
<a href="#">Track change management in business performance planning</a>	Users, automatically	-	Nov 2024
<a href="#">Provide actionable insights that drive strategic decisions and operational efficiency</a>	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024

Feature	Enabled for	Public preview	General availability
<a href="#">Try the reporting, analytics, and insights hub</a>	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024
<a href="#">Set dimensional row level security in Business performance analytics</a>	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024
<a href="#">Create dimensions and cubes using Copilot in Business performance planning</a>	Users, automatically	Feb 2025	-
<a href="#">Use Procure to Pay data models to report and gain insights</a>	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024
<a href="#">Use Order to Cash data model to gain insights and analyze sales transactions</a>	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024
<a href="#">Extend data models in Microsoft Fabric</a>	Users by admins, makers, or analysts	✓ Aug 6, 2024	Oct 2024
<a href="#">Analyze business data in Excel</a>	Users by admins, makers, or analysts	✓ Jul 1, 2024	Oct 2024
<a href="#">Refresh data frequently in Business performance analytics</a>	Users by admins, makers, or analysts	Feb 2025	Apr 2025
<a href="#">Use managed extensibility of data models</a>	Users by admins, makers, or analysts	Feb 2025	Apr 2025
<a href="#">Get support for multiple languages in Business performance analytics</a>	Users by admins, makers, or analysts	Feb 2025	Apr 2025

## Core financials

Automation, AI, and enhancements to core financials.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Use copilot to default financial tags</a>	Users by admins, makers, or analysts	Oct 2024	-
<a href="#">Add efficiency with enhanced bank reconciliation report</a>	Admins, makers, marketers, or analysts, automatically	✓ Jun 28, 2024	Oct 2024



Feature	Enabled for	Public preview	General availability
Reverse posted purchase order invoice	Users by admins, makers, or analysts	-	Mar 2025
Increase the length of invoice numbers	Users by admins, makers, or analysts	✓ Jul 26, 2024	Oct 2024
Correct receipt matching error in vendor invoices with Copilot	Users by admins, makers, or analysts	Oct 2024	-
Improve bank account lifecycle management	Users by admins, makers, or analysts	✓ Jul 31, 2024	Mar 2025
Get batch log summarization of sales invoice copilot	Users by admins, makers, or analysts	-	Feb 2025
Automatically clear bridged transactions	Admins, makers, marketers, or analysts, automatically	✓ Apr 1, 2024	Oct 2024
Use Copilot to handle vendor invoice exceptions	Users by admins, makers, or analysts	Oct 2024	-
Make payments in advance with prepayment sales invoices	Users by admins, makers, or analysts	Feb 2025	-
Manage advanced bank reconciliation with matching rule enhancement	Admins, makers, marketers, or analysts, automatically	✓ Apr 1, 2024	Oct 2024
Save time with automated cash application	Admins, makers, marketers, or analysts, automatically	✓ Apr 1, 2024	Oct 2024
Enable financial tags for purchase order invoicing	Users by admins, makers, or analysts	-	Oct 2024

## Globalization Studio

Globalization Studio automates complex tax scenarios and provides out-of-the-box localizations for multiple countries/regions and in multiple languages. Extended by partners and customers, it allows our customers to run Dynamics 365 finance and operations apps in over 200 countries/regions.

[Expand table](#)

Feature	Enabled for	Public preview	General availability
<a href="#">Expand localization for LATAM countries - Ecuador</a>	Users by admins, makers, or analysts	-	Nov 2024
<a href="#">Expand localization for LATAM countries - Bolivia</a>	Users by admins, makers, or analysts	-	Nov 2024
<a href="#">Expand localization for LATAM countries - Dominican Republic</a>	Users by admins, makers, or analysts	-	Feb 2025
<a href="#">Expand localization for LATAM countries - Peru</a>	Users by admins, makers, or analysts	-	Feb 2025
<a href="#">Expand localization for LATAM countries - Venezuela</a>	Users by admins, makers, or analysts	-	Feb 2025
<a href="#">Use the regulatory compliance immersive homepage</a>	Users by admins, makers, or analysts	Feb 2025	-
<a href="#">Convert Excel business documents to PDF</a>	Users by admins, makers, or analysts	-	Dec 2024
<a href="#">Get support for new legislation for e-invoicing in Spain</a>	Users by admins, makers, or analysts	-	Mar 2025
<a href="#">Experience updates to the Interfactura API for e-invoicing in Mexico</a>	Users by admins, makers, or analysts	-	Mar 2025

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about



geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#) ↗.

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## Feedback

Was this page helpful?

 Yes

 No

# Business performance

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

The business performance suite of capabilities brings together analytics, planning, and insights as an extensible solution on a single platform to continuously plan, act, and analyze your financial and operational data. This wave in business performance provides additional capabilities to our offering that enables you to work smarter, adapt faster, and perform better by taking quick actions to experience business agility.

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## Feedback

Was this page helpful?

 Yes

 No


# Analyze business data in Excel

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Jul 1, 2024	Oct 2024

## Business value

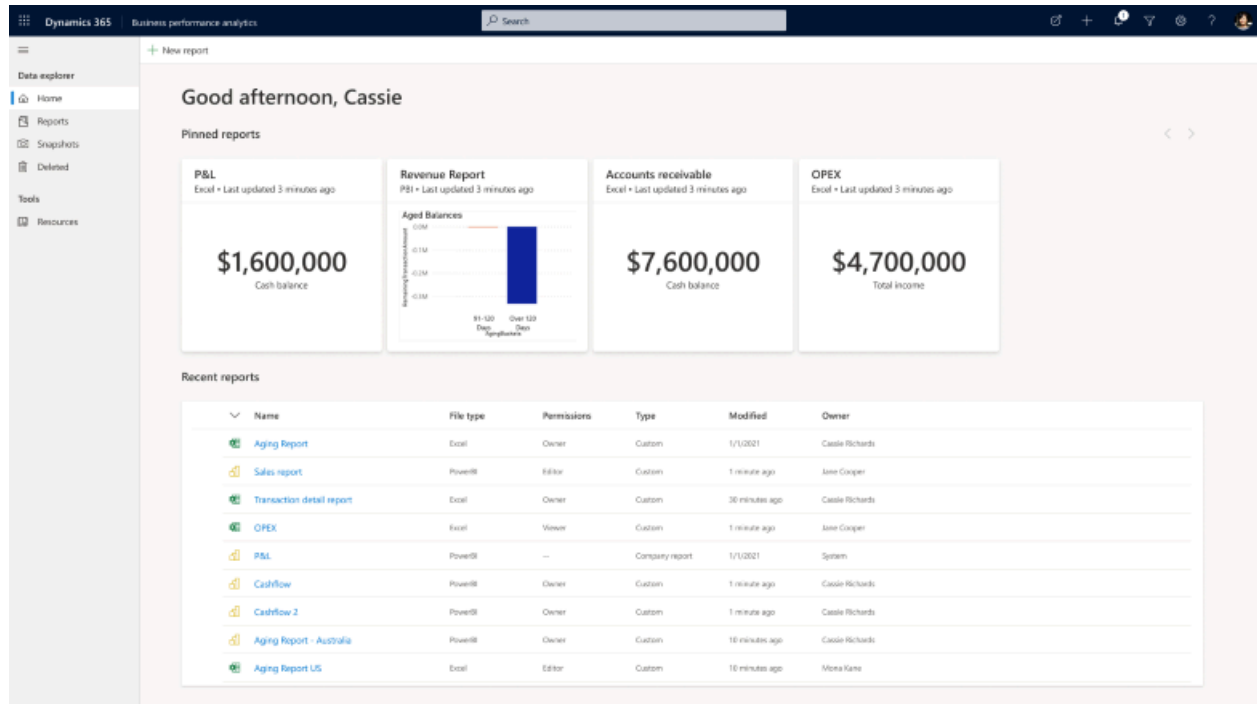
The **Analyze in Excel** feature in Business performance analytics enhances data analysis capabilities by integrating Business performance analytics data directly with Excel. This allows you to use Excel's powerful tools for creating custom analyses, pivot tables, and charts, leveraging familiar functions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

## Feature details

The Analyze in Excel feature in Business performance analytics (BPA) delivers substantial business value by allowing you to harness the full potential of Excel for data analysis directly within the BPA platform. This integration enables seamless access to BPA data in Excel, where you can leverage familiar tools and functions to create custom analyses, pivot tables, and charts. By providing direct interaction with Business performance analytics data in Excel, you can perform detailed and complex data analysis efficiently. The ability to refresh data automatically ensures that analyses are always up to date, facilitating real-time decision-making.

Analyze in Excel enhances user productivity by combining the robust data capabilities of Business performance analytics with the versatile analytical tools of Excel. This integration simplifies the data analysis process, reduces the learning curve for users already familiar with Excel, and fosters a data-driven culture within the organization.

Ultimately, it empowers users to make informed decisions, driving operational excellence and business growth. With the complete BPA data model available in Excel, users can unlock deeper insights and tailored reports, ensuring comprehensive and accurate business performance analysis.



## See also

[Business performance analytics Excel add-in \(docs\)](#)

## Feedback

Was this page helpful?


# Analyze data using the Record to Report data model

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Apr 28, 2023	Oct 2024

## Business value

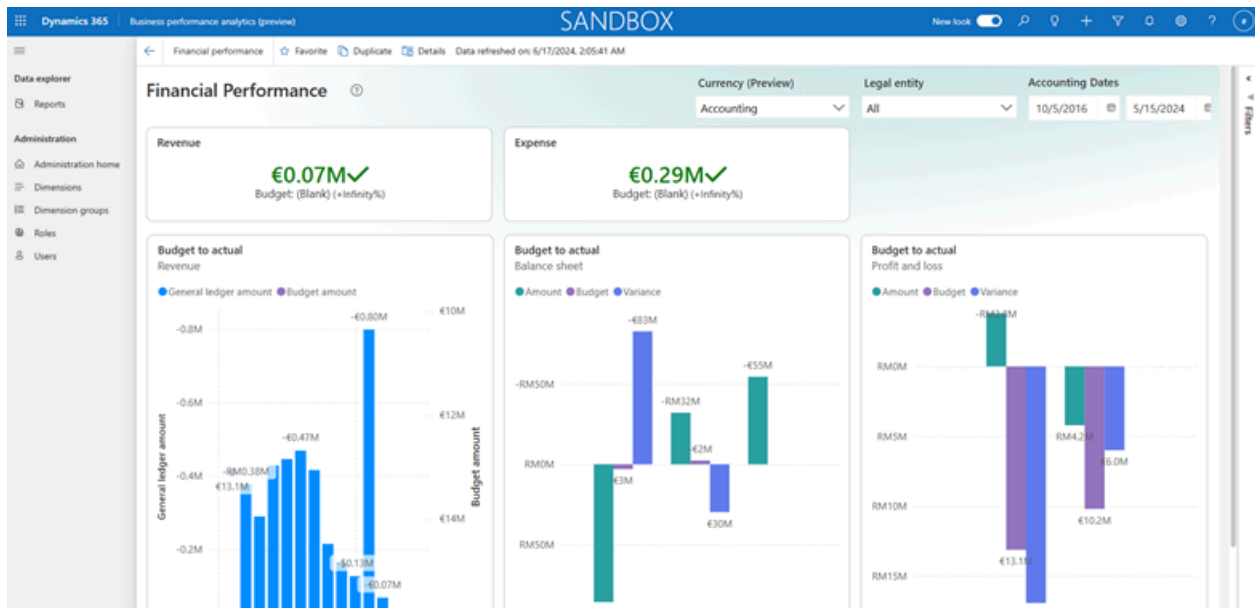
The Record to Report data model in Business performance analytics delivers fine-grained financial data, empowering users to create custom reports and perform dimension-based analysis with ease. By enhancing the accuracy and timeliness of financial statements and supporting key processes like General 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.

## Feature details

The Record to Report data model in Business performance analytics provides a comprehensive view of financial performance and ensuring regulatory compliance. By streamlining key financial processes such as General Ledger, Budgeting, and Financial Dimensions, the Record to Report data model enhances the accuracy and timeliness of financial statements, which supports better strategic planning and decision-making.

The data is brought at the most fine-grain level possible, allowing for detailed and precise analysis. Users can leverage the data model to build custom reports and analytics, making it highly accessible and user-friendly. Dimension-based analysis can be easily performed on the financial data, enabling deep insights into various financial





## See also

[About business performance analytics \(docs\)](#)

## Feedback

Was this page helpful?

Yes

No

# Create dimensions and cubes using Copilot in Business performance planning

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Feb 2025	-

## Business value

Implementations for planning software can take days to months as organizations and consultants evaluate previous tools, or tabs of Excel spreadsheets to figure out their models and implementation plans. By using these Excel spreadsheets and copilot, users have a recommended and guided experience to have suggestions on the configurations of dimensions and cubes in planning.

## Feature details

By pointing to existing spreadsheets used for planning, organizations can reduce implementation time by receiving guided experience. Using dimension and cube creation copilot for planning, this process is simplified and streamlined by pointing to the Excel spreadsheets and having the system recommend dimensions, values, cubes, and formulas.

---

## Feedback



Was this page helpful?



# Create drivers and formulas in business performance planning

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2024	-

## Business value

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 methods with identified key drivers to easily generate financial outcome scenarios, eliminating the need for manual setup in Power BI and streamlining the process while keeping track of the change made to those drivers across multiples scenarios.

## Feature details

Before this feature, the calculation and modeling were handled directly in Power BI through calculation definition. This new feature provides calculation logic and methods within the business performance planning application. This eliminates the need for the manual setup of calculations in Power BI and streamlines planning by leveraging key drivers across multiple scenarios.

---

## Feedback

Was this page helpful?




# Extend data models in Microsoft Fabric

Article • 08/19/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Aug 6, 2024	Oct 2024

## Business value

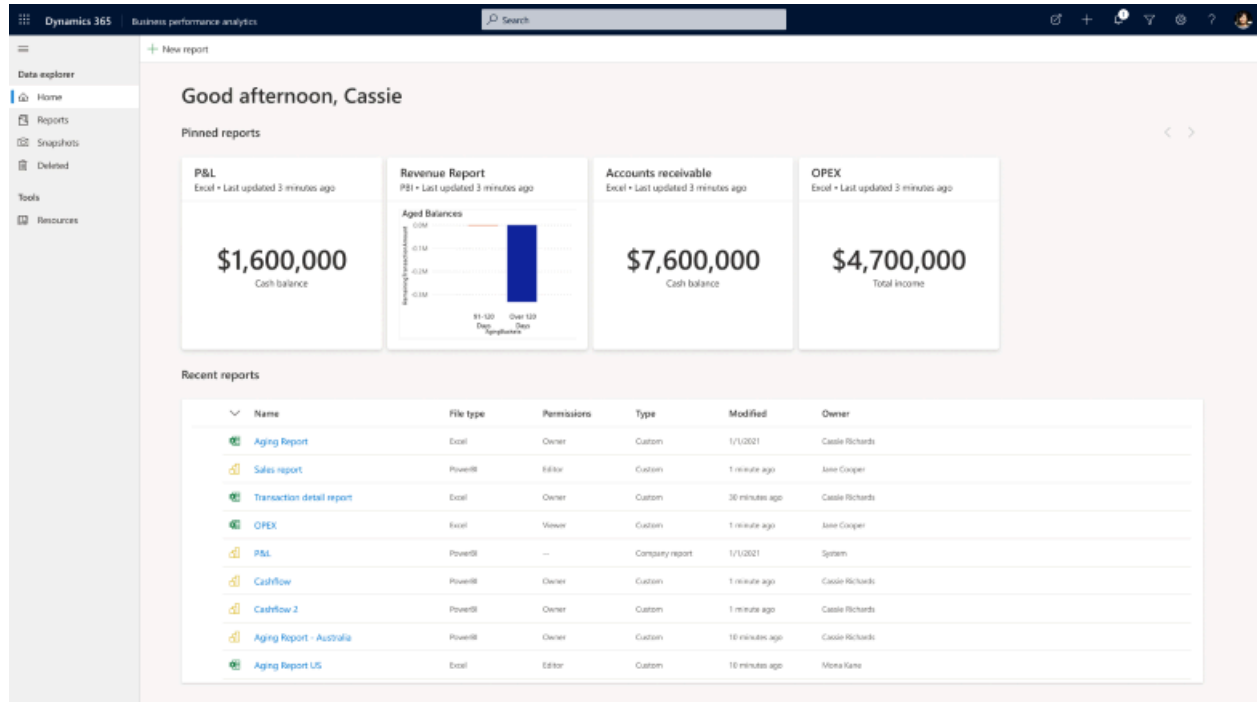
The **Extend to Fabric** feature in Business performance analytics (BPA) enhances the platform's flexibility by integrating BPA data with proprietary datasets, enabling customized analytical experiences tailored to specific business needs. This integration facilitates a holistic view of operations, breaking down data silos for comprehensive analysis and supporting better strategic planning.

## Feature details

The **Extend to Fabric** feature in Business performance analytics significantly enhances the platform's flexibility and adaptability by enabling seamless integration of Business performance analytics data with proprietary datasets, creating a customized analytical experience tailored to specific business needs. This integration breaks down data silos, providing a holistic view of operations and enabling comprehensive analysis, which supports better strategic planning and decision-making.

Users can develop bespoke reports and dashboards that reflect unique metrics and KPIs critical to their organization. This capability empowers users to address specific business challenges and opportunities, providing a competitive edge through tailored data analysis. By incorporating unique business logic and additional data sources, businesses can achieve more accurate and nuanced insights.

The Extend to Fabric feature simplifies scaling analytics capabilities as business needs evolve, allowing organizations to easily incorporate new data sources and analytical models. This ensures that the BPA solution remains relevant and robust over time. By fostering innovation and agility, extensibility with Fabric supports a dynamic and responsive approach to business performance management, driving continuous improvement and sustainable growth.



## Feedback

Was this page helpful?

# Get support for multiple languages in Business performance analytics

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

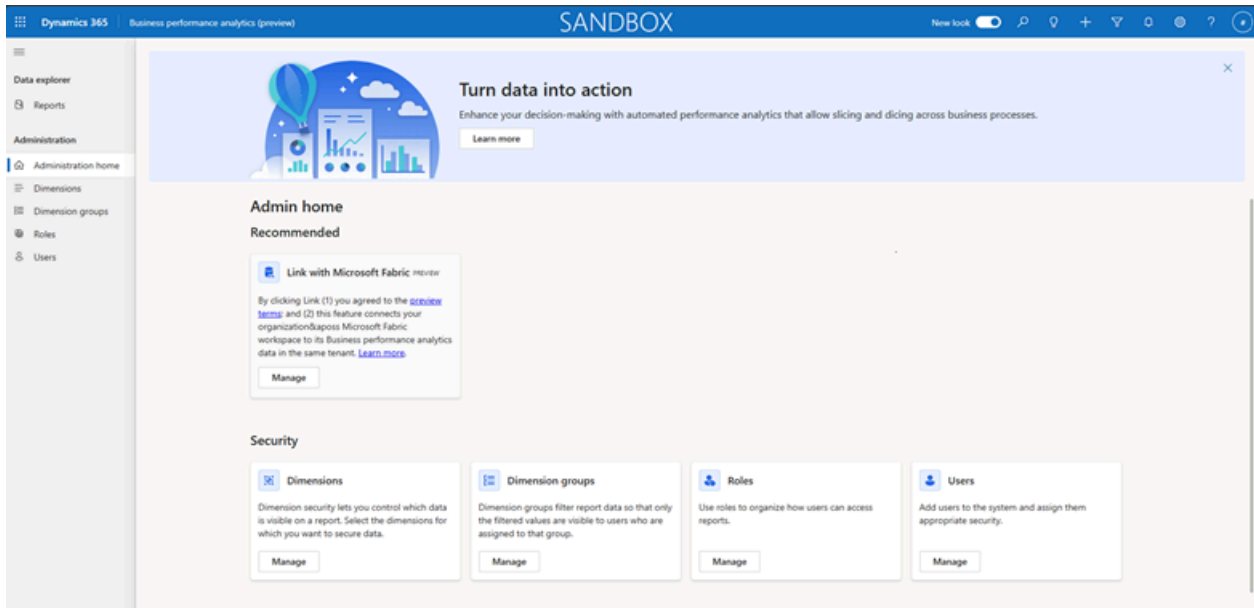
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2025	Apr 2025

## Business value

Supporting multiple languages in Business performance analytics enhances accessibility and usability for a global audience. This feature allows users from different regions to interact with Business performance analytics in their native language, improving comprehension and reducing the risk of misinterpretation. By accommodating a diverse user base, businesses can ensure more accurate and efficient data analysis and reporting.

## Feature details

Supporting multiple languages in Business performance analytics enhances accessibility and usability for a global audience. By offering translations for data, metadata, schema, and the app interface, Business performance analytics ensures that users from different linguistic backgrounds can interact with the platform in their preferred language, improving user experience and engagement. This inclusivity fosters a diverse user base, promoting collaboration across international teams and enhancing overall productivity. Additionally, multilingual support helps organizations comply with regional regulations and standards, driving broader adoption and ensuring Business performance analytics meets the needs of a global market. This feature will be enabled in an upcoming release, further expanding Business performance analytics's reach and effectiveness.



# Feedback

Was this page helpful?



# Manage assets using the Acquire to Dispose data models

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Feb 2025	Mar 2025

## Business value

The Acquire to Dispose data model in Business performance analytics enhances asset management by streamlining processes, ensuring accurate tracking and valuation, and offering detailed financial visibility. This feature enables customers to efficiently manage their assets from acquisition to disposal, reducing errors and saving time. With precise asset tracking and valuation, businesses gain better control over their financials, leading to more informed decision-making. The comprehensive financial visibility provided by the Acquire to Dispose data model allows customers to identify cost-saving opportunities, optimize asset utilization, and ultimately drive profitability and growth.

## Feature details

The Acquire to Dispose data model in Business performance analytics provides significant business value by offering a comprehensive view of asset management, from acquisition to disposal. By supporting key processes such as asset acquisition, depreciation, maintenance, valuation, and disposal, the A2D data model enhances the accuracy and timeliness of asset data, facilitating better strategic planning and decision-making.

The Acquire to Dispose data model delivers granular data that enables users to create custom reports and perform detailed analysis, incorporating various dimensions across



the asset lifecycle. This capability allows businesses to gain deeper insights into asset performance, utilization, and cost trends. With dimension-based analysis, organizations can easily identify patterns in asset use, optimize maintenance schedules, and enhance investment strategies, leading to improved asset efficiency and cost savings.

By streamlining the entire asset management process, the Acquire to Dispose data model improves operational efficiency, reduces errors in asset tracking and valuation, and ensures timely asset disposal. This enhanced efficiency contributes to better financial management, reduced total cost of ownership, and stronger financial stability. Additionally, the Acquire to Dispose model supports effective tax management and accurate depreciation calculations, further improving financial compliance and reporting.

Furthermore, the comprehensive visibility provided by the Acquire to Dispose data model strengthens asset management practices by enabling accurate tracking and reporting of asset status and value. This reliability fosters better decision-making and long-term planning, driving operational excellence and business growth. By leveraging the Acquire to Dispose data model, businesses can optimize their asset management processes, improve financial performance, and achieve sustainable growth and competitive advantage.

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## Feedback

Was this page helpful?

 Yes

 No


# Provide actionable insights that drive strategic decisions and operational efficiency

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Apr 28, 2023	Oct 2024

## Business value

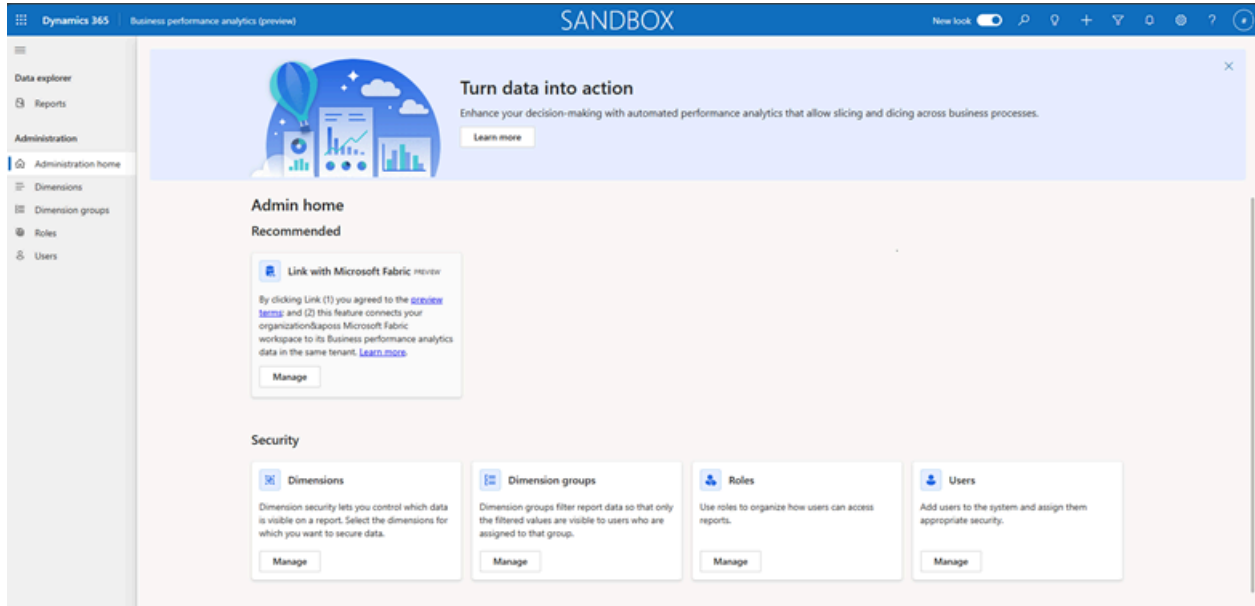
Business performance analytics is the key to unlocking your organization's full potential. By systematically collecting, analyzing, and interpreting data from various business functions, Business performance analytics provides actionable insights that drive strategic decision-making and operational efficiency. 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.

## Feature details

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, analytics and insights 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.

## Business performance analytics app: Your reporting, analytics, and insights hub

The Business performance analytics app allows seamless access to all your reports. Craft new insights, share securely, and manage report access effortlessly. The app integrates with tools like Power BI and Excel, featuring **Analyze in Excel** to fully use your data.

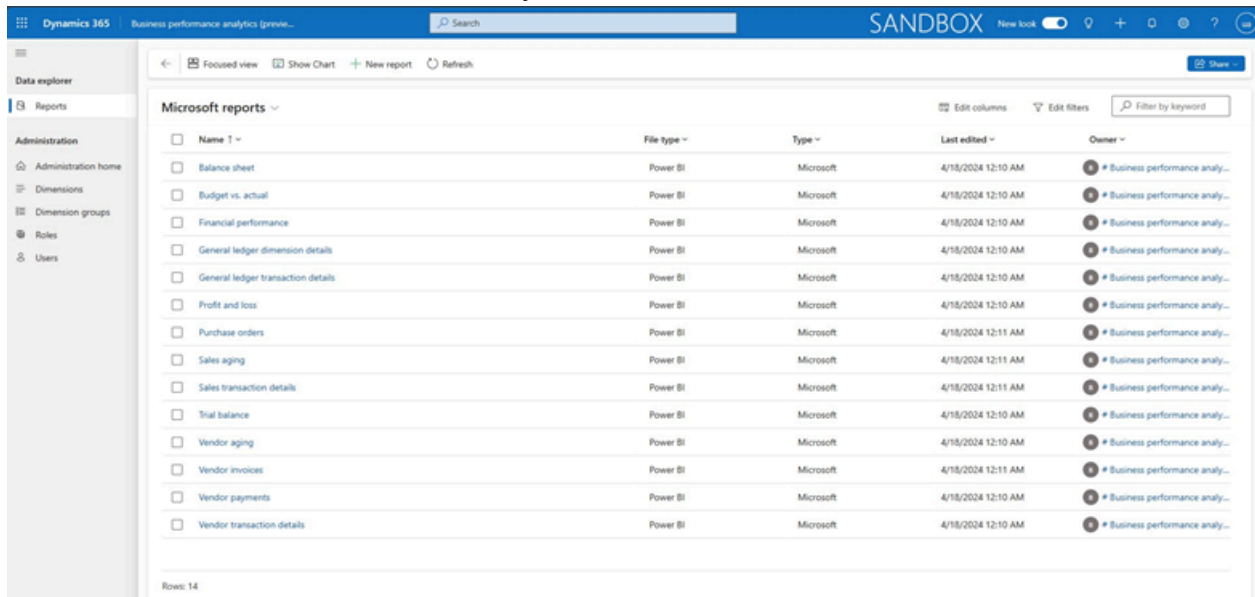


## Data Models: Tailored for insight

Comprehensive, fine-grained data models cover business processes such as Record to Report, Budgeting, Order to Cash, and Procure to Pay. These models are user-friendly, enabling personalized report construction and deep operational insights. Navigate related documents, report across ledgers, and analyze multi-currency data with ease.

## Curated prebuilt reports at launch

An array of ready-to-use reports offers immediate insights from day one. Covering key areas like financial performance, vendor transactions, and sales details, these reports ensure essential information is readily available.



## Dimensional Security: Precision control

The platform's fine-grained security model offers precise control over data and report access. Integration with Excel and Business performance analytics reports ensures data is automatically filtered according to user permissions, simplifying compliance without multiple report versions.

## Extensibility with Fabric

The **Extend to Fabric** feature allows integration of Business performance analytics data with proprietary datasets for a customized analytical experience tailored to specific business needs.

The Business performance analytics serves as an all-encompassing tool for reporting, analytics, and insights, providing the flexibility and control needed to drive business success.

## See also

[Business performance analytics](#) (docs)

---

## Feedback

Was this page helpful?

# Refresh data frequently in Business performance analytics

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

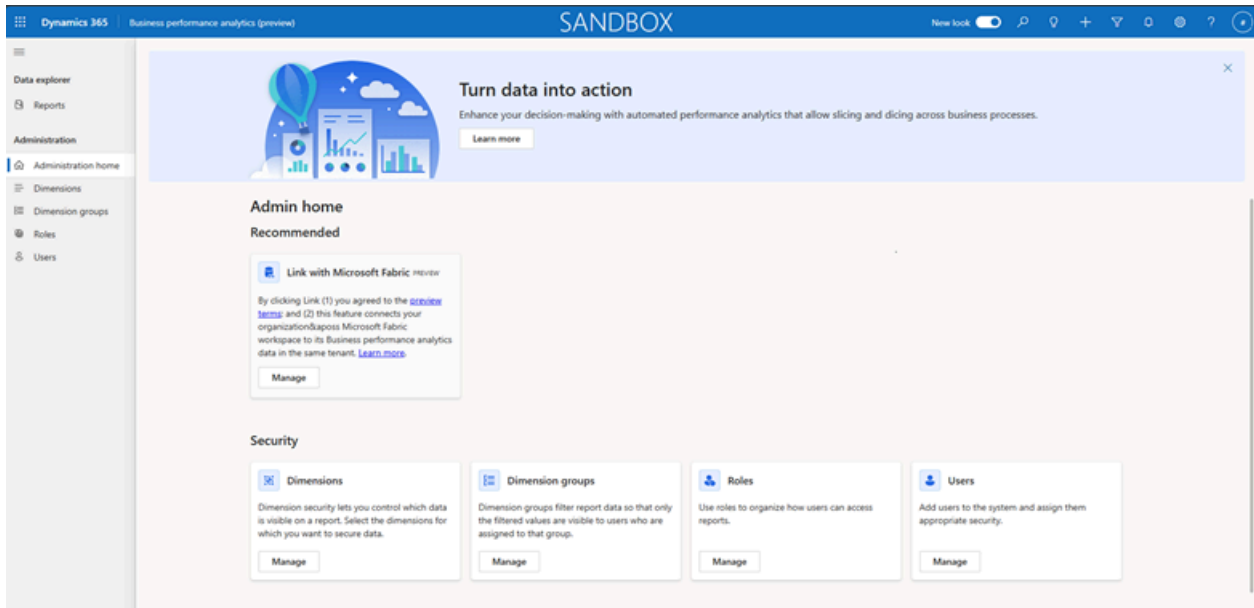
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2025	Apr 2025

## Business value

Increasing the frequency of data refreshes in Business performance analytics enhances its business value by providing more timely and accurate insights. This improvement accelerates the month-end close process and enhances reporting accuracy, enabling quicker decision-making and better financial management. As a result, businesses can respond more swiftly to changing conditions, optimize performance, and maintain a competitive edge.

## Feature details

Increasing the frequency of data refreshes in Business performance analytics supports two updates per day at general availability. Future releases will further enhance this feature by enabling more frequent refresh cycles. This capability allows users to make faster, data-driven decisions based on the most current information available, solving the issue of outdated data. Incremental data processing will be implemented, ensuring only new or changed data is processed, which reduces the time required for updates. This improvement will enhance operational efficiency, provide real-time analytics, and enable stakeholders to access the latest data. More frequent updates will drive better strategic planning, business agility, and responsiveness to market changes, thereby supporting continuous business growth and adaptability.



# Feedback

Was this page helpful?




# Set dimensional row level security in Business performance analytics

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Apr 28, 2023	Oct 2024

## Business value

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.

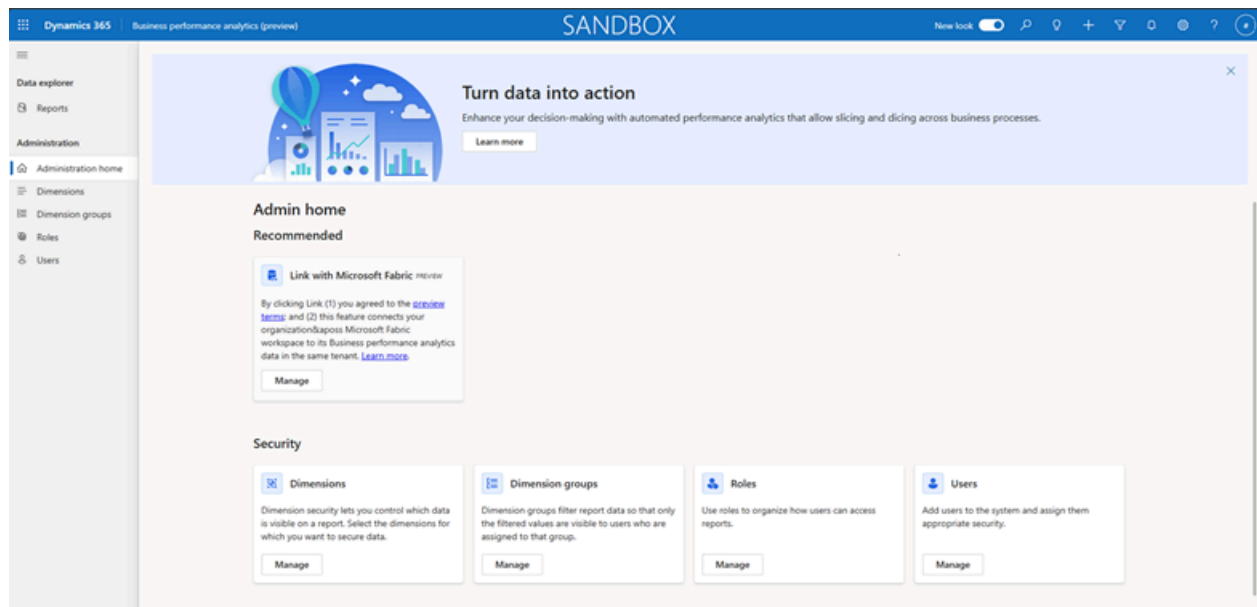
## Feature details

Dimensional row-level security in Business performance analytics offers substantial business value by enabling precise control over data access and enhancing compliance. Based on Dataverse security and Power BI security models, and incorporating dimensions from ERP, this capability allows organizations to set up reporting at the role level, ensuring that users can only view data relevant to their roles. This minimizes the risk of unauthorized access and protects sensitive information.

With dimensional row-level security, users can share reports with team members where the data is refreshed automatically, providing fields for additional reporting capabilities. When combined with the extensibility of the data model, users can view reports by dimension and by legal entity, creating refreshable, prewritten reports that can be

distributed beyond the finance organization. For instance, a sales report can be sent to field sales staff, refreshing with the most current sales numbers while being restricted to specific products and locations.

This security model simplifies report management by eliminating the need for multiple report versions tailored to different access levels, streamlining the reporting process. It also supports regulatory compliance by ensuring consistent enforcement of data access policies across the organization. By providing personalized and secure data views, dimensional row-level security enhances user trust and leads to more accurate and efficient decision-making. Ultimately, it helps maintain data integrity, reduces the risk of data breaches, and fosters a culture of data-driven decision-making while ensuring robust data protection and compliance.



## See also

[Set up security for business performance analytics \(docs\)](#)

## Feedback

Was this page helpful?

Yes

No



# Track change management in business performance planning

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Nov 2024

## Business value

This feature improves the overall transparency and accountability of changes made to cube data in business performance planning, providing users with a comprehensive view of the data's history and facilitating better decision-making.

## Feature details

The change management tracking for cubes in business performance planning aims to enhance tracking and transparency of changes made to cube data. This feature allows users to track who made changes, what changes were made, and when they were made. The UI experience will clearly show the changed values before and after the change, and users can filter the audit trail data for reporting purposes.

The feature also includes a contextualized audit trail experience within Power BI visuals, allowing users to access the audit trail directly within the visuals.

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## Feedback

Was this page helpful?

 Yes

 No


# Try the reporting, analytics, and insights hub

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Apr 28, 2023	Oct 2024

## Business value

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.

## Feature details

The Business performance analytics reporting hub offers substantial business value by providing a centralized platform for accessing, creating, and sharing reports. Seamlessly integrating with tools like Power BI and Excel, the hub enhances efficiency and collaboration across the organization. It features **Analyze in Excel** to fully utilize your data, bringing all reporting capabilities into one place.

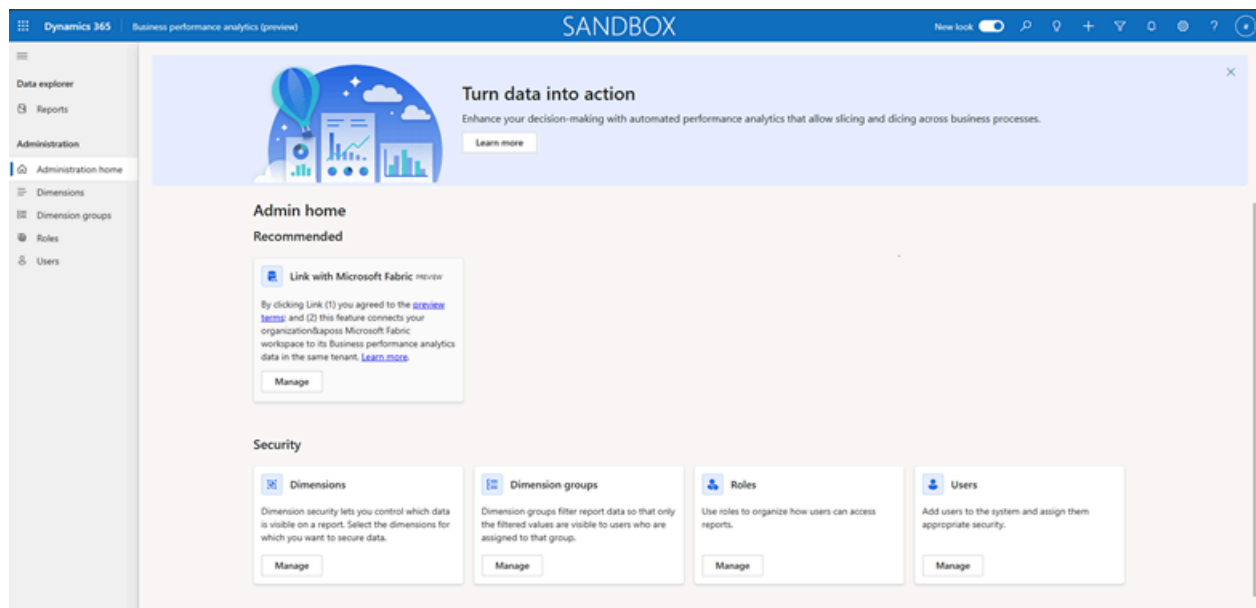
With the reporting hub, users can craft new insights and manage report access effortlessly, ensuring that the right information is available to the right people at the right time. Reports can be shared securely with team members, and data is refreshed automatically, providing up-to-date information for decision-making. This centralized

approach eliminates the need for multiple report versions, streamlining the reporting process and reducing the risk of errors.

The reporting hub includes an array of prebuilt reports such as Balance Sheet, Profit and Loss, Vendor Aging, Sales Transaction Details, and more. These reports cover key areas like financial performance, vendor transactions, and sales details, ensuring essential information is readily available from day one.

Security and administrative setup in the Business performance analytics reporting hub are designed for precision and control. The platform's fine-grained security model allows administrators to set up detailed access controls, ensuring data and reports are automatically filtered according to user permissions. This simplifies compliance and protects sensitive information without the hassle of maintaining multiple versions of reports.

Ultimately, the Business performance analytics reporting hub empowers organizations to leverage their data more effectively, improve transparency, and enhance strategic planning. It fosters a culture of data-driven decision-making, driving operational excellence and supporting sustainable business growth.



## See also

[Reports in Business performance analytics \(docs\)](#)

## Feedback

Was this page helpful?

 Yes

 No

# Use managed extensibility of data models

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2025	Apr 2025

## Business value

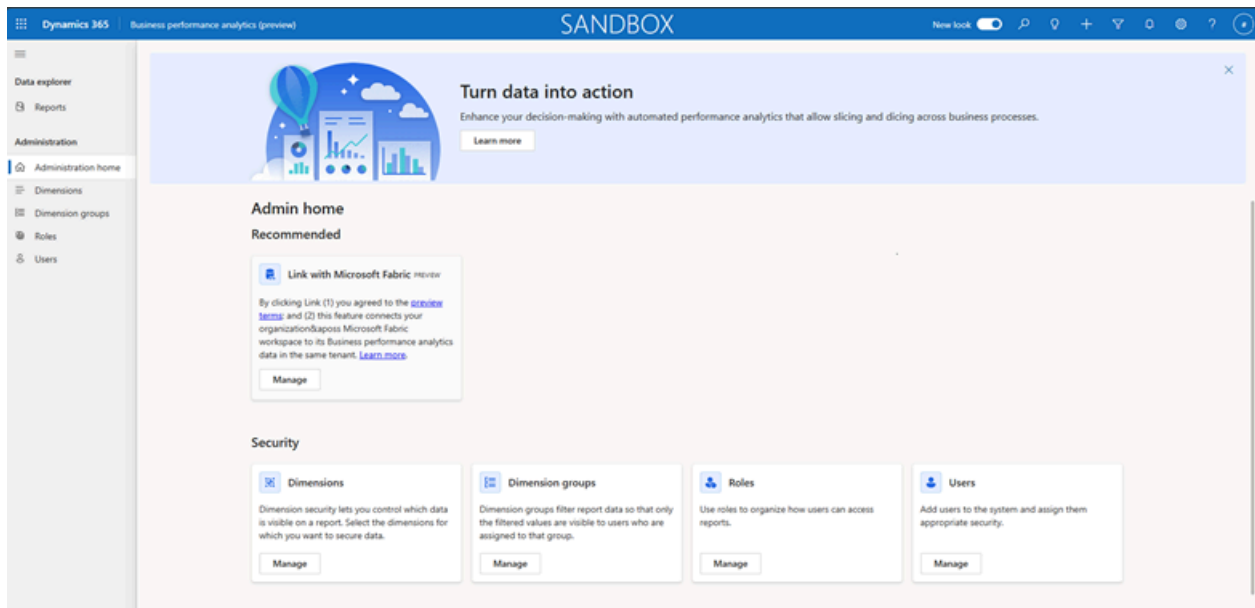
The managed extensibility of data models in Business performance analytics significantly enhances its business value by offering customers the flexibility to seamlessly integrate data from Dynamics 365 extensions and proprietary sources. This feature allows for a more comprehensive and customized data analysis, ensuring that all relevant information is included in decision-making processes. By enabling easy integration of additional data, businesses can achieve deeper insights, improved accuracy in reporting, and tailored analytics that meet specific business needs. This adaptability drives better strategic planning, operational efficiency, and supports continuous growth and innovation.

## Feature details

By incorporating placeholder fields and empty star schemas, customers can map their unique fields, enabling customized and tailored analytics. This approach allows businesses to extend the BPA model to meet specific needs, facilitating deeper insights and more relevant reporting.

Enabled within Business performance analytics and a customer's Fabric license, this feature addresses the issue of extending the Business performance analytics data model written off Dynamics 365 finance and operations data to conform to additional data

sources in Fabric. Ultimately, managed extensibility fosters a highly adaptable analytics environment, supporting personalized decision-making and driving business growth through tailored data integration.



## Feedback

Was this page helpful?

Yes

No


# Use Order to Cash data model to gain insights and analyze sales transactions

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Apr 28, 2023	Oct 2024

## Business value

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.

## Feature details

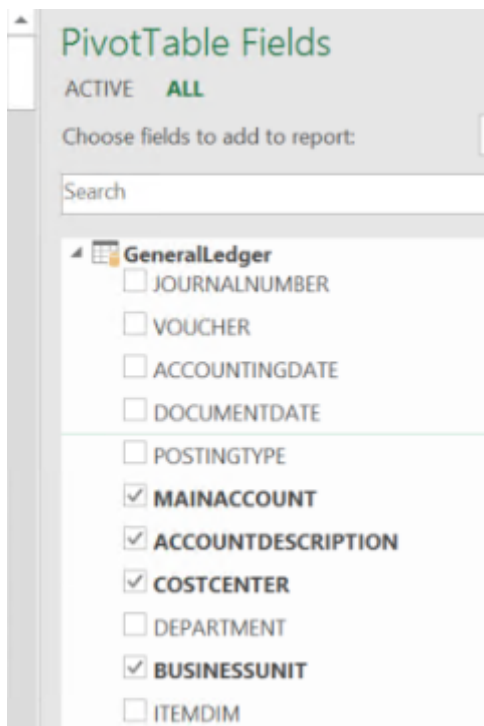
The Order to Cash data model in Business performance analytics provides an end-to-end view of the sales process, ensuring accurate invoicing and efficient payment processing. By supporting key business processes such as sales orders, picking lists, packing slips, invoices, payments, taxes, charges, and the Accounts Receivable subledger, the Order to Cash data model enhances the accuracy and timeliness of sales data, facilitating better strategic planning and decision-making.

The Order to Cash data model delivers granular data that enables end users to create custom reports and perform detailed analysis, incorporating various dimensions across

the order to cash value chain. This capability allows businesses to gain deeper insights into sales performance, customer behavior, and revenue trends. With dimension-based analysis, organizations can easily identify sales patterns, optimize pricing strategies, and enhance product offerings, leading to increased sales and customer satisfaction.

By streamlining the entire order to cash process, the Order to Cash data model improves operational efficiency, reduces errors in invoicing and payment processing, and ensures timely revenue recognition. This enhanced efficiency contributes to better cash flow management, reduced days sales outstanding (DSO), and stronger financial stability. Additionally, the Order to Cash model supports effective tax management and accurate charge allocation, further improving financial compliance and reporting.

Furthermore, the comprehensive visibility provided by the Order to Cash data model strengthens customer relationships by enabling prompt and accurate order fulfillment and billing. This reliability fosters trust and loyalty among customers, driving repeat business and long-term growth. By leveraging the Order to Cash data model, businesses can optimize their sales processes, improve financial performance, and achieve sustainable growth and competitive advantage.



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

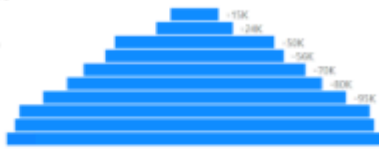


# Vendor AP Detail

COMPANY  
usll

## Top 10 AP Balances

- Paul Cannon
- Fed Outfit
- Guaranteed Sales and Serv...
- Capable Sales and Service
- Countryside Company
- Industrial Supplies
- Local Hardware Factory
- Local Sales and Rental
- General Associates
- Hardware Components



## Aging by bucket



USD  
CURRENCY

263

No. of invoices outstanding

-2.97M  
TOTAL OUTSTANDING

VENDORNAME	121+	61-90	91-120	Total
VISACC	-260,000.00			-260,000.00
Timely Shipping Service	-185,000.00			-185,000.00
Superior Hardware Distributors	-170,000.00			-170,000.00
Selected Distributors	-155,000.00			-155,000.00
Paul Cannon		-15,000.00		-15,000.00
Parcel Express Delivery Service	-140,000.00			-140,000.00
Margie's Travel	-125,000.00			-125,000.00
Local Sales and Rental	-110,000.00			-110,000.00
Local Hardware Factory	-95,000.00			-95,000.00
Kim Nielson	-290,320.00			-290,320.00
Julia Funderburk	-230,000.00			-230,000.00
Industrial Supplies	-80,000.00			-80,000.00
Hardware Components	-117,952.04			-117,952.04
<b>Total</b>	<b>-2,801,196.86</b>	<b>-15,000.00</b>	<b>-151,515.00</b>	<b>-2,967,711.86</b>

ACCOUNTINGGA... 2017

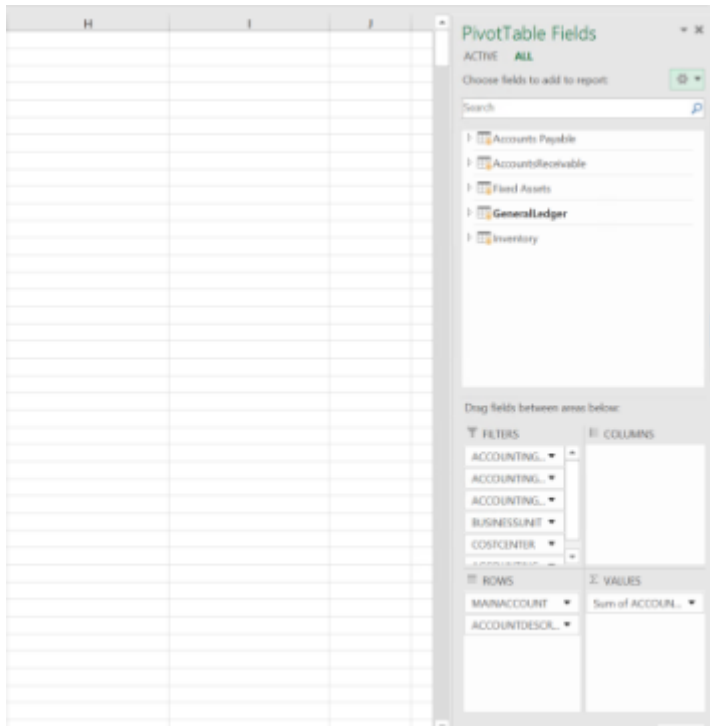
ACCOUNTING... GLMF

### Trusted Income Statement For the year ending 2017 GLMF

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Revenue</b>												
Sales	(55,481.30)	(5,455,581.00)	(545,027.28)	(55,947.81)	(8,565.82)	(1,398.17)	(1,111.88)	(151,134.12)	(201,374.91)	(1,180.04)	(108,601.44)	(805,727.72)
Cost of Goods Sold	417,507.80	1,217,069.66	600,668.90	208,667.85	(2,722.94)	527.84	949.27	(6,539.39)	591.42	628.39	908.39	969.39
<b>Gross Profit</b>	<b>363,894.20</b>	<b>(2,138,511.30)</b>	<b>290,442.42</b>	<b>54,720.32</b>	<b>(81,284.44)</b>	<b>(862.33)</b>	<b>(162.71)</b>	<b>(157,673.41)</b>	<b>(190,943.49)</b>	<b>(161.65)</b>	<b>(107,693.21)</b>	<b>(805,958.33)</b>
<b>Operating Expenses</b>												
Salaries and wages	(94,433.21)	(8,429.66)	(67.07)	99,686.36	(68.82)	(908.27)	(522.76)	(846.06)	(944.78)	(889.41)	(66,664.29)	(26,148.24)
Depreciation expenses	(232,320.28)	17,600.00	17,600.00	17,600.00	17,600.00	17,600.00	17,600.00	17,600.00	17,600.00	17,600.00	17,600.00	17,600.00
Amortization of intangible asset	(1,999.42)	-	-	-	-	-	-	-	-	-	-	-
Travel and entertainment exper	(1,140.20)	(31.00)	(21.83)	1,136.95	517.53	(24.47)	(29.48)	(36.55)	(27.64)	(28.78)	(2,358.80)	(3,911.23)
Administrative expenses	(94,074.06)	-	-	(38.87)	-	32,879.63	4,887.23	2,498.27	-	-	-	1,000.00
Manufacturing expenses	(347,972.23)	(31,000.12)	(30,208.00)	-	122,984.25	480,332.33	178,984.49	18,945.10	-	-	-	-
Total Operating expenses	482,940.50	(51,829.78)	(21,268.96)	118,112.82	146,617.78	550,277.92	280,021.45	36,973.59	29,403.85	15,981.61	(79,722.29)	(8,558.28)
<b>Operating Income</b>	<b>(19,046.30)</b>	<b>(2,338,340.18)</b>	<b>222,372.72</b>	<b>172,995.94</b>	<b>(17,335.34)</b>	<b>330,415.19</b>	<b>283,299.32</b>	<b>(218,699.92)</b>	<b>(181,378.64)</b>	<b>14,419.96</b>	<b>(187,397.64)</b>	<b>(814,677.32)</b>
Other expenses	(100,805.30)	(1,482,569.18)	(1,369,869.01)	(1,797,327.69)	6,486,568.44	30,812.59	6,184.59	4,382.18	799.00	-	-	-
Other income	(48,093.88)	(424.97)	(8,218.00)	-	(4,806.14)	(238.88)	-	-	-	-	-	-
<b>Net Income</b>	<b>(182,996.84)</b>	<b>(3,672,299.08)</b>	<b>(1,153,315.29)</b>	<b>(1,624,331.75)</b>	<b>6,513,538.05</b>	<b>566,307.32</b>	<b>286,673.83</b>	<b>(218,317.76)</b>	<b>(180,319.64)</b>	<b>15,405.96</b>	<b>(185,397.64)</b>	<b>(814,677.32)</b>

Excel screenshot showing a list of accounts and their balances.

Account	Description	Total
10000000	Bank Account - USD	2,115,517.56
10000000	Bank Account - EUR	4,509,646.60
10000000	Bank Account - Payroll	443,721.31
11000000	Deposits - Cash	248,933.87
11000000	Deposits - Check	46,121.88
11000000	Deposits - Credit card	499,489.97
11000000	Deposits - Gift card	32,265.30
11000000	Deposits - Loyalty	49,187.52
11000000	Accounts Receivable - Domestic	24,211,711.82
11000000	Accounts Receivable - Int'l received	1,214,533.91
11000000	VAT Tax Receivable	68,875.23
11000000	Intercompany Receivable - USW/DEM	282,741.50
11000000	Interunit Receivable	258,457.58
14000000	Raw Materials Inventory	5,854,216.99
14000000	Finished Goods Inventory	81,518,569.18
15000000	Production WIP-Clearing	900,061.07
15000000	Production WIP-Materials	978,122.18
15000000	Production WIP-Labor	11,012.92
15000000	Production WIP-Overhead	16,234.21
16000000	WIP - Invoiced On Account	(9.00)
18000000	Tangible Fixed Assets	41,496,519.00
18000000	Intangible Fixed Assets	4,312,280.00
18000000	Accumulated Depreciation - Tangible Fixed Assets	(2,866,559.96)
18000000	Amortization - Intangible Fixed Assets	(1,999.04)
20000000	Accounts Payable - Domestic	(1,947,194.88)
20000000	Accounts Payable - Offset Invoice Pending Approval	-
20000000	Invoice Pending Approval	-
20000000	Accrued Purchases - Reserved Not Invoiced	(80,214,291.88)
20000000	Salaries and Wages Payable	(251,432.18)
20000000	Payroll Benefits Payable	(249,973.57)
20000000	Payroll Deductions Payable	(18,545.86)
20000000	Employee Benefits Payable	(211,858.42)



## Feedback

Was this page helpful?

Yes

No


# Use Procure to Pay data models to report and gain insights

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Apr 28, 2023	Oct 2024

## Business value

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.

## Feature details

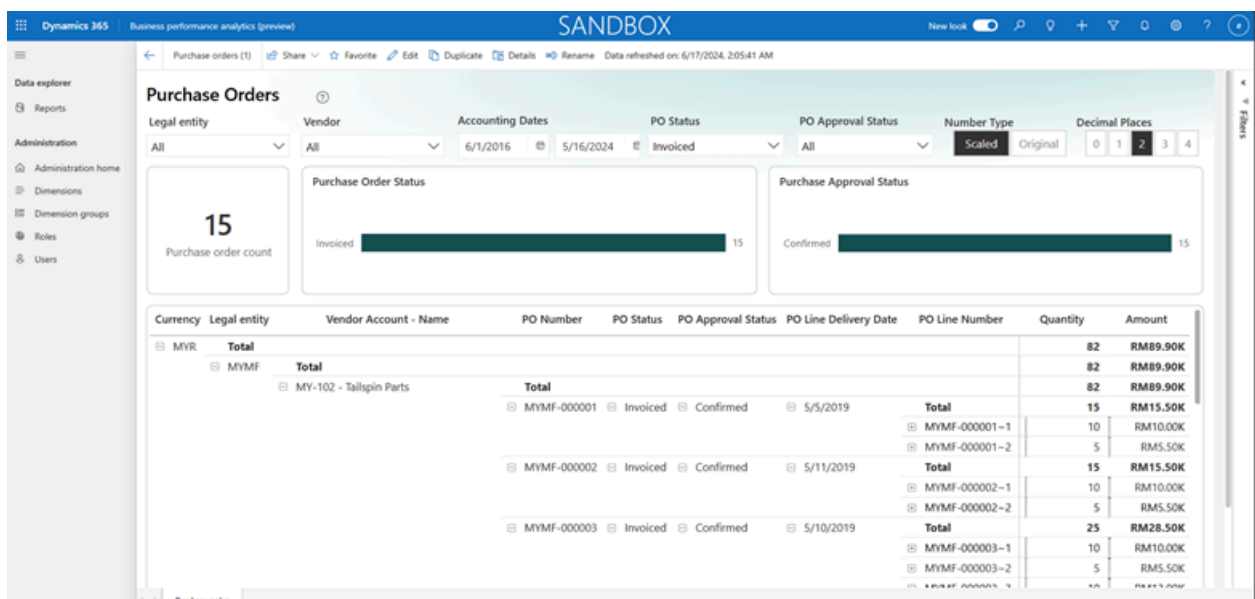
The Procure to Pay data model in Business performance analytics delivers substantial business value by providing a comprehensive view of procurement processes, ensuring accurate and efficient payment handling. By supporting key business processes such as purchase requisitions, purchase orders, product receipt, 3-way matching, invoices, taxes, charges, payments, and the Accounts Payable subledger, the Procure to Pay data model enhances the accuracy and timeliness of procurement data, facilitating better strategic planning and decision-making.

The Procure to Pay data model delivers granular data that enables users to create custom reports and perform detailed analysis, incorporating various dimensions across the procure to pay value chain. This capability allows businesses to gain deeper insights into procurement performance, supplier behavior, and cost trends. With dimension-

based analysis, organizations can easily identify procurement patterns, optimize supplier contracts, and enhance sourcing strategies, leading to cost savings and improved supplier relationships.

By streamlining the entire procure to pay process, the Procure to Pay data model improves operational efficiency, reduces errors in order processing and payment handling, and ensures timely fulfillment of procurement needs. This enhanced efficiency contributes to better cash flow management, reduced days payable outstanding (DPO), and stronger financial stability. Additionally, the Procure to Pay model supports effective tax management and accurate charge allocation, further improving financial compliance and reporting.

Furthermore, the comprehensive visibility provided by the Procure to Pay data model strengthens supplier relationships by enabling prompt and accurate order fulfillment and payment processing. This reliability fosters trust and collaboration with suppliers, driving long-term partnerships and operational excellence. By leveraging the Procure to Pay data model, businesses can optimize their procurement processes, improve financial performance, and achieve sustainable growth and competitive advantage.



Dynamics 365 Business performance analytics (preview) **SANDBOX** New look

Vendor aging | Favorite | Duplicate | Details | Data refreshed on: 6/17/2024, 2:05:41 AM

**Vendor aging**

Legal entity: USMF - Contoso Entertainme...

Vendor: All

Invoice status: Open

Currency (Preview): Reporting

Age as of: 1/1/2004 to 6/30/2023

Balance as of: 1/1/2004 to 6/30/2023

Criteria (Preview): Transaction Date

Interval in days (Preview): 7, 15, 30

Number Type: Scaled, Original

Summary		Balance	Current	1-15	16-30	31-45	45+
USD	<b>Total</b>	<b>-\$2.03M</b>		<b>-\$19.91K</b>	<b>-\$0.14M</b>	<b>-\$45.14K</b>	<b>-\$1.82M</b>
	US-101 - Fabrikam Electronics	-\$298.02K					-\$0.30M
	US-102 - Tailspin Parts	-\$113.90K					-\$0.11M
	US-103 - Rain Projectors	-\$645.17K			-\$0.12M		-\$0.52M
	US-104 - Fabrikam Supplier	-\$167.25K					-\$0.17M
	US-105 - Datum Receivers	-\$146.43K				-\$19.35K	-\$0.13M
	US-106 - Humongous Insurance	-\$131.24K			-\$13.10K		-\$0.12M
	US-107 - Idaho Department of Family Services	-\$125.13K	-\$19.91K			-\$25.80K	-\$79.42K
	US-108 - City Power & Light	-\$248.89K					-\$0.25M
	US-109 - Property Management	-\$10.33K					-\$10.33K
	US-110 - City-wide Advertising	-\$111.05K					-\$0.11M

Invoice details					
Currency	Legal entity - Name	Vendor Account - Name	Transaction Date	Purchase Invoice Number	Balance
USD	USMF - Contoso Entertainment System ...	US-111 - Contoso office supply	11/10/2020	MSDYN_UNKKNOWNS	-\$2.21K
			11/13/2020	MSDYN_UNKKNOWNS	-\$8.00K
			11/21/2020	MSDYN_UNKKNOWNS	-\$750.00
			11/24/2020	MSDYN_UNKKNOWNS	-\$1.00K
			12/29/2021	MSDYN_UNKKNOWNS	-\$2.76K
			12/29/2022	MSDYN_UNKKNOWNS	-\$12.64K
		US-110 - City-wide Advertising	11/9/2020	MSDYN_UNKKNOWNS	-\$20.17K
			11/12/2020	MSDYN_UNKKNOWNS	-\$4.00K
			11/20/2020	MSDYN_UNKKNOWNS	-\$13.33K

# Feedback

Was this page helpful?



# Core financials

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Our core financials investments focus on bringing additional enhancements to core financial capabilities, enhancing end-to-end business processes across ERP, increasing automation, reporting and analytics, and reducing financial close time.

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## Feedback

Was this page helpful?

 Yes

 No


# Add efficiency with enhanced bank reconciliation report

Article • 08/16/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	 Jun 28, 2024	Oct 2024

## Business value

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.

## Feature details

Bank reconciliation is a crucial step for businesses. It involves comparing the cash balance on a company's balance sheet to the corresponding amount on its bank statement, and identifying any discrepancies that may require accounting adjustments. This process can be time-consuming and labor-intensive, as it requires careful matching of records and generation of reports.

Advanced bank reconciliation in Dynamics 365 Finance helps businesses manage this process more efficiently. Within this feature, the existing bank reconciliation statement report in advanced bank reconciliation is redesigned with the following enhancements:

- Redesigned report header information to include amount fields: company ending balance, company unreconciled amount, company reconciled amount, bank ending balance, bank unreconciled amount, and bank reconciled amount
- Redesigned report body to include bank reconciled transactions, bank unreconciled transactions, company reconciled transactions, and company unreconciled transactions.
- Report snapshot is saved when marking the bank reconciliation worksheet as reconciled. When cash clerks run the report later, the data in the report is retrieved from the snapshot instead of the real-time transaction tables.

### Bank reconciliation - Operating account - USD

Account number: 34567853 Page No.: 1  
 Currency: USD User: Julia Funkeburk  
 Period: 2/5/2017..9/11/2023

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
	12/1/2016			0	1,000.00	0.00
	12/2/2016			0	6,000.00	0.00
	12/3/2016			0	1,000.00	0.00
				<b>Total</b>	<b>10,000.00</b>	<b>0.00</b>

Company reconciled details:						
Bank Transaction type	Date	Document type	Document number	Payment reference	Amount	Correction amount
	12/1/2016			0	2,000.00	0.00
	12/2/2016			0	9,000.00	0.00
	12/3/2016			0	6,000.00	0.00
	12/7/2016			0	23,100.00	-100.00
				<b>Total</b>	<b>40,100.00</b>	<b>-100.00</b>

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
					<b>Total</b>	<b>20,000.00</b>

Bank reconciled details:						
Bank transaction code	Booking date	Document number	Reference No.	Entry reference	Description	Amount
	12/1/2016					5,000.00
	12/2/2016					10,000.00
	12/3/2016					25,000.00
					<b>Total</b>	<b>40,000.00</b>

## Feedback

Was this page helpful?

Yes

No




# Automatically clear bridged transactions

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	 Apr 1, 2024	Oct 2024

## Business value

This feature reduces manual operations of clearing bridged transactions by automating the process in advanced bank reconciliation.

## Feature details

Bridging posting is a two-step process that is used when payments are posted. It can help ensure a smoother and more timely bank reconciliation process. In the first step, a payment is posted to a bridging account. In the second step, the posted bridging account entry is reversed and posted to the bank main account when the payment transaction clears the bank statement.

Currently, for the second step, cash clerks need to manually process it in the general ledger. This feature automates the second step by clearing the bridged transactions in advanced bank reconciliation.

This feature provides the following capabilities to automate the process:

- Define bridging posting main account by bank account.
- Select bank account for bridged payment without generating bank account transactions.
- Automatic clear bridged transactions during bank reconciliation.

Finance and Operations Preview

Bank reconciliation

Standard view

Show: All Bank account  Show un-cleared only

Overview General Blocking History

Bank account	Revenue ID	Description	Currency	Cut-off date	Last statement ID	Opening balance	Total amount Reconciled	In use	Status
Bank EUR	00020	xxxxx	EUR	06-09-2023	000027	4,220.00	4,220.00 ✓		Draft
Bank1	00020	12341	USD	01-08-2023	000026	4,505,916.66	1,004,462.23 ✓		Draft
Bank1	00020	12341	USD	30-08-2023	000018	4,503,283.24	1,004,150.00 ✓		Draft
Bank1	00027	12341	USD	24-08-2023	000014	4,502,215.81	1,001,215.81 ✓		Draft
Bank1	00025	12341	USD	11-08-2023	000011	5,498,000.00	1,000,000.00 ✓		Draft
Bank1	00024	12341	USD	11-08-2023	000011	5,498,000.00	100,000.00 ✓		Draft
Bank1	00023	12341	USD	10-08-2023	000011	5,498,000.00	1,000,000.00 ✓		Draft
Bank1	00022	12341	USD	10-08-2023	000011	5,498,000.00	1,000,000.00 ✓		Draft
Bank1	00021	12341	USD	10-08-2023	000011	5,498,000.00	100,000.00 ✓		Draft
Bank1	00020	12341	USD	10-08-2023	000011	5,498,000.00	1,000,000.00 ✓	⚠	Draft
Bank1	00019	12341	USD	10-08-2023	000011	5,498,000.00	100,000.00 ✓		Draft
Bank1	00018	12341	USD	10-08-2023	000011	5,498,000.00	100,000.00 ✓		Draft
Bank1	00017	12341	USD	10-08-2023	000011	5,498,000.00	100,000.00 ✓		Draft
Bank1	00016	12341	USD	10-08-2023	000011	5,498,000.00	1,000,000.00 ✓		Draft
Bank1	00015	12341	USD	08-08-2023	000020	-1,000.00	-1,000.00 ✓		Draft
USMP OPER	00003	Opening account - USD ...	USD	09-02-2017		0.00	0.00 ✓		Draft
USMP OPER	00002	Opening account - USD ...	USD	09-02-2017		0.00	0.00 ✓		Draft
USMP OPER	00001	Opening account - USD ...	USD	09-02-2017		0.00	0.00 ✓		Draft

## See also

[Clear bridging payments using advanced bank reconciliation \(docs\)](#)

## Feedback

Was this page helpful?

Yes

No

# Correct receipt matching error in vendor invoices with Copilot

Article • 08/16/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2024	-

## Business value

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.

## Feature details

Receipt matching errors could occur for multiple reasons such as if the receipt is not logged by the warehouse manager or the vendor has not yet delivered goods to the customer or the goods are in transit.

Copilot is integrated in the pending vendor invoice list, enabling AP clerks to select a vendor invoice with an error, analyze in the invoice, and correct the error in a single location.

In future releases, Copilot will help with corrections around failed prepayments and workflow submission errors.

Dynamics 365 Finance

Product receipt matching failed. You can ask Copilot with Analyze invoice 018012.

Vendor invoice with auto-receipt match errors

Standard view

Filter: USMF, All vendors, Match product receipts

Invoice Number	Company	Vendor account	Vendor Name	Purchase order	Invoice received date	Invoice date	Imported invoice amount	Product receipt	Automated receipt match status	Execution times	Last
018012	usmf	US-003	Lamma Suppliers	PO0180	1/12/2024	1/15/2024	30600.00	PR0354	Failed	5	1/12/24
INVPO0041	usmf	US-003	Best Supplier Europe	00000041	1/10/2024	1/8/2024	1200.00	AFK041	Failed	5	1/12/24
INVPO0042	usmf	US-003	Best Supplier Europe	00000042	1/10/2024	1/8/2024	3000.00	AFK042, AFK043	Failed	5	1/12/24

Total: 3 rows

**Copilot Invoice**

Invoice 018012 is in pending status because item Fridge105 quantity of 5 on the invoice does not match product receipt PR000054 quantity of 3. The error could be caused by one of the following reasons:

- The goods are not completely received.
- The receipt is not logged.
- Vendor invoiced a wrong quantity.

You can start resolving the issue by one of the following actions:

- Check related product receipts
- Contact warehouse manager
- Email vendor

Ask a work question or make a request

Dynamics 365 Finance

Vendor invoice center

Company: Fabrikam

Workspace: Analytics

Invoice in processing

- Invoice not imported: 0
- Manual pending invoices: 1 (On hold: 1)
- In automation: 20 (In processing: 19, Receipt match error: 3)
- In workflow: 1 (Waiting for approval: 1)
- Completed not posted: 1 (Completed not posted: 1)

Invoice dashboard

All pending invoices: 23 (Manual pending invoice, In automation, In workflow, Completed not posted)

Invoices past due: 3

Invoices due before: 100 (1/31/2024)

On hold: 1

My worklist

Invoice Number	Company	Vendor account	Vendor Name	Purchase order	Invoice received date	Invoice date	Imported invoice amount	Product receipt	Last matching status
018012	Fabrikam	US	Lamma Suppliers	PO0180	1/12/2024	1/10/2024	30600.00	PR0354	Failed
INVPO0101	Fabrikam	BeerWholesale	Beer Wholesale Inc	00000101	1/11/2024	1/8/2024	1090.00	FR001	Failed
INVPO0102	Fabrikam	1002	Contoso Retail San Diego	00000102	1/11/2024	1/8/2024	1090.00		Failed
INVPO0103	Fabrikam	1003	Contoso Retail Los Angeles	00000103	1/10/2024	1/8/2024	200.00		Failed

# Feedback

Was this page helpful?

# Enable financial tags for purchase order invoicing

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

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 and vendor names instead of using financial dimensions. This helps reduce the performance issue during the analysis phase.

## Feature details

Financial tags support user-defined fields across various transactions and financial documents in procurement-to-pay processing. Organizations can create and enter up to 20 customizable fields on transactions, stored on accounting entries. When the feature is enabled, it applies to the following transactions and documents:

- Purchase order and accounting distributions on purchase orders
- Product receipt journal
- Pending vendor invoice and accounting distribution in pending vendor invoices

---

## Feedback

Was this page helpful?



# Get batch log summarization of sales invoice copilot

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Feb 2025

## Business value

Users have an enhanced experience in reading batch logs. They'll get an AI-driven summary so they can answer questions about what is outstanding, what has failed, and why it failed. This will prevent users from contacting customer service and support for assistance.

## Feature details

Batch logs contain critical information about the processing of transactions that finance users need to answer questions such as what is outstanding, what has failed and why. Today, the logs are hard to read as they are printed in a log type format, there is no filtering or summarization, and they are difficult to export to Excel. This feature will provide an easy-to-read view of the sales invoices in a batch, which allows the users to see what has failed and why. This lets the user debut and answer questions faster during critical business operations.

---

## Feedback

Was this page helpful?

 Yes

 No






# Improve bank account lifecycle management

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Jul 31, 2024	Mar 2025

## Business value

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.

## Feature details

This feature provides additional legal entity bank account lifecycle management capabilities in Dynamics 365 Finance:

- Approval workflow for bank account activation, modification, and deactivation.
- Configurable protected fields to determine whether bank account modification needs approval.
- Approver can review proposed changes on bank account.
- Bank account change history for auditing purposes.
- Additional signer master data on bank account.

Dynamics 365 Finance

Bank accounts | Standard view

### AdvanBank: Advanced Bank Rec

Bank account status: Active from: Active to:

Active for all transactions: -

General | Payment management | Reconciliation | Negotiable instrument | Contact | Signer | Connected

**General**

Routing number type: INTERNAL INFORMATION

Name: Main account: 11011

Bank account: USD

Company statement name: Allow transactions in:  Yes  No

Routing number: 123456

Destination name: -

Bank account number: 923945

Name: Advanced Bank Rec

Bank groups: AdvancedBa

**Additional identification**

CIN: QR-BAN: Post account: -

SWIFT code: Company ID: Sort code: -

IBAN: Discode: ESR: -

My view

### Proposed changes

General

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

Signer

	CURRENT	PROPOSED
Signer	XXXX	XXXX
Signing limit	10,000.00	15,000.00
Currency	USD	USD
Effective start date	3/27/2022	3/27/2022
Effective end date	-	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	7/1/2023	7/1/2024

**REMOVE**

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

Close

# Feedback

Was this page helpful?

👍 Yes

👎 No


# Increase the length of invoice numbers

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Jul 26, 2024	Oct 2024

## Business value

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.

## Feature details

Increasing the length of invoice numbers for vendors lets you extend specific extended data types based on unique business processes. Extending the data types that determine the length of vendor invoice numbers won't adversely affect other extended data types.

To try this feature, you need to ask for a flight to be turned on.

## See also

[Extend invoice number length](#) (docs)

---

## Feedback

Was this page helpful?



Yes



No

# Make payments in advance with prepayment sales invoices

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2025	-

## Business value

The prepayment sales invoice feature streamlines the invoicing process for customers who make prepayments (advance payments). It helps businesses manage their cash flow more effectively by accurately recording and tracking prepayments. Overall, the prepayment sales invoice optimizes financial operations, increases efficiency, reduces risk, and contributes to the overall success of the business.

## Feature details

The prepayment invoice feature provides an option to issue an invoice against prepayment sales order lines. Payment is collected against a prepayment invoice before delivery of goods or services. Ultimately, the prepayment invoice is reconciled and settled with the final invoice. This makes sure that all payments are posted against an invoice.

---

## Feedback

Was this page helpful?

 Yes

 No


# Manage advanced bank reconciliation with matching rule enhancement

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	 Apr 1, 2024	Oct 2024

## Business value

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.

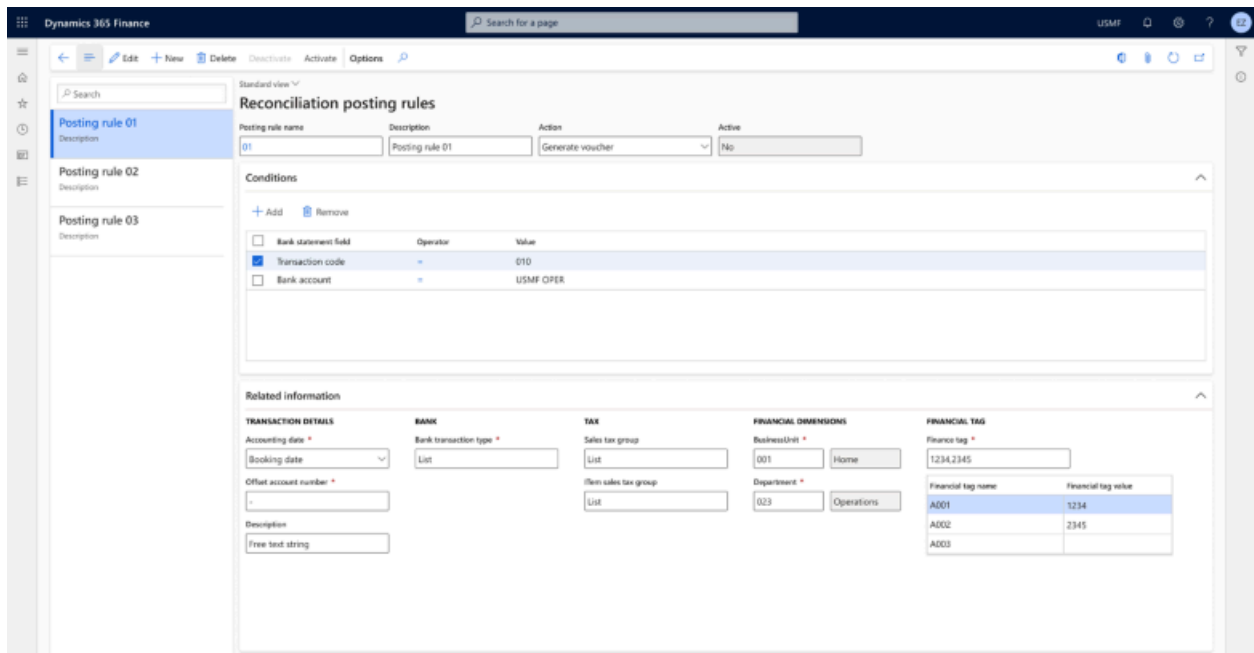
## Feature details

Bank reconciliation is a crucial step for businesses. It involves comparing the cash balance on a company's balance sheet to the corresponding amount on its bank statement, and identifying any discrepancies that may require accounting adjustments. This process can be time-consuming and labor-intensive, as it requires careful matching of records and generation of reports.

Advanced bank reconciliation in Dynamics 365 Finance helps businesses manage this process more efficiently. Within this feature, the existing matching rule in advanced bank reconciliation is enhanced with the following functions:

- Automatic post voucher

- Automatic post customer payment journal
- Automatic post vendor payment journal
- Automatic settle open customer invoices with bank statement lines



## See also

[Set up bank reconciliation matching rules \(docs\)](#)

## Feedback

Was this page helpful?

# Reverse posted purchase order invoice

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Mar 2025

## Business value

This feature is for accounts payable clerks who need to correct an incorrectly posted purchase order invoice. Previously, fixing this was a lengthy process, but now it automatically reverses the incorrect invoice and resets the purchase order status. This saves time and effort, streamlining the correction process and allowing you to post the correct invoice more efficiently.

## Feature details

Currently, when a purchase order is posted incorrectly, accounts payable clerks must follow several time-consuming steps to rectify the issue. These include adding a negative quantity line, posting a product receipt, creating and posting a credit note, adding a third line to the purchase order, posting the receipt again, and finally posting the correct invoice.

To streamline this process, the new feature automatically reverses a posted purchase order invoice and resets the purchase order status. Depending on the product receipt status, the purchase status will revert to either **Ordered** or **Received**. However, if the subsequent process after purchase order invoice posting occurs, such as settlement, financial period-end activities, or cost revaluation, the reversal will be blocked.

## Tell us what you think



Help us improve Dynamics 365 Finance by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://experience.dynamics.com/ideas/idea/?ideaid=5b4e9201-7c21-ec11-b76a-0003ff45ccf6>.

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?

 Yes

 No


# Save time with automated cash application

Article • 07/31/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	 Apr 1, 2024	Oct 2024

## Business value

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.

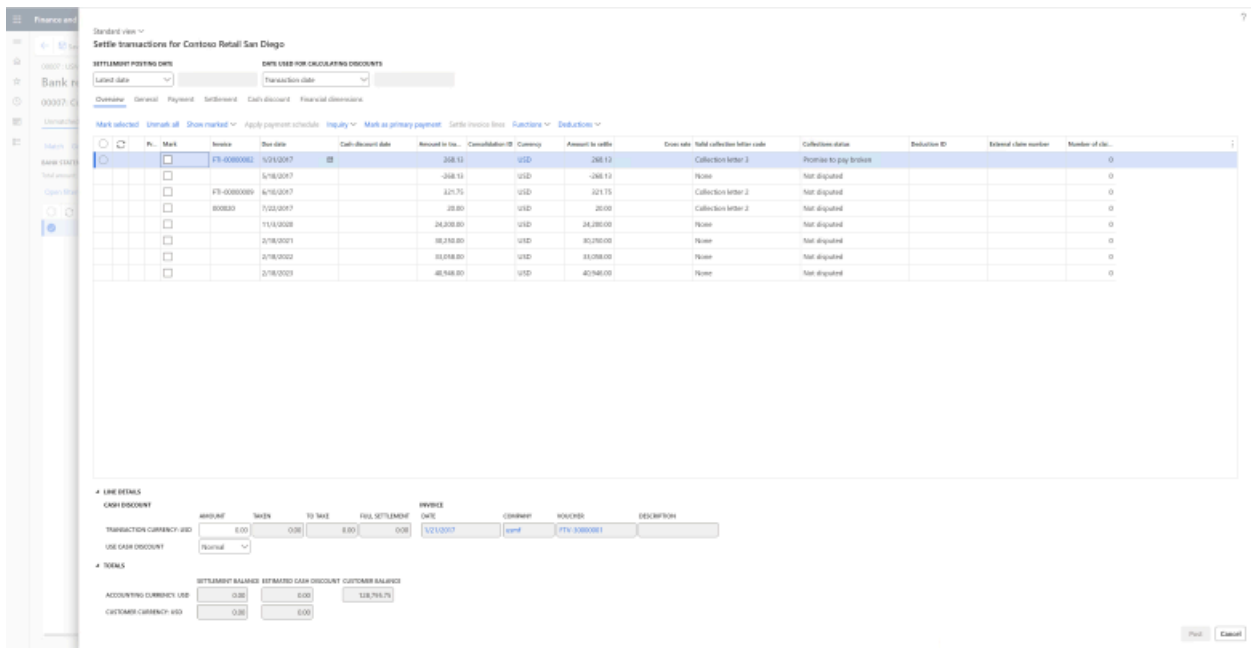
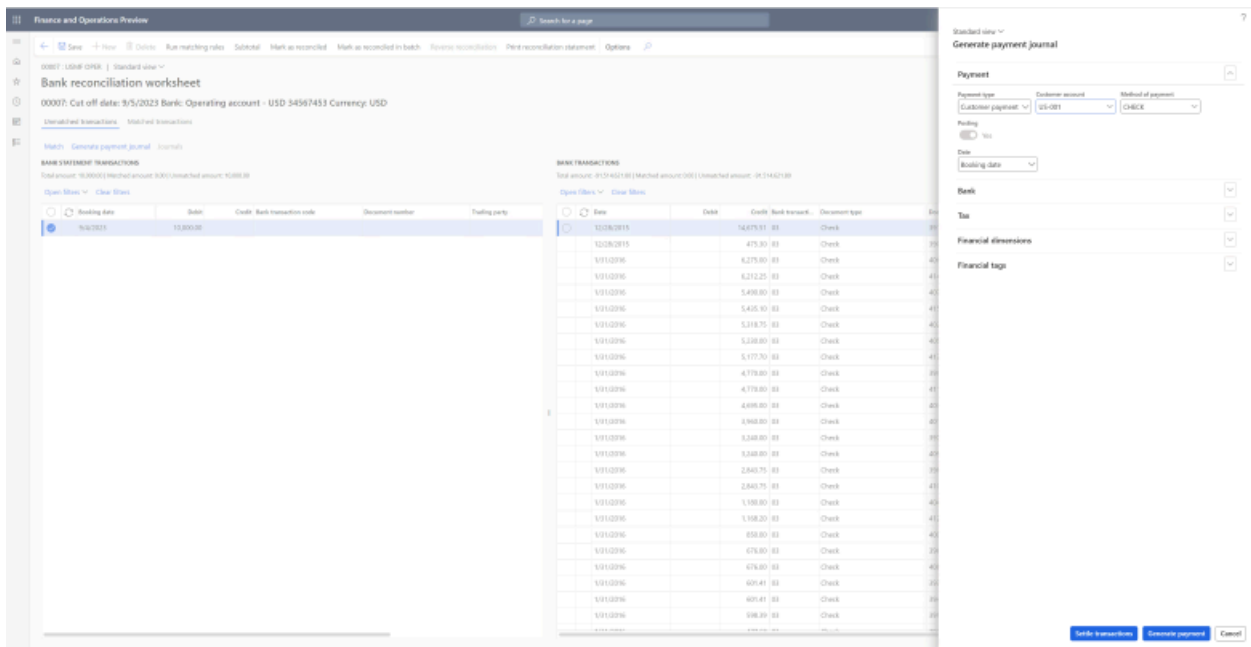
## Feature details

Bank reconciliation is a crucial step for businesses. It involves comparing the cash balance on a company's balance sheet to the corresponding amount on its bank statement, and identifying any discrepancies that may require accounting adjustments. This process can be time-consuming and labor-intensive, as it requires careful matching of records and generation of reports.

Advanced bank reconciliation in Dynamics 365 Finance can help businesses manage this process more efficiently. The following functions will be available in advanced bank reconciliation to automate the cash application:

- Generate customer payment journal from bank reconciliation worksheet.

- Generate vendor payment journal from bank reconciliation worksheet.
- Post voucher from bank reconciliation worksheet with redesigned user experience.
- Settle open customer invoices with bank statement lines.



## See also

[Cash application in advanced bank reconciliation \(docs\)](#)

## Feedback

Was this page helpful?

# Use copilot to default financial tags

Article • 09/04/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2024	-

## Business value

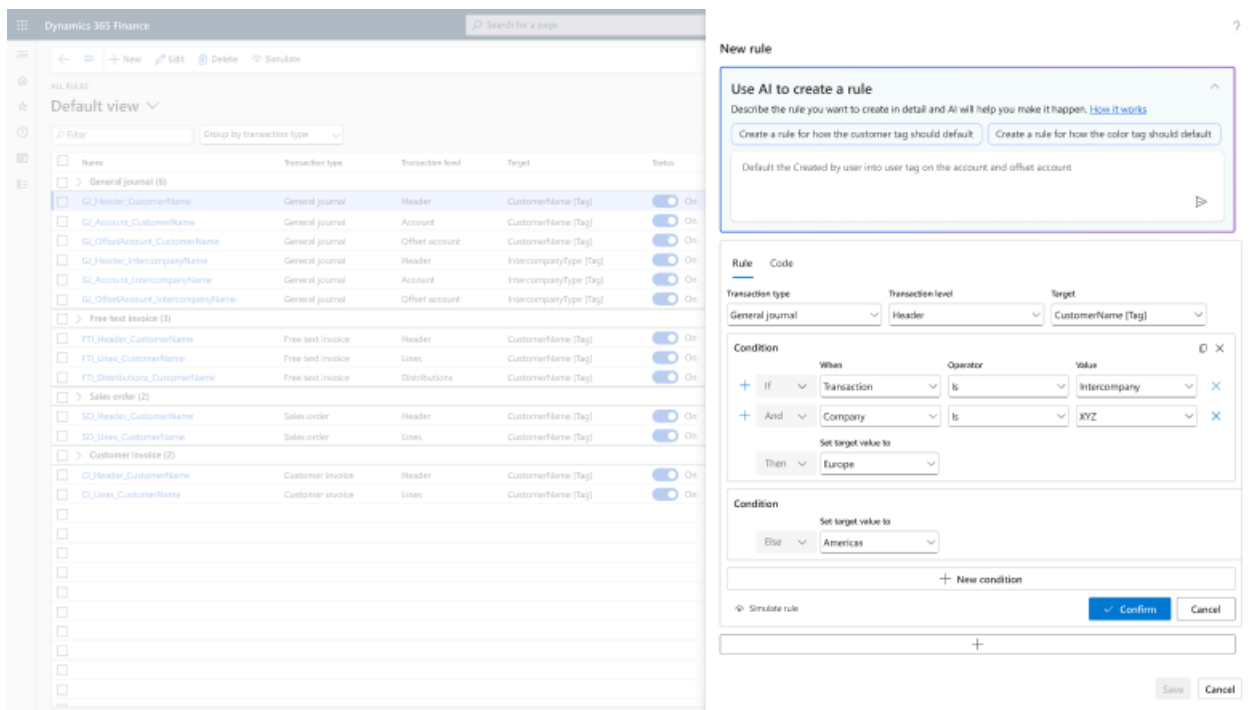
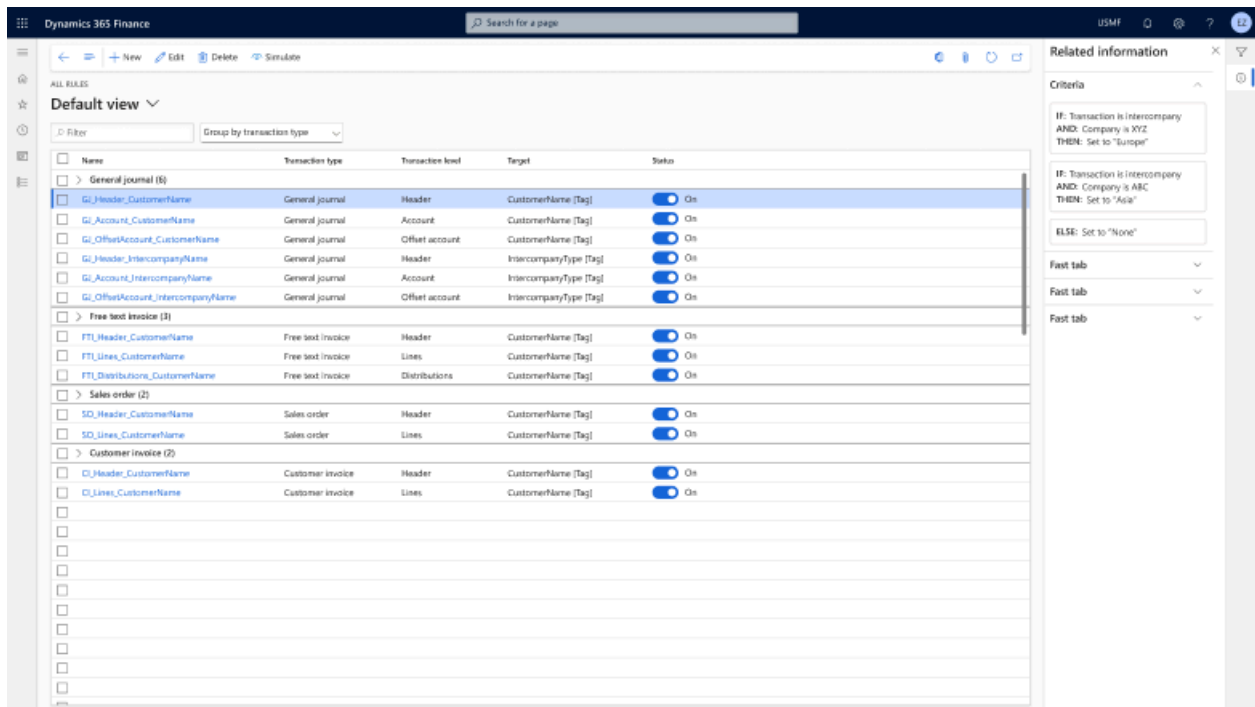
Financial tags can be used to track up to 20 user-defined fields on accounting entries. The defaulting capabilities for financial tags are limited with the initial releases. This feature gives control to accounting managers and system administrators to capture important transactional data in **Tags**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

## Feature details

The default engine for tags allows an organization to define its own rules to default financial tags. Rules can be defined per transaction entry point (general journal, free text invoice, PO, vendor invoice journal, and so on), per financial tag and per transaction level (header, lines, account, offset account, distributions). The rules can also be written using three different options. First, natural language can be entered into Copilot, which will convert them into the technical rule. The rule can be defined with an expression builder or the technical rule itself can be entered.

Before activating a rule, they can be simulated against posted transactions to preview the results of the rule. The posted transaction isn't updated, but simply used for validation of the rule.

For the first release, defaulting rules can be created for a subset of transaction entry points, such as the general journal. Support for additional journals and documents will continue to be added with each release.



Dynamics 365 Finance

ALL RULES

Default view

Filter: Group by transaction type

Name	Transaction type	Transaction level	Target	Status
General journal (6)				
GL_Header_CustomerName	General journal	Header	CustomerName [Tag]	On
GL_Account_CustomerName	General journal	Account	CustomerName [Tag]	On
GL_OffsetAccount_CustomerName	General journal	Offset account	CustomerName [Tag]	On
GL_Header_IntercompanyName	General journal	Header	IntercompanyType [Tag]	On
GL_Account_IntercompanyName	General journal	Account	IntercompanyType [Tag]	On
GL_OffsetAccount_IntercompanyName	General journal	Offset account	IntercompanyType [Tag]	On
Free text invoice (3)				
FT_Header_CustomerName	Free text invoice	Header	CustomerName [Tag]	On
FT_Lines_CustomerName	Free text invoice	Lines	CustomerName [Tag]	On
FT_Distributions_CustomerName	Free text invoice	Distributions	CustomerName [Tag]	On
Sales order (2)				
SO_Header_CustomerName	Sales order	Header	CustomerName [Tag]	On
SO_Lines_CustomerName	Sales order	Lines	CustomerName [Tag]	On
Customer invoice (2)				
CI_Header_CustomerName	Customer invoice	Header	CustomerName [Tag]	On
CI_Lines_CustomerName	Customer invoice	Lines	CustomerName [Tag]	On

New rule

Use AI to create a rule

Describe the rule you want to create in detail and AI will help you make it happen. [How it works](#)

Create a rule for how the customer tag should default    Create a rule for how the color tag should default

Default the Created by user into user tag on the account and offset account

---

Rule Code

Transaction type: General journal    Transaction level: Header    Target: CustomerName [Tag]

Condition

When	Operator	Value
+ If Transaction	Is	Intercompany
+ And Company	Is	XYZ

Set target value to: Then Europe

Condition

Set target value to: Else Americas

+ New condition

Simulate rule    Confirm    Cancel

Save    Cancel

Dynamics 365 Finance

ALL RULES

Default view

Filter: Group by transaction type

Name	Transaction type	Transaction level	Target	Status
General journal (6)				
GL_Header_CustomerName	General journal	Header	CustomerName [Tag]	On
GL_Account_CustomerName	General journal	Account	CustomerName [Tag]	On
GL_OffsetAccount_CustomerName	General journal	Offset account	CustomerName [Tag]	On
GL_Header_IntercompanyName	General journal	Header	IntercompanyType [Tag]	On
GL_Account_IntercompanyName	General journal	Account	IntercompanyType [Tag]	On
GL_OffsetAccount_IntercompanyName	General journal	Offset account	IntercompanyType [Tag]	On
Free text invoice (3)				
FT_Header_CustomerName	Free text invoice	Header	CustomerName [Tag]	On
FT_Lines_CustomerName	Free text invoice	Lines	CustomerName [Tag]	On
FT_Distributions_CustomerName	Free text invoice	Distributions	CustomerName [Tag]	On
Sales order (2)				
SO_Header_CustomerName	Sales order	Header	CustomerName [Tag]	On
SO_Lines_CustomerName	Sales order	Lines	CustomerName [Tag]	On
Customer invoice (2)				
CI_Header_CustomerName	Customer invoice	Header	CustomerName [Tag]	On
CI_Lines_CustomerName	Customer invoice	Lines	CustomerName [Tag]	On

New rule

Use AI to create a rule

Describe the rule you want to create in detail and AI will help you make it happen. [How it works](#)

Create a rule for how the customer tag should default    Create a rule for how the color tag should default

Default the Created by user into user tag on the account and offset account

---

Rule Code

Transaction type: Sales order    Transaction level: Account    Target: User [Tag]

IF: Transaction is Intercompany  
AND: Company is XYZ  
THEN: Set to "Europe"

ELSE: Set to "None"

Simulate rule

AI-generated content may be incorrect

Save    Cancel

# Feedback

Was this page helpful?

Yes    No

# Use Copilot to handle vendor invoice exceptions

Article • 08/16/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2024	-

## Business value

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.

## Feature details

Copilot can assist AP clerks in identifying and rectifying various invoice errors, including receipt matching errors, prepayment application error, workflow submission error, accounting distributions, duplicate invoice number, invalid bank account errors, and more.

**Vendor Invoice Center**

Company: Fabrikam

Workspace: Analytics

**Invoice in processing**

- Invoice not imported: 0
- Manual pending invoices: 1 (On hold: 1)
- In automation: 20 (In-processing: 19, Receipt match error: 3)
- In workflow: 1 (Waiting for approval: 1)
- Completed not posted: 1 (Completed not posted: 1)

**Invoice dashboard**

All pending invoices: 23 (Manual pending invoices: 1, In automation: 20, In workflow: 1, Completed not posted: 1)

Invoices past due: 3

Invoices due before: 100 (1/31/2024)

On hold: 1

**My worklist**

Invoice Number	Company	Vendor account	Vendor Name	Purchase order	Invoice received date	Invoice date	Invoiced invoice amount	Product/Receipt
010012	Fabrikam	13	Lenna Supplies	P01100	1/15/2024	1/15/2024	3900.00	PR0114
PWPO0101	Fabrikam	1000	Best Wholesale Inc	00000101	1/11/2024	1/6/2024	1000.00	PR001
PWPO0102	Fabrikam	1000	Continous Rental San Diego	00000102	1/11/2024	1/6/2024	1000.00	
PWPO0103	Fabrikam	1000	Continous Rental Los Angeles	00000103	1/15/2024	1/6/2024	200.00	

**CoPilot**

See suggested resolutions for invoice 010012

Invoice 010012 is in pending status and no related products receipts were found. The error could be caused by one of the following reasons:

- The goods are not completely received.
- The receipt is not logged.
- Vendor invoiced a wrong quantity.

You can start resolving the issue by one of the following actions:

- Notify responsible employee
- Email vendor
- Wait for receipt

Would you like to send below message:

"The invoice for purchase order 1011 has been received. But the receipt hasn't been logged, could you please double check that?"

as a notification to the person responsible **Uly Dues!**

Send notification

# Feedback

Was this page helpful?





# Globalization Studio

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Customers run our solution globally and must meet multiple tax compliance and other local requirements (localization). We provide out-of-the-box localizations and continuous regulatory compliance for multiple countries and regions around the globe and in multiple languages, extended by partners. Our no-code/low-code Globalization Studio services automate complex tax scenarios and allow partners and customers to easily extend localizations. As a result, customers run our solution in over 200 countries and regions.

Our investments into Globalization Studio focus on expanding the out-of-the-box country coverage, enhancing tax automation and scalability, and addressing regulatory tax digitization trends and legislation changes in multiple countries.

We continuously monitor legislations in all out-of-the-box countries and regions and ship multiple regulatory updates per government deadlines. To follow our planned and released regulatory updates, go to [Search for country-specific regulatory updates](#).

For more information on Globalization Studio, go to [Globalization Studio documentation](#).

---

## Feedback

Was this page helpful?

 Yes

 No

# Convert Excel business documents to PDF

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Dec 2024

## Business value

This feature enables local PDF conversion for Excel business documents. It allows Local Business Data conversion along with more reliability of the conversion overall.

## Feature details

When you configure ER destinations for business documents in Microsoft Excel format, the conversion performs outside the current Finance instance by default. You can enable the "Utilize application resources to perform CBD documents conversion from Excel to PDF format feature" to convert generated Word documents to PDF format locally by using application server resources in the current Finance instance.

---

## Feedback

Was this page helpful?

 Yes

 No

# Expand localization for LATAM countries - Bolivia

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Nov 2024

## Business value

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.

## Feature details

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 Bolivia is available. While the country localization will provide the following capabilities, not all of them might be available for preview.

### Country-specific features for Bolivia

- Invoicing
  - Electronic Invoicing
    - Electronic Invoice format
  - Other invoicing

- Invoice layout for sales order invoice, free text invoice, and project invoice
  - Reporting
    - General ledger and tax reports
      - Declaration reports general ledger
      - Declaration reports trial balance
      - Declaration reports standard VAT purchases book
      - Declaration reports standard VAT sales book
      - Declaration reports VAT purchases book - Credit and Debit Memo
      - File export Archivo DaVinci IVAT Purchases - Credit and Debit Memo
      - Declaration Reports VAT Sales Book - Credit and Debit Memo
      - File export Archivo DaVinci IVAT Sales – Credit and Debit Memo
      - File export Archivo DaVinci - VAT Purchases
      - File export Archivo DaVinci - VAT Sales
      - File export Bank Book - Purchase
      - File export Bank Book - Sales
  - Tax
    - Fiscal document
      - State identification
      - CA Number
- 

## Feedback

Was this page helpful?

 Yes

 No

# Expand localization for LATAM countries - Dominican Republic

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Feb 2025

## Business value

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.

## Feature details

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 Dominican Republic is available. While the country localization will provide the following capabilities, not all of them might be available for preview.

### Country-specific features for Dominican Republic

- Invoicing
  - Electronic Invoicing
    - Electronic Invoice format
  - Other invoicing

- Invoice layout for sales order invoice, free text invoice, and project invoice
  - Reporting
    - General ledger and tax reports
      - Declaration reports general ledger
      - Declaration reports trial balance
      - File export Report with Purchases of Goods and Services to issue Report 606
      - File export Report with the Sales of Goods and Services to issue Report 607
      - File export Report with voided receipts to issue report 608
- 

## Feedback

Was this page helpful?

 Yes

 No

# Expand localization for LATAM countries - Ecuador

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Nov 2024

## Business value

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.

## Feature details

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 Ecuador is available. While the country localization will provide the following capabilities, not all of them might be available for preview.

### Country-specific features for Ecuador

- Invoicing
  - Electronic Invoicing
    - Electronic Invoice format
  - Other invoicing

- Invoice layout for sales order invoice, free text invoice, and project invoice
  - Reporting
    - General ledger and tax reports
      - Declaration reports general ledger
      - Declaration reports trial balance
      - Declaration reports sales
      - Declaration reports purchases: Detailed
      - Declaration reports purchases: Payment Methods
      - Declaration reports purchases: Refunds
      - Declaration reports purchases: Withholdings
      - File export ATS
- 

## Feedback

Was this page helpful?

 Yes

 No



# Expand localization for LATAM countries

## - Peru

Article • 08/16/2024

### 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Feb 2025

## Business value

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.

## Feature details

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 Peru is available. While the country localization will provide the following capabilities, not all of them might be available for preview.

### Country-specific features for Peru

- Invoicing
  - Electronic Invoicing
    - Electronic Invoice format
  - Other invoicing

- Invoice layout for sales order invoice, free text invoice, and project invoice
  - Reporting
    - General ledger and tax reports
      - Declaration Reports Cash and Bank Ledger
      - Declaration Reports General Ledger
      - Declaration Reports Trial Balance
      - Declaration Reports Purchases Register Report
      - Declaration Reports Sales Register Report
      - File export Annual declaration of operations with third parties (DAOT):  
Purchases and Sales
      - File export Electronic Journal Book
      - File export Electronic Ledger
      - File export Electronic Purchase Book
      - File export Electronic Sales Book
      - File export Withholdings File - SUNAT
- 

## Feedback

Was this page helpful?

 Yes

 No

# Expand localization for LATAM countries - Venezuela

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Feb 2025

## Business value

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.

## Feature details

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 Venezuela is available. While the country localization will provide the following capabilities, not all of them might be available for preview.

### Country-specific features for Venezuela

- Invoicing
  - Electronic Invoicing
    - Electronic Invoice format
  - Other invoicing

- Invoice layout for sales order invoice, free text invoice, and project invoice
  - Reporting
    - General ledger and tax reports
      - Declaration Reports General Ledger Book (Libro Diario)
      - Declaration Reports ISLR Withholdings Book
      - Declaration Reports Purchases VAT Book
      - Declaration Reports Relationship purchases Book
      - Declaration Reports Relationship Sales Book
      - Declaration Reports Sales VAT Book
      - File export ISLR Withholdings
      - File export VAT withholdings
- 

## Feedback

Was this page helpful?

 Yes

 No

# Experience updates to the Interfactura API for e-invoicing in Mexico

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Mar 2025

## Business value

Interfactura provides the 'last mile' connection to the government e-invoicing platform in Mexico and is transitioning its integration from a web service to a new API platform. This integration is essential for the certification of the CFDI electronic invoice document, a system that is integral to Mexico's commercial transactions. This partnership with Interfactura PAC web services underscores Microsoft Dynamics 365 Finance's commitment to supporting businesses in Mexico, facilitating seamless electronic invoicing in line with the country's fiscal regulations. It's a testament to our dedication to providing robust, compliant solutions for our users.

## Feature details

Electronic invoicing is the primary billing model in Mexico, where it is used in 100% of commercial transactions. This system has become a tool to improve fiscal control and mitigate high evasion rates. Countries such as Mexico have dedicated laws to ensure the authenticity of these documents via authorized trust service providers, who act like electronic notaries, stamping documents and applying electronic time seals to guarantee their long-term integrity and legal weight.

The e-invoice in Mexico, known as the CFDI (Comprobante Fiscal Digital por Internet), is well established throughout Mexican society. Created in 2004, it has been subject to

updates and changes over the years to ensure a better user experience for taxpayers and to correct issues detected over time. Issuers must digitally sign all invoices using a unique system that involves the encryption of the "original string" data made up of a series of characters extracted from defined fields. An additional electronic signature, called a "Stamp" must be generated by an SAT-accredited (Servicio de Administración Tributaria, the Tax administration Service) third-party trust service provider called a PAC (Proveedores autorizados de certificación, an authorized digital signature service provider), after the invoice content and structure has been validated. The PAC stamp makes the document valid for tax purposes. All tax receipts must be stamped by a PAC, which then reports the document to the SAT online. The SAT will subsequently make it available to the issuer and recipient in their respective tax mailbox.

Microsoft Dynamics 365 Finance supports out-of-the-box integration with Interfactura PAC web services, a key player in Mexico's electronic invoicing system. This integration is essential for the certification of the CFDI electronic invoice document, a system that is integral to Mexico's commercial transactions.

---

## Feedback

Was this page helpful?

 Yes

 No

# Get support for new legislation for e-invoicing in Spain

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Mar 2025

## Business value

The extension of compulsory electronic invoicing to all relationships between companies and professionals in Spain have a clear impact on the digitalization. With this feature, all businesses can comply with the current invoicing tax compliance obligations.

## Feature details

In the absence of the publication of the technical regulation governing the new electronic invoicing system in Spain, the law provides for the following obligations in the private sector that will be satisfied with this feature:

- Ability to issue, send, and receive electronic invoices.
- Inform the status of invoices.
- Guarantee possibility to exchange electronic invoices between technological solutions or platforms.
- Ability to access, view, import, and visualize the electronic invoice for the recipients.

---

## Feedback

Was this page helpful?



# Use the regulatory compliance immersive homepage

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2025	-

## Business value

The regulatory compliance immersive homepage provides users with visibility into regulatory compliance powered by Copilot. It prioritizes and suggests actions that users need to take to maintain system compliance, especially in instances where Copilot requires user confirmation. Depending on the user's role, the regulatory compliance immersive homepage presents necessary actions to manage existing or upcoming regulatory alerts and updates, address exceptions in tax automation, and keep up with the regulatory calendar for tax report submissions, among other tasks.

## Feature details

The regulatory compliance immersive homepage provides users with visibility into regulatory compliance powered by Copilot. It outlines necessary actions for managing regulatory alerts, updates, tax automation exceptions, and other tasks.

The initial release of Regulatory compliance immersive homepage offers users the following capabilities:

- Visibility of compliance with legislation in the countries and regions where the customer operates.
- Regulatory alerts for upcoming legislative changes and the required actions.

- Updates on forthcoming legislative changes and the associated actions needed.
  - Suggested actions to handle exceptions during agent-led tax automation, as requested by Copilot.
  - A regulatory calendar for tax reporting in the countries and regions where the customer operates.
- 

## Feedback

Was this page helpful?

 Yes

 No

# Plan and prepare for Microsoft Copilot for Finance in 2024 release wave 2

Article • 08/16/2024

## Important

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Microsoft Copilot for Finance**.

## Overview

<https://aka.ms/ReleaseHighlight/2024W2/ERP> 

Microsoft Copilot for Finance accelerates time-to-impact for finance professionals by surfacing insights that support strategic decision-making and reduce the time spent on manual, repetitive work. Copilot empowers finance professionals to stay in the flow of work by seamlessly connecting productivity tools, such as Microsoft Excel, with existing financial systems, such as ERP, to support critical business processes and generate insights and actions in real-time.

With the assistance of Microsoft Copilot for Finance, common financial tasks can now be completed in Excel, Outlook, and Teams to reduce the need to sign in to ERP systems, while still maintaining financial data integrity and compliance. Copilot for Finance is integrated natively within Dynamics 365 Finance ERP, Business Central, and SAP. It is independently adaptable to provide the flexibility to integrate with existing investments in third-party ERP and finance solutions like Oracle.

Microsoft Copilot for Finance will be released for global availability as a part of 2024 release wave 2. With this release, Copilot for Finance will support the collections process, variance analysis, and enable more streamlined data reconciliation.

Users can connect to Dynamics 365 Finance, Business Central, and SAP directly from Outlook for easy access to valuable insights from customer data in ERP. Users can get help when crafting email responses and save communication summaries and action items for scaled impact. Partners and customers can create connectors to other ERP systems and use them with Copilot for Finance in Outlook.

Copilot for Finance offers experiences in Teams, supporting collections calls using Teams telephony capabilities, with suggested conversation scripts based on company-defined

procedures and customer financial information. Action items and follow-ups can be automatically recorded in the financial system.

In Excel, users get Copilot support to reconcile their financial data and analyze variances in financial reports. Reconciliation experiences include intelligent prompts when comparing financial data structures, the ability to match the records with similar data, assisted data sanitization and preparation routines, reconciliation report creation, auto-generated insights, and suggestions on possible ways to address discrepancies. The reconciliation report summary and documented action items are automatically prepared and available to save for future reference and audit.

Variance analysis is available in pivot tables with time-series data and offers capabilities both to identify variances using criteria the user can input using natural language, and detailed analysis of underlying data explaining key drivers for these variances. Users can fine-tune variance analysis results using multi-turn prompts, add additional insights, collaborate and share analysis results with stakeholders using custom report formats.

 [Updates to Microsoft Copilot for Finance 2024 release wave 2](#)

## Investment areas



### Microsoft Excel experiences

Microsoft Copilot for Finance helps finance professionals work with financial data in Microsoft Excel without jeopardizing financial data integrity in ERP systems. Finance professionals will be able to reconcile their financial data with next-generation AI support from Copilot for Finance to compare financial data structures, create reconciliation reports, and troubleshoot and correct discrepancies.

### Microsoft Outlook experiences

Microsoft Copilot for Finance experiences in Microsoft Outlook empower accounts receivable employees to communicate effectively with their customers. Finance professionals will be able to connect to their ERP system directly from Outlook while communicating with their customers, get valuable insights into customer data that's in

ERP, get help when crafting email responses, and save communication summaries and action items back into their ERP system.

### **Microsoft Teams experiences**

Microsoft Copilot for Finance experiences in Microsoft Teams enables finance professionals to collaborate and communicate on financial data using Teams. Finance professionals will be able to access and interact with customer data in the ERP system directly from the Teams call conversation. They will get help when organizing and planning collection activities and will be able to save communication summaries and action items back into their ERP system. Finance professionals will also be able to collaborate on macro-economic topics using Teams. Copilot for Finance will provide the user with summaries of external macroeconomic signals as well as automated monitoring, including preparing and sharing stakeholder reports on macroeconomy trends.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Microsoft Copilot for Finance** below:

[Check out the release plan](#)

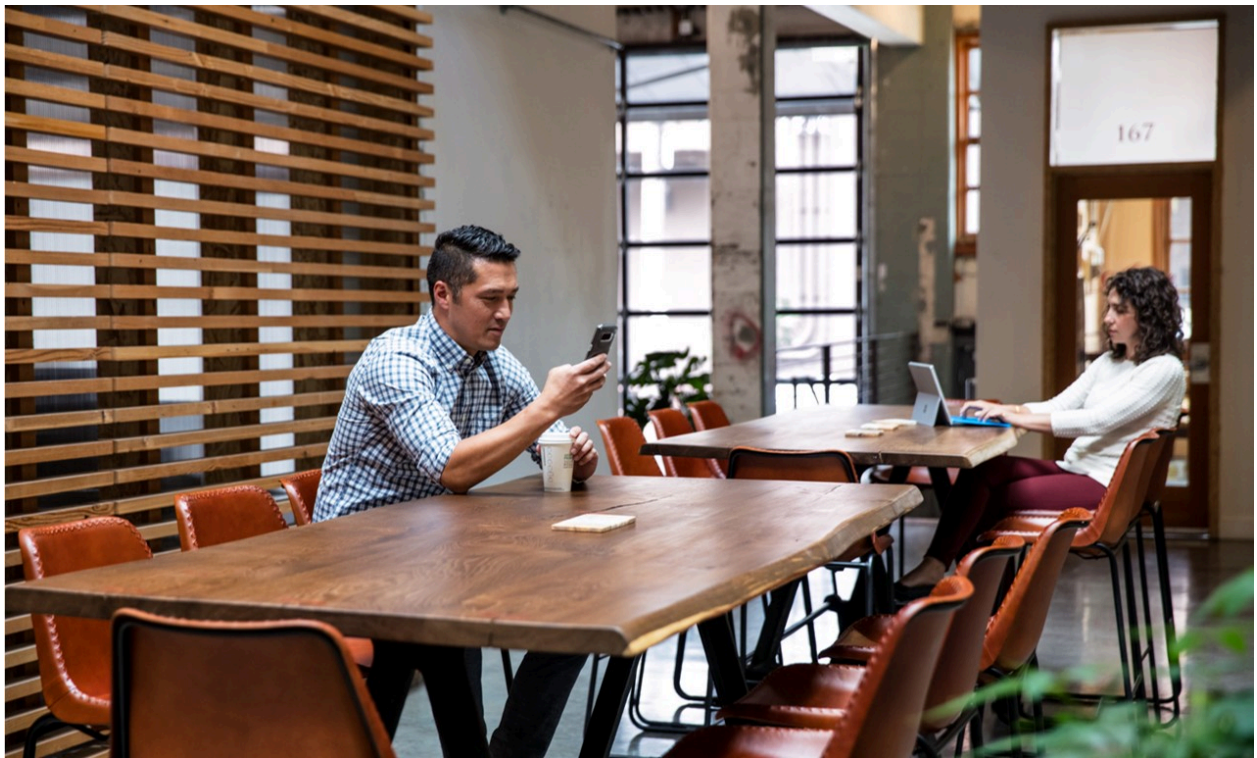
## **For application administrators**

### **User-impacting features to the user experience enabled automatically**

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

### **Features that must be enabled by application administrators**

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.



# Get the most out of Microsoft Copilot for Finance

[Expand table](#)

Helpful links	Description
<a href="#">Release plan</a>	View all capabilities included in the release.
<a href="#">Licensing</a>	Improve your understanding of how to license Microsoft Copilot for Finance.
<a href="#">Product documentation</a>	Find documentation for Microsoft Copilot for Finance.
<a href="#">User community</a>	Engage with Microsoft Copilot for Finance experts and peers in the community.
<a href="#">Upcoming events</a>	Find and register for in-person and online events.
<a href="#">Product trials</a>	Get started with Microsoft Copilot for Finance.

## Feedback

Was this page helpful?

Yes

No

# What's new and planned for Microsoft Copilot for Finance

Article • 09/20/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Microsoft Excel experiences

Copilot for Finance enables finance professionals to perform their tasks in Microsoft Excel.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Use Copilot assisted reconciliation data prep and selection</a>	Users by admins, makers, or analysts	Nov 2024	-
<a href="#">Use Copilot extended reconciliation parametrization</a>	Users by admins, makers, or analysts	Nov 2024	-
<a href="#">Analyze variances in Excel with supplementary data sources</a>	Users by admins, makers, or analysts	Feb 2025	-
<a href="#">Collaborate and share out of variance analyses in Excel</a>	Users by admins, makers, or analysts	Feb 2025	-
<a href="#">Import financial data into Excel</a>	Users by admins, makers, or analysts	Nov 2024	-



Feature	Enabled for	Public preview	General availability
<a href="#">Use Excel to analyze variances</a>	Users by admins, makers, or analysts	Feb 2025	-

## Microsoft Outlook experiences

Copilot for Finance enables finance professionals to review customer financial information and communicate more efficiently using Microsoft Outlook.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Use Copilot for Finance extensibility</a>	Users by admins, makers, or analysts	Dec 2024	Mar 2025

## Microsoft Teams experiences

Copilot for Finance enables finance professionals to collaborate and communicate on financial data using Microsoft Teams.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Manage accounts receivable in Teams</a>	Users by admins, makers, or analysts	Jan 2025	Mar 2025
<a href="#">Use Copilot for Finance macroeconomic analysis</a>	Users by admins, makers, or analysts	Jan 2025	Mar 2025

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.



- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

---

## Feedback

Was this page helpful?

Yes

No

# Microsoft Excel experiences

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Microsoft Copilot for Finance helps finance professionals work with financial data in Microsoft Excel without jeopardizing financial data integrity in ERP systems. Finance professionals will be able to reconcile their financial data with next-generation AI support from Copilot for Finance to compare financial data structures, create reconciliation reports, and troubleshoot and correct discrepancies.

---

## Feedback

Was this page helpful?

 Yes

 No

# Analyze variances in Excel with supplementary data sources

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2025	-

## Business value

Microsoft Copilot for Finance unlocks harnessing additional data sources for super-targeted and insightful analysis results.

## Feature details

Microsoft Copilot for Finance adds the following capability for variance analysis:

- Supplementary data sources allow you to add references to other contextual data that can be used to add more details to analysis.

## Note

This release is available in English only for the February 2024 release. Additional languages will be added following public preview.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- United States

---

# Feedback

Was this page helpful?

 Yes

 No

# Collaborate and share out of variance analyses in Excel

Article • 09/20/2024

## 📘 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](#)). Learn more: [What's new and planned](#)

🔍 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2025	-

## Business value

Microsoft Copilot for Finance enables the next level of productivity in analyzing variances with in-process collaboration and easy sharing of results in presentation-ready form.

## Feature details

Microsoft Copilot for Finance adds the following capability for variance analysis:

- Collaboration and sharing of variance reports in a form allowing you to share them with stakeholders (for example, using a Microsoft PowerPoint slide).

## ⚠️ Note

English only for Feb 2/29 release. Additional languages will be added post Public preview

## Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- United States
- 

## Feedback

Was this page helpful?

 Yes

 No

# Import financial data into Excel

Article • 09/20/2024

## 📘 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](#)). Learn more: [What's new and planned](#)

🔍 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Nov 2024	-

## Business value

Microsoft Copilot for Finance enables you to automate data-gathering routines to simplify your ETL processes.

## Feature details

Microsoft Copilot for Finance will add the following capabilities for obtaining financial data:

- Connectors to financial systems.
- Adding data from financial systems using natural language to support data-gathering process in data reconciliation.

## 📌 Note

This release is available only in English for the February 2024 release. Additional languages will be added following public preview.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- United States
- 

## Feedback

Was this page helpful?





# Use Copilot assisted reconciliation data prep and selection

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Nov 2024	-

## Business value

With Microsoft 365 Copilot for Finance, your prereconciliation stage is set to transform, delivering unparalleled value with the following features:


- **Data preparation excellence:** Empower your reconciliation process with Copilot's guided data sanitization capabilities. Seamlessly prepare your data for reconciliation with precision and efficiency, ensuring the integrity and accuracy of your source data. By leveraging Copilot's assistance, you can eliminate data issues in the ETL process, allowing you to embark on reconciliation with confidence.
- **Streamlined data selection:** Say goodbye to manual data hunting and selection. Copilot revolutionizes the process with its automated detection and use of newly appearing reconciliation data. Experience a streamlined selection process that optimizes efficiency and effectiveness, saving valuable time and resources.

## Feature details

Microsoft Copilot for Finance introduces enhanced capabilities for assistance in pre-reconciliation staff, offering the following features:

- **Data preparation:** Use Copilot's assisted data sanitization process for efficient and error-free reconciliation preparation, ensuring source data integrity and accuracy.

- **Data selection:** Benefit from streamlined auto-detection and use of newly appearing reconciliation data, optimizing the selection process for enhanced efficiency and effectiveness.

 **Note**

This release is available in English only for the February 2024 release. Additional languages will be added following public preview.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- United States

---

## Feedback

Was this page helpful?

 Yes

 No

# Use Copilot extended reconciliation parametrization

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Nov 2024	-

## Business value


Your reconciliation process with Microsoft Copilot for Finance now benefits from your tailored transaction categorization, adjusting for comparison accuracy to match your exact requirements and state of data you reconcile, maintaining clarity in reconciliation reporting with your defined data presentation.

## Feature details

Microsoft Copilot for Finance introduces enhanced capabilities for reconciliation process parametrization, offering the following features:

- **Customizable tolerance definition:** Tailor your reconciliation to your business process specifics by defining allowed tolerance levels. This feature empowers you to categorize transactions accurately, ensuring alignment with your unique operational requirements.
- **Numeric and monetary value parameterization:** Take full control of numeric and monetary values with Copilot's parametrization options. Whether it's adjusting values to absolute for comparison or modifying signs, you can customize your settings to match your exact needs and the state of the raw data.

- **Precision and presentation settings:** Fine-tune your reconciliation with configurable floating precision, rounding rules, and data presentation options. This level of parametrization allows you to maintain consistency and clarity in your financial reporting.

 **Note**

This release is available in English only for the February 2024 release. Additional languages will be added following public preview.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- United States

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## Feedback

Was this page helpful?

 Yes

 No

# Use Excel to analyze variances

Article • 09/20/2024

## 📘 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](#)). Learn more: [What's new and planned](#)

🔍 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2025	-

## Business value

Microsoft 365 Copilot for Finance lets you seamlessly analyze variances using the familiar interface of Microsoft Excel while defining precise criteria for identifying discrepancies, harnessing additional data sources for targeted analysis, and effortlessly generating comprehensive variance analysis reports enriched with supplementary comments for enhanced stakeholder communication.

You can dive into the heartbeat of your organization by dissecting forecast-to-actual trends on a regular basis. Stay ahead of the curve and keep all stakeholders informed about the dynamic state of your business with timely, insightful analyses, unlocking a multitude of benefits:

- **Reduce risk:** Leverage intelligent anomaly detection to mitigate risk and proactively address potential issues before they escalate, safeguarding the financial health of your organization.
- **Accelerate decision-making:** Experience a streamlined analysis cycle that empowers swift, informed decision-making. With Copilot's advanced capabilities, you'll accelerate your journey from data to actionable insights.
- **Save time:** Bid farewell to tedious manual commentary and reporting processes. Copilot automates these tasks, delivering accurate insights sourced from a plethora of data records, saving you valuable time to focus on strategic initiatives.

## Feature details

Microsoft 365 Copilot for Finance supports the following capabilities for variance analysis:

- Define criteria for identifying variances in the Excel spreadsheet that require further analysis. The criteria can be defined as natural language instruction directly in the Excel spreadsheet. Copilot will identify and highlight the variances in the worksheet using these criteria.
- Review Copilot-generated variance analysis results and adjust and complement them as needed.
- Report variance analysis outcomes in a ready-to-use form.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- United States
- 

## Feedback

Was this page helpful?

 Yes

 No

# Microsoft Outlook experiences

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Microsoft Copilot for Finance experiences in Microsoft Outlook empower accounts receivable employees to communicate effectively with their customers. Finance professionals will be able to connect to their ERP system directly from Outlook while communicating with their customers, get valuable insights into customer data that's in ERP, get help when crafting email responses, and save communication summaries and action items back into their ERP system.

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## Feedback

Was this page helpful?

 Yes

 No

# Use Copilot for Finance extensibility

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2024	Mar 2025

## Business value

ERP systems typically require customization to meet unique business needs. These customizations can involve changes to the user interface, reporting, and business logic. However, this flexibility complicates integration with other systems, requiring product and specific implementation knowledge.

Simplifying the support of extensibility allows for a high degree of customization, enabling businesses to adapt the application to their unique needs and thereby enhancing their overall performance. This flexibility improves business outcomes and results in more thorough end-to-end scenario completion and improved workflows, which leads to streamlined business operations.

## Feature details

Through Copilot Studio, this feature gives makers the ability to:

- Define the entities and fields that can be interacted with in Copilot for Finance. This will include out-of-the-box entities and custom entities retrieved from custom connectors.
- Define custom plugin interactions with each entity.
- Specify connected data sources to be used in data reconciliation.



# Feedback

Was this page helpful?

# Microsoft Teams experiences

Article • 08/16/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Microsoft Copilot for Finance experiences in Microsoft Teams enables finance professionals to collaborate and communicate on financial data using Teams. Finance professionals will be able to access and interact with customer data in the ERP system directly from the Teams call conversation. They will get help when organizing and planning collection activities and will be able to save communication summaries and action items back into their ERP system. Finance professionals will also be able to collaborate on macro-economic topics using Teams. Copilot for Finance will provide the user with summaries of external macroeconomic signals as well as automated monitoring, including preparing and sharing stakeholder reports on macroeconomy trends.

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## Feedback

Was this page helpful?

 Yes

 No

# Manage accounts receivable in Teams

Article • 09/20/2024

## 📘 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](#)). Learn more: [What's new and planned](#)

🔗 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2025	Mar 2025

## Business value

Collections software plays a vital role in modern business operations, streamlining the process of recovering outstanding debts. Some of the major advantages include:

- **Streamlined workflows:** Effective collections software brings all key data elements needed into a single pane of glass and empowers the user to execute the key end-to-end processes without bouncing between multiple applications.
- **Enhanced communication:** By providing a centralized platform for managing emails and phone calls, customers can ensure all interactions are tracked and accessible by authorized personnel, promoting increased transparency.
- **Increased compliance:** Copilot for Finance will be built on compliant, secure platform technology that allows customers to better comply with industry regulations and legal requirements.
- **Reporting and analytics:** Copilot for Finance provides accounts receivable managers the means to better measure the effectiveness of their copilot initiatives by offering insights into team performance, collection trends, and customer behavior. This data-driven approach enables teams to identify areas for improvement, optimize strategies, and make better business decisions.

Collections teams can specifically benefit from the adoption of these tools in the following ways:

- **Reduced Days Sales Outstanding (DSOs):** By being prompt in responding to customer inquiries, collections teams can reduce days sales outstanding by

avoiding delays when customers reach out for key documents.

- **Reduced delinquency rates:** By automating reminders and follow-up tasks, collections software can significantly reduce the time it takes to collect debts, leading to faster cash flow and improved financial performance.
- **Enhanced resource productivity:** By automating routine tasks and improving communication, collections software allows agents to handle more cases and resolve them faster, boosting overall team productivity.
- **Improved customer service:** Collections software fosters a more positive customer experience by facilitating personalized communication and ensuring timely resolution of inquiries.

## Feature details

Copilot for Finance is a game-changer for collections coordinators, offering a suite of capabilities that streamline and enhance the collections process. Copilot for Finance provides an immersive experience in Microsoft Teams that offers the following capabilities needed to decrease days of outstanding sales and improve cash flow.

- **Worklist Items:** This feature will display the list of cases that the collections coordinator needs to work on, sorted by priority, urgency, and status. Each item will include details of the associated customer, the invoice, and the relevant correspondence details.
- **Pre-Call Preparation:** Enriched with generative AI, collections coordinators will be provided with call scripts to prepare for calls and to support the customers during the calls.
- **Copilot Dialing Support:** During customer calls, collections coordinators will be able to interact with Copilot for Finance to gain specific customer insight and take action on key scenarios which would typically require context switching to the ERP.
- **Post-Call Support:** This feature will provide the ability to store call summaries, transcripts, and calls in Microsoft Dataverse. It will also recommend the next best actions.

### ⓘ Note

This release is available in English only for the February 2024 release. Additional languages will be added following public preview.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- United States
- 

## Feedback

Was this page helpful?



# Use Copilot for Finance macroeconomic analysis

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2025	Mar 2025

## Business value

Through Microsoft Copilot for Finance, corporate financial leaders can leverage generative AI to provide meaningful, timely summarizations of macroeconomic conditions from multiple, yet selective, market data and sources to optimize their investment and business decisions. Ever-changing conditions require consistent and constant monitoring of a variety of market-driving areas and themes that impact capital investments.

Producing impactful analyses involves analyzing and delivering clear insights from a volume and matrix of content (geos, themes, industries, government, market indices, and more). The necessary collaboration and effort are often challenging to deliver a result that is effective in content within the window of decision-making opportunity.

The effort required can result in limiting sources, less-than-optimal reactions to sudden macroeconomic events, an inability to monitor trends and themes, and keeping stakeholders informed in real time or near-real time.

Microsoft Copilot for Finance can help customers broaden sources, deliver more fine-tuned insights, and stay informed in real time. Copilot for Finance would optimize the monitoring of macroeconomic signals. Through the collaborative nature of Teams, Copilot for Finance can create macroeconomic, topic-driven libraries easily contributed to and accessible by teams such as Treasury and other senior financial leadership. A

team's experience also provides a centralized space for stakeholder reports, general updates on macroeconomic conditions, and late-breaking news that impacts capital markets.

## Feature details

Microsoft Copilot for Finance will support the following capabilities for macroeconomic analysis:

- Finance team collaboration on macroeconomic topics.
  - Customizable macroeconomic topics library.
  - AI monitoring and summarizing external macroeconomic signals.
  - Preparing and sharing stakeholder reports on macroeconomic trends.
- 

## Feedback

Was this page helpful?

 Yes

 No

# Plan and prepare for Dynamics 365 Supply Chain Management in 2024 release wave 2

Article • 08/16/2024

## Important

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Supply Chain Management**.

## Overview

<https://aka.ms/ReleaseHighlight/2024W2/ERP> 

Dynamics 365 Supply Chain Management provides capabilities for end-to-end processes that manufacturers, distributors, consumer product groups, and retailers require to meet their supply chain needs. Functionality ranges from product information management, forecasting, planning, inventory, sales, and procurement to complex manufacturing, asset maintenance, warehousing, transportation management, and costing.

This release wave focuses on copilots in three areas of plan-to-deliver e2e processes: planning, procurement, and manufacturing-traceability. We will improve Planning Optimization to calculate capable-to-promise (CTP) for sales orders faster and without waiting for the next master planning run. Demand planners can use forecast models with external signals to increase accuracy. We will also continue working to improve and expand business processes to help companies deal with complex business environments.

 [Updates to Dynamics 365 Supply Chain Management 2024 release wave 2](#)

## Investment areas





### **Copilot and AI innovation**

Dynamics 365 Supply Chain Management provides a rich set of capabilities for supporting organizations' business processes with innovative, in-product, AI-based features that empower users to rapidly unlock the full potential of Supply Chain Management.

### **Inventory and logistics**

The inventory and logistics capabilities of Dynamics 365 Supply Chain Management enable businesses to manage their sales and fulfillment processes efficiently while ensuring inventory availability that matches the desired service levels. These capabilities help businesses gain more visibility, efficiency, and resiliency in their supply chain operations.

### **Planning**

Demand planning is powered by best-in-class, out-of-the-box forecast models, immersive user experiences, intelligent reports, and analytics. It empowers organizations to build an agile, resilient, and sustainable demand planning practice that's fueled by intelligence and collaboration. In-memory supply planning offers performance and scalability to get near real-time insights into requirements changes with material requirements planning and production scheduling.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Supply Chain Management** below:

[Check out the release plan](#)

## **For application administrators**

### **User-impacting features to the user experience enabled automatically**

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new

capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

### Features that must be enabled by application administrators

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.



## Get the most out of Supply Chain Management

[Expand table](#)

Helpful links	Description
<a href="#">Release plan</a>	View all capabilities included in the release.
<a href="#">Licensing</a>	Improve your understanding of how to license Supply Chain Management.
<a href="#">Product documentation</a>	Find documentation for Supply Chain Management.
<a href="#">User community</a>	Engage with Supply Chain Management experts and peers in the community.
<a href="#">Upcoming events</a>	Find and register for in-person and online events.
<a href="#">Product trials</a>	Get started with Supply Chain Management.

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# Feedback

Was this page helpful?

# What's new and planned for Dynamics 365 Supply Chain Management

Article • 09/24/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Copilot and AI innovation

Reimagine the Dynamics 365 Supply Chain Management experience by leveraging generative AI.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Customize the conversational help provided by Copilot</a>	Users, automatically	Oct 2024	-
<a href="#">Make efficient demand planning decisions with Copilot</a>	Users, automatically	Oct 2024	Dec 2024
<a href="#">Keep conversations going with Copilot follow-up questions</a>	Users, automatically	Oct 2024	-

## Inventory and logistics

Inventory and logistics features help organizations gain visibility and resiliency in their supply chain.

[Expand table](#)

Feature	Enabled for	Public preview	General availability
<a href="#">Add transactions when recalculating weighted average</a>	Users by admins, makers, or analysts	✓ Jul 29, 2024	Mar 2025
<a href="#">Trace and solve quality issues with Copilot</a>	Users by admins, makers, or analysts	Mar 2025	-

## Planning

Demand and supply planning include forecasting future customer demand for your products or services and managing supply to fulfill it.



[Expand table](#)

Feature	Enabled for	Public preview	General availability
<a href="#">Calculate capable-to-promise quantities in real time</a>	Users by admins, makers, or analysts	Sep 2024	Dec 2024
<a href="#">Collaborate on supply plans within and across teams</a>	Users by admins, makers, or analysts	✓ Sep 12, 2024	Dec 2024
<a href="#">Enhance your demand forecasting and planning</a>	Users by admins, makers, or analysts	-	Jan 2025

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#) . For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#) .

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## Feedback

Was this page helpful?

 Yes

 No

# Copilot and AI innovation

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Dynamics 365 Supply Chain Management provides a rich set of capabilities for supporting organizations' business processes with innovative, in-product, AI-based features that empower users to rapidly unlock the full potential of Supply Chain Management.

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## Feedback

Was this page helpful?

 Yes

 No

# Customize the conversational help provided by Copilot

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	-

## Business value

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.

## Feature details

Admins can now add custom help content that Copilot will index together with the standard help content for finance and operations apps, thereby enabling Copilot to provide conversational help that's specific for your company's business processes and system customizations.

Supplementary help documents uploaded to generative answers in Copilot Studio expand on the knowledge that Copilot uses to answer questions submitted through the Copilot side car for finance and operations apps. Supported document formats include PDF and Microsoft Word.



# Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Norway
  - Singapore
  - South Africa
  - Switzerland
  - United Arab Emirates
  - Sweden
  - United States
  - Europe
  - Asia Pacific
  - United Kingdom
  - Australia
  - Brazil
  - Canada
  - India
  - Japan
  - France
  - Korea
- 

## Feedback

Was this page helpful?

 Yes

 No

# Keep conversations going with Copilot follow-up questions

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	-

## Business value

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.

## Feature details

The [conversational help and guidance experience](#) in Microsoft finance and operations apps uses Copilot to make it fast and easy for you to learn how to work with your app. Copilot accepts natural-language queries and returns conversational results. Now, Copilot can also provide a list of likely follow-up questions to help you keep the conversation going. All you need to do is select a question to instantly see more results.

This feature runs in the Copilot sidecar user interface and is expected to support many types of searches that are available in the sidecar. It uses AI to generate the suggested questions, which it displays as a list of clickable items. When you ask a question, Copilot analyzes it and presents its natural-language response, and then adds a list of related questions that other users typically ask after a similar search.

By integrating this feature into the generative help and guidance experience, all users benefit from a more intuitive and efficient way to find information. The feature is automatically enabled and seamlessly incorporated into the Copilot sidecar, requiring no additional setup.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- United States
- 

## Feedback

Was this page helpful?

 Yes

 No

# Make efficient demand planning decisions with Copilot

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Dec 2024

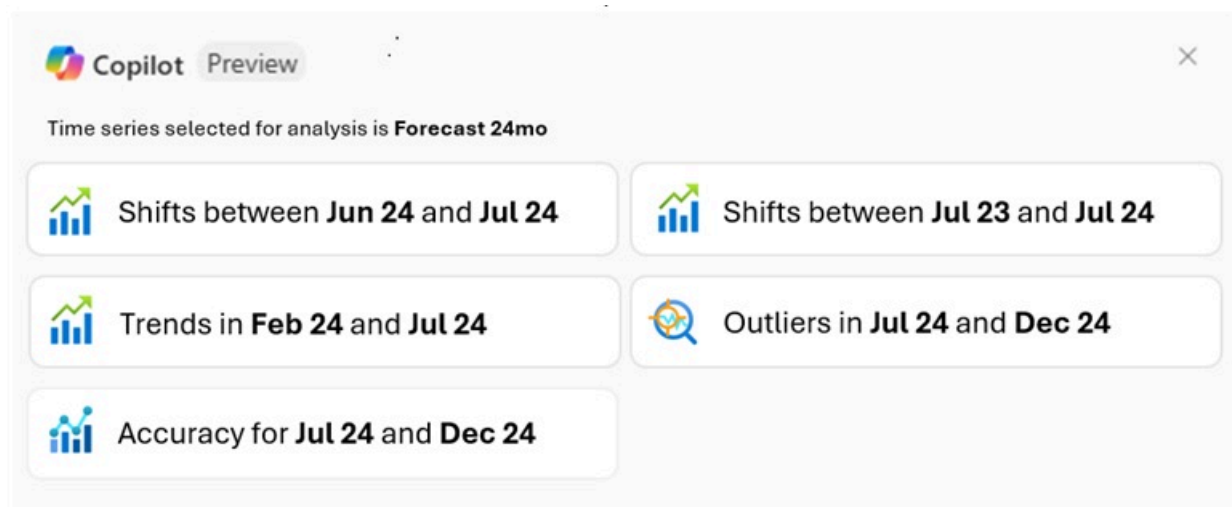
## Business value

Demand planning in Microsoft Dynamics 365 Supply Chain Management now includes a copilot that lets you explore shifts and trends, identify anomalies, measure accuracy, and discover other factors that affect demand, with results presented in natural language. This helps you make informed decisions, improve forecast accuracy, optimize supply chain operations, and improve financial results.

## Feature details

Copilot cursor prompts in demand planning help you explore a specific data point or data range in a forecast or time series. They provide a set of predefined questions that you can ask Copilot, which then returns insights into notable shifts (both positive and negative), trends, and anomalies across multiple dimensions. Copilot replies using natural-language summaries and visuals, which make it easy for you to digest the information and use it to make informed decisions.

The following illustration shows an example of Copilot cursor prompts.



## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- Sweden
- Qatar
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

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## Feedback

Was this page helpful?

Yes

No

# Inventory and logistics

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

The inventory and logistics capabilities of Dynamics 365 Supply Chain Management enable businesses to manage their sales and fulfillment processes efficiently while ensuring inventory availability that matches the desired service levels. These capabilities help businesses gain more visibility, efficiency, and resiliency in their supply chain operations.

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## Feedback

Was this page helpful?

 Yes

 No


# Add transactions when recalculating weighted average

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Jul 29, 2024	Mar 2025

## Business value

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.

## Feature details

When recalculating for weighted average, you can now choose whether to include transactions that haven't yet been financially updated. This feature:

- Adds an option for item model groups.
- Includes transactions without financial closing.
- Only applies during recalculations and doesn't affect inventory closing.

## See also

[Options for including physical value in cost calculations](#) (docs)

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# Feedback

Was this page helpful?



# Trace and solve quality issues with Copilot

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2025	-

## Business value

Effective quality assurance and issue mitigation help businesses gain customer trust. When quality assurance professionals find an issue, it can take time for them to identify the cause. They need to trace the history of manufacturing activities that went into producing the faulty items, identify specific batch/serial numbers of the relevant components and finished products, and combine this information with related data such as manufacturing time, unexpected consumption patterns, and more. Dynamics 365 Supply Chain Management now includes a copilot that applies artificial intelligence to collect and summarize all the relevant information in just a few seconds.

## Feature details

The [Traceability add-in for Dynamics 365 Supply Chain Management](#) tracks manufacturing activities against the serial/batch numbers of specific components and the related finished goods. When quality issues occur, Copilot can quickly collect all the relevant details from both the Traceability add-in and Supply Chain Management itself to summarize product status, track custody, and analyze deviations related to the impacted products. Not only can this help companies to solve quality issues quickly, but it can also find correlations between specific component batches and manufacturing delays to help improve overall manufacturing performance efficiency.

With Copilot activity summaries:

- QA managers can quickly identify abnormal activity related to any item so that they can take appropriate steps to mitigate issues.
- Production managers can easily identify delays or bottlenecks in the manufacturing process.
- Field service workers can quickly understand the lifecycle of any item to verify it and make sure it qualifies for repair or replacement.

The activities page in Supply Chain Management includes a Copilot-generated summary of recent activities and a full list of activity details. Copilot provides an activity summary that highlights the related item's status, plus any other information. From there, users can drill down into the activity to find related details. The summary for each activity provides instant access to key information such as location, time, items, workers, vendors, and more.

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## Feedback

Was this page helpful?

 Yes

 No

# Planning

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Demand planning is powered by best-in-class, out-of-the-box forecast models, immersive user experiences, intelligent reports, and analytics. It empowers organizations to build an agile, resilient, and sustainable demand planning practice that's fueled by intelligence and collaboration. In-memory supply planning offers performance and scalability to get near real-time insights into requirements changes with material requirements planning and production scheduling.

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## Feedback

Was this page helpful?

 Yes

 No

# Calculate capable-to-promise quantities in real time

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2024	Dec 2024

## Business value

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.

## Feature details

Capable-to-promise (CTP) calculations in Dynamics 365 Supply Chain Management now consider both materials and resources when calculating delivery dates. This information is essential for assemble-to-order or make-to-order businesses. CTP calculations explode all the components, purchases, transfers, and capacities needed to manufacture any specific item and can be run for any selected sales order line.

Accurate confirmed ship and receipt dates allow you to:

- Tell customers the exact dates on which they will receive their orders in real time, while they are on the phone.
- Check how any change to a product (such as color, design, or other options) would affect the promised delivery date.
- Check how any change in quantity would affect the promised delivery date.

- Group or separate line quantities to meet delivery deadlines on make-to-order products.
- 

## Feedback

Was this page helpful?



# Collaborate on supply plans within and across teams

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2024	Dec 2024

## Business value

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.

## Feature details

Master planning calculations consume significant computer resources, so companies typically schedule these processes to run overnight when spare computing capacity is available. As a result, a fresh set of optimized plans is available for review at the start of the next business day. Then, throughout the day, supply planners, production planners,

and material managers can review and update each master plan as needed to accommodate new issues such as material delays, machine breakdowns, or changing priorities. As the day goes on, each modified plan can become progressively less optimized and harder to work with until the system has time to recalculate them overnight.

Because the planning engine in Supply Chain Management operates in parallel with the rest of the system, it's able to recalculate master plans throughout the day without affecting overall system performance. That means that freshly optimized supply plans are continuously available to all collaborators, thereby ensuring the best use of materials and capacity and minimizing delays in providing products to customers.

---

## Feedback

Was this page helpful?

 Yes

 No

# Enhance your demand forecasting and planning

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jan 2025

## Business value

The latest enhancements for Demand planning in Microsoft Dynamics 365 Supply Chain Management provide new insights into your supply chain planning. Take advantage of them to optimize your supply chain and boost your financial outcomes.

## Feature details

Demand planning in Microsoft Dynamics 365 Supply Chain Management helps you plan and forecast demand based on various data sources and signals. This release enhances the app by adding the following capabilities:

- Filter the data that you need from different legal entities.
- View and select the best fit model for each planning unit based on accuracy and performance metrics.
- Allocate demand across different dimensions, such as products, customers, or channels, based on an allocation basis that you define.
- Incorporate external signals, such as inflation rates or weather conditions, into your forecast calculation and understand how they impact your demand.
- Export your data to other systems or platforms, such as Dynamics 365 Supply Chain Management or Azure Data Lake. You can also customize and map your export fields as needed.



- Aggregate your data by different time periods, such as year, quarter, or week, in the grid view. You can also perform calculations in the grid view that update in real time.
  - Manage orchestration templates for running your forecast jobs. You can delete or update your templates as needed.
  - View all your forecast jobs in one page and focus on the ones that failed or need attention.
  - Apply time fence rules to prevent edits in specific periods that are locked or closed.
  - See the dependencies between your profiles and time series and how they affect your forecast results.
  - Use weighted average as an aggregation method for your data.
  - Support bidirectional calculations between quantity and amount for your demand scenarios.
  - Extend the analyze feature with copilot to more metrics and dimensions that are relevant to your business.
  - Extend the calculations and transformations that you can apply to your data with custom logic or expressions.
- 

## Feedback

Was this page helpful?

 Yes

 No

# Plan and prepare for Dynamics 365 Project Operations in 2024 release wave 2

Article • 08/16/2024

## Important

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Project Operations**.

## Overview

<https://aka.ms/ReleaseHighlight/2024W2/ERP> 

In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams so they can win more deals, accelerate delivery, empower employees, and maximize profitability. The application provides the necessary visibility, collaboration, and agility across the project lifecycle to drive success for project-centric businesses. Powered by Microsoft Power Platform, customers are provided with an unmatched set of capabilities that enable everyone to analyze, act, and automate across their organization to transform their services business from the ground up. It's everything you need to run your project operations, from deal management to financials, all in one application.

For 2024 release wave 2, we're delivering functionally rich experiences in the following areas:

- Support for larger projects with increased tasks and dependencies in the work breakdown structure.
- Usability and performance improvements for project invoicing.
- Improvements to Time, Expense, and Material usage entry, submission, and approval process using Copilot.
- Enable stocked and resource/non-stocked deployments in the same Legal entity.
- Investments in generative AI to help with core operational workflows in project proposal generation.

 [Updates to Dynamics 365 Project Operations 2024 release wave 2](#)

# Investment areas



## Copilot in Project Operations

With every new release wave, AI and automation investments through Copilot empower consultants, sales personnel, project and resource managers, as well as project accountants in Dynamics 365 Project Operations, providing them with intelligent, natural-language interactions. These enhancements extend beyond business applications to productivity tools like Microsoft Teams, Microsoft Outlook, and Microsoft Excel, meeting employees where they are most productive. Copilot features in Project Operations streamline and expedite workflows from the frontline to the back office, optimizing operational efficiency for service delivery organizations.

## Optimize Project Operations

In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams so they can win more deals, accelerate delivery, empower employees, and maximize profitability. Project Operations is continuing to invest in capabilities to improve usability, performance, and scale across key areas of the product like project planning, invoicing, time entry, and core transaction processing flows. Project Operations continues to invest in capabilities to improve usability, performance, and scale across critical areas of the product like project sales, planning, resourcing, budgeting and tracking, invoicing, and core transaction process flows.

To learn more about the entire set of capabilities being delivered during this release wave, check out the release plan for Dynamics 365 Project Operations below:

[Check out the release plan](#)

## For application administrators

### User-impacting features to the user experience enabled automatically

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new

capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

### Features that must be enabled by application administrators

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.



## Get the most out of Project Operations

[Expand table](#)

Helpful links	Description
<a href="#">Release plan</a>	View all capabilities included in the release.
<a href="#">Licensing</a>	Improve your understanding of how to license Project Operations.
<a href="#">Product documentation</a>	Find documentation for Project Operations.
<a href="#">User community</a>	Engage with Project Operations experts and peers in the community.
<a href="#">Upcoming events</a>	Find and register for in-person and online events.
<a href="#">Product trials</a>	Get started with Project Operations.

# Feedback

Was this page helpful?

# What's new and planned for Dynamics 365 Project Operations

Article • 09/13/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Copilot in Project Operations

Introducing Copilot capabilities in Dynamics 365 Project Operations.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Use the enhanced Quote experience and AI Quote summary</a>	Users by admins, makers, or analysts	Mar 2025	Mar 2025

## Optimize Project Operations

Dynamics 365 Project Operations features optimize project execution operations from ideation and sales, to invoicing and accounting.

 Expand table

Feature	Enabled for	Public preview	General availability
Use progress billing for resource and nonstock scenarios	Users by admins, makers, or analysts	-	Dec 2024
Cost rate defaulting in project estimation scenarios	Users, automatically	Sep 2024	Mar 2025
Enable processing billed sales for resource-nonstock deployments	Users by admins, makers, or analysts	-	Mar 2025
Add time-zone agnostic fields for project and project tasks	Users, automatically	-	Oct 2024
Enable flexibility when determining financial dimension defaults	Users by admins, makers, or analysts	✓ Jun 7, 2024	Mar 2025
Use time-zone agnostic fields in project planning	Users by admins, makers, or analysts	-	Oct 2024
Copy quotes and contracts across legal entities	Users by admins, makers, or analysts	✓ Feb 29, 2024	Oct 2024
Support cost plus pricing for resource time	Users by admins, makers, or analysts	✓ Feb 16, 2024	Oct 2024
Use one grid for material and expense estimates	Users by admins, makers, or analysts	✓ Mar 8, 2024	Oct 2024
Enable multiple deployment types in a single legal entity	Users by admins, makers, or analysts	Mar 2025	Jun 2025
Enable milestone date to be time zone independent	Users by admins, makers, or analysts	-	Mar 2025
Enable progress-based billing in Billing hub	Users by admins, makers, or analysts	-	Mar 2025
Implement access restrictions in Project for the Web iFrame	Users, automatically	-	Mar 2025
Mark a task as complete from the grid view	Users by admins, makers, or analysts	-	Mar 2025
Enable time phasing of quote and contract lines	Users by admins, makers, or analysts	Mar 2025	Mar 2025
Enable estimate grid to display cost and sales on one row	Users by admins, makers, or analysts	Mar 2025	Mar 2025



You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

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## Feedback

Was this page helpful?

Yes

No



# Copilot in Project Operations

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

With every new release wave, AI and automation investments through Copilot empower consultants, sales personnel, project and resource managers, as well as project accountants in Dynamics 365 Project Operations, providing them with intelligent, natural-language interactions. These enhancements extend beyond business applications to productivity tools like Microsoft Teams, Microsoft Outlook, and Microsoft Excel, meeting employees where they are most productive. Copilot features in Project Operations streamline and expedite workflows from the frontline to the back office, optimizing operational efficiency for service delivery organizations.

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## Feedback

Was this page helpful?

 Yes

 No

# Use the enhanced Quote experience and AI Quote summary

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2025	Mar 2025

## Business value

By enabling users to add or edit quote line details directly from a unified grid interface, this feature reduces manual effort and minimizes errors. The inclusion of customer schedules, margins, and budgets within the quote line details offers deeper insights and better financial oversight.

The advanced quote summary generated using language learning models (LLM) ensures comprehensive overviews, aiding in informed decision-making and strategic planning.

## Feature details

In 2024 release wave 2, we plan to complete the Modern Quote user interface improvement work. This feature introduces several enhancements to improve the management of quotes. Users can add or edit quote line details directly from a unified grid interface, with cost details accessible. The feature provides various insightful details such as customer schedules, margins, and budgets in the quote line detail, and allows seamless addition of new lines.

An advanced quote summary, generated using LLM, provides comprehensive overviews and indicates upcoming actions and various other actionable insights.

These improvements streamline quote management, enhancing functionality, accuracy, and efficiency.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Norway
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France

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## Feedback

Was this page helpful?

 Yes

 No

# Optimize Project Operations

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams so they can win more deals, accelerate delivery, empower employees, and maximize profitability. Project Operations is continuing to invest in capabilities to improve usability, performance, and scale across key areas of the product like project planning, invoicing, time entry, and core transaction processing flows. Project Operations continues to invest in capabilities to improve usability, performance, and scale across critical areas of the product like project sales, planning, resourcing, budgeting and tracking, invoicing, and core transaction process flows.

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## Feedback

Was this page helpful?

 Yes

 No

# Add time-zone agnostic fields for project and project tasks

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

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.

## Feature details

Project and project task start and end are saved in a date-time format that is converted to GMT prior to saving. They will then be converted back to the user's time zone when being displayed in the product. However, some integrations and customizations pull only the date from this field. Problems with this arise when the conversion to GMT changes the date, then an integration pulls only that date from the field without converting it back to GMT.

To prevent this, new fields on the entity are being created to store the start and end date time without first converting to GMT. This will allow you to confidently pull only the date without concern that the time-zone conversion has caused the date to change.

---

# Feedback

Was this page helpful?


# Copy quotes and contracts across legal entities

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Feb 29, 2024	Oct 2024

## Business value

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.

## Feature details

This feature empowers you with the capability to explicitly indicate and define the desired target legal entity, customer, and business unit during the process of duplicating or replicating a quote or contract. With this functionality, our platform ensures you have complete control and flexibility in specifying the precise entities and units involved in the replication process, thereby enhancing efficiency and accuracy in managing quotes and contracts within their respective contexts.

## See also

[Copy project-based quotes](#) (docs)

---

# Feedback

Was this page helpful?



# Cost rate defaulting in project estimation scenarios

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Sep 2024	Mar 2025

## Business value

Currently in Dynamics 365 Project Operations, users can only see the markup cost based on the markup 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 confusion for users because they could see different prices in actuals when compared to estimates, QLD, CLD, and budgets.

## Feature details

With this feature, users won't be confused by different prices in actuals when compared to estimates, QLD, CLD, and budgets, when the price list is configured with the markup price.

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## Feedback

Was this page helpful?

 Yes

 No

# Enable estimate grid to display cost and sales on one row

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2025	Mar 2025

## Business value

This feature enhancement lets you view and edit both cost and sales on one line of the estimate grid so you can easily edit these within the One Grid view.

## Feature details

This feature consolidates cost and sales visibility into a single, easily accessible One Grid view while maintaining control over editable fields, thus improving efficiency, accuracy, and user satisfaction in managing estimates.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Norway
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific

- United Kingdom
  - Australia
  - Brazil
  - Canada
  - India
  - Japan
  - France
- 

## Feedback

Was this page helpful?




# Enable flexibility when determining financial dimension defaults

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Jun 7, 2024	Mar 2025

## Business value

This feature adds additional flexibility for resource-based/non-stocked scenarios by adding financial dimensions for both cost and revenue to better analyze financial performance. It eliminates the need to reclassify costs or revenue manually.

## Feature details

Previously there were limited options to determine how financial dimensions default. This feature adds functionality and more flexibility in defaulting financial dimension values. With this feature, you can:

- Create a configuration to determine how financial dimensions default based on criteria like contract, project, or cost and revenue profile.
- Set criteria to determine if dimensions should default from contract lines or projects.
- Improve reliability when saving financial dimensions and value defaults on the project.
- Add the ability to set dimensions on time and material contract lines.
- Add the ability to use contract lines for revenue recognition.

In the example in the image below, the system uses the following logic:

- The line at the bottom of the grid defaults all projects and contracts to use the project dimension unless an individual record overrides that behavior.
- The table line at the top of the grid is the next most specific record and causes all projects associated with contract 00000017 to use the dimensions from the project.
- The middle line is the most specific record because it is project specific, it overrides previously defined behavior, and has all transactions specific to Project 000000004 use the contract line for the basis of default dimensions.

The **Enable contract line based revenue recognition with Project Operations for non-stocked/resource based scenarios** feature modifies the **Project default dimension rules** form by adding another column to add rules based on specific contract line groups as the first filter.

Project cost and revenue relation	Project cost and revenue profile ID	Project contract relation	Contract ID	Project relation	Project relation ID	Default dimension priority
All		Table	00000017	All		Project
All		All		Table	00000004	Contract line
All		All		All		Project

## See also

[Financial dimension defaults \(docs\)](#)

## Feedback

Was this page helpful?

Yes

No

# Enable milestone date to be time zone independent

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Mar 2025

## Business value

The milestone date field in the project contract line milestone entity is using user local time while the same field in the invoice entity is time zone independent. This causes a discrepancy in the milestone date when viewed from the invoice schedule in the project contract line in the UI. This feature helps drive parity between the milestone date in both the entities, so that invoicing of milestones is more accurate.

## Feature details

Ensuring that the milestone date (invoice date) is consistently displayed across both the project contract line milestone entity and the invoice entity will help by improving:

- **Accuracy of Invoicing** of fixed price contract lines, thereby ensuring consistency of milestone date between both project contract line and invoice, ensuring less corrections downstream.
- **Efficiency** of the invoicing process thereby reducing the administrative burden and allowing finance teams to operate more efficiently. This can lead to faster cash flow and improved financial management.

---

## Feedback

Was this page helpful?



Yes



No

# Enable multiple deployment types in a single legal entity

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2025	Jun 2025

## Business value

This feature enables users to take advantage of our modern architecture with our resource/non-stocked scenarios using the Dataverse platform. Users benefit from the great user experiences, the deep functionality in project planning using Microsoft Project for the Web, and resource management using Unified Resource Management.

## Feature details

The enhancements introduced with this feature will work toward parallel use of projects from both deployment types. This is a large effort that won't have all functionality delivered at once.

This feature is for customers who are using our stocked/production order deployment type, but using scenarios that don't involve inventory. The changes made allow customers who have used Microsoft Project in the past to enable the resource/non-stocked deployment type without having to reimplement their existing legal entity.

Changes include:

- The existing validation in the **Global project management and accounting parameters** form will be relaxed to allow legal entities with existing project data to be enabled for resource/non-stock deployment types.



- Business processes will be evaluated to ensure proper restrictions are in place for the appropriate deployment types. For example, invoices for Dataverse-based projects can only be created from Dataverse.
- We will remove access or make read-only the legacy functions that exist in both deployment types. For example, resource management and project work breakdown structures will no longer be editable in the finance and operations user interface for both stocked and resource/non-stocked deployment mode with this feature enabled. For projects created in resource/non-stocked deployment mode, users are able to use **Unified Resource Scheduling** experiences for resource scheduling, and **Project for the Web** experiences for project planning.
- Some experiences may change. For example, we may introduce independent forms to manage installation projects for each deployment type or show both types of projects in the same list page.

Example experience: Managing existing stocked projects along with non-stocked projects in the same form.

The screenshot shows the Dynamics 365 Project Operations interface. At the top, there is a search bar and navigation tabs for 'Project', 'Plan', 'Manage', 'Control', and 'Options'. Below the navigation, there are filters for 'Project ID', 'Name', 'Type', 'Customer name', 'Legal entity', and 'Contract ID'. The main area displays a table of projects with columns for Project ID, Name, Type, Customer name, Legal entity, Contract ID, and Stage. The table contains 20 rows of project data, including various types like 'Installation services', 'Telemetry', 'Combo Installation', 'Fabricam Installation', 'City light Installation', 'Fabricam Retail', 'Fabricam Sales', 'Combo Sales', 'Service Installation', and 'Project Services'. The 'Stage' column shows 'Released' for most projects and 'Closed' for some.

Project ID	Name	Type	Customer name	Legal entity	Contract ID	Stage
P-0018000-S	Installation services		Contoso	uspm	ORD-01001-V2H9L1	
P-0018000-L	Telemetry		Contoso	uspm	ORD-01002-V2H9L2	
P-0018000-B	Combo Installation		Contoso	uspm	ORD-01003-V2H9L3	
P-0018000-D	Fabricam Installation		Fabricam	uspm	ORD-01004-V2H9L4	
P-0018000-T	City light Installation		Citi	uspm	ORD-01005-V2H9L5	
P-0018000-C	City light Installation		Citi	uspm	ORD-01006-V2H9L6	
00000000	Fabricam Retail	Time and material	Fabricam	uspm	00000000	Released
00000001	Fabricam Sales	Time and material	Fabricam	uspm	00000001	Released
00000002	Contoso Sales	Time and material	Contoso	uspm	00000002	Released
00000003	Contoso Retail	Time and material	Contoso	uspm	00000003	Released
00000004	Contoso	Time and material	Contoso	uspm	00000004	Released
00000005	Service Installation	Time and material	Contoso	uspm	00000005	Released
00000006	Project Services	Time and material	Contoso	uspm	00000006	Released
00000007	City light Installation	Time and material	Citi	uspm	00000007	Released
00000008	Fabricam Retail	Fixed price	Fabricam	uspm	00000008	Released
00000009	Fabricam Sales	Fixed price	Fabricam	uspm	00000009	Released
00000010	Contoso Sales	Fixed price	Contoso	uspm	00000010	Closed
00000011	Contoso Installation	Fixed price	Contoso	uspm	00000011	Closed
00000012	Fabricam Installation	Fixed price	Fabricam	uspm	00000012	Closed
00000013	City light Installation	Fixed price	Citi	uspm	00000013	Closed

## Feedback

Was this page helpful?

Yes

No

# Enable processing billed sales for resource-nonstock deployments

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Mar 2025

## Business value

The ability to create transactions for time, expense, and material usage directly on a draft invoice streamlines the invoicing process to help ensure timely and accurate billing. This enhances operational efficiency and accelerates cash flow, providing significant financial and administrative benefits to project-oriented companies.

## Feature details

Implementing the flexibility to create transactions for time, expense, and material usage directly on a draft invoice is indeed a significant enhancement for project-oriented companies. This approach offers several key benefits:

**Timeliness:** Invoices can be prepared and sent out more quickly, reducing delays often caused by waiting for consultants to submit their time and expenses or by manually creating journal entries.

**Accuracy:** By entering transactions directly on the draft invoice, the risk of errors is minimized. This ensures that all billable items are captured correctly and reflects the true cost of the project.

**Convenience:** Consultants and Project Managers can focus on their core activities without being bogged down by administrative tasks. This is particularly beneficial for

consultants who are frequently on the move.

**Efficiency:** Streamlining the invoicing process reduces the administrative burden and allows finance teams to operate more efficiently. This can lead to faster cash flow and improved financial management.

**Transparency:** It provides a clear and comprehensive view of all billable items on the draft invoice, making it easier to review and approve before finalizing and sending it to the client.

Overall, this flexibility can greatly enhance the invoicing process, making it more efficient and accurate, ultimately benefiting both the company and its clients.

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## Feedback

Was this page helpful?

Yes

No

# Enable progress-based billing in Billing hub

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Mar 2025

## Business value

The progress-based billing feature enables billing based on progress or % complete of a milestone. By integrating this capability with Billing hub, users will be able to take advantage of this feature from Billing hub without navigating to any other form, reducing clicks and navigation and improving user efficiency at the time of invoice creation when working on fixed price agreements.

## Feature details

With this feature, you'll experience:

- **Reduced clicks and navigation:** By enabling billing users to review all transactions in invoiceable state with a single click while staying in the context of the project contract, project operations billing users save time and are more efficient.
- **Faster invoicing cycle:** Faster invoice creation helps speed up the invoicing process and enables faster processing of payments from the customer.
- **Reduced invoice correction:** Proactive invoice insights help billing administrators make more accurate decisions at the time of invoice creation, helping improve their productivity while also reducing the need for invoice corrections later.

# Feedback

Was this page helpful?

# Enable time phasing of quote and contract lines

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2025	Mar 2025

## Business value

This feature addresses the challenge of managing the time-phased price changes in labor, expenses, and materials within quotes and contracts. This enhancement ensures that any changes in prices are automatically reflected from their effective date, providing accurate and up-to-date pricing without the need for manual intervention.

## Feature details

With this feature, the correct sales and cost prices will be automatically updated in quotes and contracts based on date effectivity. Prices will be computed using weighted average prices for both quote line details and contract line details, ensuring precise and reliable pricing calculations. This automation significantly reduces the manual effort previously required to track and update prices, minimizing the risk of errors and discrepancies in pricing.

Additionally, the new feature includes the ability to maintain a comprehensive audit trail of all changes made to quotes and contracts. This allows for full transparency and traceability, giving users confidence in the accuracy and integrity of their pricing information.

Users will now have the ability to see exact totals at any point in time, reflecting all current and historical pricing data. This real-time visibility into totals enhances contract management and helps ensure that all financial aspects are accurately accounted for.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Norway
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France

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## Feedback

Was this page helpful?

 Yes

 No

# Implement access restrictions in Project for the Web iFrame

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Mar 2025

## Business value

Currently, when a user has access to a project record, they have unlimited access to the Microsoft Project for the Web iFrame. There they can modify, create, or delete any project tasks, dependencies, goals, and more. This feature adds the ability to manage what users can do in this iFrame.

## Feature details

This feature implements a security system that allows administrators to set restrictions on what a user can access inside the Project for the Web iFrame on projects for which they have access to but are not team members. Additionally, we will implement the same system for project managers to set these restrictions for team members on their projects.

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?

 Yes

 No



# Mark a task as complete from the grid view

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Mar 2025

## Business value

This feature provides an additional method of completing a task: marking it as complete directly from the grid view.

## Feature details

Some Project Operations customers don't use time entries to track their progress on tasks. For these customers there are challenges in completing tasks, as that requires time entries to increase effort completed. With this update, we are adding functionality to mark a task as complete from the grid view, like the way it's done in default Project for the Web.

---

## Feedback

Was this page helpful?

 Yes

 No


# Support cost plus pricing for resource time

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

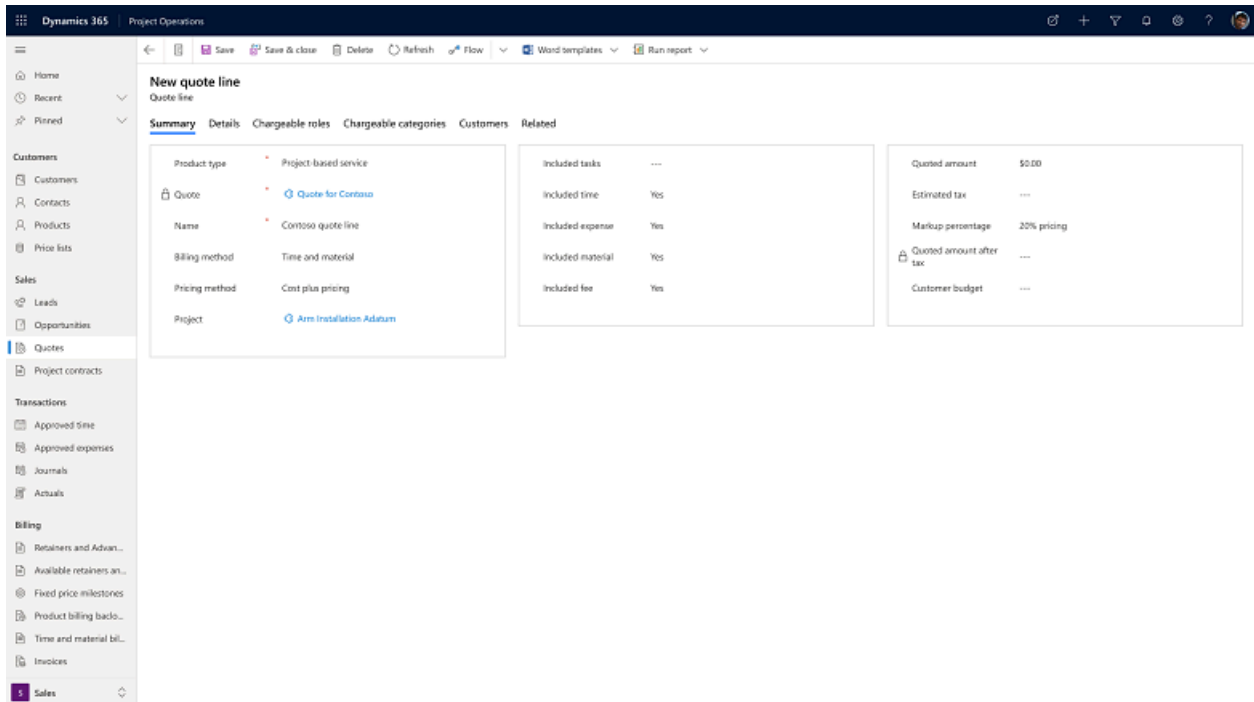
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Feb 16, 2024	Oct 2024

## Business value

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.

## Feature details

Currently, Project Operations supports the ability to define a bill rate across multiple dimensions. However, the cost is currently not a supposed configuration. This new feature provides the ability to define line items in a sales price rate as a function of a related cost rate. Enabling these capabilities supports less risk-averse contracting models such as cost plus.



## See also

[Set up labor bill rates Lite deployment \(docs\)](#)

## Feedback

Was this page helpful?




# Use one grid for material and expense estimates

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Mar 8, 2024	Oct 2024

## Business value

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.

## Feature details

This feature brings together the new grid support into Project's expense and material estimate grids. Today these custom grids are not performant and lack extensibility and capabilities. This feature enables the capabilities of the new modern grid to improve the overall experience for end users.

These enhancements include:

- Improved grid with a view switcher.
- Improved grid allowing extensibility.
- Task sorting by work breakdown structure.
- Quick create experience to easily add expense and material estimates.

## See also

## Feedback

Was this page helpful?

# Use progress billing for resource and nonstock scenarios

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Dec 2024

## Business value

Progress billing allows users to maintain progress billing rules in Project Operations non-stock/resource-based scenarios.

## Feature details

- Progress billing rules are available for project operations non-stock/resource-based scenarios.
- User can maintain the progress % for the contracts.
- Users can create invoices based on the progress completed.

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?

 Yes

 No

# Use time-zone agnostic fields in project planning

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

When a project is created, the time zone is based on the time zone defined in the applied work hour template. When a task is created, the start time, end time, and hours/day are controlled by the working hours of the project. This time zone component can make it difficult to enforce extensibility scenarios related to contracts where the definition of the time boundaries may not cross due to differences created by time zones.

## Feature details

The functionality of start and end dates in projects and project tasks within Dynamics 365 Project Operations entails the inclusion of supplementary fields that aren't dependent on specific time zones. These additional fields are incorporated into both the project and project task entities, thereby facilitating integration and extensibility possibilities for scenarios where the time zone aspect of the start and end fields is not of utmost importance or for improved accounting alignment.

---

## Feedback

Was this page helpful?





# Plan and prepare for finance and operations cross-app capabilities in 2024 release wave 2

Article • 08/16/2024

## Important

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **finance and operations cross-app capabilities**.

## Overview

Finance and operations cross-app capabilities apply to all finance and operations apps, including Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, Dynamics 365 Human Resources, and Dynamics 365 Project Operations.

We continuously enhance the platform and services that support finance and operations apps with new capabilities to enable businesses everywhere to accelerate their digital transformation. As we add product enhancements, we deliver frequent updates that help customers stay current consistently, predictably, and seamlessly. The key driver for the new core capabilities is increasing productivity and return on investment.

 [Updates to finance and operations cross-app capabilities 2024 release wave 2](#)

## Investment areas



## Boost productivity with Copilot

AI provides opportunities to empower enterprise users through copilot experiences. These experiences increase productivity by leveraging business data and large language models (LLMs). Copilot experiences in finance and operations apps will complement the experiences across Microsoft offerings, including Power Platform and Microsoft 365.

## One Dynamics One Platform

Virtual table users accessing finance and operations data will experience better performance, automation, and less management, making it an alternative solution for accessing finance and operations data on Power Platform with less effort. This is a huge leap in realizing a long-standing customer promise of the One Dynamics One Platform.

Customers using export to Data Lake will have an opportunity to transition to Azure Synapse Link for Dataverse, which will bring an integrated experience with the ability to choose data from all Dynamics 365 apps. For AX 2012 or AX 2009 customers planning an upgrade to cloud-based finance and operations, you can easily query finance and operations data using Azure Synapse Analytics. You can preserve your existing data integration pipelines by accessing finance and operations data in the lake in table form, as Azure Synapse Link for Dataverse supports finance and operations tables and entities.

To learn more about the entire set of capabilities being delivered during this release wave, [check out the release plan for finance and operations cross-app capabilities](#) below:

[Check out the release plan](#)

## For application administrators

### User-impacting features to the user experience enabled automatically

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

### Features that must be enabled by application administrators

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.

---

# Feedback

Was this page helpful?

# What's new and planned for finance and operations cross-app capabilities

Article • 09/20/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Boost productivity with Copilot

Increase your productivity with Copilot, enabling AI operations and queries in natural language.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Extend Copilot in finance and operations apps with client actions</a>	Admins, makers, marketers, or analysts, automatically	✓ Apr 26, 2024	Dec 2024
<a href="#">Navigate and search using Copilot in finance and operations</a>	Users, automatically	Oct 2024	Jan 2025
<a href="#">AI actions for finance and operations business logic</a>	Admins, makers, marketers, or analysts, automatically	✓ Jul 15, 2024	Dec 2024

## One Dynamics One Platform

Build finance and operations extensions in Power Platform.

Feature	Enabled for	Public preview	General availability
<a href="#">Get offline support for Dynamics 365 finance and operations virtual tables</a>	Admins, makers, marketers, or analysts, automatically	Oct 2024	Jan 2025
<a href="#">Enable support for asynchronous operation in dual-write functionality</a>	Users by admins, makers, or analysts	Jan 2025	Apr 2025

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

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## Feedback

Was this page helpful?

# Boost productivity with Copilot

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

AI provides opportunities to empower enterprise users through copilot experiences. These experiences increase productivity by leveraging business data and large language models (LLMs). Copilot experiences in finance and operations apps will complement the experiences across Microsoft offerings, including Power Platform and Microsoft 365.

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## Feedback

Was this page helpful?

 Yes

 No


# AI actions for finance and operations business logic

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	 Jul 15, 2024	Dec 2024

## Business value

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.

## Feature details

Copilot in finance and operations apps provides generative AI capabilities in a natural language chat experience in the finance and operations client. Makers of finance and operations apps must be able to extend and customize Copilot to tailor the capabilities

and experience to the needs of the organization. Extending Copilot can be done by creating AI plugins that add needed capabilities.

With this release, we will expand the maker's ability to customize the Copilot experience by enabling the creation of AI plugins that are based in finance and operations business logic and code. Copilot can respond to prompts with plugins that run finance and operations methods in code to determine the answer or action in response to the prompt. These are headless actions that don't require a specific context in the finance and operations client. These actions can be registered in the Dataverse plugin registry and made available in any Copilot connected to the registry, like Copilot for Microsoft 365, other Copilot experiences for Dynamics 365 applications, or custom copilots.

These capabilities open up finance and operations business logic to be used in expanding the capabilities of Copilot in finance and operations in-app experiences, as well as across your Copilot ecosystem.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- United States
- Europe
- United Kingdom
- Canada
- Japan
- France

## See also

[Extend Copilot capabilities in finance and operations apps \(docs\)](#)

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## Feedback

Was this page helpful?




# Extend Copilot in finance and operations apps with client actions

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	 Apr 26, 2024	Dec 2024

## Business value

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.

## Feature details

Copilot in finance and operations apps provides generative AI capabilities in a natural language chat experience in the finance and operations client. Makers of finance and operations apps must be able to extend and customize Copilot to tailor the capabilities and experience to the needs of the organization. Extending Copilot can be done by adding client actions, which are contextual copilot operations that can be completed in the flow of a business process in the finance and operations client.

With this release, we will expand the maker's ability to customize the Copilot experience by enabling the creation of client actions that are based in finance and operations business logic and code. Copilot can respond to prompts in the in-app chat experience with actions that run finance and operations method in code to determine the response. These capabilities, in conjunction with AI actions for finance and operations, open up finance and operations business logic to be used in expanding the capabilities of Copilot in finance and operations in-app experiences.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- United States
- Europe
- United Kingdom
- Canada
- Japan
- France

## See also

[Extend Copilot capabilities in finance and operations apps \(docs\)](#)

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## Feedback

Was this page helpful?

# Navigate and search using Copilot in finance and operations

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Jan 2025

## Business value

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.

## Feature details

Copilot in finance and operations apps provides the ability to navigate to pages in the application and deep link to specific entity records using the natural language chat experience of the Copilot interface.

---

## Feedback

Was this page helpful?

 Yes

 No

# One Dynamics One Platform

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Virtual table users accessing finance and operations data will experience better performance, automation, and less management, making it an alternative solution for accessing finance and operations data on Power Platform with less effort. This is a huge leap in realizing a long-standing customer promise of the One Dynamics One Platform.

Customers using export to Data Lake will have an opportunity to transition to Azure Synapse Link for Dataverse, which will bring an integrated experience with the ability to choose data from all Dynamics 365 apps. For AX 2012 or AX 2009 customers planning an upgrade to cloud-based finance and operations, you can easily query finance and operations data using Azure Synapse Analytics. You can preserve your existing data integration pipelines by accessing finance and operations data in the lake in table form, as Azure Synapse Link for Dataverse supports finance and operations tables and entities.

---

## Feedback

Was this page helpful?

 Yes

 No

# Enable support for asynchronous operation in dual-write functionality

Article • 09/05/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2025	Apr 2025

## Business value

This feature enables asynchronous business processes for dual-write functionality for your business.

## Feature details

Dual-write functionality currently supports initial synchronization and live synchronization modes. In this release wave, dual-write functionality supports continuous, asynchronous data movement between finance and operations apps and Microsoft Dataverse for eventual data consistency. It enables asynchronous business processes to participate in dual-write functionality. By executing bulk create and update operations in asynchronous mode, you can avoid session timeout problems and delays that can occur with blocking synchronous operations.

## Feedback

Was this page helpful?

 Yes

 No

# Get offline support for Dynamics 365 finance and operations virtual tables

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Jan 2025

## Business value

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.

## Feature details

Enterprise mobile applications often require support for running in offline mode. To support these capabilities for mobile Power Platform apps built on Dynamics 365 finance and operations data, we now support offline mode for finance and operations virtual tables. Apps can work against the data locally when offline, and sync data changes with Dynamics 365 finance and operations apps when back online.

---

## Feedback

Was this page helpful?

 Yes

 No

# Plan and prepare for Dynamics 365 Human Resources in 2024 release wave 2

Article • 08/16/2024

## Important



The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Human Resources**.

## Overview

<https://aka.ms/ReleaseHighlight/2024W2/ERP> 

As human resources roles shift more from administrative to strategic, we will leverage next-generation AI to transform common HR activities and responsibilities to empower HR users, reduce costs, and provide valuable insights for faster decision making. Our vision is to deliver an HR application that ensures full visibility, evidence, and autonomy as HR professionals navigate a complex and competitive world where regulations are constantly changing, and companies are looking at new ways to grow globally while retaining talent and increasing engagement.

One of the key challenges for human resources professionals is to stay ahead of the curve and adapt to the changing needs of their organizations and employees. To help them achieve this, in this release new AI-powered features are introduced that enables them to automate and optimize common HR tasks, such as benefits, talent management, and employee engagement. By using our in-app copilot capabilities, they can access personalized and contextual guidance, insights, and recommendations based on their role and preferences. We will also invest in our business performance planning and analytic capabilities, which will provide a holistic view of workforce data and trends, and help make informed decisions that align with strategic goals.

  Updates to Dynamics 365 Human Resources 2024 release wave 2

## Investment areas



## **Copilot in Dynamics 365 Human Resources**

With every new release wave, AI and automation investments empower employees, HR managers, administrators, and recruiting agents, providing them with intelligent, natural-language interactions. These enhancements extend beyond business applications to productivity tools like Microsoft Teams, Microsoft Outlook, and Microsoft Excel, meeting employees where they are most productive. Copilot features in Human Resources streamline and expedite workflows from the frontline of employee experiences to the human resources back office, optimizing operational efficiencies.

### **Optimize human resource operations**

Every new release wave of the Dynamics 365 Human Resource application brings new enhancements for corporations and organizations to optimize their human resource operations from personnel management, compensation, benefits, and performance management. Improvements in recruiting operations, skills and competency management, and succession management bring efficiencies in the hire-to-retain lifecycle. Core employee experiences around leave and absence, learning, and training management will benefit from investments bringing core HR data and processes to meet employees where they are.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Human Resources** below:

[Check out the release plan](#)

## **For application administrators**

### **User-impacting features to the user experience enabled automatically**

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.



## Features that must be enabled by application administrators

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.



## Get the most out of Human Resources

[Expand table](#)

Helpful links	Description
<a href="#">Release plan</a>	View all capabilities included in the release.
<a href="#">Licensing</a>	Improve your understanding of how to license Human Resources.
<a href="#">Product documentation</a>	Find documentation for Human Resources.
<a href="#">User community</a>	Engage with Human Resources experts and peers in the community.
<a href="#">Upcoming events</a>	Find and register for in-person and online events.
<a href="#">Product trials</a>	Get started with Human Resources.

## Feedback

Was this page helpful?

 Yes

 No

# What's new and planned for Dynamics 365 Human Resources

Article • 09/13/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Copilot in Dynamics 365 Human Resources

Introducing copilot capabilities in Dynamics 365 Human Resources.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Explore recruiting copilot scenarios</a>	Users by admins, makers, or analysts	Oct 2024	Jan 2025

## Optimize human resource operations

Optimize human resource operations from personnel, compensation, and benefits to performance management in a hire-to-retire lifecycle of an employee.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Avoid duplication with Microsoft Entra ID integration</a>	Users by admins, makers, or analysts	Sep 2024	Dec 2024
<a href="#">Use recruiting for service-centric organizations</a>	Users by admins, makers, or analysts	✓ Jul 17, 2024	Dec 2024
<a href="#">Integrate Human Resources with Viva Connections</a>	Users by admins, makers, or analysts	Jan 2025	Mar 2025
<a href="#">Use recruiting with copilot</a>	Users by admins, makers, or analysts	Jan 2025	Mar 2025

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

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## Feedback

Was this page helpful?

Yes

No

# Copilot in Dynamics 365 Human Resources

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

With every new release wave, AI and automation investments empower employees, HR managers, administrators, and recruiting agents, providing them with intelligent, natural-language interactions. These enhancements extend beyond business applications to productivity tools like Microsoft Teams, Microsoft Outlook, and Microsoft Excel, meeting employees where they are most productive. Copilot features in Human Resources streamline and expedite workflows from the frontline of employee experiences to the human resources back office, optimizing operational efficiencies.

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## Feedback

Was this page helpful?

 Yes

 No

# Explore recruiting copilot scenarios

Article • 09/12/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2024	Jan 2025

## Business value

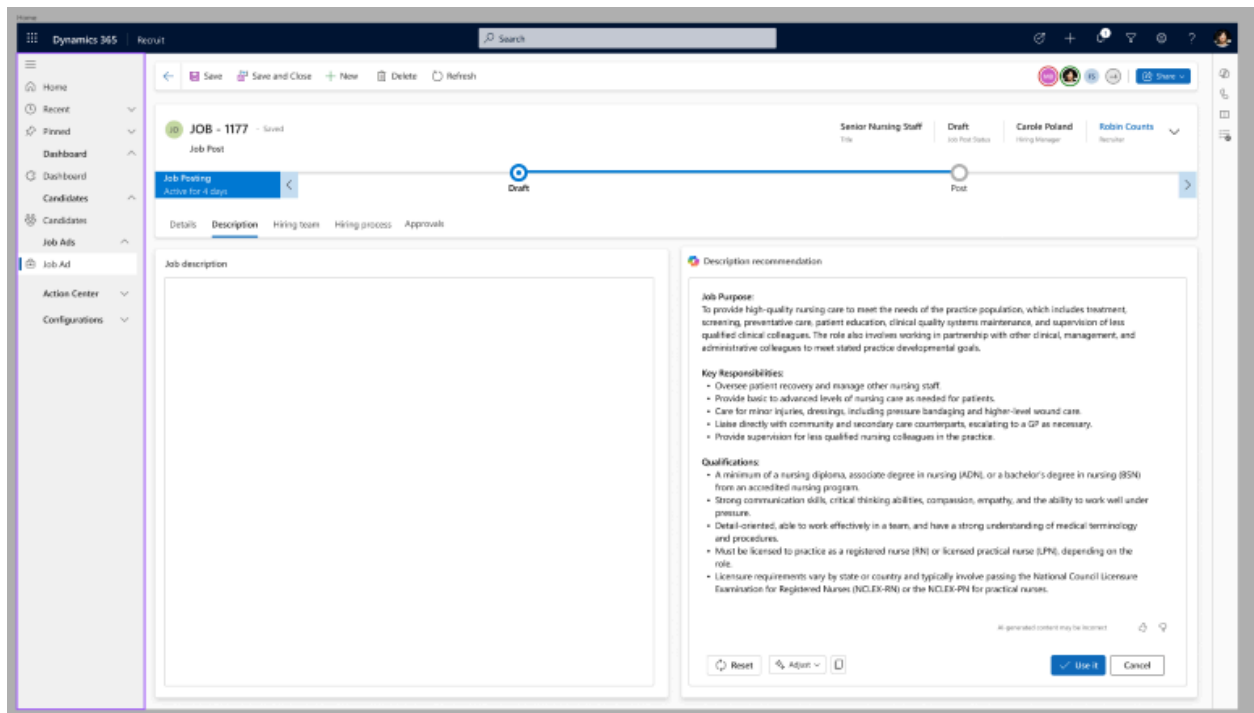
The copilot scenario in recruiting provides a range of benefits, enhancing the efficiency and effectiveness of the entire hiring process. Human resources administrators, recruiters, and hiring managers can make use of a candidate's autocalculated fitment percentage and autojob description generation features. This allows them to focus on more strategic aspects of the hiring process. It leads to a more efficient, objective, and candidate-centric hiring process, contributing to the overall success of talent acquisition efforts.

## Feature details

This is an extension of the recruiting app where end-to-end flow of the hiring process aligns with the different personas in the process.

The following scenarios are planned as part of this release:

- **Job description generation:** Quickly creates comprehensive and well-structured job descriptions without the need for manual input. Automatic job description generation in recruiting can offer several advantages, streamlining the hiring process and improving overall efficiency.
- **Interview assistant:** Provides interviewers with a list of pregenerated interview questions based on the role the candidate is applying for and the candidate's experience.



## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- South Africa
- Switzerland
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- France

 **Note:** The author created this article with assistance from AI. [Learn more](#)

## Feedback

Was this page helpful?

 Yes

 No

# Optimize human resource operations

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

Every new release wave of the Dynamics 365 Human Resource application brings new enhancements for corporations and organizations to optimize their human resource operations from personnel management, compensation, benefits, and performance management. Improvements in recruiting operations, skills and competency management, and succession management bring efficiencies in the hire-to-retain lifecycle. Core employee experiences around leave and absence, learning, and training management will benefit from investments bringing core HR data and processes to meet employees where they are.

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## Feedback

Was this page helpful?

 Yes

 No



# Avoid duplication with Microsoft Entra ID integration

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Aug 2024	Dec 2024

## Business value

You can avoid duplication of data entry in Microsoft Entra and Dynamics 365 Human Resources with this integration. Data needs to be updated only at one place, which then flows into the other. This reduces duplicate entries, decreases data entry errors, and increases efficiency. This will also help you to seamlessly maintain user data in one place, thereby increasing satisfaction and convenience, which also reduces the risk of errors and duplication of work.

## Feature details

You can now have a streamlined process where you enter employee profile data once and the same data then flows into the other. In the current process, you are required to enter employee data in Microsoft Entra and in Dynamics 365 Human Resources individually by relying on manual methods to create, update, and delete employees. You must have used methods such as uploading CSV files or custom scripts to sync employee data. These provisioning processes are error prone, insecure, and hard to manage.

## Thank you for your idea

Thank you for submitting this idea:

- [User provisioning from Dynamics 365 HR to Azure Active Directory](#) 

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

---

## Feedback

Was this page helpful?

 Yes

 No

# Integrate Human Resources with Viva Connections

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2025	Mar 2025

## Business value

Enhancing the employee experience, integration with Microsoft Viva Connections centralizes human resources (HR) data access and delivers targeted information through adaptive cards, eliminating the need to sign in to separate systems and streamlining information retrieval.

## Feature details

With this feature, you'll experience these capabilities:

- **Single sign-on access:** Eliminate the need for multiple sign-ins by centralizing HR data in one convenient location, enhancing productivity and the user experience.
- **Efficient data management:** Seamlessly access all HR-related data directly within Microsoft Teams, courtesy of the integration between Dynamics 365 Human Resources and Viva.

---

## Feedback

Was this page helpful?

 Yes

 No


# Use recruiting for service-centric organizations

Article • 09/05/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Jul 17, 2024	Dec 2024

## Business value

The recruiting feature provides human resources business partners, recruiters, and hiring managers the ability to create interview process templates, create talent pools, read candidate profile information from LinkedIn, collaborate, and include relevant information related to the position when creating a job posting.

## Feature details

We will enable the end-to-end flow of the hiring process by leveraging both Finance and Power Platform to align with the different personas in the process. Managers will use manager self-service within Dynamics 365 to submit a recruitment request that signals the beginning of the recruiting activities for the hiring team. Recruiters will use a model-driven Power Apps app to manage jobs and internal job postings, interviews, feedback, and candidate pipelines. Candidates will use a job portal built on Power Pages to apply and track progress.

The experiences are tailored to best align with how each person works and enable companies to extend and customize to meet their business needs.

FEEDBACK-1018 - Saved

Feedback

JOB-1054 Test manager Interview 1 CAND-1006

General Attachments Related

Details

Candidate Name \* ---

Candidate Contact No. 234356

Candidate Email test@ms.com

Feedback

External URL ---

Recommendation \* Yes

Interview Feedback

Interview went well.

Feedback Submitted No

Show Chart + New Refresh Export to Excel

Job Ads

Edit columns Edit filters Filter by keyword

Job ID	Title	Company	Job ad status	Hiring manager	Recruiter	Created By	Created ...
JOB-1063	Account Ma...	dat	Active	Charlie Carson (...)	J K (Offline)	Anisha # (O...	11/23/2023 ...
JOB-1062	HR assistant	dat	In Progress	Mario Rogers (O...	J K (Offline)	Anisha # (O...	11/23/2023 ...
JOB-1061	Account ma...	dat	Active	Charlie Carson (...)	Anisha # (...)	Anisha # (O...	11/23/2023 ...
JOB-1060	Business de...	dat	Active	Charlie Carson (...)	Anisha # (...)	Anisha # (O...	11/23/2023 ...
JOB-1059	Software En...		Active		J K (Offline)	Anisha # (O...	11/22/2023 ...
JOB-1058	Engineering...	USMF	Active	Charlie Carson (...)	Anisha # (...)	Anisha # (O...	11/22/2023 ...
JOB-1057	Software D...	dat	Draft	Mario Rogers (O...	Anisha # (...)	Anisha # (O...	11/21/2023 ...
JOB-1056	Software D...		Draft	Charlie Carson (...)	Anisha # (...)	Anisha # (O...	11/21/2023 ...
JOB-1054	Test manager	dat	Active	Charlie Carson (...)	Anisha # (...)	Jodi Christia...	11/20/2023 ...
JOB-1053	Senior Soft...		Complete	Charlie Carson (...)	Anisha # (...)	Anisha # (O...	11/19/2023 ...
JOB-1052	xcz		Complete	Charlie Carson (...)	Anisha # (...)	Anisha # (O...	11/17/2023 ...

1 - 21 of 21

Page 1

## See also

[Set up the Human Resources recruiting app \(docs\)](#)

## Feedback

Was this page helpful?

# Use recruiting with copilot

Article • 08/16/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2025	Mar 2025

## Business value

With copilot in the recruiting add-on for Dynamics 365 Human Resources, recruiters have a personal assistant to guide them through every step of the hiring journey. Copilot helps recruiters create effective and engaging job descriptions by using the information already associated with jobs.

## Feature details

A suggested job description is provided, and recruiters can adjust as needed before posting to job boards. Copilot also helps recruiters and the hiring team conduct interviews by suggesting a set of interview questions based on the job description plus the candidate's application and resume information. Candidate assessments will also be streamlined with copilot, and recruiters will be provided with a list of candidates who are the best fit for the role.

Dynamics 365 Recruiting add-on

Monday, Mar 28, 2024

Good morning, Robin. You have 4 new job ad requisitions and 2 interviews scheduled this week.

Recommended for today

- New Job ad requests**: You have 4 new job ad requisitions this week and 2 jobs approved to be posted. [Go to Jobs](#)
- Pending approvals**: The release of 2 candidate offers and 2 job ads are yet to be approved. Do you want to send a reminder? [Send reminder](#)
- Interview reschedules**: Sarah Perez has requested to reschedule for Interview round 4 for JOB -1012. Do you want to respond to this request? [Reschedule interview](#)

Recruiting insights

**Job status**

Status	Count
Created	16
Pending review	7
Posted	10
Interviews	8
New feedback	4
Offered	2

**Upcoming events**

- Interview round 4 | Job - 1012 | Bryan Wright | 25th May, 9:30-10:00 AM | [Send reminders](#)
- Interview round 4 | Job - 1012 | Sriniva Sankh | 26th May, 9:30-10:00 AM | [Send reminders](#)

**Hiring insights**  
Activity since Apr 24, 2024

JOB - 1177 - Saved

Practice manager: Title | Draft: Job Post Status | Carole Poland: Hiring Manager | Robin Counts: Recruiter

Job Posting: Active for 4 days

Progress: Draft (0) | Post (1)

Details: Description | Hiring team | Hiring process | Approvals

**Job description**

**Job Purpose:**  
To overseeing the administrative and business operations of a medical or wellness practice. This includes managing staff, ensuring compliance with regulations, and handling the financial aspects of the practice.

**Key Responsibilities:**

- Drive business priorities and cadences
- Collaborate with internal stakeholders and peer groups, and may communicate with external parties
- Participate in expense management for leaders and/or teams
- support budget management for morale events, and may assist with financial management for the business in partnership with others
- manage travel arrangements, logistics for managers/leaders, support space, supply, and hardware management, and provide support for employee lifecycle and team experience

**Qualifications:**

- Requires a degree in business management or a related field
- Strong communication skills, critical thinking abilities, compassion, empathy, and the ability to work well under pressure.
- Detail-oriented, able to work effectively in a team, and have a strong understanding of medical terminology and procedures.
- Management experience, preferably in the healthcare sector, is often necessary
- Professional appearance and the ability to handle the day-to-day elements of medical office management are also key

**Description recommendation**

**Job Purpose:**  
To overseeing the administrative and business operations of a medical or wellness practice. This includes managing staff, ensuring compliance with regulations, and handling the financial aspects of the practice.

**Key Responsibilities:**

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- Collaborate with internal stakeholders and peer groups, and may communicate with external parties
- Participate in expense management for leaders and/or teams
- support budget management for morale events, and may assist with financial management for the business in partnership with others
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All-generated content may be incorrect

[Reset](#) [Adjust](#) [Use it](#) [Cancel](#)

Lunch with Jane in 30 min at Fourth Coffee

Copilot Preview

Suggest interview questions for this job

Here are some questions you can ask a senior staffing nurse during an interview.

1. What inspired you to become a nurse? This question can help you understand the candidate's motivations and values. Example follow-up: "What do you enjoy most about being a nurse?"
2. What are the biggest challenges you face as a senior staffing nurse? This question can help you gauge the candidate's level of experience and expertise. Example follow-up: "How do you handle difficult situations with patients or colleagues?"
3. What are your long-term career goals? This question can help you understand the candidate's aspirations and how they align with the organization's goals. Example follow-up: "How do you plan to achieve your goals?"
4. What are the most important qualities for a senior staffing nurse? This question can help you understand the candidate's perspective on the qualities that make a good senior staffing nurse. Example follow-up: "How do you ensure that you are meeting the needs of the patients and the staff?"
5. What is your experience with scheduling and staffing? This question can help you understand the candidate's experience with scheduling and staffing. Example follow-up: "How do you ensure that you are meeting the needs of the patients and the staff?"
6. What are your thoughts on continuing education? This question can help you understand the candidate's commitment to professional development. Example follow-up: "How do you stay up-to-date with current nursing practices and research?"

Reset Adjust

AI-generated content may be incorrect

Ask a question or request for info

---

**Interview Request - Senior Nursing Staff (JOB ID - 1177)**

To: Sarah Perez, Bryan Wright +1

Wed 02/14/2024 7:30 PM - 8:30 PM No conflicts

Microsoft Teams

RSVP to this event

Yes Maybe No Propose new time

**\*\*When responding, please select "Send the Response Now" or "Edit the Response before Sending". Do not use "Propose New Time". Schedulers do not have visibility to the time proposed when this response type is used.\*\***

Hi Sarah,

Blocking your calendar for an interview loop with candidate Bryan Wright.  
Role: Senior Nursing Staff

Thank you for taking part in the interview process. We value you, your insights and your ability to bring out the best in people and Contoso Senior Living!  
Please find information about your interview and meeting invite link at the end of this mail.

Interview Details	Candidate	Building Location	Meeting Link
7:30 PM - 8:30 PM	Bryan Wright	Via Teams	<a href="#">Meeting Link</a>

Recruiter: Robin Counts  
Hiring Manager: Carole Poland

If you are unable to keep your appointment, it is your responsibility to find an interviewer to replace you. Once you do, please send me an email informing me of the change.

Thanks  
Recruiting Team.

# Feedback

Was this page helpful?



# Plan and prepare for Dynamics 365 Commerce in 2024 release wave 2

Article • 08/16/2024

## Important

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Commerce**.

## Overview

<https://aka.ms/ReleaseHighlight/2024W2/ERP> 

Microsoft Dynamics 365 Commerce is a headless omnichannel retail solution that delivers seamless end-to-end retail scenarios across physical, digital, and call center channels. By combining sales, intelligence, and productivity into a single platform, retailers have an all-encompassing view of their customers, which enables them to provide personalized shopping experiences that can lead to loyal customers and higher conversions. The Dynamics 365 Commerce solution enables comprehensive support for fixed point of sale (POS), mobile point of sale (MPOS), call center, digital commerce (direct-to-consumer [DTC], business-to-business [B2B], and B2B for wholesalers), clienteling, merchandising, channel management, cross channel inventory visibility, and order orchestration for efficient, on-time fulfillment.

Through its headless omnichannel retail solution, Dynamics 365 Commerce can help your organization drive better business outcomes and increase conversion rates in the following ways:

- **Seamlessly engage with customers across retail channels:** Give your customers the option to purchase whenever, however, and wherever they want—on any device—by delivering a frictionless and consistent engagement across physical, digital, and call center channels.
- **Modernize and streamline retail store operations:** Create personalized and friction-free commerce experiences in-store and in pop-up shops using our modern mobile POS that supports fixed, roaming, endless aisle, and self-checkout modes of operation.
- **Gain agility and scalability through a fully integrated, headless omnichannel retail solution:** Support traditional and emerging channels by using a natively

integrated, agile, API-driven, headless commerce engine that enables seamless cross-channel operations.

- **Build your digital commerce presence:** Grow your business with an integrated, end-to-end, unified digital commerce solution that enables support for DTC, B2B, and B2B for wholesaler operations.

Key features for this release include:

- **Use Copilot to streamline back-office merchandising activities:** Use Copilot to automatically validate assortments, categories, products, and more with proactive alerts that guide you to easy resolutions.
- **Use Copilot to efficiently run your retail stores:** Use Copilot to augment how you run your retail stores with insightful real-time reporting that tracks and summarizes store performance so you can proactively address issues and take advantage of local trending patterns.
- **Use Copilot to boost conversions with assisted selling and clienteling:** Use Copilot to provide personalized shopping experiences by providing sales associates with product and customer insights that can be used to increase customer loyalty and boost customer conversions.
- **Enable self-serve checkout and kiosk experiences:** Delight your customers with a POS experience that's optimized for quick and intuitive self-serve operations.
- **Enable Modern POS experiences:** Provide sales associates with improved Store Commerce components and workflows that are optimized for usability and efficiency.

 Updates to Dynamics 365 Commerce 2024 release wave 2

## Investment areas



### AI innovation with Copilot

With Dynamics 365 Copilot, organizations empower their workers with artificial intelligence (AI) tools built for sales, service, marketing, operations, and more. These AI

capabilities enable everyone to spend more time on the best parts of their jobs and less time on mundane tasks.

Retailers operate on razor thin margins and need to maximize the value of every sale. Minimizing the time required to access product and customer information and providing AI-powered sales insights are crucial for improving per-sales margins and increasing customer loyalty. Copilot in Dynamics 365 Commerce's Store Commerce point of sale (POS) focuses on enhancing sales associate productivity and effectiveness in the checkout flow, enabling associates to access summarized product and customer information with AI-powered insights, actions, and recommendations that are contextually available throughout the interface. Copilot features save sales associates time, increase sales conversions, and improve customer satisfaction and loyalty.

### **Omnichannel commerce**

Developed as a modern, cloud-based, software as a service (SAAS) solution, the Dynamics 365 Commerce omnichannel headless retail engine enables scalable retail operations across in-store, call center, and online (business-to-consumer, business-to-business, and indirect business-to-business) sales channels. Each channel can support products, pricing, and promotions and capture customer and order data that can be accessed by any other sales channel.

Merchandisers tasked with defining complex pricing structures can use the unified pricing management module to simplify their workflow by using attribute-based pricing models to configure, simulate, and approve rules-based pricing across products, attributes, channels, and customers.

### **Store Commerce**

Built on a modern, headless, omnichannel retail platform, Dynamics 365 Commerce's Store Commerce POS enables retailers to provide fast, efficient, and modern checkout experiences on fixed and mobile devices that operate on or offline. The Store Commerce POS application provides comprehensive retail workflows, from in-store, online, and curbside pickup transactions, to inventory management, order fulfillment, assisted selling, and store operations.

Sales associates spend most of their time engaging with customers and processing orders through the Store Commerce POS. Streamlining the checkout workflow to optimize for efficiency, standardizing payment flows, and providing contextual in-line controls result in time saved on every transaction, leading to happier, more efficient sales associates. Customers who want to skip the queue can instead use Store Commerce's fast and frictionless self-checkout functionality to quickly complete their payment.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Commerce** below:

Check out the release plan

## For application administrators

### User-impacting features to the user experience enabled automatically

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

### Features that must be enabled by application administrators





This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.



## Get the most out of Commerce

[Expand table](#)

Helpful links	Description
<a href="#">Release plan</a>	View all capabilities included in the release.
<a href="#">Licensing</a>	Improve your understanding of how to license Commerce.

Helpful links	Description
<a href="#">Product documentation</a> 	Find documentation for Commerce.
<a href="#">User community</a> 	Engage with Commerce experts and peers in the community.
<a href="#">Upcoming events</a> 	Find and register for in-person and online events.
<a href="#">Product trials</a> 	Get started with Commerce.

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## Feedback

Was this page helpful?

 Yes

 No

# What's new and planned for Dynamics 365 Commerce

Article • 09/20/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## AI innovation with Copilot

Reimagine customer engagement and retail operations with Store Commerce POS using GPT technology.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Drive sales, improve efficiency with Copilot for merchandising data</a>	Users, automatically	-	Oct 2024
<a href="#">Enhance clienteling with Copilot customer insights</a>	Users, automatically	-	Oct 2024
<a href="#">Discover store trends and patterns with Copilot report insights</a>	Users, automatically	-	Oct 2024
<a href="#">Improve sales with Store Commerce Copilot product insights</a>	Users, automatically	-	Oct 2024
<a href="#">Discover retail statement insights using Copilot summaries</a>	Users, automatically	-	Oct 2024

# Omnichannel commerce

Reimagine cross-channel retail operations with Dynamics 365 Commerce's headless omnichannel retail engine.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Roll out multifaceted pricing strategies</a>	Users by admins, makers, or analysts	Oct 2024	-

## Store Commerce

Store Commerce POS on Dynamics 365 Commerce enables retailers to provide efficient and frictionless sales experiences on any device, anywhere in the world.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Boost efficiency with modern Store Commerce workflows</a>	Users by admins, makers, or analysts	Oct 2024	Dec 2024
<a href="#">Enable kiosk self-checkout with intuitive workflows</a>	Users by admins, makers, or analysts	Oct 2024	Dec 2024
<a href="#">Check out faster with optimized payment flows</a>	Users by admins, makers, or analysts	Oct 2024	Dec 2024
<a href="#">Reduce checkout time with streamlined receipt workflows</a>	Users by admins, makers, or analysts	Dec 2024	Dec 2024

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.



- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

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## Feedback

Was this page helpful?

Yes

No



# AI innovation with Copilot

Article • 08/16/2024

## Important

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With Dynamics 365 Copilot, organizations empower their workers with artificial intelligence (AI) tools built for sales, service, marketing, operations, and more. These AI capabilities enable everyone to spend more time on the best parts of their jobs and less time on mundane tasks.

Retailers operate on razor thin margins and need to maximize the value of every sale. Minimizing the time required to access product and customer information and providing AI-powered sales insights are crucial for improving per-sales margins and increasing customer loyalty. Copilot in Dynamics 365 Commerce's Store Commerce point of sale (POS) focuses on enhancing sales associate productivity and effectiveness in the checkout flow, enabling associates to access summarized product and customer information with AI-powered insights, actions, and recommendations that are contextually available throughout the interface. Copilot features save sales associates time, increase sales conversions, and improve customer satisfaction and loyalty.

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## Feedback

Was this page helpful?

 Yes

 No

# Discover retail statement insights using Copilot summaries

Article • 09/20/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

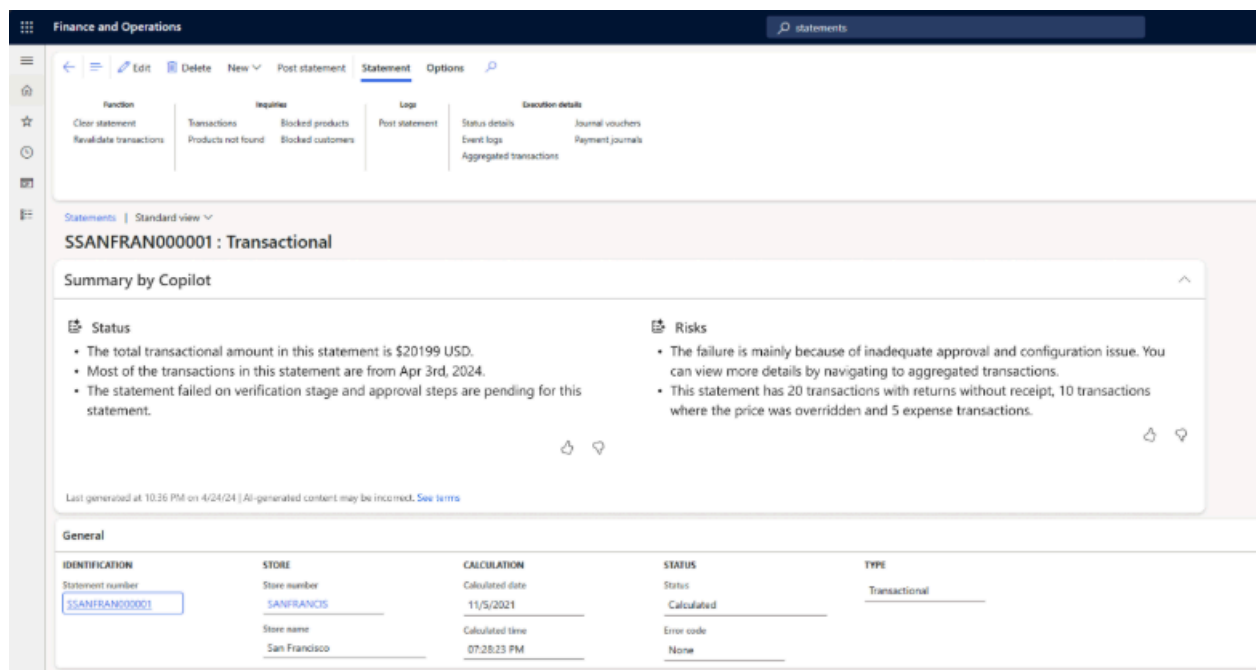
Physical stores regularly send cash and carry transactions to Dynamics 365 Commerce headquarters for processing, which updates inventory and financial records. However, frequent processing failures can lead to significant time and effort spent troubleshooting by the operations team. Delayed identification of these issues complicates resolution, especially when compounded by time-sensitive constraints like financial year closure or discontinuation of items. The statement posting summary and insights by Copilot feature aims to deliver actionable insights on failed transactions, enabling you to prioritize and address issues effectively.

## Feature details

The statement posting summary and insights by Copilot feature uses Copilot to offer a comprehensive summary of insights derived from posted and unposted statements. The summary includes insights like the count of transactions affected, total sales amount of these statements, and risks such as transactions with returns without receipts, expense transactions, price overrides, and more. Additionally, for each failed statement, the system presents a synopsis of the error to help users easily understand the issue.

The statement posting summary and insights feature is enabled automatically, but administrators can enable or disable it using the Commerce headquarters feature

management workspace. This feature is available in the Dynamics 365 Commerce 10.0.41 release, and is also included in the Commerce 10.0.38, 10.0.39, and 10.0.40 releases through proactive quality updates (PQUs) to facilitate adoption.



## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- US GCC
- US GCC High
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

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# Feedback

Was this page helpful?



# Discover store trends and patterns with Copilot report insights

Article • 08/20/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Store insights using Copilot deliver streamlined smart summaries, offering an immediate overview of a store's performance. Key metrics, such as sales, returns, discounts, and payment types that are summarized for the channel and store, are prominently featured. This equips store associates and managers with the data necessary for strategic decision making.

## Feature details

This feature enables Dynamics 365 Commerce's point-of-sale (POS) solution for Store Commerce to provide narrative summaries of channel sales and store performance reports. Using the capabilities of narrative visuals, the POS system delivers concise, human-readable summaries that highlight key metrics and trends from transactional data.

- **Efficiency:** Quick and easy access to summarized reports saves time for store associates.
- **Accuracy:** Automated summaries reduce the risk of human error in interpreting data.
- **Real-time Analysis:** Immediate availability of summarized data after transactions allows for timely decision-making.

This feature includes the following capabilities:

- **Default availability:** Summaries are accessible every time a channel report is loaded.
- **Compatibility with Highcharts reports:** Summaries seamlessly integrate with existing Highcharts-based reports.
- **Localization:** Summaries automatically adapt to the locale configuration of the POS app.
- **Data Access Control:** Summaries are governed by data access control settings. For example, a store cashier can analyze or view reports related to their own POS activity, while a store manager has broader permissions to access reports for the entire store's POS activity depending on the definition of underlying query powering reports.

Store insights can be disabled and reenabled using the functionality profile mapped to your store channels. This feature is available in the Dynamics 365 Commerce 10.0.41 release and is also included in the Commerce 10.0.38, 10.0.39, and 10.0.40 releases through proactive quality updates (PQUs) to facilitate adoption.

Product number: 6100, Start date: 01/21/2017, End date: 03/22/2024

Summary by Copilot

Sales Hours Highlights

- Highest sales gross: 13:00 – 14:00, totaling \$14,121.11.
- Highest quantity sold: 15:00 – 16:00, with a total of 7 units sold.
- Lowest sales gross: 14:00 – 15:00, totaling \$128.70
- Average sales per hour this week: \$2850.15, Average quantity per hour: 21

All generated content may be incorrect. [Learn more](#)

Sales hour	Unique item sold	Sales transaction	Sold quantity	Sale amount	Items per transaction	Average sale amount	Return transaction	Return quantity	Return amount
0:00 - 1:00	12	11	13.00	2,181.50	118	196.32	1	1	11.
1:00 - 2:00	20	19	27.00	6,050	142	375.97	1	1	122.2
2:00 - 03:00	2	2	2.00	424.00	100	211.82	0	0	0
3:00 - 4:00	6	7	17.00	2592.00	243	413.18	0	0	0
4:00 - 5:00	7	6	700	1,475.11	117	302.13	0	0	0
5:00 - 6:00	4	1	4.00	812.70	400	813.80	0	0	0
7:00 - 8:00	2	3	2.00	138.70	100	128.70	0	0	0
8:00 - 9:00	1	1	1.00	475.90	400	475.90	0	0	0
9:00 - 10:00	2	1	1.00	9,469.90	100	2,469.90	0	0	0
10:00 - 11:00	4	4	49.00	15,787.60	100	7,189.60	0	0	0
11:00 - 12:00	4	2	69.00	10,707.23	200	2,225.50	0	0	0
12:00 - 13:00	5	2	44.00	6,200.00	132	6,200.00	0	0	0
13:00 - 14:00	8	5	30.00	14,121.11	400	7,189.60	0	0	0
14:00 - 15:00	4	7	82.00	128.70	130	128.70	0	0	0
15:00 - 16:00	11	7	75.00	812.70	129	2,017.31	0	0	0
16:00 - 17:00	7	7	30.00	6,200.00	156	888.65	0	0	0
	136	124	478.00	106,884.04	4.02	3,163.25	4	4.00	385.0

Unique items sold   Sales transaction   Sold quantity   Sale amount   Items per transaction   Average sale amount   Return transaction   Return quantity   Return amount

CSV   Print   Filter

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa

- Switzerland
  - United Arab Emirates
  - US GCC
  - US GCC High
  - United States
  - Europe
  - Asia Pacific
  - United Kingdom
  - Australia
  - Brazil
  - Canada
  - India
  - Japan
  - France
  - Korea
- 

## Feedback

Was this page helpful?

 Yes

 No

# Drive sales, improve efficiency with Copilot for merchandising data

Article • 08/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

In Dynamics 365 Commerce, the Copilot-based summary and insights for merchandising data offer an interactive summary panel, automated data validations, and risk previews. By proactively identifying errors and inconsistencies in merchandising configurations, Copilot ensures data accuracy and empowers users to take corrective actions promptly. Properly configured products are essential for retail success, as inaccuracies can lead to missed sales opportunities.

## Feature details

The Copilot-based summary and insights for merchandising data in Dynamics 365 Commerce offers valuable capabilities:

- **Interactive Summary Panel:** When users navigate to a channel in the Channel Categories and Product Attributes forms within Commerce headquarters, Copilot displays a summary panel. This panel provides insights and highlights potential issues related to merchandising configurations, such as product, category, and catalog-related settings.
- **Automated Data Validations:** Copilot enables automatic runs of various merchandising data validations. By using artificial intelligence (AI), it identifies



errors and inconsistencies in your configurations. This proactive approach helps maintain data accuracy and consistency.

- **Risk Preview:** Merchandisers can preview risks identified by Copilot. This feature allows you to assess potential issues before they impact your operations, empowering you to take corrective actions promptly.

The Copilot-based summary and insights feature can be disabled and reenabled using the **Enable Copilot based summary and insights for merchandising data** feature management switch in Dynamics 365 Commerce headquarters. This feature is available in the Dynamics 365 Commerce 10.0.41 release, and has also been included in the Commerce 10.0.38, 10.0.39, and 10.0.40 releases through proactive quality updates (PQUs) to facilitate adoption.

My view ▾

## Channel product attributes : Boston

Summary by Copilot

Status	Product risks	Catalog risks
There are 1095 assorted products across 34 categories in 1 product assortment and 1 product catalog.	There are 3 types of risks for products, including: 1. Product description translation is missing for language en-us (Error): - 11 products affected 2. Sales price is missing (Error): - 4 products affected 3. Product is not released but assorted (Warning): - 2 products affected <a href="#">Review all</a>	There are no risks for <a href="#">Review all</a>

AI-generated content may be incorrect. [Learn more](#) | Last generated at 10:21 PM, 6/13/24

General

Attribute group

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- US GCC
- US GCC High
- United States
- Europe
- Asia Pacific

- United Kingdom
  - Australia
  - Brazil
  - Canada
  - India
  - Japan
  - France
  - Korea
- 

## Feedback

Was this page helpful?

 Yes

 No

# Enhance clienteling with Copilot customer insights

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Copilot can help store associates easily and more effectively personalize shopping experiences for customers with real-time insights into their preferences and behaviors as they happen, right there in the store. Copilot does the heavy lifting by analyzing purchase history, clienteling notes, product recommendations, and more to bring you precise, actionable insights. With rich contextual information directly available inline, you can now connect with your customers on a deeper level without having to switch focus. You'll see the impact where it matters most: in satisfied customers who keep coming back for that personalized touch only you can provide. With Copilot, you're not just selling products; you're crafting experiences that resonate with each individual shopper.

## Feature details

With Copilot, you gain access to a wealth of insights about your customers' preferences, including their favored categories and price points, as well as the store locations they frequent.

- **Preferred categories and basket analysis:** Copilot analyzes your customers' purchase history to identify the types of products they love. Whether they gravitate towards high-end electronics or are frequent buyers of eco-friendly products, you'll know exactly what to recommend next. Plus, Copilot understands price

sensitivity, helping you to suggest items that not only match their interests but also their budget.

- **Preferred store location preferences:** Understanding where your customers prefer to shop is crucial. Copilot tracks this data, allowing you to tailor your approach based on whether they're local regulars or out-of-town visitors looking for something special.
- **RFM analysis:** Recency, frequency, and monetary value (RFM) analysis is a cornerstone of customer segmentation. Copilot performs this analysis on your customers' transaction history, segmenting them into groups based on their shopping behavior. This enables you to prioritize your attention and offers to those who are most engaged with your store.
- **Summarized timeline of customer activity:** Keeping up with every interaction can be overwhelming. That's why Copilot summarizes the timeline of each customer's activity. At a glance, you can catch up on their past interactions, making it easy to continue the conversation where it left off or to provide a personalized follow-up.

By leveraging these insights, you're not just selling products; you're building relationships. Copilot doesn't replace your expertise—it enhances it, giving you the tools to create memorable experiences that keep customers coming back.

The customer insights feature can be disabled and reenabled using the functionality profile mapped to your store channels. This feature is available in the Dynamics 365 Commerce 10.0.41 release, and is also included in the Commerce 10.0.38, 10.0.39, and 10.0.40 releases through proactive quality updates (PQUs) to facilitate adoption.

The screenshot displays the Dynamics 365 Commerce customer insights interface. The main content is divided into four panels:

- Details:** Shows customer account information for Karen B. (Customer Account 2001), including contact details (email: karenb@contoso.com, phone: 206-555-5613) and a primary home address (712 1st Ave SW, Kirkland, WA 98007, USA).
- Summary:** Features a 'Summary by Copilot' section with a 'Purchase pattern' (Karen spends ~\$200 per order, averaging ~4 items at \$50 each, with 12 purchases in the last year, the most recent on 4/1/24, and a lifetime value of \$10,000, with \$2000 year-to-date). It also includes a 'Spark a conversation' section with prompts like 'What type of sunglasses do you prefer?' and 'Are you interested in our latest jeans collection?'. Preferred product categories are listed as Fashion sunglasses, Women's jeans, and Men's Shoes.
- Activity:** Shows a 'Catch me up' timeline with a 'Summary by Copilot' section. It notes that the customer has returned damaged items to Bellevue, showing a proactive approach to addressing issues. It also mentions that the customer called about not receiving a refund on returned items, indicating a concern for financial matters. A 'Risks and follow-ups' section highlights a risk of dissatisfaction due to the refund issue, requiring follow-up to ensure customer satisfaction and retention.
- Loyalty cards:** Displays two cards: 55103 (enrollment date: 10/10/2016) and 55104 (enrollment date: 01/12/2017).

The interface includes a search bar at the top, a navigation menu on the left, and a 'Rece' (Receipts) panel on the right. The bottom of the screen features a toolbar with options like 'Remove', 'Add to client book', 'Edit', and 'Add to sale'.

# Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
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- United Arab Emirates
- US GCC
- US GCC High
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

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## Feedback

Was this page helpful?

 Yes

 No

# Improve sales with Store Commerce Copilot product insights

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Sales associates in retail stores are better able to sell products with Copilot-generated product insights in Store Commerce. They have access to summarized key product information to help customers quickly find the right products. Copilot also helps sales associates suggest other products that complement a selected product to increase store sales.

## Feature details

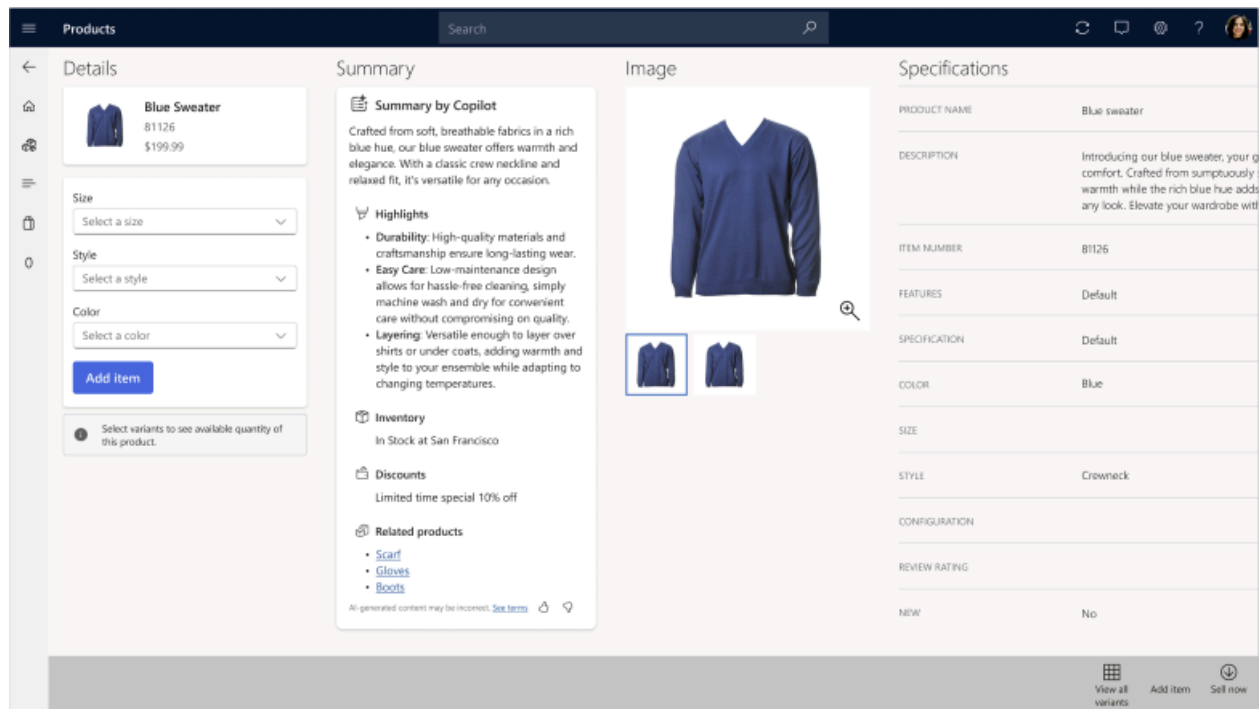
Copilot for Store Commerce generates product insights to help sales associates in retail stores improve their sales effectiveness and efficiency. Using generated insights, store associates can quickly learn and convey the most relevant information about products to customers.

Copilot-generated product insights are available on the product details page in Store Commerce and include the following information.

- **Summary:** A brief description of the product that emphasizes its main features.
- **Highlights:** The top three benefits of the product.
- **Inventory:** Product availability in the current or nearby stores.
- **Discount:** The best discounts and offers available for the product.

- **Related products:** Other products or product categories that customers generally buy with the current product.

The Copilot product insights feature can be disabled and reenabled using the functionality profile mapped to your store channels. This feature is available in the Dynamics 365 Commerce 10.0.41 release, and it has also been included in the 10.0.38, 10.0.39, and 10.0.40 Commerce releases through proactive quality updates (PQUs) to facilitate adoption.



## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
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- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada

- India
  - Japan
  - France
  - Korea
- 

## Feedback

Was this page helpful?

 Yes

 No



# Omnichannel commerce

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

Developed as a modern, cloud-based, software as a service (SAAS) solution, the Dynamics 365 Commerce omnichannel headless retail engine enables scalable retail operations across in-store, call center, and online (business-to-consumer, business-to-business, and indirect business-to-business) sales channels. Each channel can support products, pricing, and promotions and capture customer and order data that can be accessed by any other sales channel.

Merchandisers tasked with defining complex pricing structures can use the unified pricing management module to simplify their workflow by using attribute-based pricing models to configure, simulate, and approve rules-based pricing across products, attributes, channels, and customers.

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## Feedback

Was this page helpful?

 Yes

 No

# Roll out multifaceted pricing strategies

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2024	-

## Business value

Organizations are increasingly adopting multifaceted pricing strategies and seeking to gain better control over pricing in their omnichannel transformations. They want to eliminate pricing silos and use a centralized platform to plan, manage, review, and roll out pricing across all customer engagement touchpoints. Organizations also need an efficient way to define and maintain price breakdown and margin components that incorporate all relevant factors to offer contextual pricing that resonates with customers. The omnichannel experience also requires a real-time and performant pricing execution that enables businesses to quickly adapt to market changes and customer demands. This feature allows you to implement a unified pricing management module that works consistently and comprehensively across supply chain, retail, and e-commerce business processes.

## Feature details

The pricing management module provides the following capabilities to help your organization drive omnichannel pricing that covers the presale, sale, and postsale stages of business processes:

- Uses an attribute-based pricing model to set up pricing rules based on product, customer, channel, or order attributes.
- Enables sophisticated price segmentation to efficiently drive differentiated and tailored pricing experiences per market or customer segment.

- Defines and manages complex pricing structures with comprehensive price component breakdowns.
  - Drives flexible pricing strategies by using a rich set of pricing techniques that include long-term trade agreements, short-term price adjustments, promotional discounts, auto charges, and retrospective rebates.
  - Runs pricing simulation to validate pricing setup and generate pricing reports to analyze pricing execution.
  - Integrates with headless pricing application programming interfaces (APIs) for pricing lookup and calculation in business-to-consumer (B2C) and business-to-business (B2B) scenarios.
  - Configures and customizes pricing engine behavior to fit business specific needs.
- 

## Feedback

Was this page helpful?

 Yes

 No

# Store Commerce

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

Built on a modern, headless, omnichannel retail platform, Dynamics 365 Commerce's Store Commerce POS enables retailers to provide fast, efficient, and modern checkout experiences on fixed and mobile devices that operate on or offline. The Store Commerce POS application provides comprehensive retail workflows, from in-store, online, and curbside pickup transactions, to inventory management, order fulfillment, assisted selling, and store operations.

Sales associates spend most of their time engaging with customers and processing orders through the Store Commerce POS. Streamlining the checkout workflow to optimize for efficiency, standardizing payment flows, and providing contextual in-line controls result in time saved on every transaction, leading to happier, more efficient sales associates. Customers who want to skip the queue can instead use Store Commerce's fast and frictionless self-checkout functionality to quickly complete their payment.

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## Feedback

Was this page helpful?

 Yes

 No

# Boost efficiency with modern Store Commerce workflows

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2024	Dec 2024

## Business value

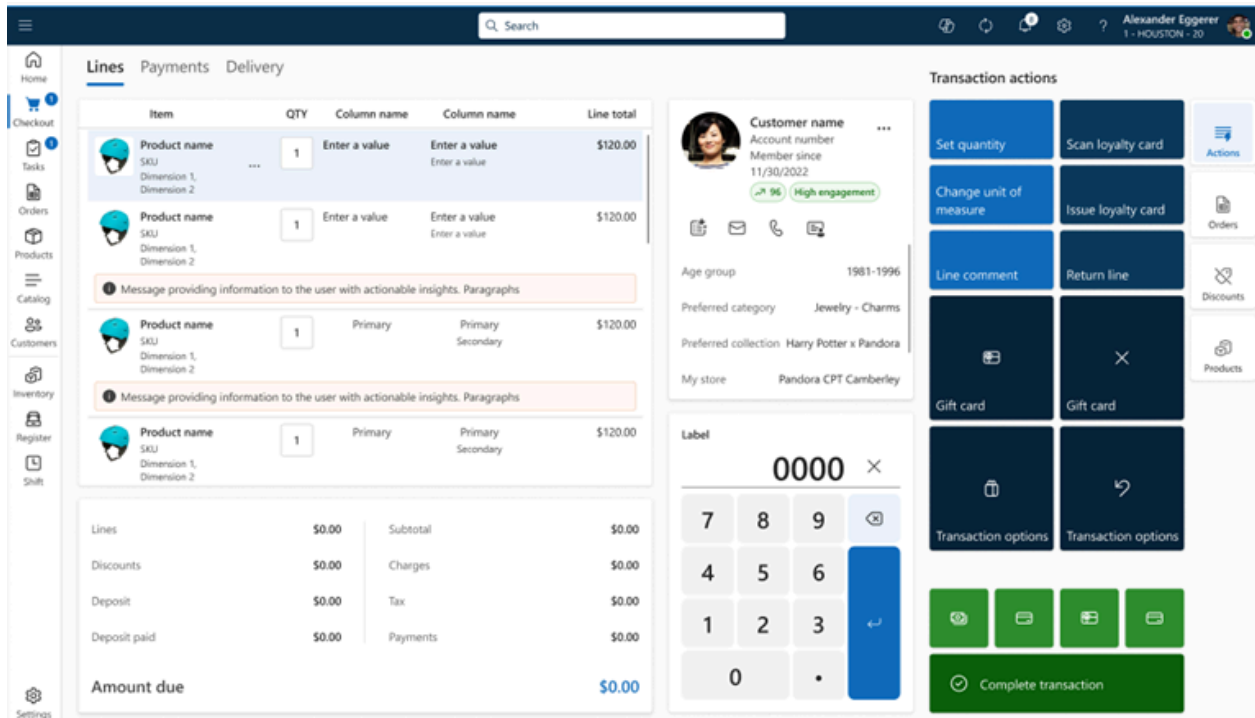
In a busy retail setting, a point of sale (POS) system that puts usability first and surfaces the most common user actions with minimal clicks helps cashiers and sales associates be more efficient, keeping customers satisfied with their experience. This feature improves transaction workflows in Store Commerce POS with modern styles and interactions that bring additional efficiencies and the ability to perform inline actions with minimal clicks.

## Feature details

Improvements in Store Commerce simplify and streamline the POS checkout experience by adopting the React framework for the Store Commerce app transaction page, which allows you to activate the following capabilities:

- **Inline editing:** Change quantity and unit of measure directly by interacting with the transaction grid.
- **Better inline messaging:** Enable modernization of the transaction grid with improved handling of inline messaging and actionable insights.
- **Inline shortcuts:** Provide shortcuts from the list rows for primary actions coupled with overflow menus such as voids and price overrides.

- **Improved user experience:** Apply modern styling and improve appearance of button grids, total panels, and customer cards.



## Feedback

Was this page helpful?

Yes

No

# Check out faster with optimized payment flows

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2024	Dec 2024

## Business value

Efficiency and predictability are key to the smooth operation of a point of sale (POS) system, especially when it comes to payment processing. When store associates process customer payments across a variety of payment types with fewer steps, customers spend less time waiting. Optimize the Dynamics 365 Commerce POS payment processing user experience to create more consistent workflows across loyalty, gift card, voucher, and customer account payment types that make the checkout process more efficient.

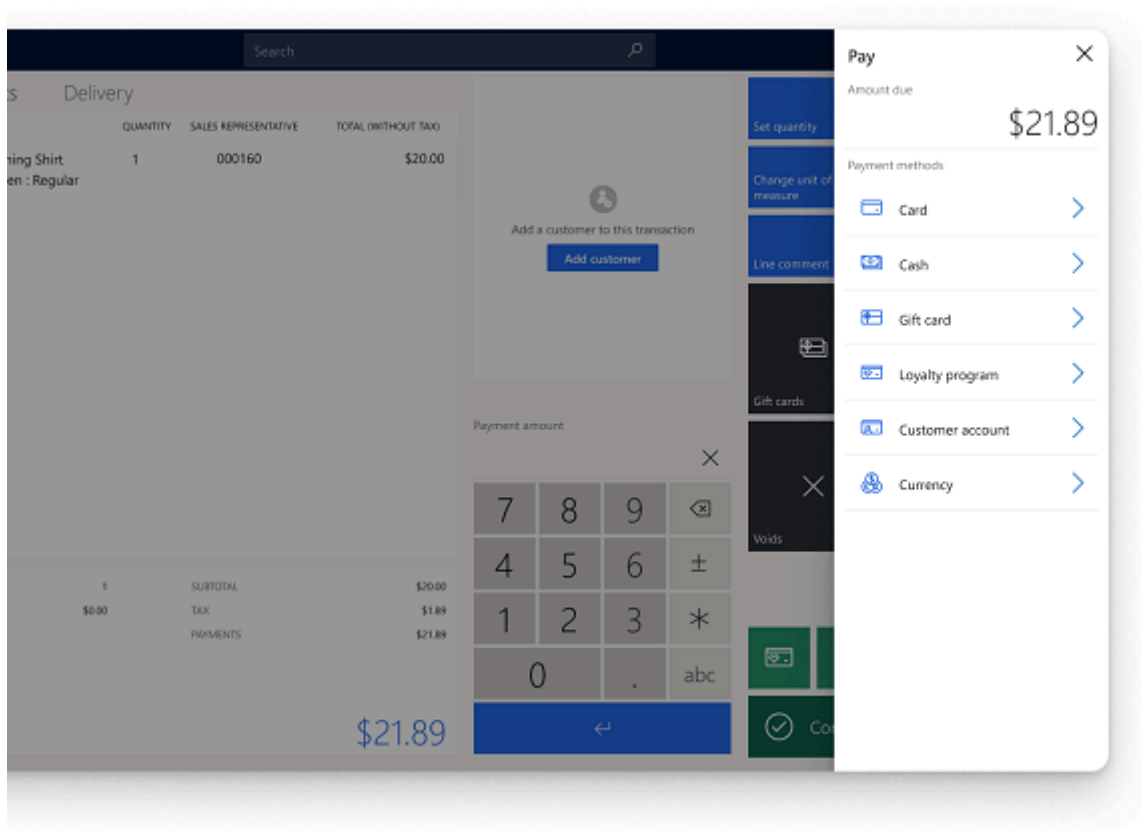
## Feature details

The payment processing workflows for Dynamics 365 Commerce POS apps are benefiting from several updates and improvements. The updates apply across all POS experiences, including Store Commerce for Windows, Android, and iOS, as well as Store Commerce for web.

Improvements include:

- **New payment methods:** New, consistent payment user interface (UI) patterns across payment types for loyalty, gift card, voucher, and customer account workflows.

- **Enhanced workflows:** New, simpler UI for payment methods that are currently unintuitive or overly complex.
- **Payment terminal integration:** Ability to send payments directly to the payment terminal during checkout.



## Feedback

Was this page helpful?

Yes

No



# Enable kiosk self-checkout with intuitive workflows

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2024	Dec 2024

## Business value

Provide faster checkout and reduced wait times to your shoppers by enabling Store Commerce kiosk-based self-checkout with automated cashier intervention workflows for restricted operations.

This release empowers Dynamics 365 Commerce point of sale customers to roll out kiosk-based self-checkout at scale for their shoppers by integration with call for assistance functionality, lights to notify associates when shoppers need assistance, and support for a variety of payment methods including gift cards and loyalty cards.

## Feature details

Store Commerce kiosk-based self-checkout functionality provides the following capabilities:

- **Age-restricted products:** Enables automated call for assistance workflows for age-restricted products and restricted operations with light peripherals integration.
- **Payment types:** Accepts payment through existing tender types such as credit, debit, and loyalty programs.

The screenshot shows a mobile application interface for a shopping cart. The cart contains two items: Quaker Old Fashioned Oats (573456, 90 Servings, 4 Pound) and Cabernet Sauvignon (930291, 750 mL Bottle). The total amount due is \$94.00. A message on the right side of the screen reads "Permission required. Associate is on the way..." and there is a button labeled "Administrator login".

Item	Quantity	Unit	Total
Quaker Old Fashioned Oats 573456 90 Servings, 4 Pound	1	Each	\$24.00
Cabernet Sauvignon 930291 750 mL Bottle	1	Each	\$60.00

Total	
Lines	1
Subtotal	\$84.00
Discounts	-\$0.00
Tax	\$10.00
Payments	\$0.00
<b>Amount due</b>	<b>\$94.00</b>

Permission required.  
Associate is on the way...

Administrator login

!]

## See also

[Enable self-checkout in the Store Commerce app \(docs\)](#)

## Feedback

Was this page helpful?

# Reduce checkout time with streamlined receipt workflows

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2024	Dec 2024

## Business value

Every action that a cashier performs to complete a transaction requires time and effort, so any reduction in the number of steps it takes to check out a customer has a meaningful impact. We are optimizing the Store Commerce app to reduce clicks and automate actions that don't require user input so that cashiers can complete transactions and print receipts faster and more efficiently.

## Feature details

To streamline the checkout process, Dynamics 365 Commerce has introduced the following optimizations to the checkout flow:

- **Immediately open the cash drawer:** Open the cash drawer when the denomination is selected, and the prompt for an emailed receipt is enabled.
- **Automatically print receipts:** Print the receipt when the cash drawer opens if printed receipts are configured to print automatically.
- **Reduce prompting:** Combine print and email dialogs into a single slide-out menu when configured to prompt the user.
- **Eliminate clicks:** Automatically dismiss the change due dialog when the cash drawer is closed.

Search

CURRENCY	AMOUNT
USD	\$100.00

Add customer to this transaction

Add customer

Suspend transaction

View discounts

Set quantity

Gift cards

**Print a receipt?**  
Select the receipt type and location of the printer.

Receipt Star No  Yes

**Email a receipt?**  
Send a copy of the receipt to an email address.

Email address

Receipt No  Yes

\$80.00

\$5.20

7 8 9

4 5 6 +

## Feedback

Was this page helpful?

Yes

No

# Plan and prepare for Dynamics 365 Business Central in 2024 release wave 2

Article • 08/16/2024

## Important

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Business Central**.

## Overview

Business Central is a business management application for small and mid-sized organizations that automates and streamlines business processes. Highly scalable and adaptable with a rich set of capabilities, Business Central enables companies to manage their finances, supply chain, manufacturing, projects, services, and more. Companies can easily add functionality that's relevant to their specific industry or region of operation by picking apps from industry-leading ISVs and customizing the app to fit their business needs. Business Central is fast to implement and easy to configure. Simplicity guides innovations in product design, development, implementation, and usability.


This release will again demonstrate our commitment to Copilot. We continue to look at how Copilot can help optimize business processes so you can complete tasks faster. We'll enable Copilot to help with creating sales orders directly from Chat. Additionally, we will also make it faster to create product information faster with Business Central using Copilot to create information like Variant, Unit of Measure, and other information. We are also investing in piloting Chat extensibility to help users learn from 3rd party content.

Developers are already improving their productivity with GitHub Copilot in Visual Studio Code, and there's more innovation to come from these world-leading development tools for AI developers. We've also enabled developers to enrich the application metadata with more details to use for a better Copilot experience.

We'll help organizations focus on their primary business while staying compliant with various government regulations by automating regulatory tasks. Expanding core functionality is always a focus, and this release will enable customers to use installments on sales documents. To support customers with international business, we'll enable support for multiple VAT numbers.

Additional updates in 2024 release wave 2 include:

- **Application:** Our e-document feature provides more capabilities for sending documents. The last release offered integration between projects in Business Central and Dynamics 365 Field Service, and in this release, we're expanding this integration to cover service orders in Business Central. We'll also deliver more reporting capabilities for sustainability to help companies track their greenhouse gas emissions for reporting.
- **Country and regional:** We've expanded Business Central's global availability. Business Central is now available in more than 170 countries and regions.
- **Development:** We'll continue to invest in areas that enhance productivity for developers who work with GitHub, Visual Studio Code, and AppSource marketplace. We're adding new code refactoring capabilities, an easy path to functional and performance testing, and ISV and custom code with AL GO for GitHub.
- **Governance and administration:** Business Central delivers a set of additional self-service features to help administrators manage access to environments at a more granular level, and audit critical admin operations using Microsoft 365 Audit Log. Audit Log provides strong options for reinforcing data privacy with customer-managed encryption keys and Azure Lockbox.
- **Legislation:** We'll continue to ensure that Business Central is compliant with local accounting laws, which means we'll make several improvements to Microsoft's localized versions.
- **Reporting and data analysis:** We'll add over 70 Power BI reports and continue to invest in our overall reporting capabilities.
- **Service and platform:** We're continuing to invest in the fundamentals of our service, focusing on high availability, performance, stability, resource governance, security, and compliance.

 [Updates to Dynamics 365 Business Central 2024 release wave 2](#)

## Investment areas



## **Adapt faster with Power Platform**

Business Central's seamless integration with Power Platform lets you improve efficiency in your organization by automating repetitive tasks. Use Power Automate templates to automate workflows that optimize your business processes for your unique requirements.

We'll continue to invest in a tight integration with Power Platform to make it more powerful and give you more ways to use your business data effectively. For example, you can use the Copilot capabilities for cloud flows in the Power Platform products to create connected business workflows and experiences. What's more, you can do so through quick and easy natural language expressions.

## **Application**

To determine what goes into the application in every release, we prioritize the top requests from customers and respond to market trends. For example, our investment in helping customers use Copilot to optimize their business processes.

For the last couple of releases, we've invested in multicurrency capabilities because an increasing number of businesses are using Business Central across borders and to manage multiple companies. We'll continue to improve the experience of using Business Central to manage multiple companies. We'll invest throughout the application, improve experiences in inventory management, service and project management, and improve our integrations with other Dynamics 365 applications.

## **Copilot and AI innovation**

According to our recent survey on business trends, nearly 9 out of 10 workers hope to use AI to reduce repetitive tasks in their jobs. But until recently, AI has been a commodity that few SMBs could truly invest in.

Microsoft Dynamics 365 Copilot enables professionals to perform their day-to-day work with the assistance of cutting-edge AI by their side. With Copilot in Business Central, our customers empower their workers with intuitive AI tools to get more done with less effort, without needing to become data scientists.

This wave expands on our use of Copilot capabilities, in order to boost productivity for a broader set of SMB roles.

### **Country and regional**

Business Central continues to become available to businesses in more countries and regions. This expansion happens largely through partner-led localizations. Our partners create and maintain apps for specific countries and regions, and publish their apps on AppSource. In combination with built-in language offerings, Business Central is available to serve customers in more than 170 countries and regions worldwide. Additionally, in the countries where Microsoft is responsible for the localization, we provide updates for all regulatory features.

### **Development**

To empower AL developers and increase their productivity, we've laid the foundation for introducing namespace support in the platform and application. Namespace support makes it easier to structure apps, create better object names, and avoid identifier clashes. As apps mature, the need to refactor is inevitable, so we've added the ability to move ownership of a table and its data between extensions. Additionally, developers can hide specific variable data so that other parties can't access it during debugging, which protects internal data.

When it comes to data analysis and reporting, developers have more control. For example, you can turn off Analysis Mode on pages and specify how to embed content from Power BI.

Consultants and developers can easily open Visual Studio Code for a production or sandbox environment to investigate and understand objects across installed extensions, view code for owned extensions, and perform troubleshooting—all without having to set up Visual Studio Code manually. Similarly, we've improved profiling from the client and Visual Studio Code so it's easier to find database-related performance issues.

AppSource publishers can sell through CSPs, and better handling for AppSource runtime packages gives seamless development and troubleshooting across app dependencies for publishers and resellers.

### **Governance and administration**

We're giving Business Central administrators more tools for managing environments, apps, and data migrations. The goal is for administrators to be self-sufficient, able to solve their customer needs, and handle a wide variety of administrative scenarios.

- More granular administrator roles to give more control over the access granted to (delegated) administrators.
- Improved processes for minor update releases.



- The ability to link Business Central and Power Platform environments to set up integrations consistently and to apply Power Platform environment settings to Business Central.
- The ability to cancel Cloud Migration replication runs.

## **Legislation**

Business Central offers updates to regulatory features based on popular requests for improvements and ever-changing requirements from local authorities. To give our customers peace of mind and enable them to focus on their core business, we automate many processes and ensure that features comply with the regulations set by government agencies. For example, if local regulations require that you create vouchers that serve as proof of transactions and a detailed audit trail, you can automate the process. Business Central can automatically generate and attach vouchers to general ledger entries, so that accountants can rest assured that they're compliant, without extra steps. The retention policy features let you specify how long you need to store vouchers before you clean them up, giving you more control over the amount of data you store.

We're working to make regulatory features a standard part of Business Central, so that we can deliver improvements out of the box across the countries and regions where they're relevant. For example, the E-documents module is a foundation that supports processes for sales and purchase invoicing, and it's easy for partners to extend by building country-specific apps for e-invoicing.

## **Reporting and data analysis**

In the modern world, data is an invaluable resource, forming the foundation of decision-making and progress across all sectors. Recent advances in AI technology and data analytics tools bring radically new ways for businesses to distill complex information into actionable intelligence, reveal hidden patterns and trends, and find correlations that were previously concealed. The critical insights gained from data analysis empower organizations to optimize their strategies, enhance customer experiences, identify potential risks, gain unprecedented insights into the details of their operations and environments, and innovate in ways that were once inconceivable.

As data continues to fuel innovation and drive transformative advancements, harnessing its potential has become essential for staying competitive and shaping a more efficient and sustainable future for SMBs.

Our reporting strategy revolves around building universal BI and analytics within the Business Central experience. We aim to seamlessly integrate in-context, rich, and immersive BI and analytics content from first and third parties into Business Central. Alongside flexible self-service capabilities, you can effortlessly access and leverage your data for maximum value.

## User experiences

Business Central offers a broad portfolio of user interfaces that enable our customers to work with their data from anywhere, and on any device. User interfaces include an installable desktop app, a browser-based web app, and mobile apps. Whether you need to enter data at high speed, casually update entries, or analyze relational data, Business Central offers numerous features that are easy to get started with and powerful when needed.

Every release includes enhancements to usability, accessibility, performance, and reliability. In this release wave, we're boosting efficiency when you're working with actions across selections in lists of records and viewing summarized data to help you easily fix data entry mistakes.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Business Central** below:

[Check out the release plan](#)

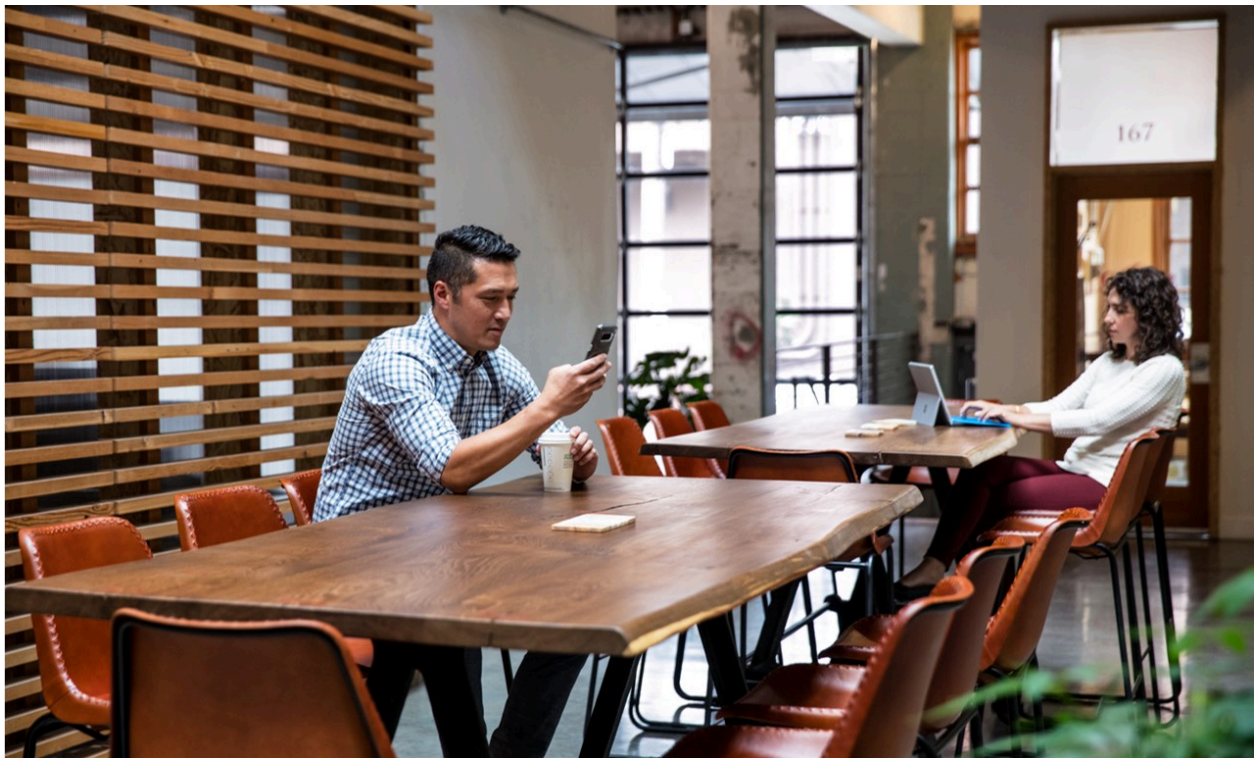
## For application administrators

### User-impacting features to the user experience enabled automatically

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

### Features that must be enabled by application administrators

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.



## Get the most out of Business Central

[Expand table](#)

Helpful links	Description
<a href="#">Release plan</a>	View all capabilities included in the release.
<a href="#">Licensing</a>	Improve your understanding of how to license Business Central.
<a href="#">Product documentation</a>	Find documentation for Business Central.
<a href="#">User community</a>	Engage with Business Central experts and peers in the community.
<a href="#">Upcoming events</a>	Find and register for in-person and online events.
<a href="#">Product trials</a>	Get started with Business Central.

## Feedback

Was this page helpful?

Yes

No

# What's new and planned for Dynamics 365 Business Central

Article • 09/24/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Adapt faster with Power Platform

We're continuously investing in a seamless experience for customers who use Business Central together with Power Apps, Power Automate or Power BI.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Auto-apply templates when you synchronize data with Dataverse</a>	Users, automatically	-	Oct 2024

## Application

Core application functionality is a key investment area for us. We listen to our partners and customers to make sure we deliver what they need to be even more productive with every release.

 Expand table

Feature	Enabled for	Public preview	General availability
Allow more than one user to post warehouse entries at a time	Users, automatically	-	Oct 2024
Use new reports and demo data for financial reporting	Users, automatically	-	Oct 2024
Manage subscription billing and revenue and expense recognition	Users, automatically	✓ Sep 2, 2024	Oct 2024
Add an item as a Shopify variant	Admins, makers, marketers, or analysts, automatically	-	Oct 2024
Integrate Field Service with service management	Users, automatically	-	Nov 2024
Archive service management documents	Users by admins, makers, or analysts	-	Oct 2024
View item availability in Field Service work orders	Users by admins, makers, or analysts	Oct 2024	Nov 2024
Use Excel reports for consolidation and fixed assets	Users, automatically	✓ Sep 2, 2024	Oct 2024
Synchronize product translations to Shopify	Users by admins, makers, or analysts	-	Oct 2024
Use specific prices and discounts when synchronizing prices in Shopify	Users by admins, makers, or analysts	-	Oct 2024
Define shipping information for Shopify shipping fees	Users by admins, makers, or analysts	-	Oct 2024
Add extended text to project planning lines	Users by admins, makers, or analysts	-	Oct 2024
Export posted sales invoices to Shopify	Users, automatically	-	Oct 2024
Use a default quantity of 1 for accounts on documents	Users, automatically	✓ Sep 6, 2024	Oct 2024
Replenish items for projects	Users, automatically	-	Oct 2024
Reconcile payment transactions in Shopify with invoices	Users, automatically	-	Oct 2024

Feature	Enabled for	Public preview	General availability
<a href="#">Use directed put-away and pick warehouses with projects</a>	Users, automatically	-	Oct 2024
<a href="#">Enable locations in Shopify refunds</a>	Users by admins, makers, or analysts	-	Oct 2024
<a href="#">See improved usability for service and projects</a>	Users, automatically	-	Oct 2024
<a href="#">Import, export product info using Shopify Metafields</a>	Users by admins, makers, or analysts	-	Oct 2024

## Copilot and AI innovation

This wave expands on our first Copilot capability, marketing text suggestions, boosting productivity for a broader set of SMB roles.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Suggest number series with Copilot</a>	Users, automatically	Nov 2024	-
<a href="#">Raise awareness of Copilot actions on Card, Document, and ListPlus pages</a>	Users by admins, makers, or analysts	Oct 2024	Oct 2024
<a href="#">Start creating Power Automate flows with Copilot</a>	Users, automatically	Dec 2024	-
<a href="#">Create sales lines easily with Copilot</a>	Users, automatically	Oct 2024	-
<a href="#">Display errors and messages in Copilot prompt dialogs</a>	Users, automatically	Oct 2024	Oct 2024
<a href="#">Chat with Copilot to learn how to use installed add-on apps</a>	Users by admins, makers, or analysts	Jan 2025	-
<a href="#">Complete bank account reconciliation faster with Copilot</a>	Users, automatically	✓ Nov 9, 2023	Oct 2024
<a href="#">Create product information faster with Copilot</a>	Users, automatically	Oct 2024	-
<a href="#">Experience enhancements to chat with Copilot</a>	Users, automatically	Oct 2024	-

Feature	Enabled for	Public preview	General availability
<a href="#">Experience enhancements to analysis assist with Copilot</a>	Users, automatically	Oct 2024	-
<a href="#">Start using Copilot without having to set things up</a>	Users, automatically	-	Oct 2024
<a href="#">Get usage telemetry on Copilot extensions as an ISV</a>	Users, automatically	-	Oct 2024
<a href="#">Automate tests for your Copilot extensions with the Business Central Test Toolkit</a>	Users by admins, makers, or analysts	Dec 2024	Dec 2024

## Country and regional

We've made Business Central available in more countries and regions around the world in this release wave.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Deferral accounting - posting the original amount as correction - Czechia</a>	Users, automatically	-	Oct 2024
<a href="#">Start using integration with IRS for 1099 submissions</a>	Users, automatically	Dec 2024	Jan 2025
<a href="#">Posting of alternative customer-vendor posting groups - Czechia</a>	Users, automatically	-	Oct 2024
<a href="#">Calculate and post VAT settlement by Activity Code - Italy</a>	Users, automatically	-	Nov 2024
<a href="#">Start using E-Documents framework localized for Germany</a>	Users, automatically	Nov 2024	Dec 2024
<a href="#">Enable additional countries and regions</a>	Users, automatically	-	Feb 2025
<a href="#">Advance letters with reverse charge - Czechia</a>	Users, automatically	-	Oct 2024
<a href="#">VAT Return feature now available - Czechia</a>	Users, automatically	-	Nov 2024

Feature	Enabled for	Public preview	General availability
<a href="#">Show features with demo dataset for Czechia</a>	Users, automatically	-	Oct 2024
<a href="#">Include employee transactions in exchange rate adjustment report - Czechia</a>	Users, automatically	-	Oct 2024
<a href="#">Improve VAT reporting and adjustments - Czechia</a>	Users, automatically	-	Oct 2024
<a href="#">Allocations functionality in Cash Desks - Czechia</a>	Users, automatically	-	Oct 2024
<a href="#">Sales advance from the project - Czechia</a>	Users, automatically	-	Oct 2024
<a href="#">Enable use of other currencies - Czechia</a>	Users, automatically	-	Oct 2024

## Development

Our focus is on making Business Central AL developers more productive, and empowering consultants, citizen developers, and users to do more while lowering the cost of changes.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Set up easier in-client performance profiling with rules</a>	Users, automatically	Oct 2024	Oct 2024
<a href="#">Use the ternary operator when coding in the AL language</a>	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
<a href="#">Pull extension source from GitHub when opening Visual Studio Code from web client</a>	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
<a href="#">Remove friction when working with external app dependencies</a>	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024



Feature	Enabled for	Public preview	General availability
<a href="#">Use the 'this' keyword for codeunit self reference</a>	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
<a href="#">Specify and use full-text search indexes on table fields</a>	Admins, makers, marketers, or analysts, automatically	-	Oct 2024
<a href="#">Restore extensions if publishing from Visual Studio Code fails</a>	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
<a href="#">Use improved features for document reports</a>	Users by admins, makers, or analysts	-	Oct 2024
<a href="#">Package resources in extensions and access from AL</a>	Admins, makers, marketers, or analysts, automatically	Dec 2024	Dec 2024
<a href="#">Run code action for 'with' for file, project, or workspace</a>	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
<a href="#">Type testing and casting operators for interfaces</a>	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
<a href="#">Extend AL interfaces</a>	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
<a href="#">Extend and customize profiles from other extensions</a>	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

## Governance and administration

We're adding new tools and improving existing tools for administrators to manage environments, apps, and data migrations.

 [Expand table](#)

Feature	Enabled for	Public preview	General availability
<a href="#">Manage environment updates more flexibly</a>	Admins, makers, marketers, or analysts, automatically	Oct 2024	Mar 2025
<a href="#">Migrate record links and notes with cloud migration tooling</a>	Users, automatically	-	Nov 2024
<a href="#">Manage per-tenant extensions in admin center</a>	Admins, makers, marketers, or analysts, automatically	-	Dec 2024
<a href="#">View app compatibility with future versions in admin center</a>	Users, automatically	-	Dec 2024
<a href="#">Encrypt data at-rest with customer-managed encryption key</a>	Users by admins, makers, or analysts	-	Oct 2024
<a href="#">Get external notifications when job queue entries fail</a>	Users by admins, makers, or analysts	Oct 2024	-
<a href="#">Get in-product notifications about issues with job queue background processing</a>	Users by admins, makers, or analysts	-	Oct 2024
<a href="#">Get list of manageable environments for Microsoft Entra apps</a>	Admins, makers, marketers, or analysts, automatically	-	Dec 2024
<a href="#">Support IPv6 for enhanced security and scalability</a>	Users, automatically	-	Feb 2025

## Legislation

This Business Central release wave delivers a set of legislative capabilities that can act as a foundation for more specific requirements in local versions.

 [Expand table](#)

Feature	Enabled for	Public preview	General availability
<a href="#">Use e-documents with Power Automate</a>	Users, automatically	-	Dec 2024
<a href="#">Use multiple VAT numbers for a customer</a>	Users, automatically	-	Oct 2024
<a href="#">Achieve sustainability scorecards and goals</a>	Users, automatically	-	Oct 2024

Feature	Enabled for	Public preview	General availability
<a href="#">Navigate the sustainability manager role center with ease</a>	Users, automatically	-	Oct 2024
<a href="#">Add attachments when you send electronic documents</a>	Users, automatically	Oct 2024	Nov 2024
<a href="#">Record greenhouse gas emissions using purchase invoices</a>	Users, automatically	-	Oct 2024
<a href="#">Report sustainability entries with financial reports</a>	Users, automatically	Oct 2024	Nov 2024
<a href="#">Use multiple subcategories for one sustainability account</a>	Users, automatically	-	Oct 2024
<a href="#">Use new service providers in the e-documents framework</a>	Users, automatically	Nov 2024	Dec 2024
<a href="#">Purchase carbon credits</a>	Users, automatically	-	Oct 2024
<a href="#">Track sustainability certificates for items and vendors</a>	Users, automatically	-	Oct 2024
<a href="#">Enable internal carbon fee calculation in Sustainability</a>	Users, automatically	-	Oct 2024

## Reporting and data analysis

Access to the right reports and data analysis capabilities is essential for companies wanting to be in control of the business and identify new growth opportunities.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Use built-in named formulas in Excel layouts</a>	Admins, makers, marketers, or analysts, automatically	-	Oct 2024
<a href="#">Do ad hoc analysis on fixed assets, projects, and services</a>	Users, automatically	-	Oct 2024
<a href="#">Use embedded Power BI reports out of the box</a>	Users by admins, makers, or analysts	-	Nov 2024

Feature	Enabled for	Public preview	General availability
<a href="#">Use advanced settings in the Power BI connector</a>	Users by admins, makers, or analysts	-	Oct 2024

## User experiences

Great user experiences help users enter, update, and fix mistakes in their data in an intuitive way.



 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Experience access keys with key tips in more languages</a>	Users, automatically	-	Oct 2024
<a href="#">Use drag and drop on file upload dialog to attach multiple files</a>	Users, automatically	-	Oct 2024
<a href="#">Resize columns even when personalization isn't enabled</a>	Users, automatically	-	Oct 2024
<a href="#">Change the data search method in lists</a>	Admins, makers, marketers, or analysts, automatically	Oct 2024	Nov 2024

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#) . For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#) .

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## Feedback

Was this page helpful?

 Yes

 No

# Adapt faster with Power Platform

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

Business Central's seamless integration with Power Platform lets you improve efficiency in your organization by automating repetitive tasks. Use Power Automate templates to automate workflows that optimize your business processes for your unique requirements.

We'll continue to invest in a tight integration with Power Platform to make it more powerful and give you more ways to use your business data effectively. For example, you can use the Copilot capabilities for cloud flows in the Power Platform products to create connected business workflows and experiences. What's more, you can do so through quick and easy natural language expressions.

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## Feedback

Was this page helpful?

 Yes

 No

# Auto-apply templates when you synchronize data with Dataverse

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Businesses often enrich data that's synchronized between Business Central and Dataverse by using templates that make the data ready to use in either application. Having a configurable, rule-based, and automated way to select the templates to apply when they synchronize data in either direction means you don't have to extend your integration solutions with such rules, so integration between Business Central, Dataverse, and Dynamics 365 apps is faster and more cost effective.

## Feature details

For example, when you synchronize account data from Dataverse to the customer table in Business Central, you might want to apply different configuration templates for domestic or foreign customers. Configuration templates can contain different posting groups and other settings for the customer records that synchronization creates. The synchronization engine chooses a configuration template based on the country specified for the account record in Dataverse.

On the **Integration Table Mapping** page, you can specify multiple configuration templates and define filters for when to apply them by choosing the link in the **Table Config Template Code** and **Int. Tbl. Config Template Code** fields.

Integration Table Mappings | Work Date: 7/22/2005

← Edit List Delete Synchronization Mapping Uncoupling Coupling More options

Name ↑	Integration Field	Integration Field Type	Table Config Templates	Integration Table Config Templates	Synch. Modified On Filter	Synch. Int. Tbl. Mod. On Filtr.
CONTACT	Contact	GUID	-	-	8/6/2024 2:55 PM	8/6/2024 2:55 PM
CURRENCY	Transaction Currency	GUID	-	-		
→ CUSTOMER	Account	GUID	3 templates	BCICUSTOME	8/6/2024 2:53 PM	
PAYMENT T...	Payment Terms	Option	-	-		
SALESPEOP...	User	GUID	-	-		
SHIPMENT ...	Address 1: Freight Terms	Option	-	-		
SHIPPING ...	Address 1: Shipping Method	Option	-	-		
VENDOR	Account	GUID	-	BCIVENDOR	8/6/2024 2:54 PM	

The **Table Config Template Code** and **Int. Tbl. Config Template Code** fields show different values depending on the number of templates that you configure for a specific integration table mapping:

- If you configure a single configuration template, the name of the configuration template shows in order to stay compatible with current capabilities.
- If you configure multiple configuration templates, the number of configured configuration templates shows.

To set up the configuration template to apply when you synchronize data to Business Central, choose the link in the **Table Config Template Code** field on an integration table mapping to open the **Table Config Templates** page. On the **Table Config Templates** page, you can insert multiple configuration templates, and for each you can specify a **Filter** that determines which template to apply. The **Priority** column determines the order in which the filters for each configuration template are evaluated.

### Table Config Templates

+ New Edit List Delete

Table Config Template Code	Integration Table Filter	Priority
→ DOMESTIC	VERSION(1) SORTING(Field1) WHERE(Field71=1(UK GB United Kingdom))	1
EU	VERSION(1) SORTING(Field1) WHERE(Field71=1(AT BE BG CY CZ DE DK EE E...	2
FOREIGN	VERSION(1) SORTING(Field1) WHERE(Field71=1(<>AT&<>BE&<>BG&<>...	3

The same applies when you choose a link in the **Int. Tbl. Config Template Code** field.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.



# Feedback

Was this page helpful?

# Application

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

To determine what goes into the application in every release, we prioritize the top requests from customers and respond to market trends. For example, our investment in helping customers use Copilot to optimize their business processes.

For the last couple of releases, we've invested in multicompany capabilities because an increasing number of businesses are using Business Central across borders and to manage multiple companies. We'll continue to improve the experience of using Business Central to manage multiple companies. We'll invest throughout the application, improve experiences in inventory management, service and project management, and improve our integrations with other Dynamics 365 applications.

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## Feedback

Was this page helpful?

 Yes

 No

# Add an item as a Shopify variant

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Oct 2024

## Business value

The new release of the Shopify connector allows you to export items from Business Central as variants in Shopify. This gives you more flexibility and convenience when you manage product information across both applications.

## Feature details

Shopify and Business Central both offer extensive features for managing products and variants. Depending on your needs, you can choose different options. In Shopify, where you focus on convenience for customers, and in Business Central, where other criteria are taken into consideration, such as the ability to define an assembly BOM.

We're adding support for export scenarios when Shopify has products with variants, but the list of items is flat on the Business Central side. You can use the **Add item as Variant** action on the **Variants** subpage of the **Shopify Products** page.

Shopify Variants						
Id ↑	Item No.	Variant No.	Title	Option 1 Name	Option 1	
47613949673770	1010	ESSENTIAL	ESSENTIAL	Variant	ESSENT	
→ 47613949706538	1010	PREMIUM	PREMIUM	Variant	PREMIU	
49059613868330	1988-S	—	1988-S	Variant	1988-S	

## Details

The item is added as a Shopify variant under the existing product option (for example, color, material, or title, if the product only had the default variant). If the Shopify product has more than one option, you can't add the item as Shopify variant.

You can add items as variants if they have their own item variants—however, only the item itself is added, and not item variants.

You can't add an item as a variant if the **UOM as Variant** toggle is turned on on the **Shopify Shop Card** page.

Shopify always creates a variant, even if you haven't defined any. This variant is called **Default title**. When you add more variants via Shopify Admin, this technical variant entry is deleted. The Shopify connector runs similar logic. When the first item is added to Shopify as a product, the Default title variant is added to Shopify and to Business Central. When you run the **Add Item as Variant** action, the selected item is added as a variant and the default variant is deleted in both Shopify and Business Central.

When adding an item as a variant, the connector won't search by SKU or barcode.


## Product information overview

 Expand table

<b>Production information</b>	<b>Business Central: Flat item list. Only items, no variants.</b>	<b>Business Central: Items with item variants</b>
Shopify: Flat product list. Only products, no variants.	Supported  Import into Business Central. Use barcode or SKU field in the Shopify product to point to an item in Business Central.  Export items from Business Central via the <b>Add Item to Shopify</b> action.	Not supported  You can manually create products/items in both systems independently, and use the barcode or SKU for automatic mapping or map products to item variants manually.
Shopify: products with variants	Supported  We recommend that you select <b>Item No.</b> , <b>Vendor Item No.</b> or <b>Barcode</b> in the <b>SKU Mapping</b> field and add the barcode or SKU on the variant to ensure that when a product/variant is imported from Shopify it finds the corresponding item in Business Central.  Export from Business Central via the new <b>Add Item as Variant</b> action.	Supported  Recommendation is to select <b>Item No.+Variant Code</b> in the <b>SKU Mapping</b> field and add the barcode or SKU on the variant to ensure that when the product or variant is imported from Shopify it finds the corresponding item or variant in Business Central.  Export from Business Central via the <b>Add Item to Shopify</b> action.

For more information, see [Effect of Shopify product SKUs and barcodes on mapping and creating items and variants in Business Central](#)

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

 **Note:** The author created this article with assistance from AI. [Learn more](#)

## Feedback

Was this page helpful?

 Yes

 No

# Add extended text to project planning lines

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

Add detailed, customized information to project planning lines for items, resources, standard text, and general ledger accounts. You can use extended text to communicate information about special prices, terms, or instructions for your projects with your customers, vendors, and employees.

## Feature details

You can extend the description for items, general ledger accounts, and resources by adding extra lines as extended text on purchase and sales documents. Now, you can add extra lines on **project planning lines**. You can have multiple extended texts, and automatically or manually add them to documents using criteria that gives you an extra capability to communicate important information to customers, vendors, and employees.

For example, you can automatically add a particular text, such as details about a special price, to project planning lines on all your German projects for a limited period.

## To define extended text for an item


1. Open the card for an item that you want to add extended text to, and then choose the **Extended Text** action.
2. Choose **New**.
3. Fill in the **Code** and **Description** fields.
4. If you want to apply extended text only for projects in a specific language, fill in the **Language Code** field. To use all language codes, select the **All Language Codes** checkbox.
5. To limit the dates on which the extended text is used, fill in the **Starting Date** and **Ending Date** fields. The **Document Date** defined in the project planning line is used as a filter.
6. In the **Text** field, write the extended text.
7. Select the relevant checkboxes for the document types where you want the extended text printed. To include projects, select **Projects** on the **Sales FastTab**.
8. Close the page.

You can activate the **Automatic Ext. Texts** to automatically add an extended text on sales, purchases, or project documents for an item. You can also add the extended text to documents manually.

## To add an extended item text on a project planning line

1. Open a project, and then choose a project task with a line for an item that has extended text.
2. Select the line, and then choose the **Insert Ext. Text** action.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

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## Feedback

Was this page helpful?

 Yes

 No

# Allow more than one user to post warehouse entries at a time

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

In busy warehouses where lots of things are moving around, it's important that warehouse employees don't get in each other's way or slow each other down. That includes registering their activities in Business Central. Multiple workers can now work on transactions that involve warehouse entries without locking each other out, which means less waiting time and more productivity.

## Feature details

To avoid the warehouse entry table being locked while warehouse employees posts transactions, we now use a number sequence to assign entry numbers to warehouse entries and entries in the Warehouse Register table. This feature is controlled by a feature key, which is enabled by default. However, you can turn it off if needed—for example, if you have an extension that requires the previous behavior.

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## Feedback

Was this page helpful?

 Yes

 No



# Archive service management documents

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

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.

## Feature details

Archiving capabilities for service management are similar to the functionality you might already be familiar with from the sales and purchase areas. You can set up documents to archive automatically, so that you don't need to think about it. With automatic archiving, Business Central creates a new version of the archived document when people do the following:

- Delete service quote or service order.
- Post a service order.
- Convert a service quote to an order.

We're also extending the functionality of contract filing, which serves a similar purpose of storing a version of a service contract or service contract quote. Now, filed service contracts and filed service contract quotes include more fields, such as **Payment Method Code** or **Direct Debit Mandate ID**, and also include the following related tables:

- Filed Contract/Service Discount
- Filed Contract Service Hour
- Filed Service Contract Comment Line

Filed Service Contract



# Contract SVC000002

Related ▾ Automate ▾

- Contract >
  - Service Discounts
  - Service Hours
  - Comments

Contract No. ....	SY	Phone No. ....	
Description .....	Prepaid Contract - Quarterly	Email .....	
Customer No. ....	10000	Contract Group Code ..	
Contact No. ....	CT000001	Salesperson Code .....	JO

You're in full control of archiving. The following list shows the documents and options you can choose when you set up automatic archiving on the **Service Management Setup** page:

- **Archive service quotes:** Never (default), Questions, Always.
- **Archive orders:** Yes/No
- **Delete Filed Contracts:** Yes/No.



# Service Management Setup

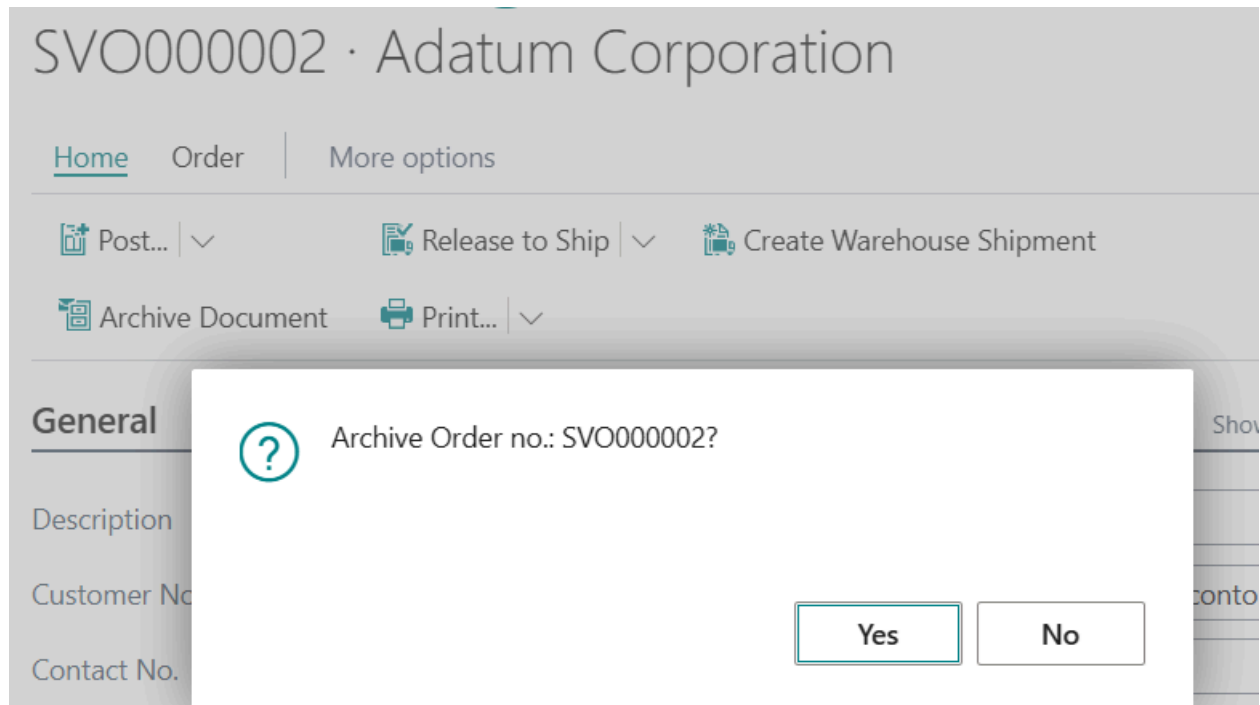
## Contracts

Register Contra... · <input checked="" type="checkbox"/>	Contract Value ... · None ▾
Contract Inv. Li... · ▾	Contract Value % · 0
Contract Line In... · ▾	Delete Filed Co... · <input checked="" type="checkbox"/>

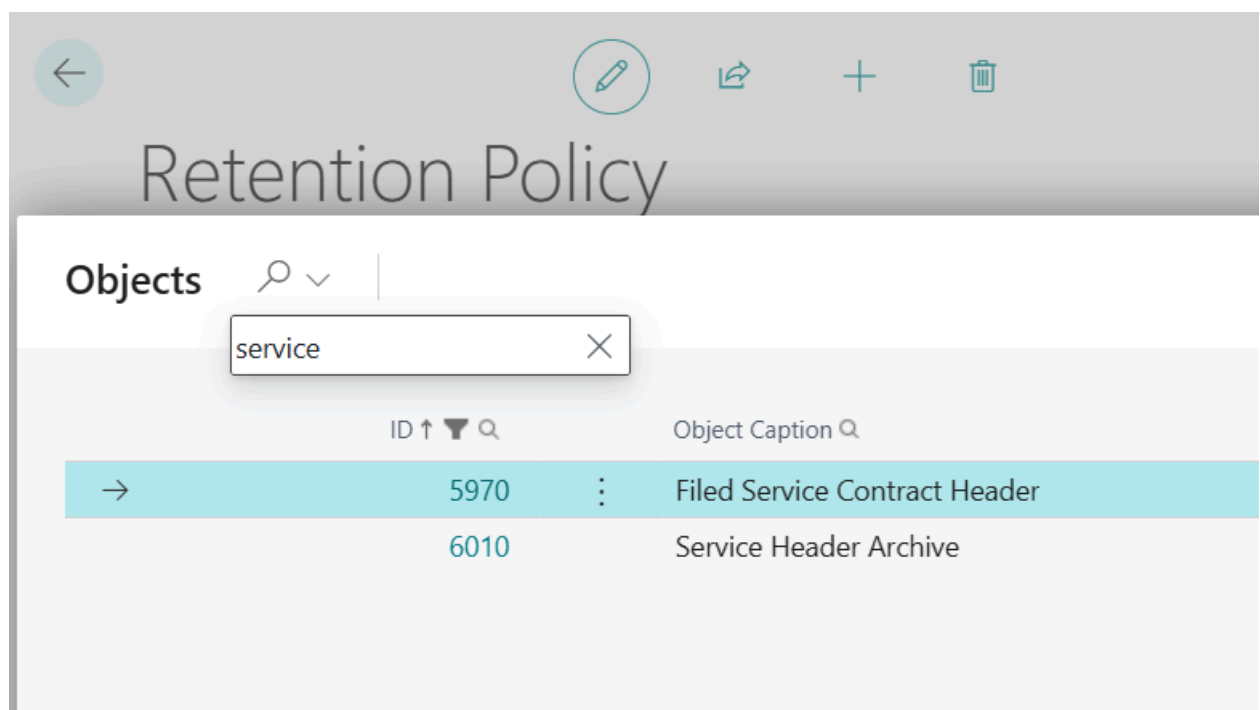
## Archiving

Archive Quotes · · Question ▾	Archive Orders · · <input checked="" type="checkbox"/>
-------------------------------	--

You can also use the **Archive** action to manually archive versions of service documents, such as service quotes and orders.



To keep the size of your database under control, archived service documents are added to a list of Retention policy tables.



## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

# Thank you for your idea

Thank you for submitting this idea:

- [Archive Service Orders](#) 

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

---

## Feedback

Was this page helpful?

 Yes

 No

# Define shipping information for Shopify shipping fees

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

Map shipping fee information from Shopify to Business Central more accurately and with more flexibility. You can choose different types of shipping charges, such as G/L account, item, or item charge, and specify the shipping agent and shipping agent service.

## Feature details

In addition to the **Shipping Charges Account** field available on the Shopify Shop Card page, we're adding **Shipping Charges Type** and **Shipping Charges No** fields to the **Shopify Shipment Method** page. Adding these fields allows you to more precisely map shipping fee information from Shopify to the sales document in Business Central.

You can continue to use the G/L account defined on the Shopify Shop Card page, but if you define a **Shipping Charges Type** and **Shipping Charges No**, those values are used instead.

The Shopify Connector now supports the following types:

- G/L Account
- Item
- Item Charge

Item Charge is automatically assigned to all items on the sales document.

## Shopify Shipment Methods

Name ↑	Shipment Method Code	Shipping Charges Type	Shipping Charges No.	Shipping Agent Code	Shipping Agent Service Code
Shipping					
Shipping 1	PICKUP	Charge (Item)	JB-FREIGHT		
Shipping 2	DELIVERY	Item	SER203	OWN LOG.	NEXT DAY
→ <u>Shipping 5</u>	CFR	G/L Account	*		

You can also find the **Shipping Agent Code** and **Shipping Agent Service Code** fields in the **Shopify Shipment Methods** page. If you fill them in, they populate the corresponding fields on the sales document in Business Central.

Find Mappings	Create Sales Document	Create New Customer	Mark as Paid
---------------	-----------------------	---------------------	--------------

### General


Shopify Order No. ....	#1408
Risk Level .....	Low
Customer Template Code .....	<input type="text"/>
Sell-to Customer No. ....	10000
Shipping Method Code .....	PICKUP
Shipping Agent Code .....	OWN LOG.
Shipping Agent Service Code .....	NEXT DAY

## Multiple shipping fees

Shopify lets you add multiple shipment fees to an order—for example, by editing the order in the Shopify Admin. When you receive several shipping fees with a Shopify order, the Shopify Connector uses the first one to initialize the Shipment Method Code, Shipping Agent Code and Shipping Agent Service Code fields in the header of the document.

Be aware that in other cases, Shopify merges multiple shipping rates into one value called **Shipping** and doesn't transfer individual rates.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

---

## Feedback

Was this page helpful?

 Yes

 No

# Enable locations in Shopify refunds

Article • 08/16/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

This update significantly reduces manual intervention and the risk of errors by fully using the original return location from Shopify when synchronizing refunds and returns. It streamlines the credit memo creation process, ensuring that the location code is accurate without additional reviews.

## Feature details

This update enhances the integration between Shopify and Business Central by using the original return location from Shopify for refunds and returns. This improvement ensures accurate location data in credit memos, which reduces manual adjustments and streamlines the returns process.

To turn on the feature, on the **Shopify Shop Card** page, choose **Original** > **Default Location** in the new **Return Location Priority** field.





# STORE

Related Synchronization | Actions ▾ Automate ▾ Fewer options

## Return and Refund Processing

Process Type ...

Import Only ▾

Return Location Prior...

Default Return Location ▾

### Return Location Priority

Specifies the priority of the return location.

Ask Copilot

The **Return Location Priority** field offers the following options:

- **Default Return Location:** This is the default option. It uses the value from the **Default Return Location** field when creating sales credit memos.
- **Original > Default Location:** Select this option if you want the connector to find the original location on the Shopify refund or, if applicable, the Shopify return document. If the connector can't find the original location, for example, when an item is restocked in several locations, it uses the **Default Return Location** defined on the **Shopify Shop Card**.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

**Note:** The author created this article with assistance from AI. [Learn more](#)

## Feedback

Was this page helpful?

Yes

No

# Export posted sales invoices to Shopify

Article • 08/16/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Buyers can sign in to Shopify and access all their invoices, regardless of whether the invoices were created in Shopify or in Business Central.

## Feature details

You can export posted sales invoices to Shopify as orders by using a new report (batch job). The report is available on the **Shopify Shop Card** page, or you can use Tell Me search to find it. You can also run the report by using the job queue.

To enable the capability for a specific shop, go to the **Shopify Shop Card** page and turn on the **\*\* Posted Invoice Sync\*\*** toggle.

The sync includes invoices under the following conditions:

- The **Shopify Order ID** field contains 0.
- The bill-to customer has a mapping in the **Shopify Customers** or **Shopify Companies** tables.
- The bill-to customer isn't used as the **Default Customer** on the **Shopify Shop Card** or **Shopify Customer Template**.
- The posted invoice has at least one non-comment line where the **No.** field has a value.

When you run the report, the following happens in Business Central and Shopify.

## Business Central

Update the **Shopify Order ID** field based on results of sync:

- Successful export – update Shopify Order Id field with ID of order in Shopify.
- Export failed – set "-1"
- Invoice is excluded from sync for a reason listed in the conditions mentioned earlier – set "-2"

The same pattern is used in the **Posted Sales Shipment**, where the **Update Document** page lets you replace "-1" and "-2" or "0" to retry the export.

## Shopify

The connector uses GraphQL to first create a draft order with header and item lines, and then complete the draft order and convert it to an order.

### Headers and lines

The following fields are exported on the order header:

- The mapped bill-to customer/company is used.
- The **Fulfilment Status** field shows **Fulfilled**. Tracking Details don't synchronize.
- The **Paid Status** field shows **Paid** or **Partially Paid**, based on the customer ledger entry linked to the sales invoice. For partially paid, it shows the **Remaining Amount** field.

The following fields are exported on the order lines:

- Items (item variants) that are mapped export as products.
- Items that aren't mapped and lines of other types, such as G/L Account or Item Charge lines, export as custom products in Shopify.
- Shipping charges in Shopify aren't created. The shipping cost is registered as a custom product in Shopify.
- The new setting on the **Shopify Shop Card** page lets you avoid exporting invoices with non-mapped items. Turn on the **Items must be mapped to Products** toggle to exclude posted invoices from sync if there's at least one line of type **Item** where the selected item isn't mapped to a product or variant in Shopify.
- Tax amounts. Because the Graph API doesn't currently support the TaxLine object, the calculated tax is added as a custom product. Tax information from Business Central won't be available in the tax report in Shopify Admin. To avoid Shopify recalculating taxes, orders are marked as **Tax Exempt**.
- Quantity, in whole numbers. Shopify doesn't support fractions.

### Impact on the process of synchronizing orders

Synchronization imports the order and checks whether it was exported earlier. If it was exported earlier:


- It marks the order as processed.
- It adds a link to the posted sales invoice (related documents, should happen automatically because the Shopify Order ID is already populated). Shopify might automatically archive Fully Paid and Fulfilled orders, and the synchronization won't process them.

### Deal with updates

In Shopify, because the order is already fulfilled, the only meaningful changes are Notes, Payment Status, and payment transactions. If payments are processed in Shopify, refunds and returns are as well.

In Business Central, changes aren't tracked. Currently, if you want to mark the order as paid, use the **Mark as Paid** action on the **Shopify Order Card** page.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

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## Feedback

Was this page helpful?

 Yes

 No

# Import, export product info using Shopify Metafields

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

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.

## Feature details

Shopify's platform includes data models for fundamental commerce concepts out of the box. However, commerce is diverse and often requires more complex or specific data models. The custom data platform enables you to extend Shopify's data models and create your own by using metafields. Metafields are a flexible way to add and store additional information about a Shopify resource, such as a product or variant. The additional information stored in metafields can be almost anything related to a resource. Some examples are specifications, size charts, downloadable documents, release dates, images, or part numbers.


We're adding the ability to import and export data stored in metafields into Business Central. Also, we're providing an extensibility model that allows developers to map standard or custom fields, attributes, or other related entries in Business Central to metafields in Shopify.

You can see and edit metafields using the **Shopify Metafields** page, which you open from the **Shopify Products** and **Shopify Variants** pages.

#### ⓘ Note

The page is editable if the **Product Sync** field is set to **Products to Shopify** and the **Can update Shopify products** toggle is turned on. When you insert a new record, the connector immediately sends a request to Shopify and stores the entry only when it gets a response with the Shopify ID for the metafield. You can't edit types that have AssistEdit functionality defined directly on the line.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

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## Feedback

Was this page helpful?

 Yes

 No

# Integrate Field Service with service management

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Nov 2024

## Business value

Integrating Business Central with Dynamics 365 Field Service is particularly valuable for organizations that provide regular maintenance and repair services. 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.

## Feature details

To integrate Field Service with service management features in Business Central, you must have a Premium license. When you do, on the **Company Information** page in Business Central, you must set **User Experience** to **Premium**.

You can enable the integration in the **Integration Type** field by selecting **Project (default)**, **Service**, or **Both** in the following places:

- In the **Set up integration to Dynamics 365 Field Service** assisted setup guide.
- On the **Dynamics 365 Field Service Integration Setup** page.

# Dynamics 365 Field Service Integration Setup ↗ ✕

To enable the connection, fill out the settings below and choose Finish. You may be asked to specify an administrative user account in Dynamics 365 Field Service.

Project Journal Template ..... JOB

Project Journal Batch ..... DEFAULT

Hour Unit of Measure ..... HOUR

Synchronize work order produc... · when work order product/service is used

Automatically post project jour... · I will post project journal lines manually

Integration Type ..... Projects (default)

Projects (default)

Service

Both Service

Back Next Finish

When **Integration Type** is set to **Service** or **Both**, the following things happen when you enable Field Service integration:

- Adds integration table mappings for service order types, service documents, service lines, and service item lines.
- Turns on the **Archive Orders** toggle on the **Service Management Setup** page.
- Makes the **Service Order Type** field on service orders mandatory because the **Work Order Type** is mandatory on Field Service work orders.

← Integration Table Mappings ✓ Saved 🔖 🔗 🔄

🔍 🔍 🔍 Edit List 🗑️ Delete 🔄 Synchronization 🗺️ Mapping 🔗 Uncoupling ⋮ 🔗 🔍 ☰ 🕒

Name ↑ ▼	Table	Table Filter	Direction	Integration Table	Integr
→ SRVORDER	Service Header	VERSION(1) ...	Bidirectional	FS Work Order	VERS
SRVORDERLINE	Service Item Line	VERSION(1) ...	Bidirectional	FS Work Order Incident	VERS
SRVORDERLINE-ITEM	Service Line	VERSION(1) ...	Bidirectional	FS Work Order Product	VERS
SRVORDERLINE-RESOURC	Service Line	VERSION(1) ...	Bidirectional	FS Bookable Resource Booking	VERS
SRVORDERLINE-SERVICE	Service Line	VERSION(1) ...	Bidirectional	FS Work Order Service	VERS
SRVORDERTYPE	Service Order Type		Bidirectional	FS Work Order Type	VERS

- Fields in the headers on service orders and work orders transfer information, such as the **Service Account**, **Billing Account**, and **Work Order Type**.



- **Service Item Lines** and **Work Order Incidents** in Field Service transfer information about the customer assets being repaired.
- **Service Line** fields and **Work Order Products** and **Work Order Services** fields, such as **Qty. to Ship**, **Qty. to Invoice**, and **Qty. to Consume**.

When a technician marks a work order product or service as **Used** on a work order with a specific work order type, the lines synchronize to a service order. Consumption is also posted, based on settings on the **Dynamics 365 Field Service Integration Setup** page.


During consumption and invoice posting in Business Central, the consumed and invoiced quantities are updated on the original work order product and work order service lines in Field Service.

If you choose **Enable Inventory Availability by Location** when you set up the integration, you can view the allocated product quantity from work orders in Field Service as part of the gross requirements in Business Central's inventory availability calculation. Demand generated by orders in Field Service automatically becomes input for planning through synchronized service orders.

#### **Note**

Dynamics 365 Field Service integration with Dynamics 365 Business Central's Service management module requires use of a Premium license.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

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## Feedback

Was this page helpful?

 **Yes**

 **No**

# Manage subscription billing and revenue and expense recognition

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	 Sep 2, 2024	Oct 2024

## Business value

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, so you can spend more time selling and less time organizing and invoicing contracts.

## Feature details

Companies across sectors have increased their adoption of digitalization and are revamping their products and services to accommodate subscription-based business models.

Business Central now supports many different types of subscription scenarios. There's a simple set of processes that let you manage portfolios of the items and services that you bill on a recurring schedule. For example, hardware maintenance, IT support, cleaning services, and so on. You combine the sale of services and items in mixed subscription contracts that hold information about the items, services, and the billing schedule.

Templates simplify the process of creating subscription contracts by standardizing the parameters and schedules for recurring billing. You can manage current pricing and plan for future price updates. On the accounting side, posting accruals to balance sheet


accounts is automated, and revenue or expense is assigned to the correct periods in the income statement.

The subscription features come with:

- Contracts for which you do recurring billing for items and services.
- Billing schedules with flexible parameters that cater to typical use cases for recurring billing.
- Usage-based billing.
- Automated billing.
- Deferral integration.
- Revenue recognition based on billing schedules.
- Contract updates (parameters and prices).
- Standard reports for contracts, customers, billing schedules, recognized revenue, future billing dates and amounts, and so on. Most reports are available as Power BI reports.

The subscription features are available in both the Essential and Premium licenses.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

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## Feedback

Was this page helpful?

 Yes

 No

# Reconcile payment transactions in Shopify with invoices

Article • 08/16/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

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.

## Feature details

When a customer completes their checkout in the online store, the information about their payment is saved as a **Transaction**. There can be multiple transactions linked to an order—for example, a customer might use a gift card to pay some of the cost and then use a credit card or PayPal for the remaining amount. The payment transactions in Shopify synchronize with the orders and you can view them on the **Shopify Orders** page.

There are several options for processing imported payment transactions in Business Central. This release offers an extra option that's helpful in cases where several payment methods are involved. The gift card scenario is probably the most common, but there are also store credits, which were recently added to the Shopify admin.

## Sample scenario

This example scenario involves the following parties:

- The buyer, who is the person who buys goods from your Shopify online store.
- The merchant, which is your company.
- The payment provider, which is the company that facilitates payment processing for you. The provider can be Shopify Payments or a third party.

## How the money flows

The buyer buys goods from an online store. The last stage is to process their payment.

### ⓘ Note

This example doesn't cover cases where payment is completed outside Shopify checkout, which is valid for B2B scenarios.

The buyer pays part of the amount with a gift card (or store credit), and the remaining amount with a credit card, PayPal, or a local payment method such as MobilePay in Denmark.

The merchant can see the issued gift card and information about its use in Business Central.

Depending on the payment provider, the merchant might see the money in their account with the payment provider, including both the amount received and the amount deducted for the provider's commissions. Payment providers often take a commission from each transaction, and in some cases they also have a fixed fee.

Depending on the payment provider, the merchant either transfers the money to their bank account (payout) manually or automatically within a defined period. For example, one time per day, per month, and so on.

Depending on the bank, the merchant can see the incoming transaction in their bank account via online banking or their bank statement.

## Reconcile transactions and bank statements

The merchant imports a sales order to Business Central and posts the shipment and invoice. Business Central creates a customer ledger entry of the type **Invoice** with the full amount, and sets **Open** to **Yes**. The remaining amount equals the invoiced amount.

The merchant processes the imported Shopify transactions in the **Transactions** list. They apply filters, and then use the **Suggest Shopify Payments** action to transfer the transactions to the general journal. Alternatively, the merchant can use the **Suggest Shopify Payments** action on the **Cash Receipt Journal** page.

Cash Receipt Journals

Batch Name ..... GENERAL

Manage Home Prepare Request Approval Line Page | More options

Suggest Shopify Payments...

### Suggest Shopify Payments

Posting Date ..... 4/8/2024

Starting Document No. .... G02002

New Document No. per Line .....

Posting Date	
4/8/2024	⋮
4/8/2024	
4/8/2024	
4/8/2024	

The merchant reviews the lines, and notices that the applied documents are selected automatically. They post the journal, and Business Central creates a customer ledger entry of the type **Payment** and applies it to the corresponding entry of the type **Invoice**.

Batch Name ..... GENERAL

Manage Home Prepare Request Approval Line Page | More options

Delete

Document No.	Description	Amount	Document Type	Applies-to Doc. No.	Payment Method Code
G02001	Shopify order #1005 gift_card ...	-100.00	Payment	PS-INV103218	GIFT_CARD
G02001	Shopify order #1005 Credit card	-49.00	Payment	PS-INV103218	BANK
G02001	Shopify order #1005 Credit card	49.00	Refund	PS-CR104003	BANK
G02001	Shopify order #1005 gift_card ...	100.00	Refund	PS-CR104003	GIFT_CARD

**Note**

If you configured a payment method mapping, make sure the payment method doesn't have the **Bal. Account Type** and **Bal. Account No.** fields filled in. If they are, when you post the invoice Business Central creates a balancing entry of the **Payment** type and applies it to the **Invoice** type on the customer ledger entry. You won't be able to create a journal line and apply it to the sales invoice.


Instead, create a **Journal Batch** for each payment method, and fill in the **Bal. Account Type** and **Bal. Account No.** fields.

The merchant imports their bank statement using a payment reconciliation journal or bank reconciliation journal with one or more transactions that represent the transfer from the payment provider to bank account.

## Currency handling

The Shopify connector imports orders and transactions in **Shop Currency**. If you configure Shopify to use different currencies based on country, that might lead to some differences. For example, in a store where the local currency is Danish Krone (DKK), an order for a German customer totaling 13.95 EUR converts to 409.53 DKK in sales. However, the payment transaction shows 409.48 DKK.

## Tell us what you think

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## Feedback

Was this page helpful?

 Yes

 No

# Replenish items for projects

Article • 09/20/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

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.

## Feature details

The process of creating purchase orders from projects is similar to the functionality you might already be familiar with from the sales area. The process lets you create purchase orders right from a project. It shares the same algorithm as the **Order Planning** worksheet, which means it doesn't require elaborated setup to produce recommendations, but it's intelligent enough to analyze demand and supply for required items.

## To create one or more purchase orders from a project

To create a purchase order for the quantity of each item the project is missing, use the **Create Purchase Orders** action.

1. Choose the **Lightbulb** that opens the **Tell Me** feature icon, enter **Projects**, and then choose the related link.



2. Open a project that you want to purchase items for.
3. Choose the **Create Purchase Orders** action.
4. The **Create Purchase Orders** page opens and shows a line for each item on the project. Lines for both fully available quantities and unavailable quantities show by default. Unavailable quantities aren't available. To show only unavailable quantities, choose the **Show Unavailable** action.
5. The **Quantity to Purchase** field contains the unavailable quantity. To purchase a different quantity, edit the value in the field.

ⓘ **Note**

You can also change the Quantity to Purchase field on unavailable lines, even though they represent fully available quantities.

6. You can also turn on the **Reserve** toggle if you want to reserve the quantity on the purchase line against a demand instead of populating the **Project No.** and **Project Task No.** fields of the purchase line. To add the **Reserve** field, personalize the page.
7. Select **OK**.

The screenshot displays the 'Create Purchase Orders' interface. On the left, a sidebar shows the 'Project Card' for 'J00010' with a 'Home' link and a 'Copy Project' icon. The main area has a title 'Create Purchase Orders' and navigation tabs: 'Home' (selected), 'Item Availability', and 'More options'. Below the tabs are two buttons: 'Show All' and 'Show Unavailable'. A table lists purchase order lines with the following data:

No.	Description	Vendor	Quantity to Purchase
S-210	S-210 Semi-Automatic	Fabrikam, Inc.	1
→ F-100	Remote pump	First Up Consultants	1

This process creates a purchase order for each vendor from which you purchase the items on the project, including any quantity changes that you made on the **Create Purchase Orders** page. You can continue to process the purchase order or orders, for example, by editing or adding purchase order lines.

Later, you can review the purchase lines linked to the project either from the **Project Card** page or **Project Planning Lines** by choosing the **Purchase Lines** action.

The screenshot shows the 'Purchase Lines' window with the following data:

Document Type	Document No.	Buy-from Vendor No.	Type	No.	Description
Order	106019	20000	Item	S-210	S-210_Semi-Automatic
Order	106019	20000	Item	F-100	Remote pump

As in other cases that involve advanced inventory processes, such as reservation, warehousing, and assemble-to-order, the project's status must be *Open* and the **Apply Usage** toggle must be selected.

## Tell us what you think

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## Feedback

Was this page helpful?

Yes

No

# See improved usability for service and projects

Article • 09/20/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

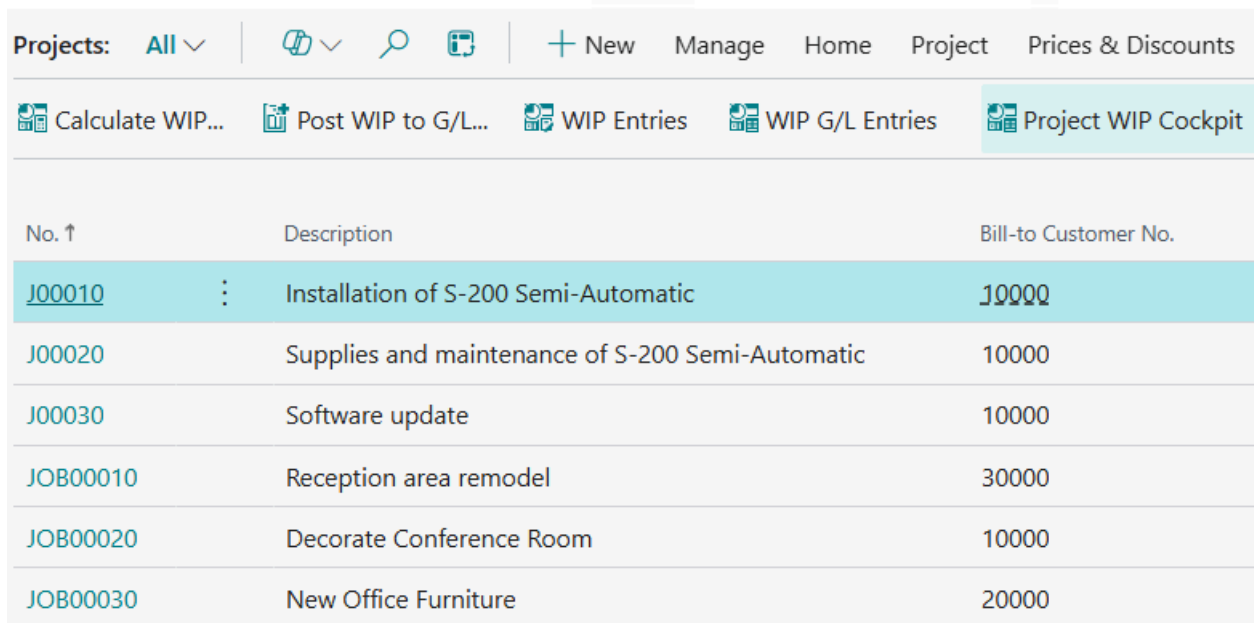
Productivity increases when processes are easy, so we've improved the usability of several areas within project and service management. For both projects and services, to make it a bit faster to get to information, we've added fields and actions on several pages.

## Feature details

Based on feedback from our customers, we've made it easier to complete several business processes in projects and service management.

To speed up the process of creating invoices for projects, we've added the **Create Project Sales Invoice** action to the **Project Card** page. Now you can create invoices without having to leave the project information. Additionally, we've made it faster to access and work with details about projects by adding the following actions to the **Project List** page:

- Assembly Orders
- Put-away, Pick, and Movement Lines
- Registered Pick Lines
- Project WIP Cockpit



The screenshot shows the 'Project WIP Cockpit' interface. At the top, there is a navigation bar with 'Projects: All' and several icons. Below the navigation bar, there are five tabs: 'Calculate WIP...', 'Post WIP to G/L...', 'WIP Entries', 'WIP G/L Entries', and 'Project WIP Cockpit'. The 'Project WIP Cockpit' tab is active. Below the tabs is a table with three columns: 'No. ↑', 'Description', and 'Bill-to Customer No.'. The table contains six rows of project data.

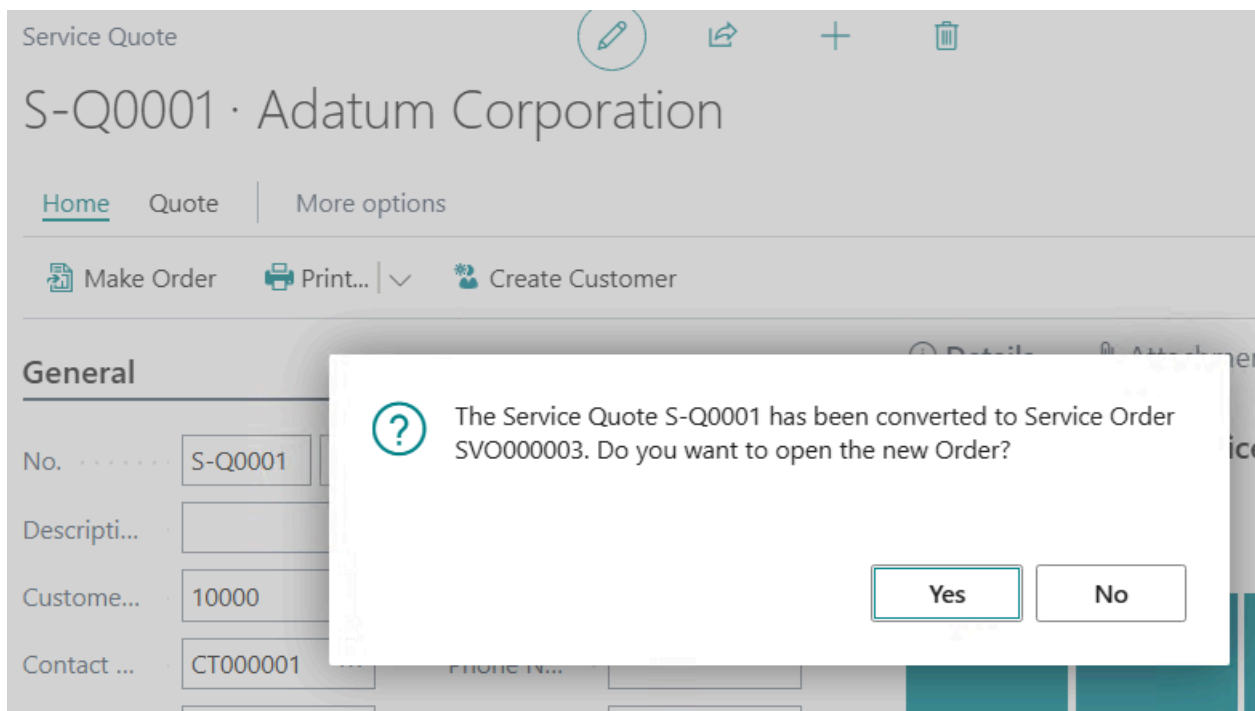
No. ↑	Description	Bill-to Customer No.
<a href="#">J00010</a>	Installation of S-200 Semi-Automatic	10000
J00020	Supplies and maintenance of S-200 Semi-Automatic	10000
J00030	Software update	10000
JOB00010	Reception area remodel	30000
JOB00020	Decorate Conference Room	10000
JOB00030	New Office Furniture	20000

We've also done some renaming in projects. The **Project WIP** page is now named **Project WIP Cockpit**, which makes it easier to distinguish it from other Project WIP pages and actions.

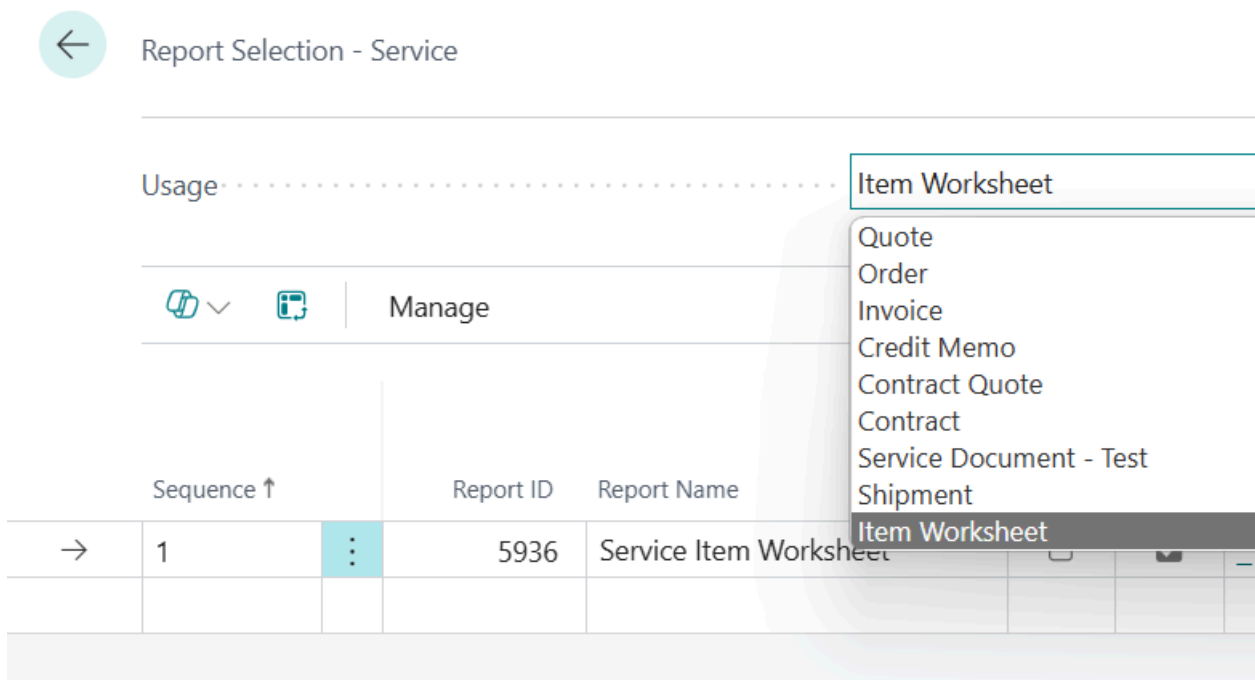
To improve service management features, we've added some useful fields to several pages. The addition of the **Customer Name** field on the **Service Items** page lets you identify the customers that use the items. Also, to make it easier to find records by searching for your reference numbers, we've added the **Your Reference** field to the following pages:

- Service Invoice
- Service Orders
- Service Quotes
- Posted Service Invoice
- Posted Service Invoices

We've streamlined the **Make order** process for both service and sales. When you convert a service quote to an order, you're prompted to open the newly created service order and process it.



We are adding **Service Item Worksheet** as an option on the **Report Selection - Service** pages. The worksheet contains the currently available **Service Item Worksheet** report, but you can change it if needed. You can also add reports if you want to print more than one report per document type, for example.



To give you more information about when and where an item is available from the context of a business task, we're adding the **Item available by** action to the **Project Planning Lines** and **Project Journal** pages. You can also view the availability of each item per location, by event, or by period.



Create Sales Invoice...

Create Sales Credit Memo...

Open Project Journal

Create Project Journal Lines

Reserve...

Sales Invoices/Credit Memos...

Item Tracking Lines

Item Availability by ▾

Event

Period

Variant

Unit of Measure

Location

Lot

BOM Level

Project Task No. ↑	Line Type	Planning Date	Type	
→ 220	Both Budg...	8/22/2024	Item	Automatic

**Note:** The author created this article with assistance from AI. [Learn more](#)

## Feedback

Was this page helpful?

Yes

No

# Synchronize product translations to Shopify

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

Automatically synchronizing translations from Business Central to Shopify guarantees consistent product descriptions and details across various languages. Offering customers product information in their native language enhances accessibility and satisfaction, which can boost conversion rates and foster customer loyalty.

## Feature details

To include translations to the product synchronization, follow these steps:

1. Choose the **Tell Me** icon, enter **Shopify shops**, and choose the related link.
2. Select the shop to open the **Shopify Shop Card** page.
3. To open the **Shopify Languages** page, choose the **Languages** action.
4. To import languages enabled on Shopify, choose the **Refresh** action. Notice that the primary language isn't be listed. For the primary language, continue to use the **Language Code** field in the **Shopify Shop Card**.
5. For each language you want to include ino synchronization, fill in the **Language Code** field and turn on the **Sync translations** toggle.

That's it. Translations are included every time you run the **Sync Product** task either manually or by using the job queue.


## More information

- A new Shopify permission (scope) is needed: *read\_locales*. You must request a new access token.
- The first export of items, initiated by the **Add item to Shopify** action, doesn't include translations. You need to run **Sync product** and turn on the **Can Update Shopify Products** toggle.
- Marketing text is only added for the primary language.
- Extended texts are added for each language, plus extended texts where the **All Languages** toggle is turned on.
- Attributes are added for each language. If a translation is missing, the primary language is used.
- Item translations are added for each language if a translation is defined.
- Variant translations aren't used because the connector only exports the variant code, and not its description.

## Extensibility impact

The CreateProductBody procedure in the Product Export codeunit takes language codes as parameters so it can be used for each language. Now this procedure is called multiple times according to the list of selected languages. Because it contains the OnBeforeCreateProductBodyHtml and OnAfterCreateProductBodyHtml events, those events are now triggered multiple times per item. The events now include the language code as a parameter, so you can skip translation or add your own logic.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

---

## Feedback

Was this page helpful?

 Yes

 No



# Use a default quantity of 1 for accounts on documents

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table


Enabled for	Public preview	General availability
Users, automatically	 Sep 6, 2024	Oct 2024

## Business value

Some people prefer to enter a specific quantity on document lines, while others like to have a default value entered for them that they can overwrite. To accommodate the latter preference, Business Central lets you specify that you want lines for general ledger accounts on sales documents to have a quantity of 1 by default.

## Feature details

Default values on documents can speed up data entry. If you want new lines for general ledger accounts on sales and purchase documents to have a quantity of 1 by default, on the **Sales & Receivables Setup** and **Purchase & Payables Setup** pages, turn on the **Default G/L Account Quantity** toggle .

Default Item Quantity 

Default G/L Account...

### Default G/L Account Quantity

Specifies that Quantity is set to 1 on lines of type G/L Account.

 Ask Copilot

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Feedback

Was this page helpful?

 Yes

 No

# Use directed put-away and pick warehouses with projects

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Businesses can use warehouse activities with projects to help drive an effective flow through the warehouse, and to organize and maintain project-related inventory.

## Feature details

As a continuation to our multi-release effort to ensure that project management features benefit from the rich warehouse capabilities in Business Central, you can now use locations configured for directed flows with projects.

Businesses pick items before they're consumed in different ways. The process depends on how their warehouse is configured. When you want to specify either a default **Location Code** on the **Project** and **Project Task Lines Subform** pages, or enter a **Location Code** on **Project Planning Lines**, you can now also use locations where the **Directed Put-Away and Pick** toggle is turned on.

To create or register a pick document, you can use the **Create warehouse pick** action under the following conditions:

- The **Status** of the project is **Open**.
- The **Line Type** of the project planning line is **Budget** or **Both Budget and Billable**.
- The **Type** of the project planning line is **Item**.


- The **Project Consump. Whse. Handling is Warehouse Pick (mandatory)** , which is now available when Directed Pick and Put-away is selected.

You can also create warehouse picks using a pick worksheet. The pick worksheet lets you organize pick information before you create warehouse pick instructions. You'll need to fill in the a **To-Project Bin Code** field on the **Location Card** page.

## Limitations

You can't use the **Project No.** and **Project Task No.** fields in the purchase order together with locations where the **Directed Put-Away and Pick** toggle is turned on. You must post receipts and consumption separately with the fully directed warehouse flow.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

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## Feedback

Was this page helpful?

 Yes

 No

# Use Excel reports for consolidation and fixed assets

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	 Sep 2, 2024	Oct 2024

## Business value

Excel reports give you the underlying data that they're based on, so that you can reformat the data to build a custom report—for example, to get a specific insight or for troubleshooting.

## Feature details

In this release we have added four Excel report layouts that cover the consolidation and fixed assets areas:

- Consolidated Trial Balance (Preview)
- Fixed Asset Details (Preview)
- Fixed Asset Analysis (Preview)
- Fixed Asset Projected Value (Preview)

The report layouts are available through search and the Accountant home page.

The content of each report covers the content of one or more existing RDLC reports, and gives you the underlying data so you can create custom reports.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

 Yes

 No

# Use new reports and demo data for financial reporting

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

New reports are provided as demo data for Business Central. The reports can serve as ready-to-use reports, or as templates 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.

## Feature details

The list of standard reports for financial reporting is expanded to include five new reports. In addition, a set of five new row definitions and 12 column definitions are provided. You can combine them to create more than 25 new reports.

The following table lists the new reports:

 Expand table

Name	Description
TB	Trial Balance
BS DET	Balance Sheet Detailed
BS SUM	Balance Sheet Summary

Name	Description
IS DET	Income Statement Detailed
IS SUM	Income Statement Summary

The new row definitions have the same names and descriptions as the reports.

The following table lists the new column definitions:

 Expand table

Name	Description
BBDRCREB	TB Beginning Balance Debits Credits Ending Balance
BSTREND	BS 12 Months Balance Trending Current Fiscal Year
CB	BS Current Month Balance
CB V PB	BS Current Month Balance v Prior Month Balance
CB V SPYB	BS Current Month Balance v Same Month Prior Year Balance
CNC	IS Current Month Net Change
CNC BUD	IS 12 Months Net Change Budget Only
CNC V PNC	IS Current Month Net Change v Prior Month Net Change
CNC VSPYNC	IS Current Month Net Change v Same Month Prior Year Net Change
CNCVPNCYOY	IS Current Month v Prior Month for CY and Current Month v Prior Month for PY
CVC YTD BUD	IS Current Month v Budget Year to Date v Budget and Bud Total and Bud Remaining
ISTREND	IS 12 Months Net Change Trending Current Fiscal Year

#### Note

The five reports are ready to use for the US version. For other country versions, you must map the row definitions to your chart of accounts in order for the reports to display any data. Microsoft will work on providing the ready-to-use experience for more country versions in future releases.

## Financial reporting demo data



Financial reporting is at the core of every business, and when evaluating business management applications it's often desirable to view the reporting capabilities as they would look for a running company. The new demo data can be generated by running the Contoso Financial demo data from the **Contoso Demo Tool** tool page. The data will contain three years of G/L entries, broken down to dimensions with a budget for the current year for variance analysis reporting.

**IS DET - Income Statement Detailed - IS DET - CVC YTDBUD**

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

**IS SUM - Income Statement Summarized - IS SUM - ISTREND**

Row No.	Description	January	February	March	April	May	June
1	<b>Revenue</b>	-155,933.28	-41,805.08	-46,199.45	-1,624,282.22	-2,813.60	-
2	Cost of Goods	58,833.26	41,226.70	45,138.70	-	2,113.00	-
3	<b>Gross Margin \$</b>	<b>-97,100.02</b>	<b>-578.38</b>	<b>-1,060.75</b>	<b>-1,624,282.22</b>	<b>-700.60</b>	-
4	<b>Gross Margin %</b>	<b>62.27</b>	<b>1.38</b>	<b>2.30</b>	<b>100.00</b>	<b>24.90</b>	-
5		-	-	-	-	-	-
6	Operating Expense	51,898.71	-	-	11,024.10	1,200.00	2,400.00
7	<b>Net (Income) / Loss</b>	<b>-45,201.31</b>	<b>-578.38</b>	<b>-1,060.75</b>	<b>-1,613,258.12</b>	<b>499.40</b>	<b>2,400.00</b>
8		-	-	-	-	-	-
9	Total of Income Statement	-45,201.31	-578.38	-1,060.75	-1,613,258.12	499.40	2,400.00
10	Check Figure	-	-	-	-	-	-

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

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# Feedback

Was this page helpful?

# Use specific prices and discounts when synchronizing prices in Shopify

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

The latest release of the Shopify connector adds individual prices and discounts that complement the global and customer price group/customer discount group prices and discounts. Individual prices and discounts give you more flexibility and personalization for B2B customers.

## Feature details

If you use Shopify B2B, you can configure the connector to synchronize prices for Shopify catalogs that are linked to B2B customers. The following steps explain the process.

## Sync catalogs from Shopify

1. Select the **Tell Me** icon, enter **Shopify Catalogs**, and select the related link.
2. Select **Get Catalogs**.
3. Select the entry for which to define and export prices, and then fill in the fields as necessary.

You can use two strategies. One is the default strategy, where you can use settings similar to the ones for synchronizing the **Price** and **Compare at Price** fields for Shopify

products (Shopify variant). The following table describes settings for the default strategy.

 Expand table

Field	Description
<b>Customer Price Group</b>	Determine the price for an item in Shopify. The sales price of this customer price group is taken. If no group is specified, the price on the item card is used.
<b>Customer Discount Group</b>	Determine the discount to use when calculating the price of an item in Shopify. Discounted prices are stored in the <b>Price</b> field and the full price is stored in the <b>Compare at Price</b> field.
<b>Allow Line Disc.</b>	Specifies whether you allow a line discount when calculating prices for Shopify. This setting applies only for prices on the item. Prices for the customer price group have their own toggle on lines.
<b>Prices including VAT</b>	Specifies whether price calculations for Shopify include VAT.
<b>VAT Business Posting Group</b>	Specifies which VAT business posting group is used to calculate prices in Shopify. This should be the group you use for domestic customers.

The second strategy is to use the new **Customer No.** field. In this case, the connector uses the customer to calculate the price. It ignores other values defined in the Shopify Catalog entry, and uses the **Customer Price Group**, **Customer Discount Group**, and **Allow Line Discount** fields from the customer card. Use personalization to add the **Customer No.** field to the **Shopify Catalog** page.

After you enter the settings, turn on the **Sync Prices** toggle and choose **Sync Prices** to start synchronizing catalog prices.

| **Edit List** Delete [Home](#) Catalog | More options

Get Catalogs Sync Prices

	Id ↑		Customer No.	Name	Company	Sync Prices	Customer Price Group
	109769556266			Alpine Ski House	<a href="#">Alpine Ski House</a>	<input type="checkbox"/>	SHOPIFY
→	<a href="#">112949559594</a>		50000	Relecloud	<a href="#">Relecloud</a>	<input checked="" type="checkbox"/>	

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Feedback

Was this page helpful?

# View item availability in Field Service work orders

Article • 09/20/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2024	Nov 2024

## Business value

When you integrate Field Service with Business Central, technicians and dispatchers can check item availability at 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 optimize their service and purchasing operations.

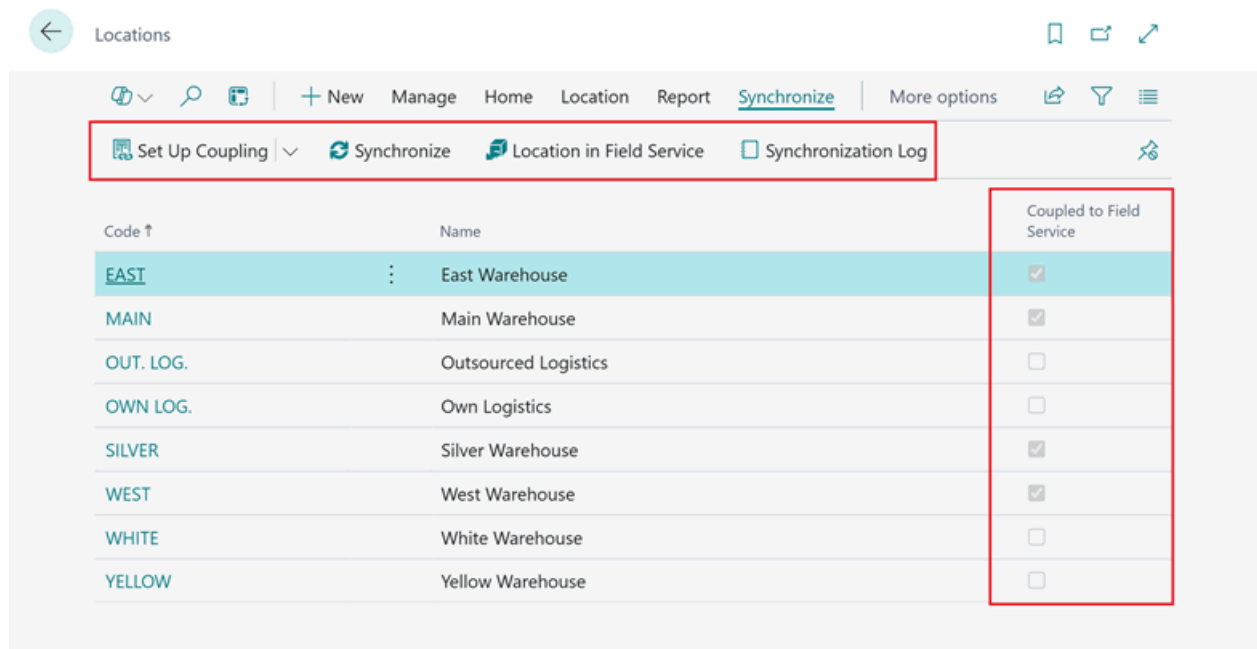
## Feature details

You can now integrate, configure, and customize Field Service warehouses with Business Central's locations. To manage the synchronization of data, we've added a unidirectional (from Business Central) integration table mapping between Business Central locations and warehouses in Field Service. To use the new integration table mapping, in Business Central you must turn on the **Location Mandatory** toggle on the **Inventory Setup** page.

Business Central synchronizes locations with the following settings on the **Location Card** page:

- The **Use as In-Transit** toggle is turned off.
- **Project Consump. Whse. Handling** is different from Warehouse Pick (mandatory).
- **Assm. Consump. Whse. Handling** is different from Warehouse Pick (mandatory).

On the **Locations** and **Location Card** pages, you can use the **Warehouse** action to open a coupled location in Field Service, synchronize it, set up and delete couplings, and view synchronization logs.



You can use **Open in Business Central** in Field Service to open a location in Business Central that's coupled to a warehouse in Field Service.

Choose **Enable Inventory Availability by Location** in the **Dynamics 365 Field Service Integration Setup** page or in the **Set up integration to Dynamics 365 Field Service** page.

# Dynamics 365 Field Service Integration Setup



## SET UP VIRTUAL TABLES

Set up Business Central Virtual Tables app in a Dataverse environment to allow Business Central to send business events to Dataverse.

Use the link below to go to AppSource and get the the Business Central Virtual Table app, so you can install it in your Dataverse environment. To refresh status after you install, click back and next.

Enable Inventory Availability by...

[Install Business Central Virtual Table app](#)

**The Business Central Virtual Table app is installed.**

Choose Refresh to enable above toggle when Business Central Virtual Table app is installed.

Refresh

Back

Next

Finish

When you enable inventory availability by location, a new Inventory Availability by Location API becomes available as a Dataverse virtual table and a synthetic relationship is created between this virtual table and the native **Products** table in Field Service.

On the Field Service side, on a **Products** page, technicians can check how much of particular product is available at a warehouse they specify.

The screenshot shows the Dynamics 365 Field Service interface in a 'SANDBOX' environment. The main view is 'Product: Whole Roasted Beans, Colombia'. The 'Items Availability by Location' tab is selected, showing a table with the following data:

Location Code	Unit of Measure Code	Remaining Quantity
<input type="checkbox"/> EAST	PCS	1.00
<input type="checkbox"/> MAIN	PCS	4.00

The 'Related - Common' list on the right includes 'Items Availability by Location', which is highlighted with a red box. The 'Item Availability by Location Associated View' table is also highlighted with a red box.

Tell us what you think



Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

 Yes

 No

# Copilot and AI innovation

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

According to our recent survey on business trends, nearly 9 out of 10 workers hope to use AI to reduce repetitive tasks in their jobs. But until recently, AI has been a commodity that few SMBs could truly invest in.

Microsoft Dynamics 365 Copilot enables professionals to perform their day-to-day work with the assistance of cutting-edge AI by their side. With Copilot in Business Central, our customers empower their workers with intuitive AI tools to get more done with less effort, without needing to become data scientists.

This wave expands on our use of Copilot capabilities, in order to boost productivity for a broader set of SMB roles.

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## Feedback

Was this page helpful?

 Yes

 No

# Automate tests for your Copilot extensions with the Business Central Test Toolkit

Article • 08/16/2024

## 📘 Important

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🔗 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2024	Dec 2024

## Business value

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.

## Feature details

With this feature, you can:

- Author tests for your prompt dialogs using a familiar framework in AL and Visual Studio Code.
- Organize your test datasets based on purpose and prompt variations.
- Implement automated verification depending on your feature use case.
- Run tests as fully automated or semiautomated.

# Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

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## Feedback

Was this page helpful?

 Yes

 No

# Chat with Copilot to learn how to use installed add-on apps

Article • 09/20/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2025	-

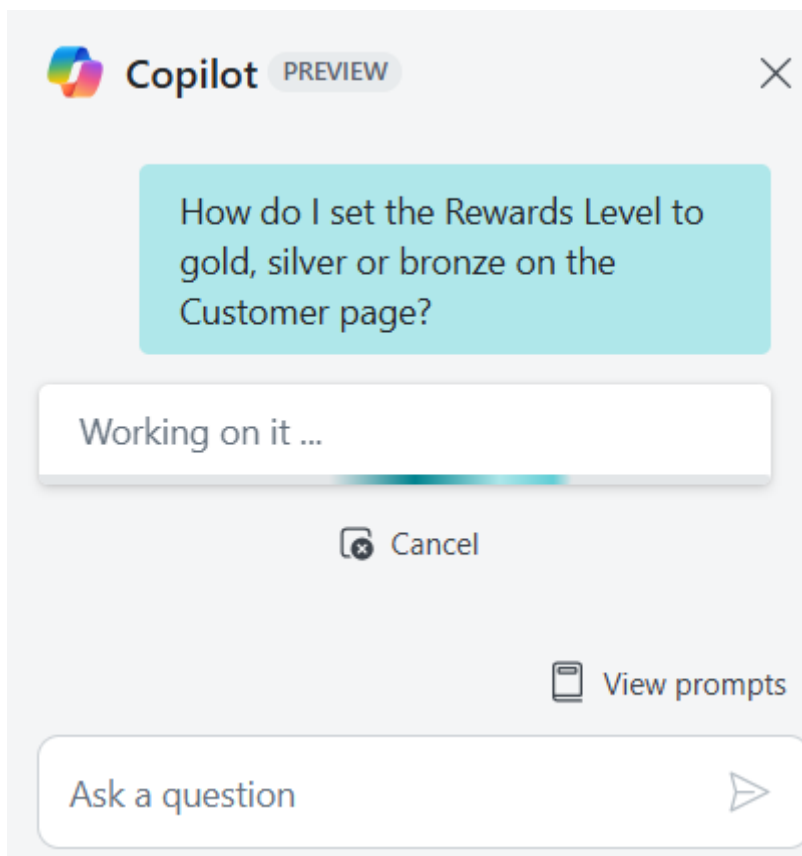
## Business value

With 2024 release wave 1, we introduced chat with Copilot: 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 can explain and guide workers through using functionality of these add-on apps, transforming Copilot from a simple "librarian" to an in-house expert that understands your unique Business Central.

## Feature details

Copilot's chat capabilities have been enhanced with the following:

- Users can ask questions about content from installed add-on apps, such as new pages, fields, and business processes.
- Copilot explains and guides based on documentation provided by the apps installed to your Business Central environment.



#### ⓘ Note

- Copilot responses are subject to availability and quality of the documentation provided by each app publisher. Microsoft isn't responsible for third party content provided by app publishers.
- This feature is part of Copilot chat and is available as a production-ready preview for production and sandbox environments in any country localization. Production-ready previews are subject to supplemental terms of use. For more information, go to [Supplemental terms of use for Dynamics 365 preview](#).
- This feature is supported in English only. While it can be used in other languages, it might not function as intended. Language quality might vary based on the user's interaction or system settings, which may impact accuracy and the user experience.
- AI-generated content might be incorrect.

## About security, privacy and AI

Copilot is built on Microsoft's comprehensive approach to enterprise security, privacy, compliance, and responsible AI. Our philosophy is that your data is your data: customer

data in Business Central is not used to train AI models. For more information, go to [FAQ for Copilot data security and privacy for Dynamics 365 and Power Platform](#)

## Looking for more details?

- Read the preview announcement for [Chat with Copilot](#)
- [Learn about Chat with Copilot](#)
- [AI FAQ for Chat with Copilot](#)

## Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at [aka.ms/bclideas](https://aka.ms/bclideas), or join the discussion on the [Dynamics 365 Business Central Partner Community Network on Viva Engage](#) (formerly Yammer) to help us shape the future of AI in Business Central.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
  - Norway
  - Singapore
  - South Africa
  - Switzerland
  - United Arab Emirates
  - United States
  - Europe
  - Asia Pacific
  - United Kingdom
  - Australia
  - Brazil
  - Canada
  - India
  - Japan
  - France
  - Korea
-

# Feedback

Was this page helpful?



# Complete bank account reconciliation faster with Copilot

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	 Nov 9, 2023	Oct 2024

## Business value

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.

## Feature details

The bank account reconciliation feature in Business Central has been enhanced with:

- **AI-powered transaction matching** that complements rule-based matching and further reduces the remaining unmatched transactions that require review.
- **AI-powered G/L account suggestions** where Copilot suggests the most likely ledger account to post any residual transactions to and offers the opportunity to remember a specific transaction description for the next reconciliation.
- **Built-in demo data** for evaluation companies that makes it easier to experience and demonstrate this Copilot capability to others. Demo data is available in English with 23.1 and other languages with 23.2.

## Bank Account Reconciliations

Search  Analyse + New Manage **Reconcile with Copilot** Post

Bank Account No. ↑	Bank Account Name	Statement No. ↑	Statement Date
<u>CHECKING</u>	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
→ <a href="#">7/14/2023</a>	Bank charges JULY	-15.00	Post payment to account 67100 (B... <a href="#">Save...</a>
<a href="#">7/15/2023</a>	Fuel Stop U54	-45.00	Post payment to account 62110 (P... <a href="#">Save...</a>

Keep it

## Public preview notes

This feature is available as a production-ready preview for production and sandbox environments with any country localization of Business Central and is available for any user language. Production-ready previews are subject to supplemental terms of use. For more information, see [Supplemental terms of use for Dynamics 365 preview](#).

While the feature is in preview, it performs best when the G/L account names, ledger entries, and bank account transaction descriptions are in English.

## Availability

This feature is exclusively available for Business Central online.

## Looking for more details?

[Watch the 20-minute video](#) where the product engineering team at Microsoft shares more details about this new capability.

To access recordings on demand from the Business Central 2023 release wave 2 launch event, register for free at [aka.ms/BCLE](https://aka.ms/BCLE).

## Try it out

To get started, go to the [Bank Account Reconciliations page](#) and choose *Reconcile with Copilot*.

This feature is available with all new production and sandbox environments with Update 23.1.

For upgrading customers, the feature will be automatically enabled with Update 24, but administrators can enable it as early as Update 23.1. To enable features ahead of time, sign in to your online environment and [open Feature Management](#), then enable for all users the item named **Feature Preview: Bank account reconciliation with Copilot**.

In some regions where Azure OpenAI Service is not yet available, administrators must first consent to business data moving across compliance boundaries from the [Copilot & AI capabilities page](#).

## Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at [aka.ms/bcldeas](https://aka.ms/bcldeas), or join the discussion on the [Dynamics 365 Business Central Development Yammer network](#) to help us shape the future of AI in Business Central.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates

- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

## See also

[Reconcile bank accounts with Copilot \(docs\)](#)

---

## Feedback

Was this page helpful?

# Create product information faster with Copilot

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	-

## Business value

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.

## Feature details

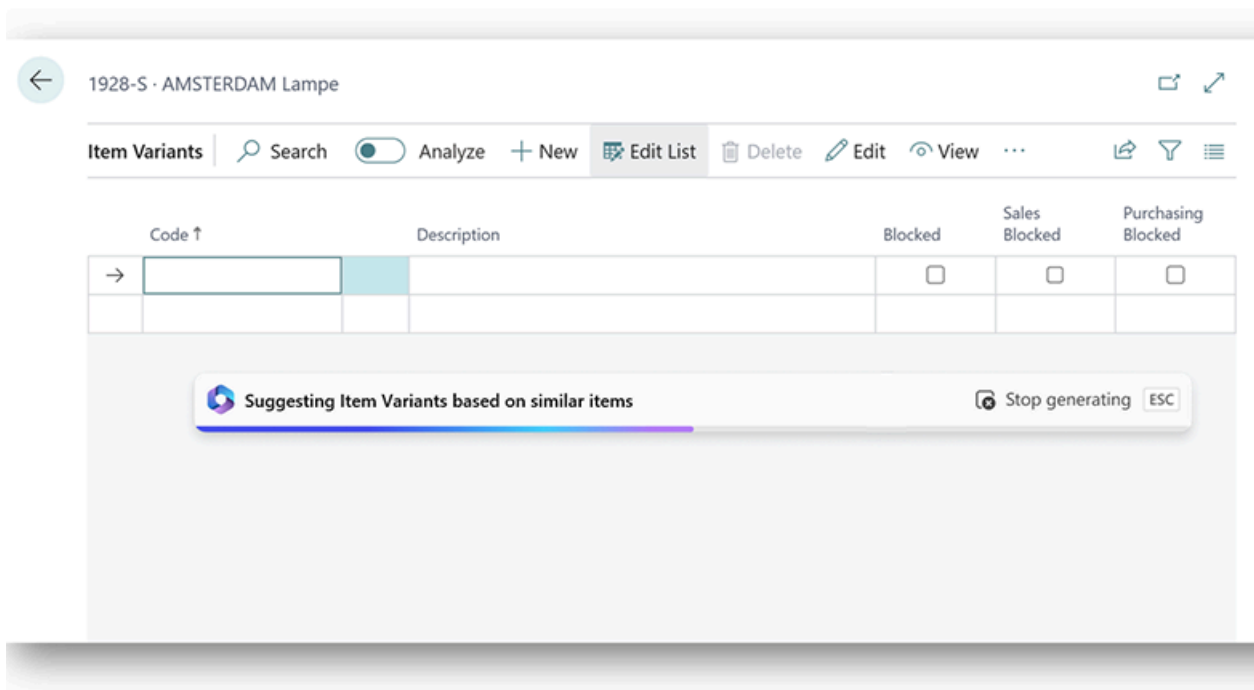
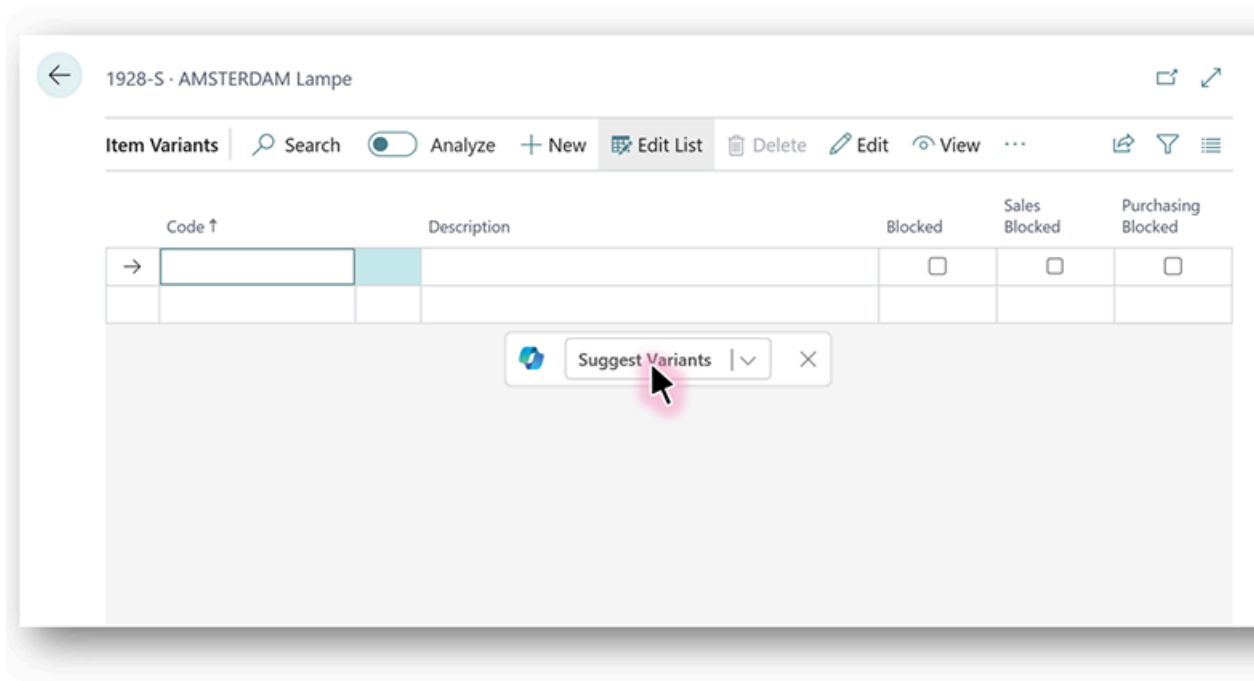
Because product (item) information is spread out across several pages, creating and managing this information can be a time-consuming task. The effort involves looking up information based on existing items, pasting values, and ensuring the new product is ready to transact. Creating variants, dimensions, units of measure, and other item-related information also takes time that delays market readiness for new products.

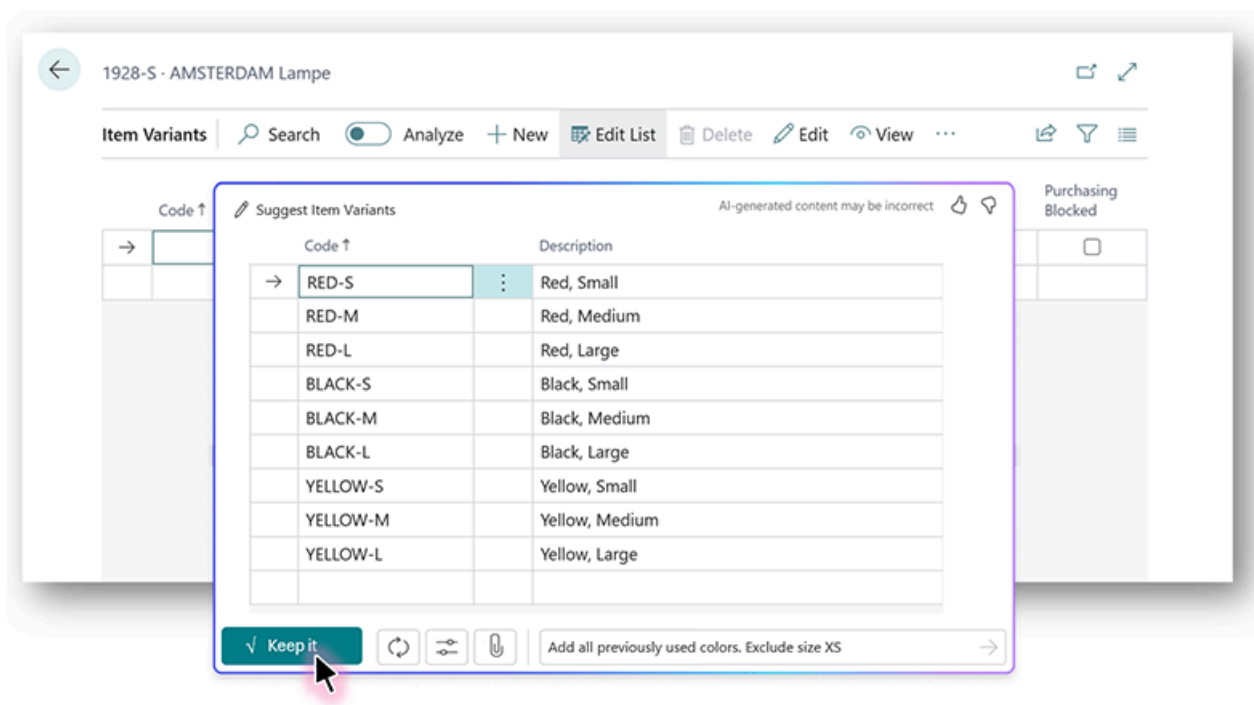
Copilot can help you add items by reusing information from similar items. Copilot can suggest the following information:

- Variants
- Units of Measure

- Substitutions
- Dimensions

When you manage product information, Copilot can assist by suggesting data from similar products (items). Copilot assistance not only reduces the time it takes to create a product, but it also ensures that your products are ready to transact faster than ever before.





### ! Note

- This feature is available as a production-ready preview for production and sandbox environments of any country localization. Production-ready previews are subject to supplemental terms of use. For more information, see [Supplemental terms of use for Dynamics 365 preview](#).
- This feature is supported in English only. While it can be used in other languages, it may not function as intended. Language quality may vary based on the user's interaction or system settings, which may impact accuracy and the user experience.
- AI-generated content may be incorrect.

## About security, privacy and AI

Copilot is built on Microsoft's comprehensive approach to enterprise security, privacy, compliance, and responsible AI. Our philosophy is that your data is your data: customer data in Business Central is not used to train AI models. [Read the FAQ for Copilot data security and privacy for Dynamics 365 and Power Platform](#)

## Try it out

Copilot is available exclusively for Business Central online. To experience this feature, sign in to your Business Central environment, go to the Items list, and activate the link

for **Substitutes Exist** on any item. Then, choose the **Suggest substitutions** action.

## Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at [aka.ms/bclideas](https://aka.ms/bclideas), or join the partner discussion on the [Dynamics 365 Business Central Partner Community Network on Viva Engage](#) (formerly Yammer) to help us shape the future of AI in Business Central.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

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## Feedback

Was this page helpful?

Yes

No



# Create sales lines easily with Copilot

Article • 08/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	-

## Business value

The introduction of Copilot in Business Central adds a significant enhancement to the process of creating sales documents. It expedites the creation of sales documents and minimizes time spent on repetitive tasks and lookups. With its ability to accept various input methods, including free text, files, or prebuilt prompts, Copilot understands the input and can use it to create sales lines. This Copilot assistance drives operational efficiency and contributes to revenue growth by getting sales documents into the hands of customers faster. Copilot is the AI-powered assistant for work that boosts creativity and improves productivity for Business Central users.

## Feature details

In\*\* 2024 release wave 1\*\* we introduced Copilot that can suggest and assist with creating sales lines on sales documents such as sales quotes, orders, and invoices based on structured input or natural language. This assistance can reduce manual data entry and drive operational efficiency.

**Versatile input methods:** Copilot can accept various input methods, including free text, files, or prebuilt input prompt suggestions. This flexibility allows you to interact with Business Central in ways that are convenient for you, which further boosts efficiency.

**Intelligent processing:** Leveraging advanced AI capabilities, Copilot understands the input you provide and uses it to suggest sales lines. This intelligent processing

eliminates the need for manual data entry, reduces the likelihood of errors, and saves time. Additionally, Copilot can suggest sales lines based on how recently and frequently the customer on the sales document has purchased from you.

New additions in update **24.2 for 2024 release wave 1**:

- This feature is now available in environments localized to Canada.
- People who use Business Central in a language other than English can access this feature.

New additions in **2024 release wave 2**.

We continue to improve Copilot in Business Central by adding new capabilities and polishing existing ones.

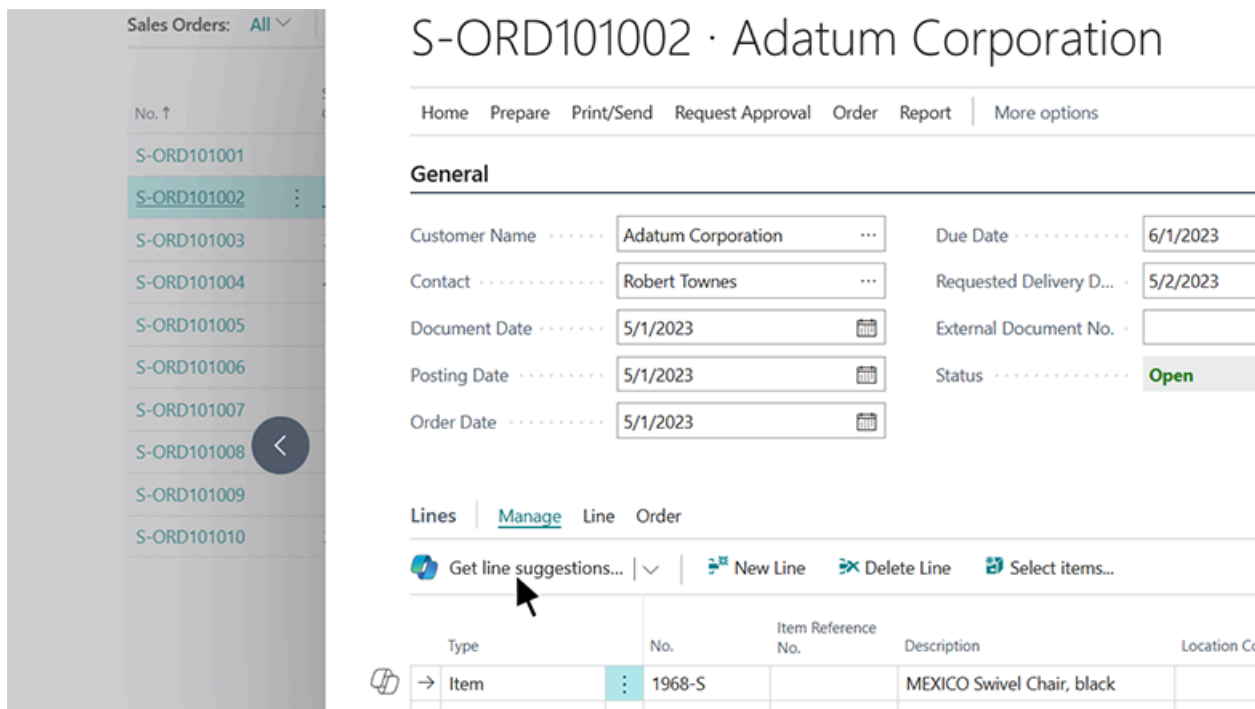
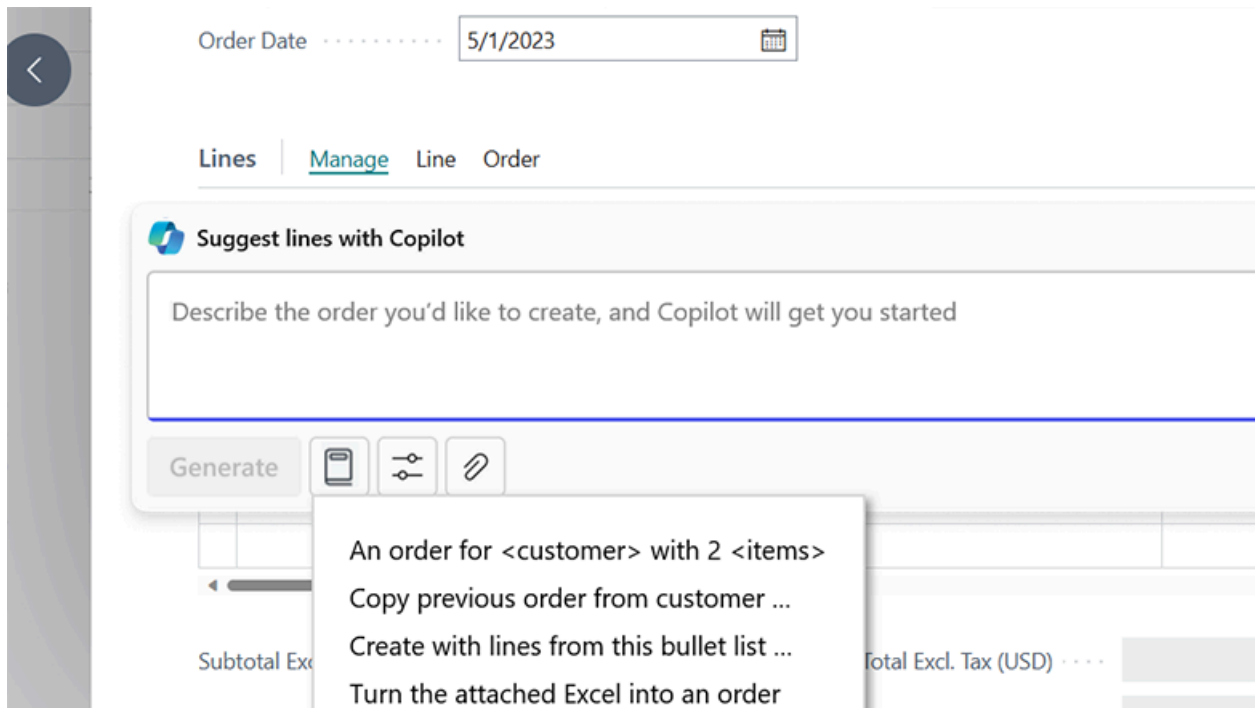
In addition to the **Find product** and **Find document by reference** skills, Copilot can combine them. It can first find documents, and then search for products on document lines. This combination can be particularly useful for companies that often work with blanket orders. The **Find document by reference** skill now includes sales blanket orders as source documents.

Also, it also now supports units of measure. Copilot can try to use the unit of measure you specify in your prompt, but if that isn't found it falls back to the sales unit of measure for the item.

Attachments are a longer journey that starts with CSV files. Copilot analyzes the structure of an attached file to identify things like field and row separators, date and decimal formats, columns, and headers. It suggests field mappings to fill in product and quantity fields.

#### ⓘ Note

- This feature is available as a production-ready preview for production and sandbox environments in any country localization. Production-ready previews are subject to supplemental terms of use. For more information, see [Supplemental terms of use for Dynamics 365 preview](#) <sup>↗</sup>.
- This feature is supported in English only. While it can be used in other languages, it might not function as intended. Language quality might vary based on the user's interaction or system settings, which might impact accuracy and the user experience.
- AI-generated content might be incorrect.




## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- United States

- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

## See also

[Suggest lines on sales documents with Copilot](#) (docs)

---

## Feedback

Was this page helpful?

 Yes

 No

# Display errors and messages in Copilot prompt dialogs

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Oct 2024

## Business value

Users learning to work with Copilot often need a simple and effective feedback loop to help them experiment and make the most out of their AI-powered assistant.

Copilot features that display a prompt dialog can now show errors and messages directly inside the dialog. While prompt dialogs aren't intended for conversational experiences, the integrated feedback keeps users focused on the dialog without distraction.

## Feature details

Errors and messages that are thrown by the code logic in Copilot prompt dialogs now surface directly inside the dialog rather than in a separate pop-up dialog. There's no additional work required by developers to enable this feature, apart from authoring proper error handling and warnings as you already do today. Both the classic `Dialog.Error()` and `Dialog.Message()`, as well as the newer `ErrorInfo` patterns are supported. In the case of the latter, the title and description will both be shown.

If the code throws more than one message, only the latest will be shown, but the user is told that there were multiple issues. Also, as has already been the case, if an error is

thrown, a subsequent message will be suppressed. If the error or message contains line breaks, these are ignored, as opposed to rendering in dialogs.

## Example 1: Rendering multiple messages thrown by `Message()` while in the prompt dialog

The following code snippet illustrates throwing multiple messages, using `Message()`, when the user chooses the **Generate** button in a prompt dialog.

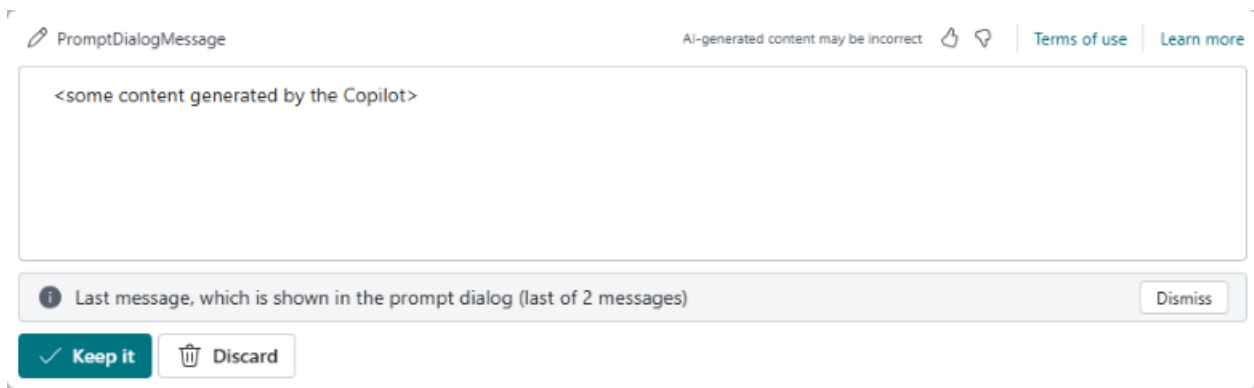
AL

```
page 50110 PromptDialog
{
    PageType = PromptDialog;

    layout
    { ... }

    actions
    {
        area(SystemActions)
        {
            systemaction(Generate)
            {
                trigger OnAction()
                begin
                    Message('First message, which is not shown in the prompt
dialog');
                    Message('Last message, which is shown in the prompt
dialog');
                end;
            }
        }
    }
}
```

As a result, when invoking the **Generate** action in the Copilot prompt dialog, the last message is rendered inline in the Copilot prompt dialog, along with an indication that there were more messages.



## Example 2: Rendering an error thrown by `Error()` while in the prompt dialog

Here we instead change to throwing an `Error()`:

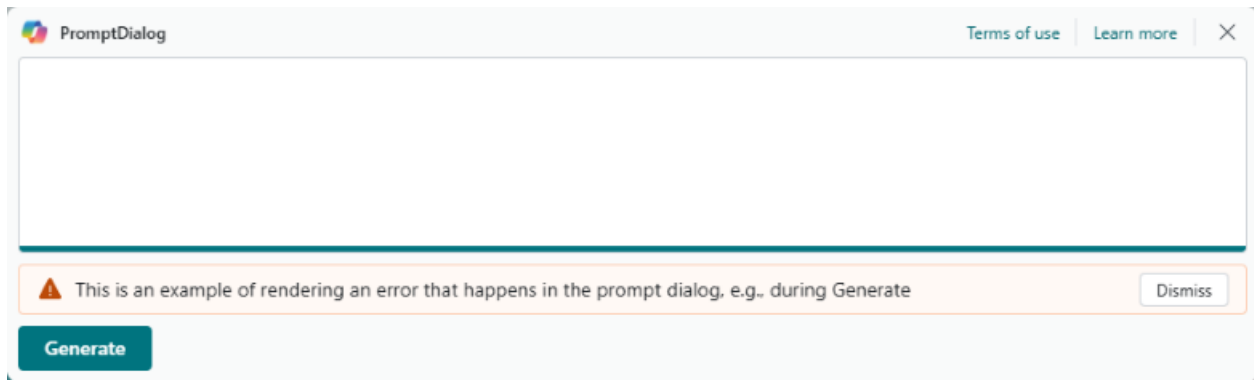
```
AL

page 50110 PromptDialog
{
    PageType = PromptDialog;

    layout
    { ... }

    actions
    {
        area(SystemActions)
        {
            systemaction(Generate)
            {
                trigger OnAction()
                begin
                    Error('This is an example of rendering an error that
happens in the prompt dialog, e.g., during Generate');
                end;
            }
        }
    }
}
```

In this case, the error is rendered inline:



## Example 3: Rendering an error thrown by `ErrorInfo` while in the prompt dialog

The final example illustrates using the recent `ErrorInfo` type.

```
AL

page 50110 PromptDialog
{
    PageType = PromptDialog;

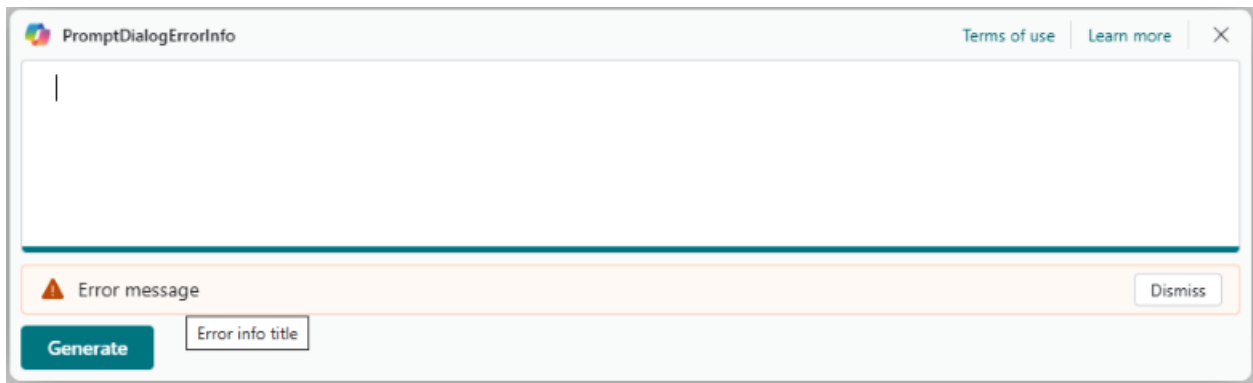
    layout
    { ... }

    actions
    {
        area(SystemActions)
        {
            systemaction(Generate)
            {
                trigger OnAction()
                var
                    ErrorInfo: ErrorInfo;
                begin
                    ErrorInfo.Title('Error info title');
                    ErrorInfo.Message('Error message');
                    ErrorInfo.DetailedMessage('Detailed error');

                    Error(ErrorInfo);
                end;
            }
        }
    }
}
```

In this case, the `ErrorInfo` message part is rendered inline, and the title part is used for the tooltip. The detailed message is ignored.





## Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at [aka.ms/bcldeas](https://aka.ms/bcldeas), or join the partner discussion on the [Dynamics 365 Business Central Partner Community Network on Viva Engage](#) (formerly Yammer) to help us shape the future of AI in Business Central.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

# Experience enhancements to analysis assist with Copilot

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	-

## Business value

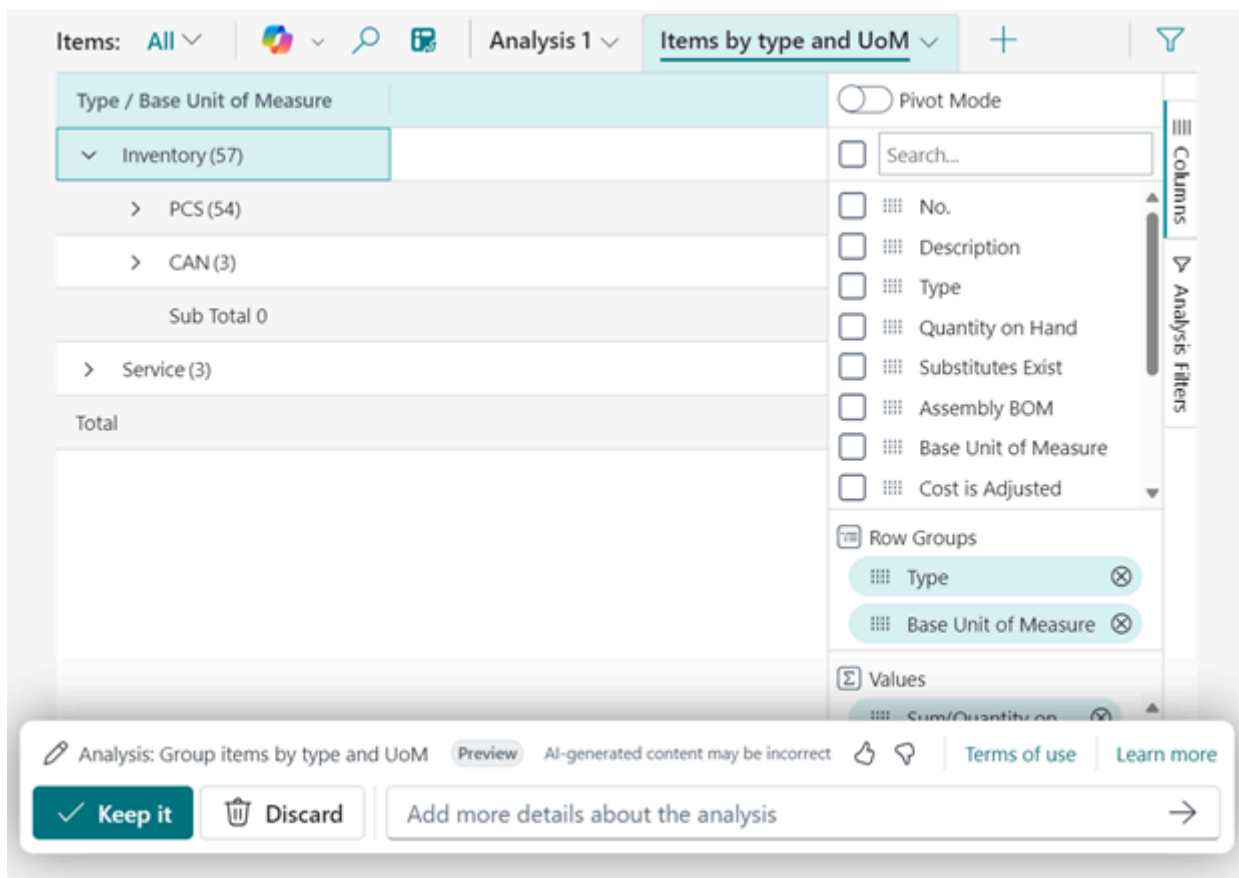
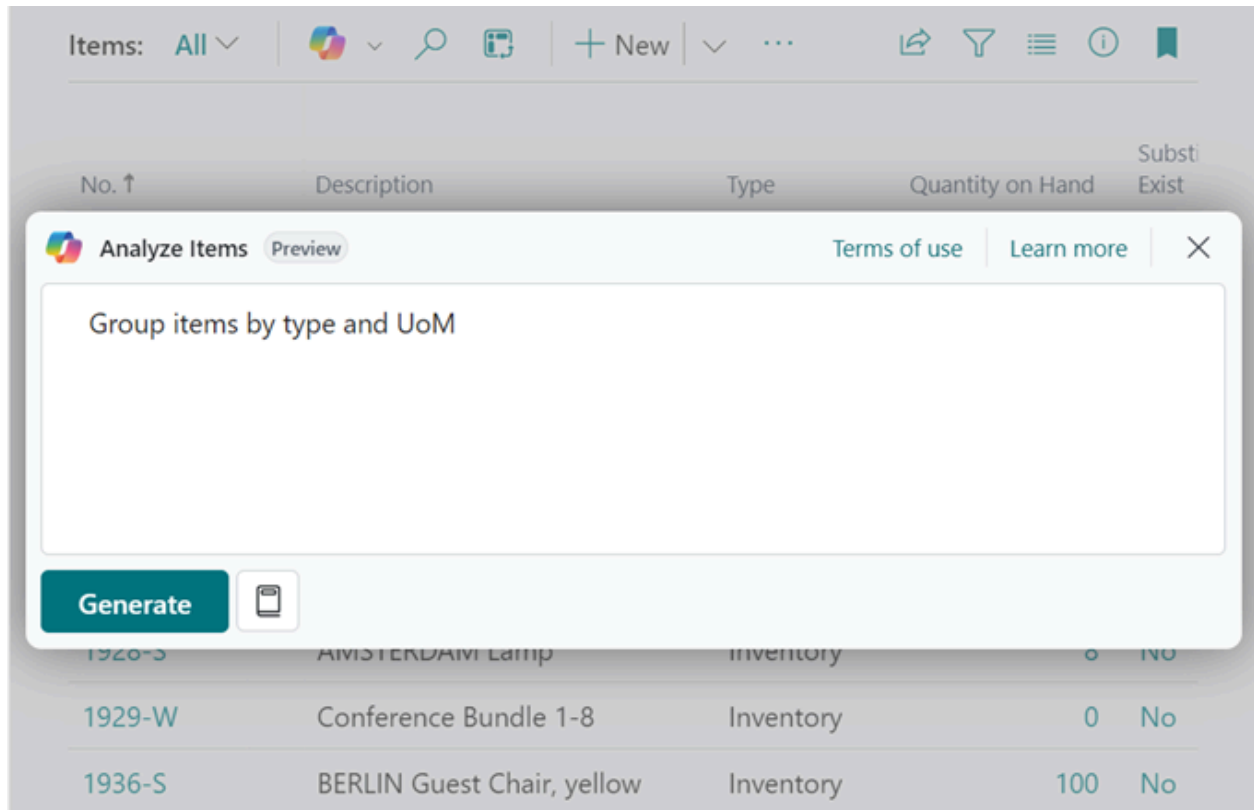
Microsoft Copilot in Business Central is the AI-powered assistant that boosts creativity, improves productivity and eliminates tedious tasks. Copilot can help reduce the time it takes to identify trends and anomalies in your business data by enabling you to express your analysis as a simple sentence, 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.

## Feature details

This update to the preview includes:

- **Availability for more users:** Added support for more languages, now including: English, Danish, German, Italian, French, Dutch, Spanish, Portuguese (Brazil), Japanese, Swedish, Finnish, Norwegian, Polish, Russian, Thai, Turkish, Czech, Greek, Korean, Chinese (simplified)

- **Flexibility:** Copilot can draft analysis tabs using all fields from the list page, including columns that might be hidden.
- **Improved control:** It is easier to make manual changes to an analysis tab drafted by Copilot, with the ability to navigate back and forth through the history of the tab before finalizing it.



### ⓘ Note

- This feature is available as a production-ready preview for production and sandbox environments in any country localization. Production-ready previews are subject to supplemental terms of use. For more information, go to [Supplemental terms of use for Dynamics 365 preview](#).
- This feature is supported in select languages only. While it can be used in other languages, it may not function as intended. Language quality may vary based on the user's interaction or system settings, which may impact accuracy and the user experience.
- AI-generated content may be incorrect.

## About security, privacy, and AI

Copilot is built on Microsoft's comprehensive approach to enterprise security, privacy, compliance, and responsible AI. Our philosophy is that your data is your data: customer data in Business Central is not used to train AI models.

[Read the FAQ for Copilot data security and privacy for Dynamics 365 and Power Platform.](#)

## Looking for more details?

- Read the preview announcement: [Get to insights fast with Copilot-created analysis tabs](#)
- [Analyze data in lists with the help from Copilot](#)
- [AI FAQs for analysis assist](#)

## Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at [aka.ms/bclideas](https://aka.ms/bclideas), or join the partner discussion on the [Dynamics 365 Business Central Partner Community Network on Viva Engage](#) (formerly Yammer) to help us shape the future of AI in Business Central.

# Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
  - Norway
  - Singapore
  - South Africa
  - Switzerland
  - United Arab Emirates
  - United States
  - Europe
  - Asia Pacific
  - United Kingdom
  - Australia
  - Brazil
  - Canada
  - India
  - Japan
  - France
  - Korea
- 

## Feedback

Was this page helpful?

 Yes

 No

# Experience enhancements to chat with Copilot

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	-

## Business value

For our customers, much of their workday revolves around chatting with coworkers, customers, and vendors to get insights and solve problems. Now, Dynamics 365 Copilot helps them continue the conversation in Business Central with AI-powered chat alongside their data. Copilot in Business Central transforms how people approach business applications by empowering workers to express themselves using their own language.


## Feature details


In this wave, we evolve [chat with Copilot](#) (first announced for 2024 release wave 1) based on community feedback:

- **Faster:** Copilot fetches records more quickly.
- **Better at data inquiries:** Copilot generates analysis tabs directly from the Chat pane to help you get to insights about your data. Copilot takes this approach whenever you ask questions that are best illustrated by grouped records or simple math such as totals or averages. Try entering, "In which countries are my top customers?"

In which countries are my top customers?

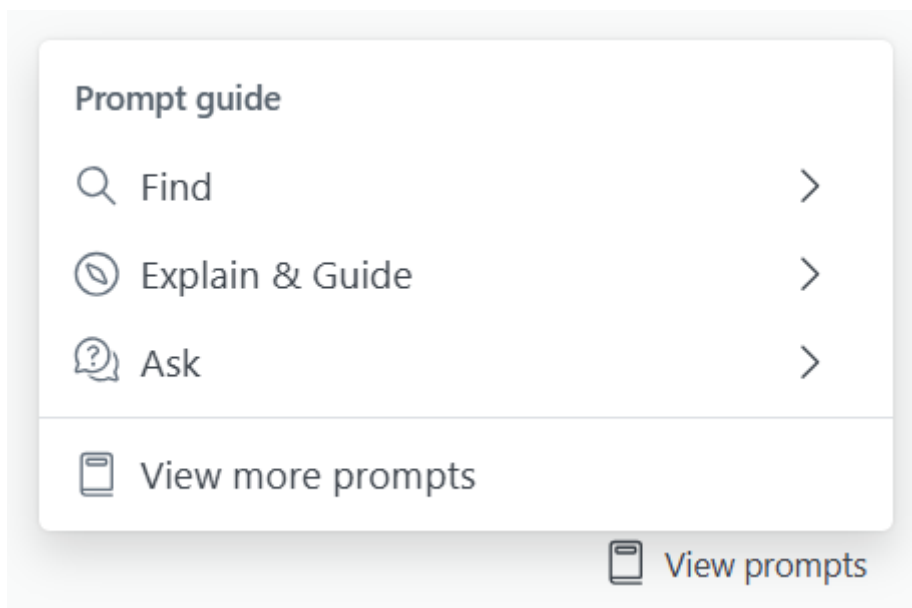
You can view the countries where your top customers are located, based on sales, by using **Analysis Assist** on the [Customers page](#) <sup>1</sup>.

 **Open analysis tab**

AI-generated content may be incorrect  

1 reference 

- **Awareness of the current page:** Copilot responds to requests to find data from the currently open page, using its ability to filter, sort, and generate analysis tabs to help you get to insights. Try entering, "Which products are blue on the current page?" while the Items list page is open.
- **Interconnected AI:** Copilot helps you understand how it can provide additional AI-powered assistance on the current page, identifying built-in features as well as extensions to Copilot. Try entering, "What can Copilot do on this page?"
- **More knowledgeable:** Copilot uses more sources of information from Microsoft Learn to explain and guide. For example, it now searches learning paths and release plans.
- **More examples:** The prompt guides (displayed at the bottom of the chat pane) include new example prompts and a link to tips and tricks to improve your prompt skills.



#### ⓘ Note

- Copilot Chat is available as a production-ready preview for production and sandbox environments for US customers only. Production-ready previews are subject to supplemental terms of use. For more information, see [Supplemental terms of use for Dynamics 365 preview](#).
- This feature is supported in English only. While it can be used in other languages, it may not function as intended. Language quality may vary based on the user's interaction or system settings, which may impact accuracy and the user experience.
- AI-generated content may be incorrect.

## About security, privacy and AI

Copilot is built on Microsoft's comprehensive approach to enterprise security, privacy, compliance, and responsible AI. Our philosophy is that your data is your data: customer data in Business Central is not used to train AI models.

[Read the FAQ for Copilot data security and privacy for Dynamics 365 and Power Platform.](#)

## Try it out

Copilot is available exclusively for Business Central online.



To experience Chat, sign in to your Business Central environment and find the Copilot icon in the app bar at the top.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- United States

## Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at [aka.ms/bclideas](https://aka.ms/bclideas), or join the partner discussion on the [Dynamics 365 Business Central Partner Community Network on Viva Engage](#) (formerly Yammer) to help us shape the future of AI in Business Central.

---

## Feedback

Was this page helpful?

# Get usage telemetry on Copilot extensions as an ISV

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Providing developers with a way to collect telemetry data on customer usage of their extensions to Copilot empowers them to understand the adoption, success, and safety of the extensions. Telemetry makes it easier and more effective for developers to gather this data and make timely adjustments.

## Feature details

Prior to this release wave, if a method in a system module was instrumented with telemetry, any call from AL to the method wouldn't be sent as a telemetry event to the app publisher's telemetry pipeline.

This condition has now changed. A telemetry event from the system module (as long as `Scope == All`) is sent to the Application Insights resource defined in the app.json manifest of the calling app/extension. This capability is particularly beneficial for the Copilot system module.

## About security, privacy, and AI

Copilot is built on Microsoft's comprehensive approach to enterprise security, privacy, compliance, and responsible AI. Our philosophy is that your data is your data: customer

data in Business Central is not used to train AI models.

[Read the FAQ for Copilot data security and privacy for Dynamics 365 and Power Platform.](#)

## Join our Copilot and AI discussions

We're excited to have you with us on our Copilot journey. Join the partner discussion on the [Dynamics 365 Business Central Partner Community Network on Viva Engage](#) (formerly Yammer) to help us shape the future of AI in Business Central.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

# Raise awareness of Copilot actions on Card, Document, and ListPlus pages

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2024	Oct 2024

## Business value

In 2024 release wave 1, the developer tools for Copilot in Business Central introduced Copilot prompt actions, a new way to draw attention to Copilot capabilities in your extensions. A prompt action is a standard action, which is rendered with greater prominence on the page, such as in a floating bar, and is connected to the Copilot brand.

In the first iteration, Business Central supported Copilot prompt actions on List, ListPart, Worksheet, and StandardDialog page types. To help with more Copilot experiences and address partner feedback, we're now introducing support for Copilot prompt actions on Card, Document, and ListPlus page types.

## Feature details

You can now use Copilot prompt actions on Card, Document, and ListPlus page types to nudge users to use your Copilots on such pages. The required AL code follows the same model as when adding Copilot prompt actions to list pages.

As an example, this code adds four prompt actions to the Customer Card via a page extension, where two of the Copilot prompt actions are nested in a group.

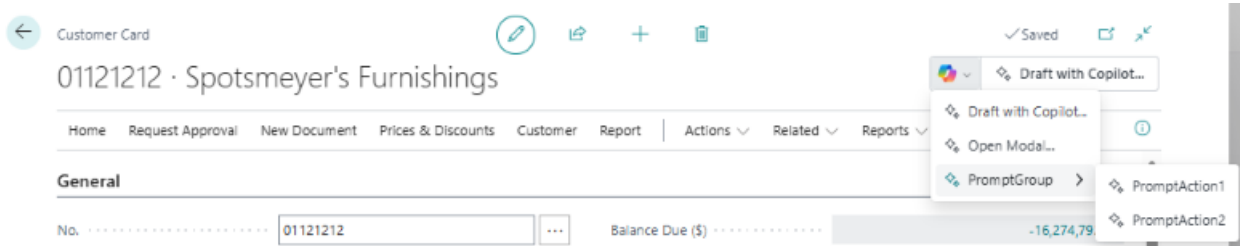
AL

```

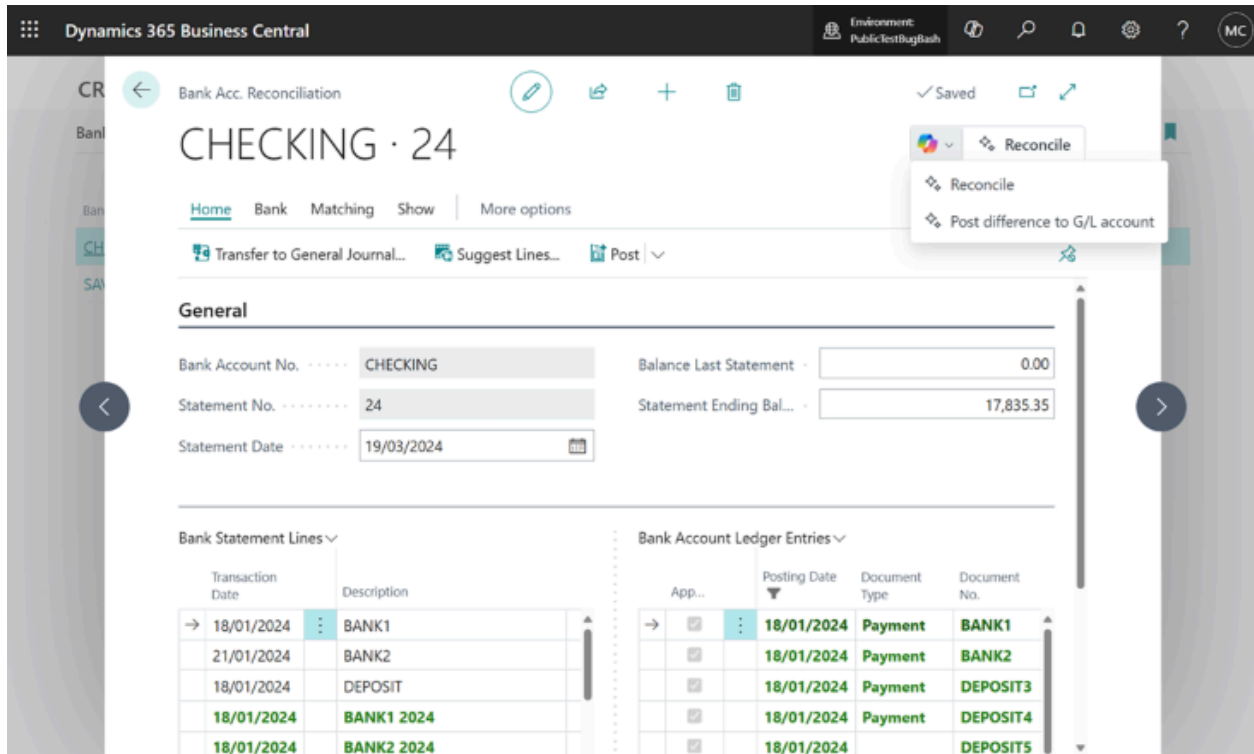
pageextension 50110 "Customer with prompt" extends "Customer Card"
{
    actions
    {
        addlast(Prompting)
        {
            action(DraftWithCopilot)
            {
                Caption = 'Draft with Copilot';
                Ellipsis = true;
                trigger OnAction()
                begin
                    Message('Draft with Copilot pressed');
                end;
            }
            action(OpenModal)
            {
                Caption = 'Open Modal';
                Ellipsis = true;
                trigger OnAction()
                begin
                    RunModal(22);
                end;
            }
            group(PromptGroup)
            {
                action(PromptAction1)
                {
                    trigger OnAction()
                    begin
                        Message('PromptAction1 pressed');
                    end;
                }
                action(PromptAction2)
                {
                    trigger OnAction()
                    begin
                        Message('PromptAction2 pressed');
                    end;
                }
            }
        }
    }
}

```

The example results in the user experience on the customer card shown in the following image.



The base application already uses Copilot prompt actions on cards—for example, on the Bank Reconciliation card where it provides multiple Copilot actions.



### 📘 Important

Update 25.0 includes a change in behavior for Copilot prompt actions on all page types. These actions are no longer hidden automatically for on-premises deployments, making it easier for developers to implement and test Copilot extensions before release. To ensure that your on-premises customers are unaffected, you must use the **Visible AL** property to dynamically hide actions for these customers.

## Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at [aka.ms/bclideas](https://aka.ms/bclideas), or join the partner discussion on the [Dynamics 365 Business Central Partner Community Network](#)

on [Viva Engage](#) (formerly Yammer) to help us shape the future of AI in Business Central.

---

## Feedback

Was this page helpful?

 Yes

 No

# Start creating Power Automate flows with Copilot

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Dec 2024	-

## Business value

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.

## Feature details

This feature integrates Copilot in Power Automate with Business Central so that you can start creating automation flows based on natural language. When such flows are opened in Power Automate for further refinement, you can take advantage of the Copilot experience in Power Automate.

Copilot in Power Automate allows open-ended and conversational experiences while authoring flows that use your Business Central data. You can ask questions and get assistance to improve and change those flows. Copilot stays with you in your flow and helps you build, set up, and run an automation on your behalf through a comfortable chat experience. Copilot takes your input and provides either documentation, links, or



answers in the Copilot chat pane. But most importantly, it makes changes to the structure of the flow based on your natural language description.

This feature helps you streamline business processes and improve productivity by shortening the path to automation.

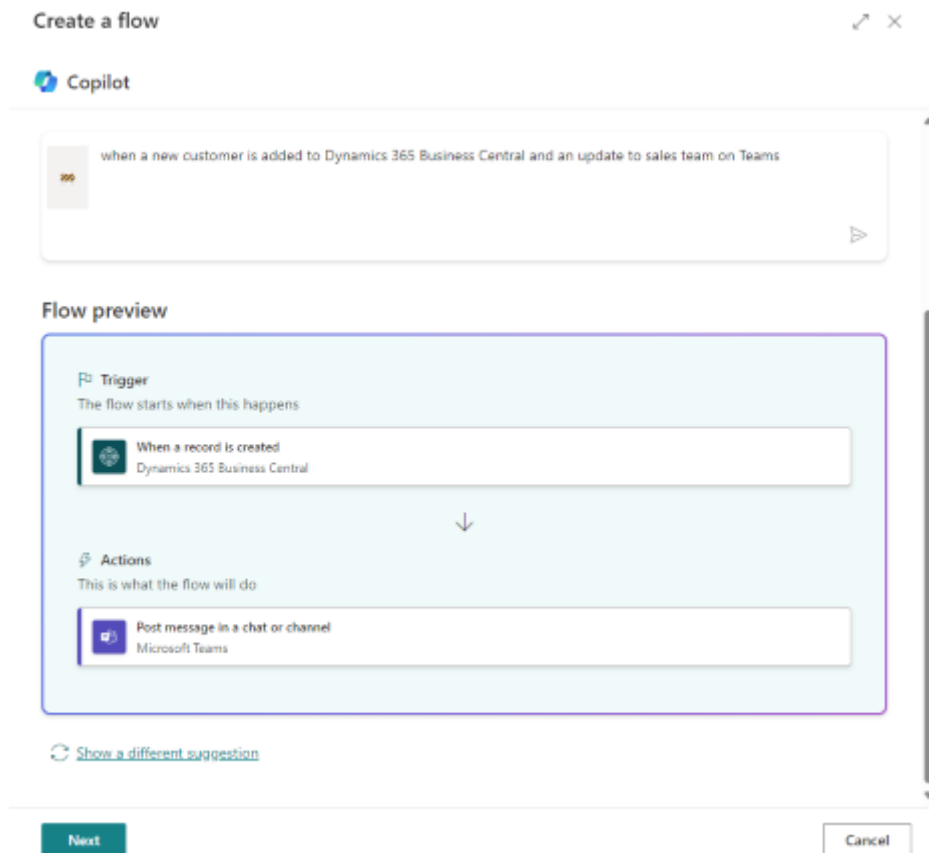
#### ⓘ Note

- This feature will be made available later in 2024 release wave 1 as a production-ready preview for production and sandbox environments based on the English language in the US region.
- Production-ready previews are subject to supplemental terms of use. For more information, see [Supplemental terms of use for Dynamics 365 preview](#) <sup>↗</sup>.
- While in preview, this feature is available in English only. When using other languages, users must change their language in the **My Settings** page to experience this feature.
- This feature needs to be enabled in **Feature Management**.
- AI-generated content may be incorrect.

## Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at [aka.ms/bclideas](https://aka.ms/bclideas) <sup>↗</sup>, or join the discussion on the [Dynamics 365 Business Central Development Viva Engage network](#) <sup>↗</sup> (formerly Yammer) to help us shape the future of AI in Business Central.



## Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- United States

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

Yes

No

# Start using Copilot without having to set things up

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

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.

## Feature details

Customers with environments deployed to the United States, United Kingdom, India, and Australia Azure regions continue to benefit from Microsoft Azure OpenAI Service availability in their own geography with no administrative setup for Microsoft Copilot in Business Central.

For all other geographies, the administrative setting on the **Copilot & AI Capabilities** page is now on by default.

- New environments of version 25.0 or later no longer require administrative setup, and users are immediately able to enjoy Copilot capabilities.
- Environments upgrading to version 25.0 in 2024 release wave 2 are automatically updated. The **Allow data movement** setting in the **Copilot & AI Capabilities** page

is switched on, and users will be able to access Copilot capabilities as soon as the environment is upgraded.

- Administrators can use this switch at any time to opt out of data movement across geographies, which deactivates Copilot for all users of that environment.

## Copilot & AI capabilities

---

Copilot uses the Azure OpenAI Service, which isn't available in your region. To keep using Copilot capabilities, you must allow data movement.

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

[In which region will my data be stored](#)

## Looking for more details?

[FAQ for Copilot data security and privacy for Dynamics 365 and Power Platform](#)

[Copilot data movement across geographies](#)

## Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at [aka.ms/bclideas](https://aka.ms/bclideas), or join the partner discussion on the [Dynamics 365 Business Central Partner Community Network on Viva Engage](#) (formerly Yammer) to help us shape the future of AI in Business Central.


## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa

- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

---

## Feedback

Was this page helpful?

# Suggest number series with Copilot

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Nov 2024	-

## Business value

Getting started fast on new implementations and recurring maintenance in Business Central setup saves companies time and money. Copilot can reduce the time it takes to set up number series and make their maintenance quick and easy. For example, when you need to update year or month-based numbering for many draft and posted documents in Business Central.

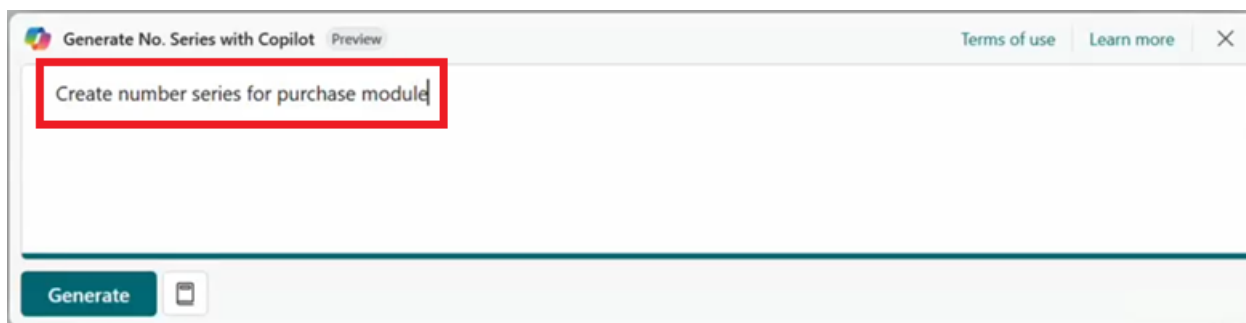
## Feature details

Copilot can help you create and update number series faster on the **No. Series** page. The **Generate** action opens the **Generate No. Series with Copilot** dialog, where you can enter a prompt to create new, or modify existing, number series.

## Number series setup creation

To help you write the prompt, the **Create new** action in the **Generate No. Series with Copilot** dialog provides sets of prompt guides that you can use as inspiration.

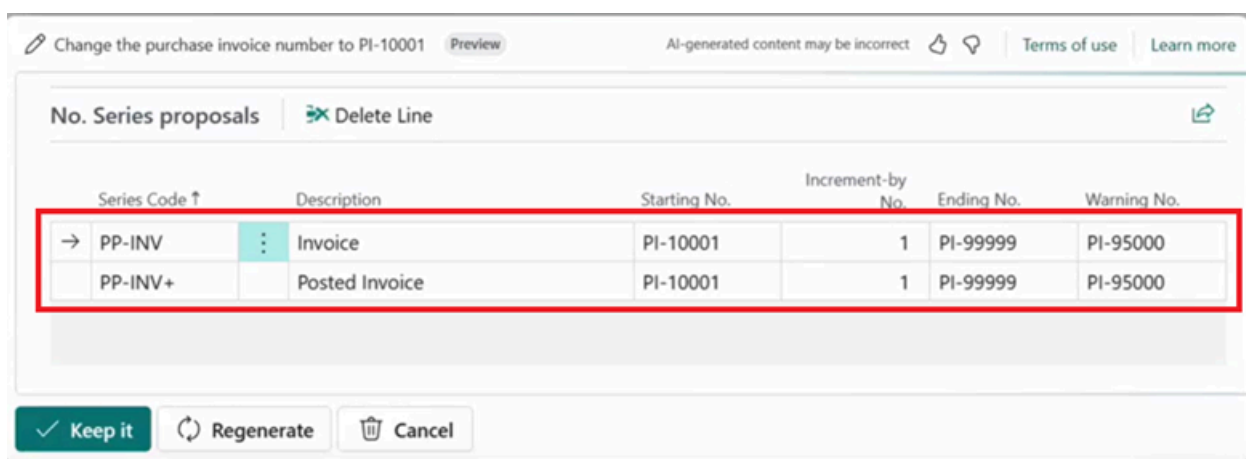
When you choose **Generate**, Copilot creates proposals for one or more number series, and you can review the proposals in the **No. Series Proposals** view. You can remove the proposals that you don't like, and edit the ones you do. When you're ready, you can choose **Keep it** to add or update a proposal. In addition, Copilot updates various setup pages with the number series you decided to keep.



## Number series updates

In the **Generate No. Series with Copilot** dialog, **Modify existing** offers sets of prompt guides to help you write a prompt to update an existing number series.

When you choose **Generate**, Copilot updates one or more number series proposals, and you can review the proposals in the **No. Series proposals** view. You can remove the proposals Copilot generated, and edit the ones you like. When you're ready, you can choose **Keep it** to add or update a proposal.



### ⓘ Note

- This feature is available as a production-ready preview for production and sandbox environments of any country localization. Production-ready previews are subject to supplemental terms of use. For more information, see [Supplemental terms of use for Dynamics 365 preview](#).
- This feature is supported in English only. While it can be used in other languages, it may not function as intended. Language quality may vary based on the user's interaction or system settings, which may impact accuracy and the user experience.
- AI-generated content may be incorrect.

# About security, privacy and AI

Copilot is built on Microsoft's comprehensive approach to enterprise security, privacy, compliance, and responsible AI. Our philosophy is that your data is your data: customer data in Business Central is not used to train AI models.

[Read the FAQ for Copilot data security and privacy for Dynamics 365 and Power Platform.](#)

## Join the conversation

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at [aka.ms/bcldeas](https://aka.ms/bcldeas), or join the partner discussion on the [Dynamics 365 Business Central Partner Community Network on Viva Engage](#) (formerly Yammer) to help us shape the future of AI in Business Central.

### ⓘ Note

We'd like to thank our community for making this valuable contribution through our BusinessCentralApps open-source repo on GitHub.

## Geographic areas


This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil



- Canada
- India
- Japan
- France
- Korea

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

---

## Feedback

Was this page helpful?

 Yes

 No

# Country and regional

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Business Central continues to become available to businesses in more countries and regions. This expansion happens largely through partner-led localizations. Our partners create and maintain apps for specific countries and regions, and publish their apps on AppSource. In combination with built-in language offerings, Business Central is available to serve customers in more than 170 countries and regions worldwide. Additionally, in the countries where Microsoft is responsible for the localization, we provide updates for all regulatory features.

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## Feedback

Was this page helpful?

 Yes

 No

# Advance letters with reverse charge - Czechia

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value


By eliminating the need to automatically post advance tax documents for reverse charge payments, businesses can streamline their processes, reduce administrative overhead, and enhance operational efficiency.

## Feature details

The new functionality allows you to post advances in accordance with the Czech VAT Act and not create tax documents for payments of advances or parts thereof under the reverse charge regime. This function can be set up in the **Advance Letter Templates**.

For advances with both normal VAT and reverse charge transactions, tax documents for payments will be posted only for the parts corresponding to normal transactions. Thus, only the parts of the document with normal transactions will be included in the **VAT statement** and the **VAT Control** report. The parts of the advances corresponding to the reverse charge will be posted to the final invoices in the standard way, that is, they will reduce the invoice balance but not the VAT value of the transaction.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

## See also

[Advance Payments Localization for Czech \(Extension\) \(docs\)](#)

---

## Feedback

Was this page helpful?

 Yes

 No

# Allocations functionality in Cash Desks - Czechia

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

To make data entry efficient and reduce errors for recurring types of posting, you can use allocations to predefine how to distribute revenue for transactions or cost amounts across G/L accounts and dimensions. You can use allocation keys on cash desk document lines.

## Feature details

You can use allocation keys to automate the distribution of revenue or cost transactions in journals, sales documents, purchase documents and newly created cash desk documents. Allocation keys can trigger automatic G/L entry postings and allocations across different accounts and dimensions.


For example, allocation keys can automate postings related to payroll overhead. When posting total salary expenses at the end of the month, you can use automatic account codes to assign a percentage of the total salary to automatically post as overhead expenses. Or, you can use headcount per department to distribute the cost to the department-related dimension.

You can define your allocation keys based on:

- Fixed amounts

- Variable amounts (balance, net change)
- Statistical accounts (non-financial quantities you track through the Statistical Accounts feature)

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

## See also

[Cash Desk localization for Czech \(extension\) \(docs\)](#)

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?

 Yes

 No

# Calculate and post VAT settlement by Activity Code - Italy

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Nov 2024

## Business value

Users can ensure full compliance with Italian tax regulations by calculating VAT settlements based on activity codes.

## Feature details


This feature allows users to configure various **Activity Codes**, such as trade or service, for use in **VAT Settlements**. When enabled, Business Central will support posting multiple VAT settlements within the same period, each associated with a different Activity Code. These activity codes will also be recorded in the **Periodic Settlement VAT Entry**. Once a VAT settlement for a specific period is posted, the system will automatically document the period in the corresponding Activity Codes, ensuring accurate and compliant reporting.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## See also

[Submit VAT Statements in the Italian Version - To settle and post VAT transactions \(docs\)](#)

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?

 **Yes**

 **No**



# Deferral accounting - posting the original amount as correction - Czechia

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

The deferrals functionality lets you automatically defer revenues and expenses over a specified schedule and multiple accounting periods, giving accountants more control over when people post deferrals. Deferral accounting in such a way that the derecognition of the original amount entered does not increase turnover.

## Feature details

You can define periods during which you allow people to post deferrals for specific users on the G/L Setup page, and for users on the User Setup page by entering dates in the Allow Deferral Posting From and Allow Deferral Posting To fields. This lets people post deferral entries in a future period, even though the Allow Posting From/To fields block other entries. Within this new Czech functionality, accrual accounting is implemented in order to avoid increasing the turnover by de-recognizing the originally entered amount.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## See also

[Defer revenues and expenses \(docs\)](#)

---

## Feedback

Was this page helpful?

Yes

No

# Enable additional countries and regions

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Feb 2025

## Business value

Business Central is available in more countries and regions, so more businesses around the world can leverage the benefits of its cloud-based business management features.

## Feature details

We're expanding the availability of Business Central to include more countries and regions through partner-led localizations. Our partners create the relevant localization apps and publish them to AppSource. In combination with the built-in language offerings, we're making Business Central online available to serve customers in more than 180 countries and regions worldwide.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

 Yes

 No

# Include employee transactions in exchange rate adjustment report - Czechia

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

You can use general journals for employee accounts to register employee expenses and reimbursement transactions in foreign currencies, and then easily track the amounts and compare them to receipts. The Czech version of the exchange rate adjustment report (31004) now allows you to include employee transactions.

## Feature details

When you use general journals to post transactions for employee accounts, such as when you reimburse expenses, you can use the Currency Code field to specify the currency for the transactions. Specifying a currency lets you use the same features as when you register transactions in the customer and vendor ledgers. For example, employees can register an expense in euros but get paid in dollars.

To ensure that the exchange rate for the amounts is up to date, you can adjust employee balances when you run the Czech version of a currency exchange rate batch job (Adjust Exchange Rates CZL (31004)). If you want to use the exchange rate table, but settle employee balances in your local currency, you can exclude employee accounts when you adjust exchange rates.

# Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## See also

[Exchange rates adjustment feature \(recalculation of receivables and payables\)](#) (docs)

ⓘ  **Note:** The author created this article with assistance from AI. [Learn more](#)

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## Feedback

Was this page helpful?

Yes

No

# Enable use of other currencies – Czechia

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Recent Czech legislation allows Czech companies to determine a functional currency and record their accounting in a currency other than Czech. It's now possible to use a foreign currency for corporate accounting and to use the Additional Currency Reporting functionality for other records and reports that must be in Czech currency.

## Feature details

The new amendment to Act No. 563/1991 Coll., on Accounting, effective from January 1, 2024, introduces the concept of functional currency as the currency of accounting. Functional currency means the currency of the primary economic environment in which the entity operates and may be other than the Czech currency. The functional currency of an entity can be determined on the basis of the criteria for determining the functional currency under IFRS as governed by European Union law.

If the company decides to implement accounting in a foreign currency, then for other records and reports that must be in Czech currency, it uses the Additional Reporting Currencies functionality for reporting. However, this only deals with the creation of material items and VAT items, but not with subsequent reporting. All VAT reporting must be done in Czech currency (CZK), so the reporting functionalities have been adapted as follows:

- Preview of the VAT statement

- VAT control report
- VAT control report statistics
- VIES Declaration
- Export of the VAT statement
- Export of VAT control report
- Export of the VIES Declaration
- Printing the VAT statement (Report 11769)
- Printing of the Recording Obligation (Basis for VAT) and List of Tax Documents (Report 11756)
- Test report of the VAT Control Report (Report 31103)
- Test report of the VIES Declaration (Report 31064)

New VAT rate to additional reporting currency (Document Currency/Additional Reporting Currency) fields have been added to the purchase and sales documents to allow the currency rate to be adjusted if necessary. Similar functionality has been added to purchase and sales advances. The printing of document reports has also been modified.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## See also

[Functional Currency – Czechia](#) (docs)

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?

 Yes

 No

# Improve VAT reporting and adjustments - Czechia

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

The addition of non-deductible VAT functionality for CZ legislation, specifically to support VAT reporting and accounting period-end posting coefficient.

## Feature details

The standard functionality non-deductible VAT allows you to reduce input VAT entries, add the amount of unclaimed VAT to the account or item entry. However, it doesn't cover all mandatory requirements of the Czech legislation, especially regarding VAT reporting and the posting coefficient at the end of the accounting period.

The value of the VAT reduction coefficient can be set for the whole company in one place. The value will be applied to all marked combinations of VAT posting groups. In addition to the input tax reduction through the shortening coefficient, it's also possible to set a 100 percent tax reduction in the VAT account group combination, that is, the case when there is no entitlement to apply VAT on the input side, but the output side (in the case of transactions under the reverse charge regime) has to report VAT in full.


The VAT reduction also applies to the VAT Report and the VAT Control Reports, which include the entire unreduced amounts. After the end of the calendar year, it's possible, on the basis of the calculated settlement coefficient, to recalculate all VAT entries from



the period and post the difference between the originally applied and the settlement coefficient.

This functionality extends the non-deductible VAT solution for the Czech Republic also with support for advance purchase invoices.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

## See also

[Non-deductible VAT for Czech \(docs\)](#)

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?

 Yes

 No

# Posting of alternative customer-vendor posting groups - Czechia

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Thanks to this modification, turnovers on customer or vendor balance accounts will not be increased and values will not be distorted during analyses.

## Feature details

If different customer or vendor posting groups are used on an invoice, credit note or payment document, then the G/L entries are automatically recharged between the accounts from each posting group when applying customer/vendor entries. The previous posting method for applying items increased the turnover on the debit and credit sides by the same amount.

This modification accounts for the balancing as a correction—that is, only one side of the debit or credit account is used for posting. This avoids increasing the turnover on the balance accounts and distorting the values in the analyses.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## See also

[Multiple payables/receivables accounts in the Czech version \(docs\)](#)

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?

 **Yes**

 **No**

# Sales advance from the project - Czechia

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Creating Sales advances from Project can save users time and effort by reducing the need to manually enter data. Sales advances can be created for the entire project or only for a project task.

## Feature details

The process improves productivity and efficiency by allowing you to quickly and easily create sales advances for the entire project or only for a project task.

The project number is entered in the sales advance invoice and the project task number is also entered in the advance line. This link between the project and the advance allows you to determine the amounts of the advances with a link to the project.

However, there won't be a linking (applying) of advances as with sales orders to ensure that the advance is automatically deducted when the invoice is created from the project. A factbox is added to the project card to show the number of advances created from the project and the amounts of advances total, to be paid and to be used.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## See also

[Advance Payments Localization for Czech \(Extension\) \(docs\)](#)

---

## Feedback

Was this page helpful?

Yes

No

# Show features with demo dataset for Czechia

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

To help partners demonstrate the capabilities of Business Central, we're making a demo tool that provides setup and data for Czech localization scenarios.

## Feature details

The demo dataset for the Czech localization adds country-specific content on top of the base application.

The Contoso Coffee app provides a demo tool and a related set of demo data. You can install the extension in any environment. Presales specialists can run the tool on Cronus or MyCompany and get the setup and demo data they need to demonstrate features for various scenarios in the Czech localization. For Business Central on-premises, the demo tool and data are available on the product media as source code.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## See also

[Show features with demo dataset for Czechia \(docs\)](#)

---

## Feedback

Was this page helpful?

Yes

No

# Start using E-Documents framework localized for Germany

Article • 09/25/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Nov 2024	Dec 2024

## Business value

This feature introduces electronic documents for receipts and invoices, which significantly enhances business efficiency by streamlining administrative processes and reducing operational costs. This feature minimizes manual data entry errors and accelerates transaction processing, allowing quicker and more accurate financial computation and tracking. Additionally, it reduces the need for physical storage space and paper usage, contributing to environment sustainability. The real-time access to electronic documents improves transparency and facilitates better decision-making, ultimately leading to increased productivity and customer satisfaction.


## Feature details

Users can use **E-Documents** framework localized for Germany, so users can work with **Peppol BIS3** or **XRechnung** electronic invoices formats.

They can choose to use one of existing Peppol service providers as communication channel via access points or exchange documents by uploading it manually or via e-mail.

## Tell us what you think



Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

## See also

[Map e-documents to purchase order lines with Copilot \(preview\) \(docs\)](#)

---

## Feedback

Was this page helpful?

 Yes

 No

# Start using integration with IRS for 1099 submissions

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Dec 2024	Jan 2025

## Business value

This feature introduces the IRS 1099 tax forms in the latest release for taxpayers and businesses. The feature integrates with the IRS and doesn't print 1099 Tax Forms on preprinted original IRS 1099 Tax Forms. Instead, Business Central submits 1099 Tax Forms through integration with the IRS and sends Copy B to vendors as Copy Substitutions printed on plain paper. This feature can guide you on setting up and reporting to the IRS.

## Feature details

Users can report *IRS 1099* forms directly to the IRS using API integration with IRS using the IRIS platform. This integration functionality will be based on a new 1099 feature that was delivered in 2024 release wave 1.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Thank you for your ideas

Thank you for submitting these ideas:

- [1099's on blank paper](#) ↗
- [1099 update as an extension instead of incorporating in version upgrades](#) ↗
- [1099 Print to Blank paper](#) ↗
- [1099 Forms - print without using IRS preprinted forms](#) ↗
- [Adjust 1099 Annual Cumulative Amounts by Vendor](#) ↗
- [Add ability to have DBA name and legal name so IRS 1099 vendor reports are legal.](#) ↗
- [1099 Improvements](#) ↗

We listened to your ideas, along with comments and votes, to help us decide what to add to our product roadmap.

## See also

[Set up the IRS 1099 forms \(docs\)](#)

---

## Feedback

Was this page helpful?

# VAT Return feature now available - Czechia

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Nov 2024

## Business value

The standard VAT Return feature can now be used to submit a VAT return in compliance with Czech law.

## Feature details

Previously, the VAT Statement feature was used for VAT returns in the Czech version of Business Central. We've now added the option to use the standard VAT Return feature in Business Central. The VAT return is generated and submitted to the "Moje daně" portal. The lines on the VAT return are created based on the settings in the VAT statement. The system verifies if a regular VAT return has already been created for the period. However, since there can be multiple corrective and additional returns for a given period, this is not checked. This feature allows the VAT return to be saved, providing the user with immediate access to it in the system for future reference.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## See also

[Report VAT to tax authorities \(docs\)](#)

---

## Feedback

Was this page helpful?

Yes

No

# Development

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

To empower AL developers and increase their productivity, we've laid the foundation for introducing namespace support in the platform and application. Namespace support makes it easier to structure apps, create better object names, and avoid identifier clashes. As apps mature, the need to refactor is inevitable, so we've added the ability to move ownership of a table and its data between extensions. Additionally, developers can hide specific variable data so that other parties can't access it during debugging, which protects internal data.

When it comes to data analysis and reporting, developers have more control. For example, you can turn off Analysis Mode on pages and specify how to embed content from Power BI.

Consultants and developers can easily open Visual Studio Code for a production or sandbox environment to investigate and understand objects across installed extensions, view code for owned extensions, and perform troubleshooting—all without having to set up Visual Studio Code manually. Similarly, we've improved profiling from the client and Visual Studio Code so it's easier to find database-related performance issues.

AppSource publishers can sell through CSPs, and better handling for AppSource runtime packages gives seamless development and troubleshooting across app dependencies for publishers and resellers.

---

## Feedback

Was this page helpful?

 Yes

 No

# Extend AL interfaces

Article • 08/16/2024

## 📘 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](#)). Learn more: [What's new and planned](#)

🔍 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

## Business value

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.

## Feature details

You can now extend one or more existing interfaces when you declare an interface. When implementing an interface that extends other interfaces, the implementor must also implement all methods from all extended interfaces.

The feature also works with the testing and casting operators `is` and `as`, which are also new additions to the AL language in this release.

The syntax is shown in example below. Here, `TheImplementor` can be used as both `IFoo`, `IBar`, and `IFooBar`.

```
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
}
```

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?



# Extend and customize profiles from other extensions

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

## Business value

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.

## Feature details

With this feature, you can now create profile extension objects in your AL code. They can be used to modify the target profile's caption, role center, or even include/remove it from the role explorer. It's also possible to add page customizations to a specified profile.

In addition to the language support, additional coverage in IntelliSense, AL Explorer, and analyzer rules have been added.

The following code example shows a profile extension:

```
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  }
```

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

# Package resources in extensions and access from AL

Article • 08/26/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Dec 2024	Dec 2024

## Business value

Features often 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.

## Feature details

Developers will be able to package resources in extensions and access the content of these resources from within AL code. This can be used to ship data for setup and initialization features (for example, for RapidStart packages, demo data, templates, and more), thereby avoiding having to use labels or codeunits for this purpose.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?



Yes



No

# Pull extension source from GitHub when opening Visual Studio Code from web client

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

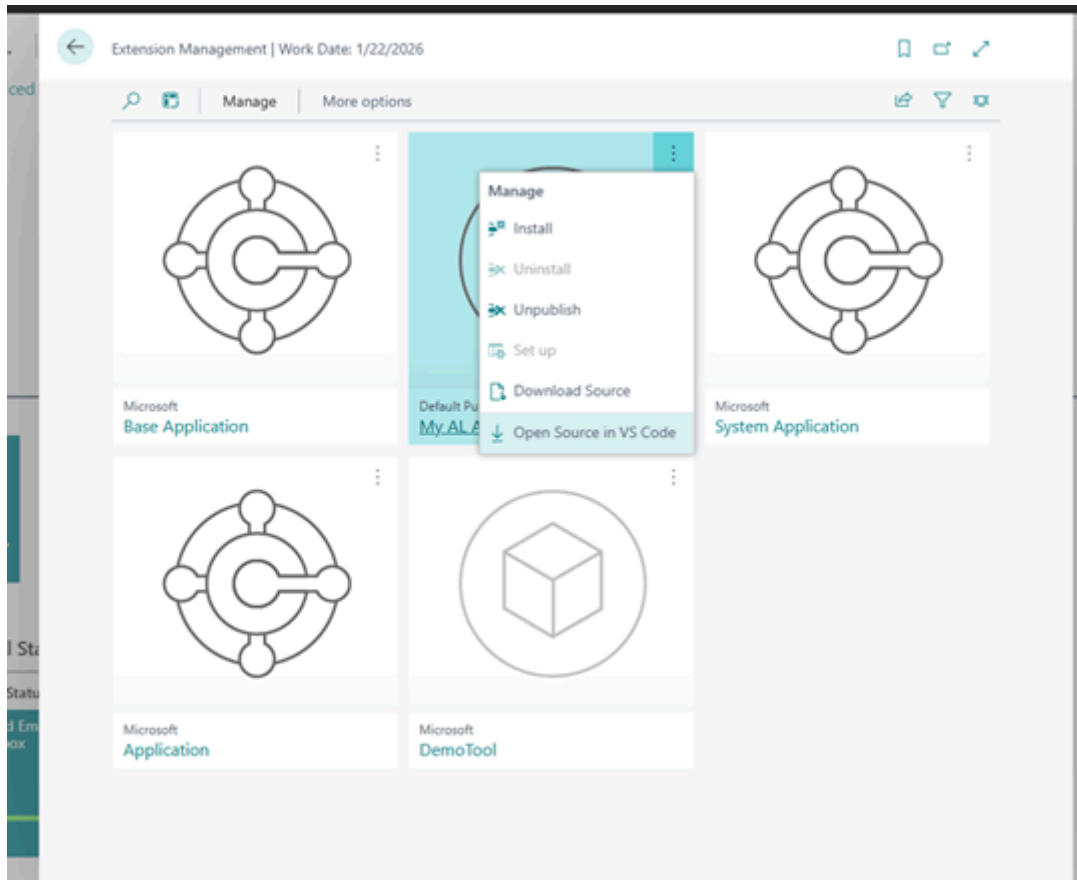
## Business value

A year ago, you got the power to open a Visual Studio Code project from within the web client. This removed 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 the 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.

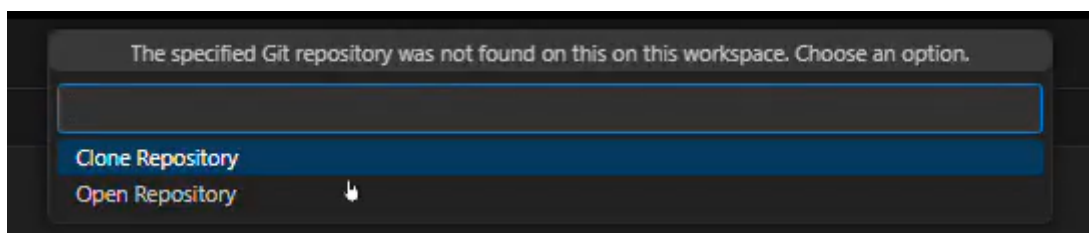
## Feature details

In this release, we're building on the recent "Explore in Visual Studio Code" feature by using the source and build metadata in the manifest of an extension to offer pulling source from the related GitHub repository and from a specific build. This allows navigating code for the extensions that you have source access to and allows you to hotfix a given build or sync to get the latest changes for investigation or development.

From the **Extension Management** list page, you now have a new **Open Source in VS Code** option in the context menu for an extension.



If you invoke that, Visual Studio Code will open and ask you whether to clone or open the GitHub repo for the extension. It will use the repo metadata that was included in the extension when it was built.



You can read more about the source and build metadata in the app.json file here:

- [Track source and build metadata on extensions](#)
- [JSON files](#)

---

## Feedback

Was this page helpful?

# Remove friction when working with external app dependencies

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

## Business value

Resellers who develop per-tenant extensions for customers and publishers who create AppSource apps commonly build on the work of other publishers, and thereby take a dependency on these. 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 emerge, making the process time-consuming and error-prone.

In this version we plan to unblock developing and compiling against external applications and test in online sandboxes.

## Feature details

In this release we add support for resellers and publishers to download symbols for AppSource applications to develop against, providing a public NuGet feed with packages containing symbols for AppSource applications. If you are using AL-Go for

GitHub, then it will automatically locate and download these symbols during the build. You can also take advantage of AL-Go for GitHub to run tests in online sandboxes.

---

## Feedback

Was this page helpful?

 Yes

 No



# Restore extensions if publishing from Visual Studio Code fails

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

## Business value

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.

## Feature details

When deploying an extension from Visual Studio Code, which is part of a graph of installed extensions on the target environment, first-level dependent extensions are uninstalled and unpublished in order to be recompiled once the extension has been deployed. However, if the deployment from Visual Studio Code fails (for example, due to a compilation issue on the server), the server is left with an incomplete graph of installed extensions. This results in unnecessary manual work to redeploy the previously installed extensions in the correct order. With this release, Visual Studio Code now tries to restore the previous extension state, removing the need for manual work in most cases.

## Tell us what you think

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---

## Feedback

Was this page helpful?

 Yes

 No

# Run code action for 'with' for file, project, or workspace

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

## Business value

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.

## Feature details

Previously, we added generic support for running code actions on the active document, active project, or the complete workspace. This has been adopted by code actions, which are used for converting uses of ApplicationArea or tooltips. In this release, the code action to convert the usage of `with` can now be run on the entire document, the active project, as well as the complete workspace level. This makes it much more productive to convert the usage of `with` statements in existing code to use explicit records.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> ↗.

---

## Feedback

Was this page helpful?

 Yes

 No

# Set up easier in-client performance profiling with rules

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Oct 2024

## Business value

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.

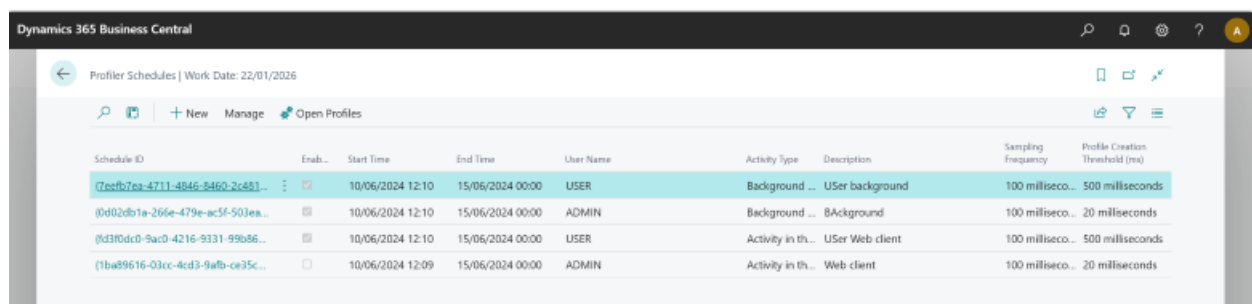
## Feature details

In addition to the existing interactive way of capturing a performance profile - by starting the profile, performing repro steps in the client, stopping the profiler and then

analyzing the results - a new rule-based scheduling mode for capturing profiles in the background is added.

With this, a customer admin, consultant, support person or developer can set up a specific scheduled rule, for example, to profile as a given user and session type for a given duration. Once the rule is defined and enabled, the server will trigger a profile each time the rule is met. At the end of the duration, profiling will stop, and the results can be inspected to see if there are any performance issues, including intermittent or long running ones.

To create a new profile rule schedule, open the **Profiler Schedules** page. This lists the defined schedules, and the additional schedule details. From here, you can create a new schedule.

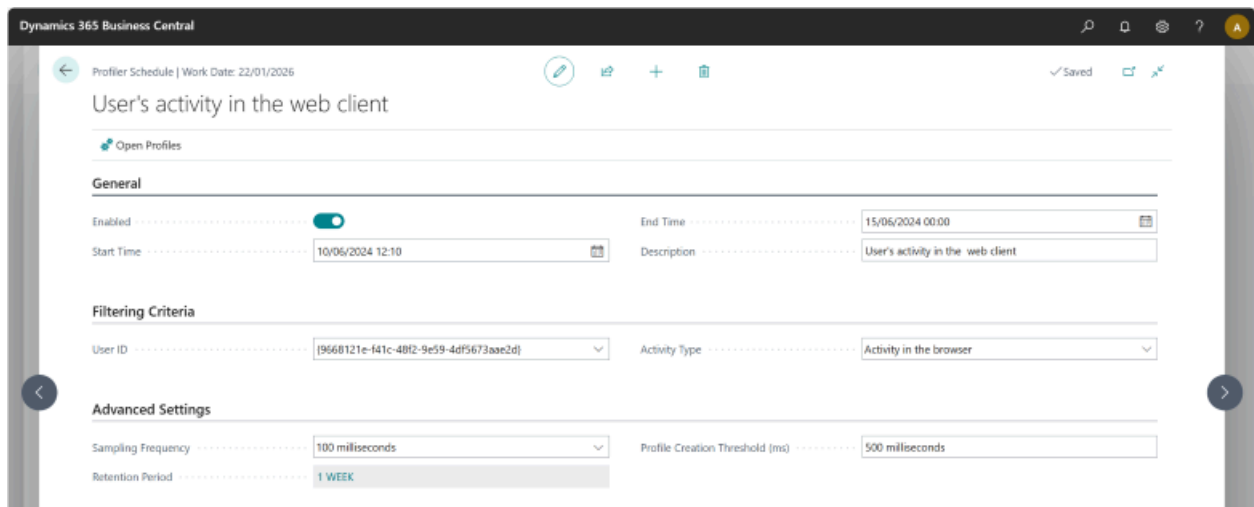


Schedule ID	Enab...	Start Time	End Time	User Name	Activity Type	Description	Sampling Frequency	Profile Creation Threshold (ms)
(7cedfb7ea-4711-4846-8460-2c483...	<input checked="" type="checkbox"/>	10/06/2024 12:10	15/06/2024 00:00	USER	Background ...	User background	100 milliseco...	500 milliseconds
(0d02db1a-266e-479e-ac5f-503ea...	<input type="checkbox"/>	10/06/2024 12:10	15/06/2024 00:00	ADMIN	Background ...	BBackground	100 milliseco...	20 milliseconds
(8d3f0dc0-9ac0-4216-9331-990b6...	<input type="checkbox"/>	10/06/2024 12:10	15/06/2024 00:00	USER	Activity in th...	User Web client	100 milliseco...	500 milliseconds
(1ba89616-03cc-4cd3-9afb-ce35c...	<input type="checkbox"/>	10/06/2024 12:09	15/06/2024 00:00	ADMIN	Activity in th...	Web client	100 milliseco...	20 milliseconds

When creating a new profile capture schedule, you can define a number of rules and settings:

- Enabled: Allows you to enable or disable the defined schedule.
- Start and End Time: Sets the duration in schedule is active and can trigger profile captures.
- Description: Add your own description of the profile schedule.
- User ID: Choose whether the scheduling only captures profiles for a specific user.
- Activity Type: Select the kind of activity that will trigger capturing profiles. It can be background tasks, or activity in the browser (such as opening a page).
- Sampling frequency: Choose the sampling frequency used when capturing profiles. You can select the same options as in the existing interactive in-client performance profiler, or AL profiler in Visual Studio Code.
- Profile creation threshold: Specify the minimum duration of the profile for it to be saved.
- Retention period: Specify how long captured profiles for this schedule should be kept.

The following example shows how you can set up a schedule for capturing profiles for a specific users browser activity during 5 days.



Once profile schedules have been defined, enabled, and run, you can view all the captured profiles in the **Performance Profiles** list page, and open a selected profile for detailed analysis, similar to what's known from the in-client performance profiler.

The screenshot shows the 'Performance Profiles' list page in Dynamics 365 Business Central for 'CRONUS International Ltd.'. The table lists various activities with their start times, activity types, descriptions, objects, and durations.

Start Time	Activity Type	Activity Description	Object	Activity Duration
10/06/2024 12:21	Activity in the browser	GetMetadataForPageAndAllItsDependencies PageId: 9305	CodeUnit UI Helper Triggers	798 milliseconds
10/06/2024 12:22	Activity in the browser	GetMetadataForPageAndAllItsDependencies PageId: 42	CodeUnit UI Helper Triggers	1 second 279 milliseconds
10/06/2024 12:24	Activity in the browser	OpenForm Controls: 478543505 FormId: 9087	Page Sales Line FactBox	1 second 515 milliseconds
10/06/2024 12:30	Activity in the browser	GetPage TableId: 36 FormId: 42 ParentFormId: 0	Page Sales Order	665 milliseconds
10/06/2024 12:36	Activity in the browser	GetMetadataForPageAndAllItsDependencies PageId: 672	Page Job Queue Entries	262 milliseconds
10/06/2024 12:36	Activity in the browser	GetMetadataForPageAndAllItsDependencies PageId: 673	Page Job Queue Entry Card	29 milliseconds
10/06/2024 12:36	Activity in the browser	ActionField ControlId: 1597295592 ControlEventId: 1597295592 FieldId: 0 TableId: 472 FormId: 673 ParentFormId: 0	Page Job Queue Entry Card	110 milliseconds
10/06/2024 12:37	Activity in the browser	ActionField ControlId: 1597295592 ControlEventId: 1597295592 FieldId: 0 TableId: 472 FormId: 673 ParentFormId: 0	Page Job Queue Entry Card	24 milliseconds
10/06/2024 12:37	Activity in the browser	InsertRecord TableId: 472 FormId: 673 ParentFormId: 0	Table Job Queue Entry	140 milliseconds
10/06/2024 12:53	Activity in the browser	OpenCompany	CodeUnit Company Triggers	28 milliseconds
10/06/2024 16:26	Background Tasks	TaskId=51bcd50d-527a-464d-a5d2-30d19833ad79, Type=Codeunit, Attempt=0, Run main codeunit=448	CodeUnit Company Triggers	3 seconds 722 milliseconds
10/06/2024 16:29	Background Tasks	TaskId=dfccbb7b-f78d-44e5-9793-7ca3c6aee1a, Type=Codeunit, Attempt=0, Run main codeunit=448	CodeUnit Job Queue Dispatcher	241 milliseconds
10/06/2024 16:32	Background Tasks	TaskId=652a1ad6-d9b9-4eaf-98bb-74702fa3a31, Type=Codeunit, Attempt=0, Run main codeunit=448	CodeUnit Job Queue Dispatcher	239 milliseconds

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## Feedback

Was this page helpful?

# Specify and use full-text search indexes on table fields

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Oct 2024

## Business value

With the new full-text search metadata on table fields, AL developers can significantly enhance data search features, making them easier and faster for users. This feature improves user satisfaction and productivity by providing more precise and relevant search results.

## Feature details

As an AL developer, you can now specify which table fields are included in full-text search indexes on the database. By doing this, the following search features will be faster and provide better search capabilities:

- Companywide search (data search)
- List page search
- Lookup search

To specify full-text search, you set the `OptimizeForTextSearch` property on fields in tables or table extensions.

In AL code, you can also use a new `&&` filter syntax in the `SetFilter()` method. For example:



AL

```
FieldRef.SetFilter('&&' + SearchString + '*')
```

The new syntax supports a subset of SQL Server's `CONTAINS` operator.

You can also use new `OptimizedForTextSearch` property on the Field virtual table and `IsOptimizedForTextSearch` on variables of the FieldRef data type.

---

## Feedback

Was this page helpful?

 Yes

 No

# Type testing and casting operators for interfaces

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

## Business value

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.

## Feature details

In this version, we introduce support for casting between AL interfaces. Given an interface A, you can cast it to the interface B if the underlying object (only codeunit for now) implements B. Two new operators, 'is' and 'as', are added to facilitate these operations.

The `is` operator

The `is` operator allows you to test whether an instance of an interface, or the content of a variant supports a specific interface. Here's the syntax for using the `is` keyword:

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

You can also use the `is` operator with variants:

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

The `as` operator

The `as` operator is used for casting an instance of an interface to a specific interface. If the source interface doesn't implement the target interface, it will throw an error at runtime. Here's an example:

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

Similarly, the `as` keyword works with variants:

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

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

# Use improved features for document reports

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

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.

## Feature details

You use report documents in Business Central when you need to send a document such as a quote, order, or invoice to your customers or suppliers. The following sections list improvements that are available in this release.

### Word layouts

The following improvements are available for the Word layout feature:

- You can use sections in Word layouts even when the report uses the [WordMergeDataItem](#) property in AL code. This improvement unlocks the ability to change layout properties, such as margins, orientation (portrait or landscape), or columns inside your Word layout. Additionally, you can use different watermarks for different parts of the layout. Learn more at [Using sections in a Word layout](#).

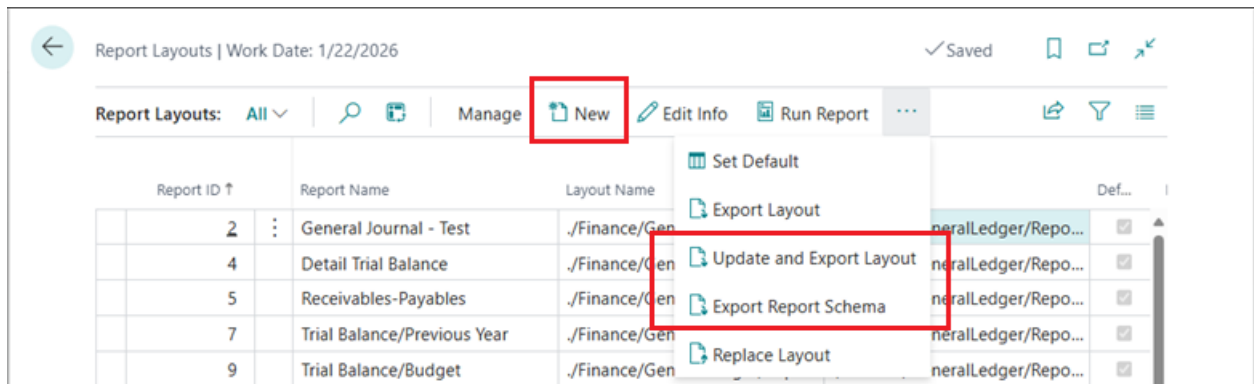
- A new Word add-in lets you control the conditional visibility of text, tables, or table rows/columns.
- New “themeable” layouts are included for the following document reports: Draft Invoice, Sales Quote/Confirmation/Invoice/Credit Memo/Shipment, Return Shipment, and Purchase Order.

These layouts allow you to change the report’s look and feel (including colors, fonts, and styles) directly in Word by simply changing the **Office Theme** from the **Design** tab.

## Report layout page

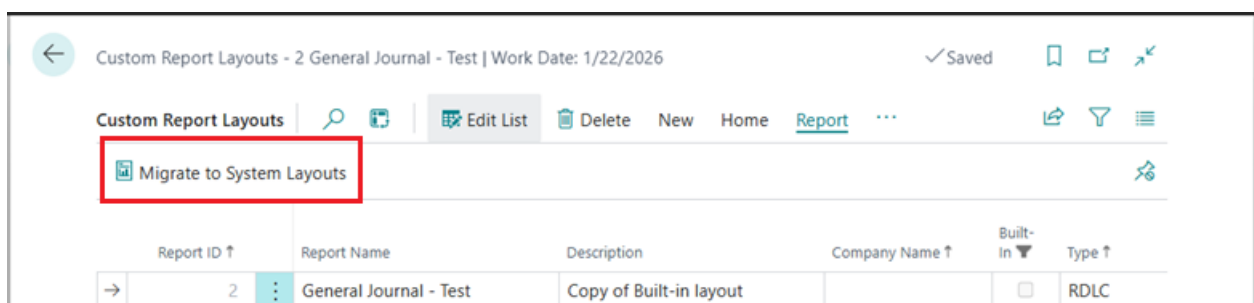
From the **Report Layouts** page, you can now do the following:

- Export a report schema as a Microsoft Word Custom XML file. This file makes it easier to convert an RDL layout or a customer-supplied Word file into a Word layout for a report.
- Update a layout with the latest report dataset definition.
- Create a new blank Word layout for any report.



## Custom report layouts page

From the **Custom Report Layouts** page, you can now migrate layouts to the new system table for layouts, so that the layouts will appear on the **Report Layouts** page.



# Visual Studio Code

In Visual Studio Code, we added a code snippet for report (and query) `DataLinkItem` to make developers more productive when creating report objects.

---

## Feedback

Was this page helpful?

 Yes

 No

# Use the 'this' keyword for codeunit self reference

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

## Business value

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.

## Feature details

We have added support for the `this` keyword for self-reference on all objects, as known from other programming languages.

The main benefits of using the `this` keyword are that it:

- Allows codeunits to pass a reference to this (which is itself) as an argument to another method.
- Improves readability by signaling that a referenced symbol is a member on the object itself.

A new CodeCop rule AA0248 is added and enabled by default with severity "hidden." "Hidden" means that it shows up as three dots in the editor, but not as a diagnostics in

the **Problem** view in Visual Studio Code, or in pipelines. There's also a workspace-wide CodeFixer to update existing code to use the `this` keyword.

The System Application is converted to use `this` for referencing methods and globals in the same object.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

 Yes

 No



# Use the ternary operator when coding in the AL language

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

## Business value

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.

## Feature details

The ternary operator `?:` can now be used to assign one of two values to a variable, depending on the condition of an expression.

Here's an example of using if-then-else as until now and the new ternary operator.

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

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

Yes

No

# Governance and administration

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

We're giving Business Central administrators more tools for managing environments, apps, and data migrations. The goal is for administrators to be self-sufficient, able to solve their customer needs, and handle a wide variety of administrative scenarios.

- More granular administrator roles to give more control over the access granted to (delegated) administrators.
- Improved processes for minor update releases.
- The ability to link Business Central and Power Platform environments to set up integrations consistently and to apply Power Platform environment settings to Business Central.
- The ability to cancel Cloud Migration replication runs.

---

## Feedback

Was this page helpful?

 Yes

 No

# Encrypt data at-rest with customer-managed encryption key

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

This capability will allow customers to meet their data and privacy policy according to the standard privacy guidelines.

## Feature details

With Dynamics 365 Business Central 2024 release wave 1, customers will gain the ability to encrypt their environment database using their own encryption key. This feature, also known as a customer-managed key (CMK), provides enhanced data protection and compliance for your business data. With CMK, you can use your own Azure Key Vault key to protect and control access to the key that encrypts your environment database. This gives you more flexibility and control over your encryption keys, such as the ability to rotate, revoke, or restore them.

This feature will be administered in the Power Platform admin center, and will require the Business Central environment to be linked to a Power Platform environment. Enabling CMK on a Power Platform environment linked to a Business Central environment will apply the same CMK policy on the Power Platform and Business Central environments.

# Feedback

Was this page helpful?

# Get external notifications when job queue entries fail

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2024	-

## Business value

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 job queue 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 about the issue can help you react quickly to resolve it.

## Feature details

To be notified about issues with job queue processing, start by running the **Set up Job Queue Notifications** assisted setup guide from the **Assisted Setup** page. The guide will help you set up your notifications. Follow the steps as described in the [Get notified about issues with job queue background processing](#) release plan.

Choose **Next** on the second step to specify how to send notifications. In addition to **In-product notifications**, you can choose to manage your notifications through external business events by turning on the **Control notifications with business events (preview)** toggle.

## Set Up Job Queue notifications



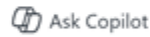
How do you want to notify users?

In-product notifications

Control notifications with busin...

Control notifications with business events (preview)

Specifies if the external business event will be enabled. ications.



Back

Next

Finish

On the fourth step, choose **Next** to complete the guide to set up a Power Automate flow that sends notifications when the Job Queue Failed external business event is sent.

## Set Up Job Queue notifications



The Job Queue notification setup is complete.

To enable notifications using Power Automate:

[Create an automated flow from Job Queue Notification template.](#)

Choose Finish to apply the setup and complete the guide.

Back

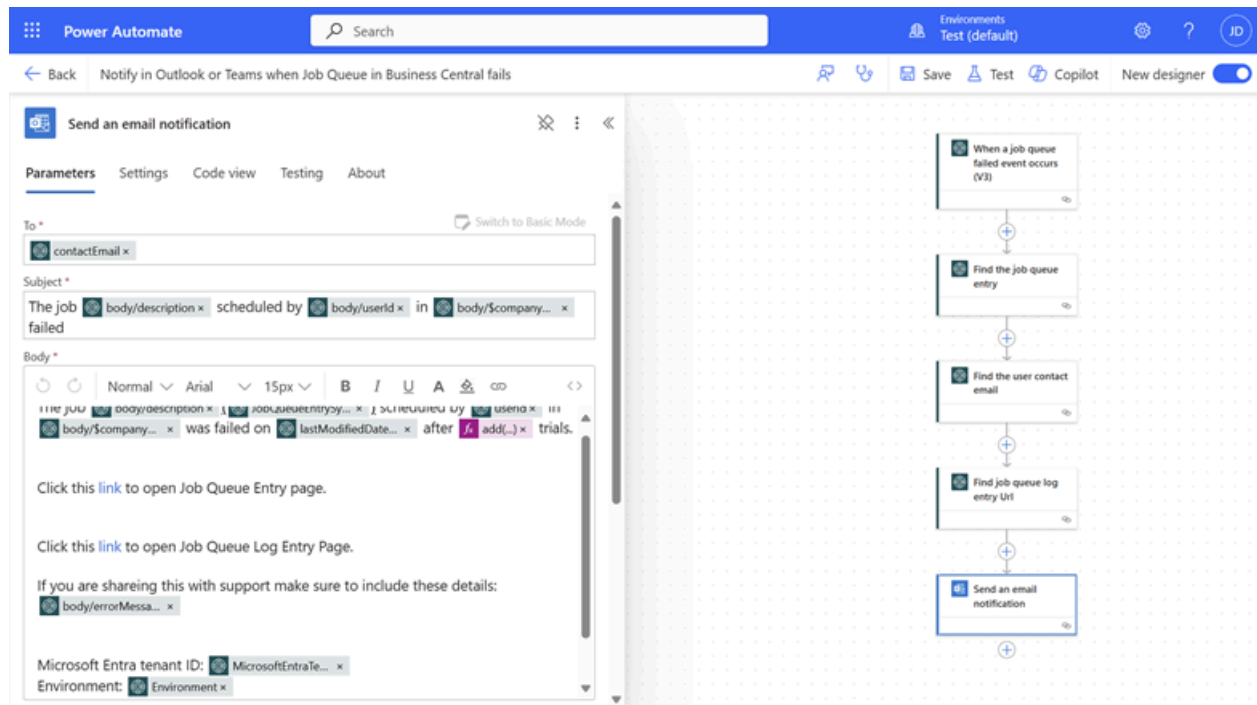
Next

Finish

Choose **Create an automated flow from Job Queue Notification template** to open the **Job Queue Entries** page. On the **Job Queue Entries** page, choose **Automate, Power**

Automate, and then **Create automated flow** to open the **Create a flow** page. The **Create a flow** page contains a **Notify on Outlook or Teams when Job Queue in Business Central fails** template.

On the **Create a flow** page, set up connections to Business Central, Outlook, and Teams, or any combination of the apps. Choose **Next** to set parameters for the flow, or choose **Edit in advanced mode** to edit the flow that's created based on the template to fit your needs.



To apply the notification settings, choose **Finish**.

## Feedback

Was this page helpful?

Yes

No



# Get in-product notifications about issues with job queue background processing

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

[Expand table](#)

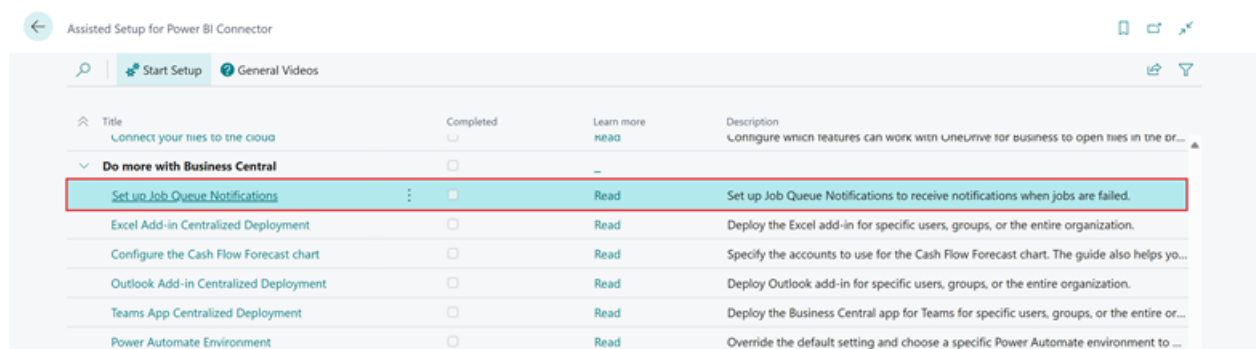
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

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 in product of the issue can help you react quickly to resolve it.

## Feature details

To be notified when there are issues with job queue processing, you can run the **Set up Job Queue Notifications** assisted setup guide from the **Assisted Setup** page.



Choose **Next** on the first step of the **Set up Job Queue Notifications** guide to set up the users to notify about issues with job queue entries. You can choose whether to notify the user who started the job queue entry by turning on the **Notify the user who initiates background task** toggle. You can also choose to notify job queue notification administrators by turning on the **Job Queue Administrators** toggle and choosing users in the list.

**Set Up Job Queue notifications**

Who should be notified about Job Queue status changes?

Notify the user who initiates b...

Job Queue Administrators

Job Queue Admin List ▾

	User Name ↑	
→	JIMOLIVE	⋮

Back Next Finish

Choose **Next** on the second step to specify how to send notifications. You can choose whether to use in-product notifications on home pages by turning on the **In-product notifications** toggle.

## Set Up Job Queue notifications



### Choose the type of notification

In-product notifications

Notify using Power Automate F...

**NOTE:** To use Power Automate you must enable Virtual tables and Business Events in DataVerse.

[Set up connection to Dataverse](#)

*Virtual tables and Business Events are disabled.*

Refresh

Back

Next

Finish

### ⓘ Note

You can also use external Business Events to control notifications using, for example, Power Automate, when virtual tables and events are enabled in your Dataverse connection setup. Because the external Business Events feature is still in preview, a separate release plan explains how to set up and use this feature. This release plan focuses only on in-product notifications of issues with job queue entries.

Choose **Next** on the third step of the **Set up Job Queue Notifications** guide to specify when to send notifications if a job queue entry has an issue. You can choose to notify users immediately with in-product notifications on their home pages by turning on the **Immediately, per job queue** toggle or, to reduce the noise, you can choose to notify users when failure thresholds are exceeded by turning on the **After a threshold is reached** toggle. Use the **Threshold 1** and **Threshold 2** fields to define how many times a job queue entry must fail before notifying a user.

## Set Up Job Queue notifications



For the in-product notifications, when should notifications appear?

Immediately, per job queue	<input checked="" type="checkbox"/>
After a threshold is reached	<input checked="" type="checkbox"/>
Threshold 1	<input type="text" value="3"/>
Threshold 2	<input type="text" value="5"/>

Back

Next

Finish

Choose **Next** on the fourth step to complete the guide and **Finish** to apply the notification settings.

After the guide completes, if you chose **Notify the user who initiates background task**, the notification is enabled for all users on the **My notifications** page. If a user doesn't want to receive these notifications, they can turn off **Job Queue Failed Notification** on the page.

## My Notifications



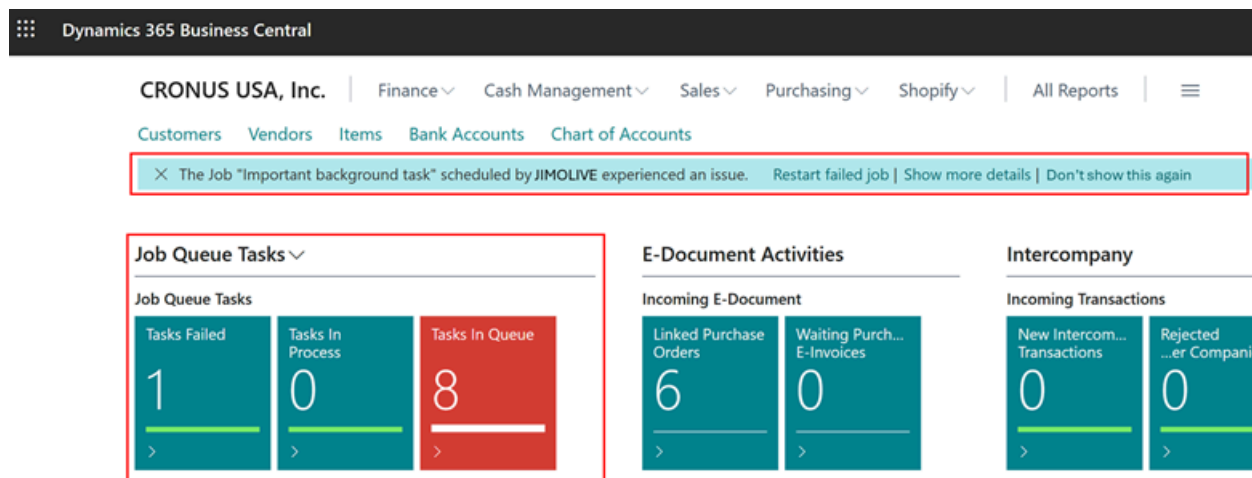
Edit List



Notification	Enabled	Conditions
Assembly BOM availability is low.	<input checked="" type="checkbox"/>	(View filter details)
You can get the payment prediction updated auto...	<input checked="" type="checkbox"/>	-
Notify the user of Image Analysis capabilities whe...	<input checked="" type="checkbox"/>	-
Update Pay-to Vendor Address	<input checked="" type="checkbox"/>	-
→ Job Queue Failed Notification	<input checked="" type="checkbox"/>	-
Item availability is low.	<input checked="" type="checkbox"/>	(View filter details)
Original System permission set changed	<input checked="" type="checkbox"/>	-

In-product notifications also let you perform actions. You can turn off the notification by choosing **Don't show this again**. You can also choose **Restart failed job** to try to start the job queue entry again, or view more details about the issue by choosing **Show more**

details. Choosing **Show more details** opens the job queue entry's **Job Queue Log Entries** page, which contains the error message that caused the job queue entry to fail.



User home pages contain three new cues that inform them of the current state of the job queue entries they started:

- **Tasks Failed** shows the number of job queue entries that failed.
- **Tasks In Process** shows the number of job queue entries that are in progress.
- **Tasks in Queue** shows the number of job queue entries that are waiting to start.

Each user can further [set up the visual appearance](#) of these cues by choosing the **Set up cues** action in the **Job Queue Tasks** part of the home page. The **Set up Job Queue Notifications** guide only sets **Tasks failed** thresholds.

#### ⓘ Note

The users listed as job queue notification administrators can view the job queue entry failures for all users.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Feedback

Was this page helpful?

Yes

No

# Get list of manageable environments for Microsoft Entra apps

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Dec 2024

## Business value

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.

## Feature details

Partners increasingly automate administrative tasks on their customer environments by authorizing their multitenant Microsoft Entra app in their customers' admin center. As the number of customers per partner and partners per customer grows, and with the environment-level access controls introduced for partners in 2024 wave 1, the overhead of manually keeping lists of manageable environments per Microsoft Entra app is increasing. So is the demand to automate repetitive tasks, like updating installed apps.

A new API endpoint for Microsoft Entra apps returns a complete list of all environments in all tenants that are manageable by the Microsoft Entra app. This will make it easier for partners to automate administrative tasks across all their customers' environments.

# Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

 Yes

 No

# Manage environment updates more flexibly

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Mar 2025

## Business value

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.

## Feature details

Previously, relatively rigid update policies were in place for major and minor updates. This release introduces the following changes for much more flexibility:

- **Five-month update periods for major updates:** This change gives more time for thorough testing and preparation before implementing the update. Resellers can spread the workload of updating all customer environments over the entire calendar year to avoid peak periods for major updates. Developers have more time to ensure all apps are compatible with the update, and customers with specific testing and preparation requirements have more time to comply with those requirements.
- **Optional minor updates:** This change allows administrators to choose when and whether to implement minor updates based on their needs and schedule. The default behavior of environments receiving updates every month doesn't change.



Instead, a new environment-level setting makes it possible to opt out of monthly minor updates.

As part of these changes, the grace period after the update period for the next major update shortened to one month. As before, the update will run and can't be postponed to a later date during this grace period. The update will be forced by uninstalling incompatible extensions once the grace period ends.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

Yes

No

# Manage per-tenant extensions in admin center

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Dec 2024

## Business value

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.

## Feature details

In this release, we're introducing a new feature that lets Business Central administrators manage PTEs from the Business Central admin center and its API, similar to how AppSource apps can be managed today. This feature saves time and effort because admins can manage PTEs across different environments and tenants without having to go to the client of each environment.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?



Yes



No

# Migrate record links and notes with cloud migration tooling

Article • 09/05/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Nov 2024

## Business value

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. The feature saves valuable time and reduces the risks of error with manual data transfer.

## Feature details

Previously, the record links and notes were not automatically migrated to the online tenant as part of the cloud migration process. Instead, you had to use manual means to move the data. Now, the cloud migration setup and replication tooling will automatically migrate the links and notes on records for you with minimal work on your part.

Item Card

1928-S · AMSTERDAM Lamp

Home | Request Approval | Item | Prices & Discounts | More options

Copy Item | Adjust Inventory | Create Stockkeeping Unit | Apply Template

**Item** Show more

No.	1928-S	Base Unit of M...	PCS
Description	AMSTERDAM Lamp	Item Category ...	MISC
Blocked	<input type="checkbox"/>	Variant Manda...	Default (No)
Type	Inventory	Manufacturer ...	

**Inventory** Show more

Shelf No.		Qty. on Sales ...	37
Quantity on H...	8	Stockout Warn...	Default (yes)

**Details** | **Attachments (2)**

**Attachments**

Documents 0

**Links (1) +**

- Northwind Traders  
http://www.northwindtraders.com

**Notes (1) +**

- Check with Northwind traders.  
04.06.2024 \*

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Feedback

Was this page helpful?

Yes

No

# Support IPv6 for enhanced security and scalability

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Feb 2025

## Business value

The adoption of IPv6 in Business Central helps to ensure uninterrupted service, improved security, and scalability in the future as the number of internet-connected devices continues to grow and IPv4 addresses become less available.

## Feature details

The supply of IPv4 addresses is limited and will eventually run out. So, starting in 2024 wave 2, Business Central supports IPv6 addresses. The transition to IPv6 not only ensures seamless connectivity for your environments but also enhances the security of your data with IPv6's built-in security protocols. More importantly, this update prepares your environments for the future as the world moves towards widespread IPv6 adoption.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?



Yes



No

# View app compatibility with future versions in admin center

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Dec 2024

## Business value

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.

## Feature details

Environment updates might include changes to functionality that installed apps depend on, which, in turn, can break those apps. Until 2024 release wave 2, only notification recipients and registered Application Insights resources received messages about incompatibilities of installed apps with a future Business Central update.

To make it easier to plan for these changes ahead of time and avoid upgrade failures, you can now view app compatibility reports directly in the admin center. You're prevented from scheduling an update to a version that installed apps are incompatible with.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.



---

# Feedback

Was this page helpful?

 Yes

 No

# Legislation

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

Business Central offers updates to regulatory features based on popular requests for improvements and ever-changing requirements from local authorities. To give our customers peace of mind and enable them to focus on their core business, we automate many processes and ensure that features comply with the regulations set by government agencies. For example, if local regulations require that you create vouchers that serve as proof of transactions and a detailed audit trail, you can automate the process. Business Central can automatically generate and attach vouchers to general ledger entries, so that accountants can rest assured that they're compliant, without extra steps. The retention policy features let you specify how long you need to store vouchers before you clean them up, giving you more control over the amount of data you store.

We're working to make regulatory features a standard part of Business Central, so that we can deliver improvements out of the box across the countries and regions where they're relevant. For example, the E-documents module is a foundation that supports processes for sales and purchase invoicing, and it's easy for partners to extend by building country-specific apps for e-invoicing.

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## Feedback

Was this page helpful?

 Yes

 No

# Achieve sustainability scorecards and goals

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

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.

## Feature details

Users have the ability to set up specific scorecards with owner information to track sustainability and add goals for each.

Goals will have start and end dates, baselines, and current and target values for all tracked emissions, so users can easily track their progress in achieving their sustainability plans.

🔍 🗑️ + New Edit List Delete

User ID ↑	Regl... Time	Salespers./Pu... Code	Sales Resp. Ctr. Filter	Purchase Resp. Ctr. Filter	Service Resp. Ctr. Filter	Time Sheet Ad...	Sustainability Manager
→ REDMOND\V-ROHANGARG	⋮	<input type="checkbox"/>				<input type="checkbox"/>	<input checked="" type="checkbox"/>

🔍 🗑️ + New Edit List Delete Show My Goals Show All Goals

Scorecard No. ↑ ▾	No. ↑	Name	Owner	Start Date	End Date	Baseline for CO2	
→ SCORECARD-001	⋮	GOAL-001	Goal-001	REDMOND\V-ROHANGARG	7/1/2024	7/31/2024	0.00

No. ↑	Name	Owner
SCORECARD-001	Scorecard-001	REDMOND

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## See also

[Using key performance indicators \(KPIs\) to meet your business goals \(docs\)](#)

---

## Feedback

Was this page helpful?

# Add attachments when you send electronic documents

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Nov 2024

## Business value

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.

## Feature details

Before this release, you could create **E-Document** files (for example, in the Peppol BIS 3 format) when you post sales documents. You could only send this e-document file to the electronic document service provider. The Peppol BIS 3 format includes the possibility to include attachments as encoded objects within the XML file.

In this release, you can include PDF attachments with the electronic document and Business Central can encode it in the XML file (alongside invoices or credit notes) when you send documents to various end points.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

# Feedback

Was this page helpful?

 Yes

 No

# Enable internal carbon fee calculation in Sustainability

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Motivate your business, or individual business units, to reduce carbon emissions by setting up carbon fees for greenhouse gas emissions.

## Feature details

Companies can set up an internal fee that they charge themselves for each unit of carbon they emit. An internal company carbon fee is a fee that a company charges itself for each unit of CO<sub>2</sub> that it emits. The purpose of the fee is to encourage the organization to reduce its carbon footprint and be more environmentally sustainable. By putting a price on carbon emissions, the company or individual organizational units are motivated to find ways to reduce emissions and save money.

Organizations can set their carbon fee, and fees for other greenhouse gas (GHG) emissions, by scope type or use a flat fee across scopes. GHG fee calculation should include allocations by **Country/regions** and by **Responsibility Centers**.


Administrators can enable carbon fee (or other GHG fees) calculations using the **GHG Fees** field on the **Sustainability Setup** page. Afterward, Business Central automatically calculates the fees when posting sustainability journals, or you can run a manual action.



The fees are posted to the **Sustainability Ledger Entry** page, where they're available in the **Emission Fee** field.

To use this functionality, you must set up fees on the **Emission Fees** page, where you can specify the GHG emissions you want to use in calculations and the emission fee amount. You can also use a recalculation model to calculate all fees in a carbon equivalent.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

---

## Feedback

Was this page helpful?

 Yes

 No

# Navigate the sustainability manager role center with ease

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

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.

## Feature details

In the future, sustainability experts within the company can establish a dedicated role center, **Sustainability Manager**, where they can access all crucial data concerning greenhouse gas emissions within their organizations.

Users will have a specific menu, with sustainability-related information provided in the headline, as well as charts and cues for all important information about emissions. It also will have purchase documents featuring emission-related lines and goals.

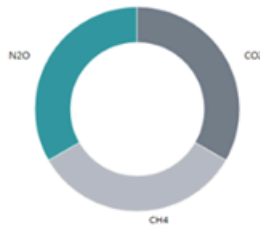
Goals

Realized % for CO2	Realized % for CH4	Realized % for N2O	CO2 % vs Baseline	CH4 % vs Baseline
0.00	0.00	0.00	100.00	100.00

N2O % vs Baseline  
100.00

Insights

Emission Scope Ratio Chart



Headline

Your carbon footprint is 585 and this is 2.632 % more than yesterday.

○ ● ○

Actions

- + Sustainability Journal
- + Recurring Sustainability Journals
- Total Emissions
- Emission Per Facility
- Emission By Category

Activities

CO2 This Month	CH4 This Month	N2O This Month
385.00	385.00	385.00
> See more	> See more	> See more

Ongoing Purchases

Ongoing Purc... Orders	Ongoing Purc... Invoices	Purch. Invoices... Next Week	My Incoming Documents
1	0	0	1
>	>	>	>

# Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## See also

[Sustainability management overview \(docs\)](#)

# Feedback

Was this page helpful?

# Purchase carbon credits

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

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.

## Feature details

On **Item Card** pages, you can set the **GHG Credit** field for items to treat them as carbon credits. When you set up an item as a carbon credit item type, the **Carbon Credit per UoM** field (decimal) is enabled so you can specify the carbon credit value.

Afterward, when you include the item on purchase documents, it posts a negative line for emission (in the **Emission CO2** field) together with the cost of the item (in the **Emission Fee** field) in the **Sustainability Ledger Entry** table.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?



Yes



No

# Record greenhouse gas emissions using purchase invoices

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

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 to cost savings through more efficient resource management.

## Feature details

When users receive emissions information on their invoices from vendors, they can promptly include these values in the *Purchase Invoice* or *Purchase Order*, eliminating the need for redundant data entry in *Sustainability Journals* later on. This streamlined process enhances user productivity. Users simply need to choose the **Sustainability Account** and input the designated emission amounts tracked for each account.

These values will also be available in the **Purchase Credit Memo**, so it can be used for reversal entries as well.

Upon posting a purchase document, emission information becomes visible in both the **Posted Purchase Invoice** or **Posted Purchase Credit Memo**, as well as in the **Sustainability Ledger Entry** with the appropriate entry type.

If users prefer not to track emissions within purchase documents, they can easily disable this feature on the **Sustainability Setup**.

The screenshot shows the 'Find entries' interface for a 'Posted Purchase Invoice' with document number 108039, dated 07/05/24. A table of related entries is displayed:

Related Entries	No. of Entries
→ Posted Purchase Invoice	1
Sustainability Ledger Entry	1
G/L Entry	3
VAT Entry	1
Vendor Ledger Entry	1
Detailed Vendor Ledg. Entry	1
Value Entry	2

At the bottom, the source information is shown: Document Type 'Posted Purchase Invoice' and Source No. '10000'.

The screenshot shows the 'Purchase Order' interface for document number 106025, dated 7/5/2024. The status is 'Open'. The 'General' section contains the following data:

Vendor Name	London Postmaster	Vendor Invoice No.	INV-001
Contact	Mrs. Carol Philips	Vendor Shipment No.	
Document Date	7/5/2024	Status	Open

The 'Lines' section shows a table with one line item:

Type	No.	Item Reference No.	Description	Location Code	Bin Code	Sustainability Account No.	Quantity	Rese
→ Item	1000		Bicycle			ACC-001	1	



# 106025 · London Postmaster

Home Prepare Print/Send Request Approval Order | More options

Post... Release Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Docum

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	Qty. to Invoice	Quantity Invoiced	Emission CO2 Per Unit	Emission CH4 Per Unit	Emission N2O Per Unit	Qty. to Assign	Item Charge Qty. to Handle	Qty. Assign
→ Item	1	-	100.00	100.00	100.00	0	0	

Subtotal Excl. VAT (GBP)	100.00	Total Excl. VAT (GBP)	
Inv. Discount Amount (GBP)	0.00	Total VAT (GBP)	
Invoice Discount %	0	Total Incl. VAT (GBP)	

Posted Purchase Invoice

## 108039 · London P

Home Print/Send Invoice

Update Document Find

Vendor

Contact

Posting Date

Lines Manage

New Line Delete Line

Type	No.
→ Item	J000

Invoice Discount Amount Excl. VAT

Total Excl. VAT (GBP)

Purchase Invoice Statistics

## 108039 · London Postmaster

General

Amount	100.00	Quantity	1
Inv. Discount Amount	0.00	Parcels	0
Total	100.00	Net Weight	0
25% VAT	25.00	Gross Weight	0
Total Incl. VAT	125.00	Volume	0
Purchase (LCY)	100.00		

Lines >

Vendor >

Sustainability

Emission CO2	100.00	Emission N2O	100.00
Emission CH4	100.00		

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## See also

[Record sustainability entries \(docs\)](#)

# Feedback

Was this page helpful?

# Report sustainability entries with financial reports

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Nov 2024

## Business value

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.

## Feature details

Users can choose a new **Totaling Type** on the **Financial Reports Line - Sust. Account** referring to the **Sustainability Ledger Entries**.

With this model, users can combine values based on **General Ledger Entries** or **Statistical Account Ledger Entries** with the following sustainability values: **Emission Fees**, **CO2 Emission**, **CH4 Emission**, and **N2O Emission**.

Name: CA-PROF

Manage Home Insert

Outdent Indent

Row No.	Description	Totaling Type	Totaling	Row Type	Amount Type	Show Oppo... Sign	Sho
100	CC / CO Summary Report	Cost Type		Net Change	Net Amount	<input type="checkbox"/>	Yes
110	Revenues	Cost Type Total	6110..6955	Net Change	Net Amount	<input type="checkbox"/>	Yes
120	Revenue Reductions	Cost Type	6710..6910	Net Change	Net Amount	<input type="checkbox"/>	Yes
130	Net Revenue	Formula	110..120	Net Change	Net Amount	<input type="checkbox"/>	Yes
140	Material Costs	Cost Type	7110..7894	Net Change	Net Amount	<input type="checkbox"/>	Yes
160	Gross Profit	Formula	130..150	Net Change	Net Amount	<input type="checkbox"/>	Yes
170	Salary Direct Costs	Cost Type	8790	Net Change	Net Amount	<input type="checkbox"/>	Yes
300	Main Cost Centers	Sust. Accounts	11302	Balance at Da...	CO2e	<input type="checkbox"/>	Yes
500	Total Transfers	Formula	200..300	Net Change	Net Amount	<input type="checkbox"/>	Yes

(Financial Report) Row Definition | Work Date: 1/22/2026

Changes to this row definition will affect all financial reports using it. Don't show again

Name: CA-PROF

Manage Home Insert

Outdent Indent

Row No.	Description	Totaling Type	Totaling	Row Type	Amount Type	Show Oppo... Sign	Sho
100	CC / CO Summary Report	Posting Accounts		Net Change	Net Amount	<input type="checkbox"/>	Yes
110	Revenues	Total Accounts	55	Net Change	Net Amount	<input type="checkbox"/>	Yes
120	Revenue Reductions	Formula		Net Change	Net Amount	<input type="checkbox"/>	Yes
130	Net Revenue	Set Base For Percent	10	Net Change	Net Amount	<input type="checkbox"/>	Yes
140	Material Costs	Cost Type		Net Change	Net Amount	<input type="checkbox"/>	Yes
140	Material Costs	Cost Type Total		Net Change	Net Amount	<input type="checkbox"/>	Yes
140	Material Costs	Cash Flow Entry Accounts	34	Net Change	Net Amount	<input type="checkbox"/>	Yes
160	Gross Profit	Cash Flow Total Accounts		Net Change	Net Amount	<input type="checkbox"/>	Yes
160	Gross Profit	Account Category		Net Change	Net Amount	<input type="checkbox"/>	Yes
170	Salary Direct Costs	Sust. Accounts		Net Change	Net Amount	<input type="checkbox"/>	Yes
300	Main Cost Centers	Sust. Accou	11302	Balance at Da...	CO2e	<input type="checkbox"/>	Yes
500	Total Transfers	Formula	200..300	Net Change	Net Amount	<input type="checkbox"/>	Yes

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## See also

[Sustainability management overview \(docs\)](#)

# Feedback

Was this page helpful?

# Track sustainability certificates for items and vendors

Article • 08/16/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Customers are increasingly seeking products that are more friendly to people and the environment. It's good for business if you can demonstrate that the products you build or buy were produced with sustainability in mind. To encourage that, there are various sustainability certificates that recognized organizations award. To keep track of the sustainability certificates that your vendors have earned, you can add their certificates to them, or to the items they work with.

## Feature details

If a vendor or an item has a sustainability certificate from an issuer, you can easily record the information on the vendor or item so that the information is readily available. If you want to find a vendor that has a certain sustainability certificate, you can filter on it.

You can create sustainability certificates with the following details:

- Name
- Area
- Standard
- Issuer
- Value

# Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

 Yes

 No

# Use e-documents with Power Automate

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Dec 2024

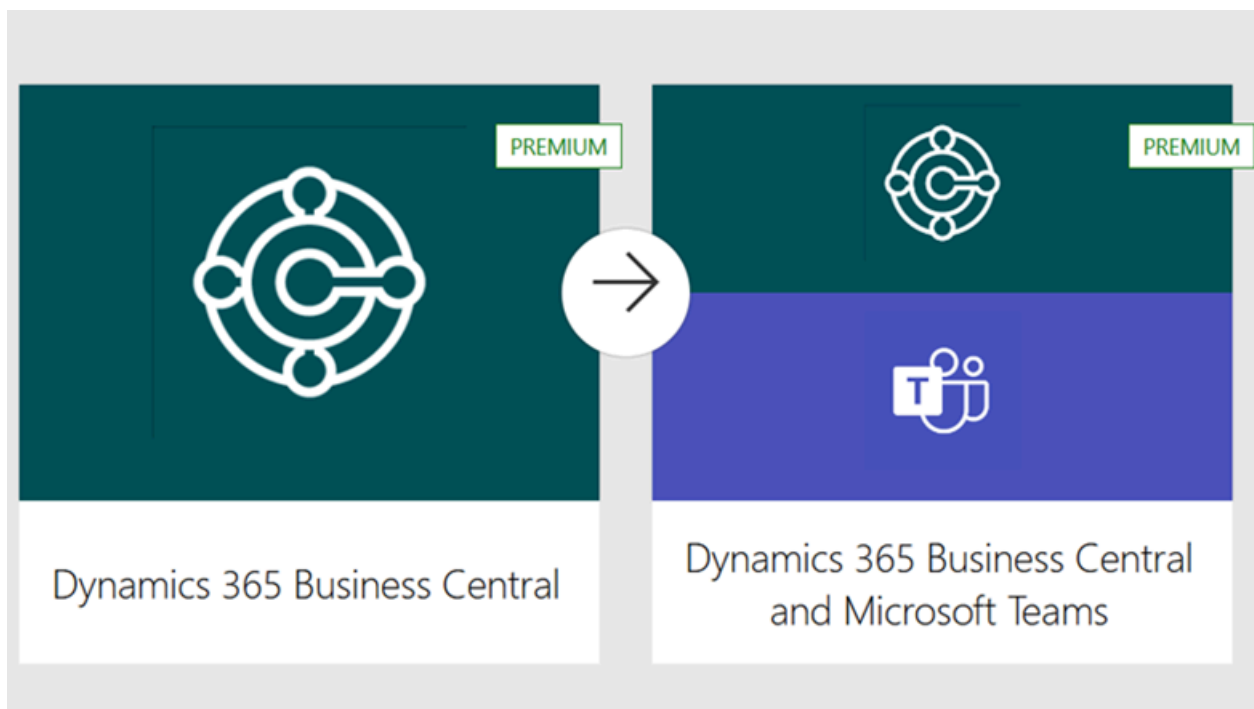
## Business value

Because e-documents are essentially 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.

## Feature details

It's easy to share electronic documents for sales and purchases in Business Central with other applications. You can use Power Automate with the E-Documents app in Business Central to integrate the app with Power Platform tools and other systems. The integration lets you use Power Automate to send electronic documents as BLOB files to the different communication channels that people in your business use.





## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Feedback

Was this page helpful?

Yes

No

# Use multiple VAT numbers for a customer

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Customers who have warehouses in multiple EU countries have a different VAT number for each country. Business Central makes it easy to accommodate that situation. You can configure alternative VAT numbers and posting groups for customers' warehouses in different countries, so when you use ship-to addresses on your sales documents for different countries, Business Central will automatically apply the correct VAT number and corresponding posting groups.

## Feature details

Customers with warehouses in different EU countries must register a new VAT number in each country, which means they have more than one VAT number.




You can add the **VAT Number**, the **VAT Business Posting Group**, and the **General Business Posting Group** to the alternate address for a customer if the address has a different **Country/Region Code**. When you want to send goods to another address and you select an **Alternate Ship-to Address**, Business Central shows the appropriate VAT number. You also have the option to use different posting groups.






When you create a new alternative address for your customer and the **Country/Region Code** is different than the customer's setup, Business Central checks whether a different

VAT Number already exists. If the number doesn't exist, it notifies you to create new one.




This feature is available on the following sales documents:

- Sales invoices
- Sales orders
- Sales credit memos
- Sales return orders

Legal Entity Setup | Work Date: 1/22/2026 ✓ Saved   

  + New Edit List Delete   

Entity Type	Entity No.	VAT Country/Region Code	VAT Registration No.	Gen. Bus. Posting Group	VAT Bus. Posting Group
→ Customer	10000	DE	DE123456789	EU	EU

← Ship-to Address | Work Date: 1/22/2026 ✓ Saved   

## 10000 The Cannon Group PLC TEST6 The Cannon Group PLC

✕ The Ship-To Country Code is different from the customer Country Code. In case if you need a different VAT configuration, add a new legal entity setup. Add

**General** Show more

Code	TEST6	Contact	Mr. Andy Teal
Name	The Cannon Group PLC	Location Code	
GLN		Service Zone Code	
Address	192 Market Square		
Address 2			
City			
Post Code			
Country/Region Code	DK		

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/BCIdeas>.

## Thank you for your ideas

Thank you for submitting this idea:

- [VAT-Registration No. + VAT Bus. Posting Group in Ship-to Address \(Table 222\)](#)

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

---

## Feedback

Was this page helpful?

Yes

No

# Use new service providers in the e-documents framework

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	Nov 2024	Dec 2024

## Business value

With multiple external service provider options available for electronic invoice exchanges during B2B or B2G communication, businesses can now select the provider that best aligns with their specific needs. This flexibility enhances operational efficiency, reduces costs, and mitigates risks associated with dependency on a single provider. Businesses can improve their invoice processing times, ensure compliance with diverse regulatory requirements, and streamline their financial workflows.

## Feature details

You have more options to use as access points for electronic invoicing because we added more electronic document service providers to Business Central. Now you can choose one of the following connectors for your electronic invoicing:

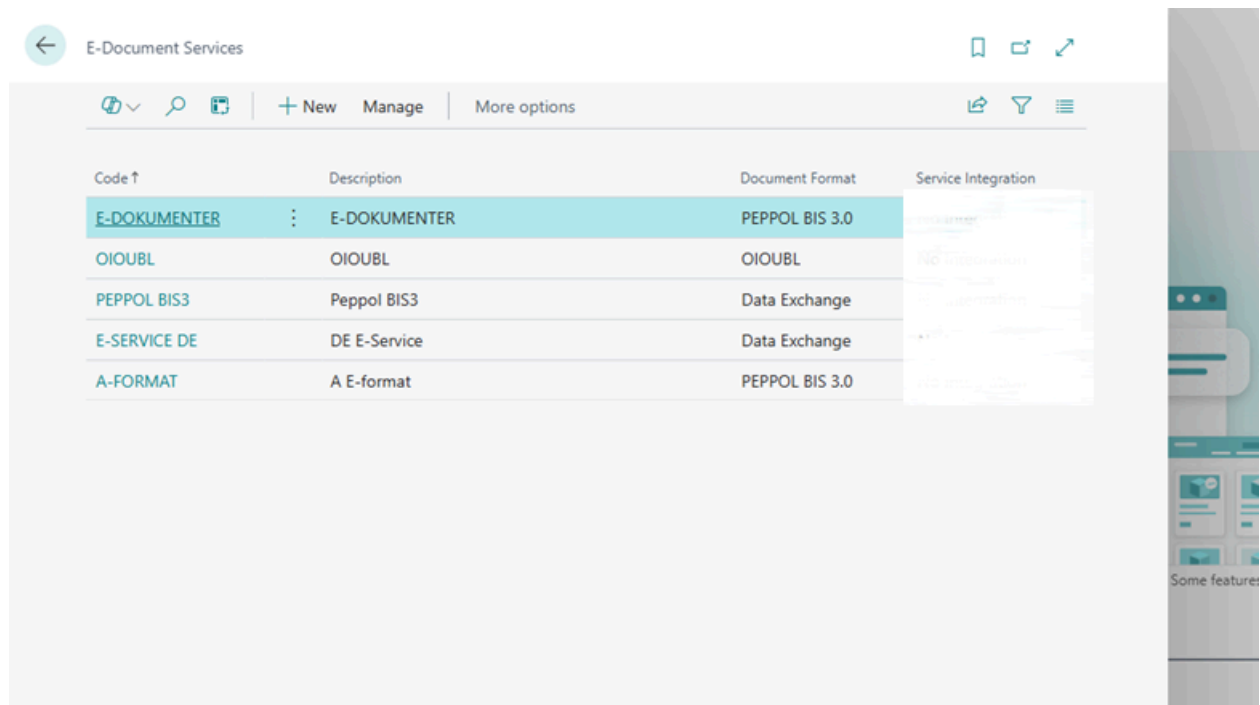
- Avalara
- B2B Router
- Continia
- Logiq
- Pagero
- SignUp
- Tietoevry

- True Commerce

You can choose new options as the **Service Integration** endpoints on the **E-Document Service** page. After you choose a service provider and consent to using third-party systems, you set up the connection. To set up the connection, use the **Setup Service Integration** action to configure credentials and API URLs.

By integrating new service providers, you can automate the receipt and delivery of electronic invoices. The providers serve as endpoints for e-document exchange. This automation streamlines invoice management, reduces manual processing errors, and accelerates transaction times, significantly enhancing operational efficiency and boosting overall productivity.

Although the **E-Document Services** page has several global service integrations already, partners can easily add their own to the list by publishing a connector app on AppSource.



## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Feedback

Was this page helpful?

Yes

No



# Use multiple subcategories for one sustainability account

Article • 09/20/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

By enabling the use of more diverse account subcategories for the sustainability account, users can reduce the number of different accounts needed and consolidate various types of information into a single account.

## Feature details

Users can set a default **Sustainability Account Subcategory** for each **Sustainability Account**, and this information must be included during setup. However, users can also configure multiple subcategories for a single account.


When working with **Sustainability Journals**, users can easily change the **Sustainability Account Subcategory** on each line if multiple options are available. This approach allows entries to be posted to the same **Sustainability Accounts** but with different emission factors in the formulas. For example, if a user wants to use one account for all company cars, they can handle different emission factors for different types of cars more easily. And using it this way, they can post all entries using only one account, but they can use subcategories as an additional analytic.

Additionally, users can now post entries to the **Sustainability Ledger Entry** even with zero emissions if their **Sustainability Account Subcategories** are marked as **Renewable**



**Energy.** In this case, the system will post only the basic information used in the formula, but the total emissions will be zero, and the entry will be marked as **Renewable Energy**.  
Using multiple subcategories for one sustainability account]  
(media/multisubcategories.png "Using multiple subcategories for one sustainability account") -->

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas> .

## See also

[Chart of sustainability accounts and ledger](#) (docs)

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?

 Yes

 No

# Reporting and data analysis

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

In the modern world, data is an invaluable resource, forming the foundation of decision-making and progress across all sectors. Recent advances in AI technology and data analytics tools bring radically new ways for businesses to distill complex information into actionable intelligence, reveal hidden patterns and trends, and find correlations that were previously concealed. The critical insights gained from data analysis empower organizations to optimize their strategies, enhance customer experiences, identify potential risks, gain unprecedented insights into the details of their operations and environments, and innovate in ways that were once inconceivable.

As data continues to fuel innovation and drive transformative advancements, harnessing its potential has become essential for staying competitive and shaping a more efficient and sustainable future for SMBs.

Our reporting strategy revolves around building universal BI and analytics within the Business Central experience. We aim to seamlessly integrate in-context, rich, and immersive BI and analytics content from first and third parties into Business Central. Alongside flexible self-service capabilities, you can effortlessly access and leverage your data for maximum value.

---

## Feedback

Was this page helpful?

 Yes

 No

# Do ad hoc analysis on fixed assets, projects, and services

Article • 08/16/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Do reporting and ad hoc data analysis on transactions from fixed assets, projects, and service management: group, summarize, and pivot data to give you the insights you need without the need to run a report.

## Feature details

In 2023 release wave 2, we introduced the ability to do data analysis on an AL query. Now, 2024 release wave 2 has out-of-the-box queries designed to make ad hoc analysis easier for fixed assets, projects, and services.

Many of the first examples are ledger entry tables (such as fixed assets ledger entries or project ledger entries) joined to relevant tables (typically the tables where a code field on the ledger can be joined) where additional fields can enrich the analysis scenarios that people typically do on ledger entry list pages.

### Example: fixed assets ad hoc analysis

The fixed assets ad hoc analysis query joins data from fixed asset ledger entries to master data tables, such as the Fixed Asset, Fixed Asset Class, Fixed Asset Subclass, Fixed Asset Location, and Depreciation Book tables.

When you open the query in the Business Central client, you can slice and dice data about fixed assets any way you like. The following image shows the options that are available.

The screenshot shows a pivot table titled "Fixed Assets Ad-hoc Analysis" with the following data:

Depreciation Book Desc. / Class Name / Subclass Name ...	Sum(Amount)	Sum(Amount)
Company Book	112116	-16452
Tangible Fixed Assets	112116	-16452
Car	87000	-13350
Mercedes 300	30000	-6000
Toyota Supra 3.0	42000	-5600
VW Transporter	15000	-1750
Machinery	17976	-2167
Conveyor Belt	6600	-660
Conveyor Computer	3024	-630
Conveyor Lift	4512	-517
Lift for Furniture	3840	-360
Telephone Equipment	7140	-935
Switchboard	7140	-935

The right sidebar shows the following configuration:

- Pivot Mode: On
- Search: [ ]
- Columns: [ ]
- Analysis Filter: [ ]
- Row Groups: Depreciation Bo..., Class Name, Subclass Name, FA Description
- Values: Sum(Amount)
- Column Labels: Posting Type

## Feedback

Was this page helpful?

Yes

No

# Use advanced settings in the Power BI connector

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

## Business value

Advanced users of Power Query can now fine-tune the use of the Power BI connector for Business Central in their semantic models. The introduction of new parameters to the Power BI connector for Business Central enhances the flexibility, performance, and user experience of data integration and analysis, while still ensuring the default values are optimal in the majority of cases. These parameters empower users with more control over their data interactions, leading to more efficient data processing, better performance, and an improved user experience.

## Feature details

Starting in this release, the Power BI connector for Business Central now supports several advanced properties that you can set in your Power Query queries:

- **AcceptLanguage:** This parameter allows you to specify preferred languages for responses, ensuring users receive messages and translatable strings in their desired language. This improves user satisfaction and makes the data more accessible and relevant. Learn more at [Load a report in Power BI](#).
- **ODataMaxPageSize:** By limiting the number of entities per results page, this parameter allows for more flexibility when connecting to large datasets or using

complex queries. It ensures efficient and responsive data retrieval, leading to faster insights and decision-making. You can't exceed the maximum page size defined on the service. Learn more at [ODataPreferenceHeader.MaxPageSize Property](#).

- **Timeout:** This parameter defines the maximum duration for a request before cancellation. It helps manage system resources effectively and prevents long-running queries from impacting overall system performance. Users experience minimal delays and interruptions, ensuring a smoother workflow. You can't exceed the timeout defined on the service. Learn more at [OData.Feed](#).
- **UseReadOnlyReplica:** This parameter determines whether requests target the primary database or a read-only replica. Offloading read operations from the primary database can significantly boost performance. This leads to faster data retrieval and improved system stability, especially during peak usage times.

---

## Feedback

Was this page helpful?

 Yes

 No

# Use built-in named formulas in Excel layouts

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Oct 2024

## Business value

We're saving Excel report authors time and energy by providing built-in named formulas that make it easy to access data from metadata sheets.

## Feature details

To make it easier to use data from metadata sheets, named formulas are now built in to Excel layout workbooks (when generated in 2024 release wave 2). Instead of taking time to develop complicated VLOOKUP or XLOOKUP formulas, report authors can use named formulas, such as `ReportRequest.Date` or `ReportMetaData.ReportHelpLink`.

Name	Value	Refers To	Scope	Comment
CaptionData	{\"}	=CaptionData!\$A\$2:\$B\$2	Workbook	
DataItemName	{\"}\Value1\"}\Value10\";...	=DataItemName!\$A\$2:\$D\$10	Workbook	
DataItemName2	{\"}\Value1\"}\Value10\";...	=DataItemName2!\$A\$2:\$D\$10	Workbook	
DataItemName3	{\"}\Value1\"}\Value10\";...	=DataItemName3!\$A\$2:\$D\$10	Workbook	
ReportMetadata.AboutThisReportText	{\"}	=XLOOKUP!About This Report Te...	Workbook	Use this function to get the About This Report text from the ReportMetadata!values table in the Aggregated Metadata worksheet
ReportMetadata.AboutThisReportTitle	{\"}	=XLOOKUP!About This Report Titl...	Workbook	Use this function to get the About This Report Title from the ReportMetadata!values table in the Aggregated Metadata worksh...
ReportMetadata.ExtensionID	{\"}	=XLOOKUP!Extension ID!ReportM...	Workbook	Use this function to get the Extension ID from the ReportMetadata!values table in the Aggregated Metadata worksheet
ReportMetadata.ExtensionName	{\"}	=XLOOKUP!Extension Name!Repo...	Workbook	Use this function to get the Extension Name from the ReportMetadata!values table in the Aggregated Metadata worksheet
ReportMetadata.ExtensionPublisher	{\"}	=XLOOKUP!Extension Publisher!R...	Workbook	Use this function to get the Extension Publisher from the ReportMetadata!values table in the Aggregated Metadata worksheet
ReportMetadata.ExtensionVersion	{\"}	=XLOOKUP!Extension Version!Re...	Workbook	Use this function to get the Extension Version from the ReportMetadata!values table in the Aggregated Metadata worksheet
ReportMetadata.ObjectID	{\"}	=XLOOKUP!Object ID!ReportMeta...	Workbook	Use this function to get the Object ID from the ReportMetadata!values table in the Aggregated Metadata worksheet
ReportMetadata.ObjectName	{\"}	=XLOOKUP!Object Name!Report...	Workbook	Use this function to get the Object Name from the ReportMetadata!values table in the Aggregated Metadata worksheet
ReportMetadata.ReportHelpLink	{\"}	=XLOOKUP!Report help link!Rep...	Workbook	Use this function to get the Report help link from the ReportMetadata!values table in the Aggregated Metadata worksheet
ReportRequest.CompanyId	{\"}	=XLOOKUP!Company Id!ReportRe...	Workbook	Use this function to get the Company id from the ReportRequest!values table in the Aggregated Metadata worksheet
ReportRequest.CompanyName	{\"}	=XLOOKUP!Company name!Repo...	Workbook	Use this function to get the Company name from the ReportRequest!values table in the Aggregated Metadata worksheet
ReportRequest.Date	{\"}	=XLOOKUP!Date!ReportRequestV...	Workbook	Use this function to get the Date from the ReportRequest!values table in the Aggregated Metadata worksheet
ReportRequest.EnvironmentName	{\"}	=XLOOKUP!Environment name!Re...	Workbook	Use this function to get the Environment name from the ReportRequest!values table in the Aggregated Metadata worksheet
ReportRequest.EnvironmentType	{\"}	=XLOOKUP!Environment type!Re...	Workbook	Use this function to get the Environment type from the ReportRequest!values table in the Aggregated Metadata worksheet
ReportRequest.FormatRegion	{\"}	=XLOOKUP!Format Region!Repo...	Workbook	Use this function to get the Format Region from the ReportRequest!values table in the Aggregated Metadata worksheet
ReportRequest.Language	{\"}	=XLOOKUP!Language!ReportReq...	Workbook	Use this function to get the Language from the ReportRequest!values table in the Aggregated Metadata worksheet
ReportRequest.TenantEntralId	{\"}	=XLOOKUP!Tenant Entra Id!Repo...	Workbook	Use this function to get the Tenant Entra Id from the ReportRequest!values table in the Aggregated Metadata worksheet
ReportRequest.TenantId	{\"}	=XLOOKUP!Tenant Id!ReportReq...	Workbook	Use this function to get the Tenant Id from the ReportRequest!values table in the Aggregated Metadata worksheet
ReportRequest.UserName	{\"}	=XLOOKUP!User name!ReportReq...	Workbook	Use this function to get the User name from the ReportRequest!values table in the Aggregated Metadata worksheet

 **Note:** The author created this article with assistance from AI. [Learn more](#)

## Feedback

Was this page helpful?

 Yes

 No



# Use embedded Power BI reports out of the box

Article • 09/25/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Nov 2024

## Business value

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.

## Feature details

Business Central comes with many options for reporting, business intelligence (BI) dashboards, and data analysis. This release wave adds a lot of new reports for finance, sales, purchasing, inventory, manufacturing, and projects.

Specifically, the following Power BI reports are available:

- Finance: 14 reports
- Sales: 12 reports
- Purchasing: 13 reports
- Inventory: 7 reports
- Manufacturing: 11 reports
- Projects: 6 reports

You can also embed the Power BI Metrics scorecards you use to track your important KPIs directly inside Business Central.

---

# Feedback

Was this page helpful?

 Yes

 No

# User experiences

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

Business Central offers a broad portfolio of user interfaces that enable our customers to work with their data from anywhere, and on any device. User interfaces include an installable desktop app, a browser-based web app, and mobile apps. Whether you need to enter data at high speed, casually update entries, or analyze relational data, Business Central offers numerous features that are easy to get started with and powerful when needed.

Every release includes enhancements to usability, accessibility, performance, and reliability. In this release wave, we're boosting efficiency when you're working with actions across selections in lists of records and viewing summarized data to help you easily fix data entry mistakes.

---

## Feedback

Was this page helpful?

 Yes

 No

# Change the data search method in lists

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Nov 2024

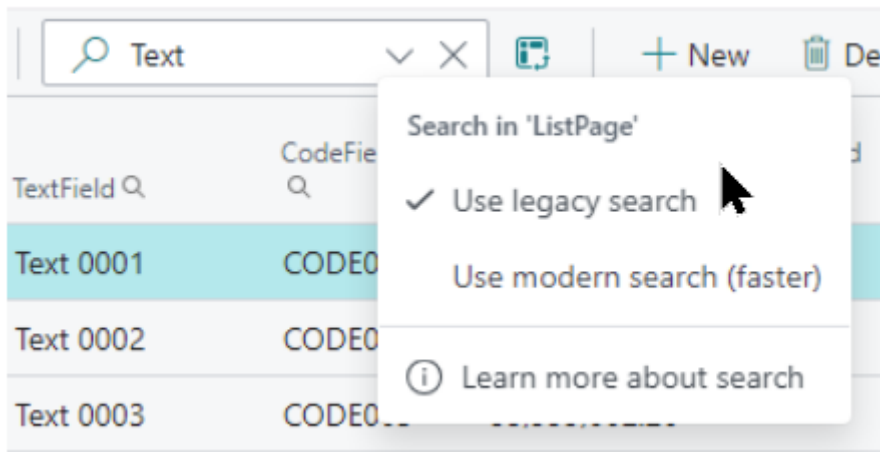
## Business value

Giving users fast access to data is key. This feature introduces a modern search option on lists that focuses exclusively on columns that are enhanced with full-text search capability, while retaining the option to use the older method. The modern search accelerates the search process and delivers more precise, relevant results, which increases user satisfaction and productivity.

## Feature details

Users can switch between the “legacy” search, which searches across all columns, and the “modern” search, which searches only in columns optimized for full-text search matching. The modern search is available for selected tables/lists.

The modern search capability is enabled by the **Use optimized text search in lists** switch in the **Feature Management** page. When it's enabled, it becomes the default search method on list pages that include full-text search columns. Users switch between the modern and legacy search methods on pages by using the **Use legacy search** and **Use modern search (faster)** options in the search box:



The new full-text search is more flexible. For example, consider the item named **LONDON Swivel Chair** in the CRONUS demonstration company. If you use the legacy search and enter *London chair*, it won't find anything because there's no exact match. However, using the modern search for the same query will readily find that item.

The modern search also allows users to enclose search terms in quotes to narrow the results, similar to popular search engines. For example, using the CRONUS demonstration data again:

- The search term *blue chair* returns all items that match both the words "blue" and "chair".
- The search term *blue chair* returns no results because the item descriptions in the demonstration data are listed as "chair, blue" (which is similar to the legacy search experience).

The modern search experience isn't available for all tables, but only for those tables we recognized as prominent for this type of search algorithm. However, partners can programmatically optimize their own tables for modern search by using a new `OptimizeForTextSearch` property on fields in AL code. If a table on a given list page isn't optimized for the modern search, then the **Use modern search (faster)** option won't be present in the search box.

#### ⓘ Note

This feature is being gradually added to Business Central tables during the 2024 release wave 2 update, starting with main tables like Customers, Contacts, Items, G/L Accounts, and so on. In subsequent updates, you'll start to notice this feature on more tables, such as Sales and Purchase documents, Projects, G/L Entries, Customer Ledger Entries, Vendor Ledger Entries, and Job Ledger Entries.

For now, the administrator can use **Feature Management** to control whether the modern search is enabled on these lists. In a future release, the "modern" search

will become the default search method.

Learn more about search at [Search for a record in your data](#).

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

Yes

No

# Experience access keys with key tips in more languages

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

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 UI elements.

## Feature details

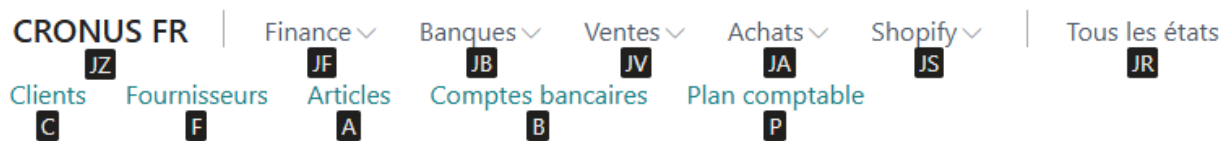
You can use access keys with key tips, regardless of your language setting in **My Settings**. Key tips are now enabled for the following languages:

- English
- Danish
- Dutch
- Italian
- French
- German
- Spanish
- Portuguese

- Swedish
- Finnish
- Norwegian
- Polish
- Czech
- Icelandic

If you're using the Business Central Web client, when you press the Alt key, the following become available:

- Key tips are revealed alongside UI elements to indicate the next keystroke.
- Sequences of keystrokes can be used to navigate the user interface and activate UI elements, without leaving your current focused element.
- Access keys are available for actions in the action bar and links in the navigation menu, regardless of whether they are assigned a specific shortcut key.



Mise en route

Bonjour, bienvenue dans  
Business Central !

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Feedback

Was this page helpful?

Yes

No



# Resize columns even when personalization isn't enabled

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

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.

## Feature details

- **Optimize for each device:** When you're working on multiple browsers or devices, such as a desktop PC at work and a laptop when you're on the go, you can adjust column widths independently on each device for an optimal view of your data.
- **Resize regardless of role:** Even when personalization is off for a given profile (role), users who are assigned that profile can still resize columns by dragging or double-clicking the sides of the column header.
- **Get it done, quicker:** Resizing a column is notably faster.
- **On any page:** Unlocks the ability to resize columns on page types where you previously couldn't, such as Copilot prompt dialogs.
- **Best of both worlds:** Resizing columns in personalization mode or role customization mode will continue to persist the column width to the UI personalization store in the database.

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	–
<b>18999</b>	<b>Total, Cash and Bank</b>	<b>76,549.23</b>
<b>19999</b>	<b>Total Assets</b>	<b>191,167.17</b>

Column size preferences now join many other simple UI adjustments that are stored in your browser. Using in-private or incognito browsing, or clearing your browser history might discard your preferences, including column sizing.

## Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

## Feedback

Was this page helpful?

# Use drag and drop on file upload dialog to attach multiple files

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

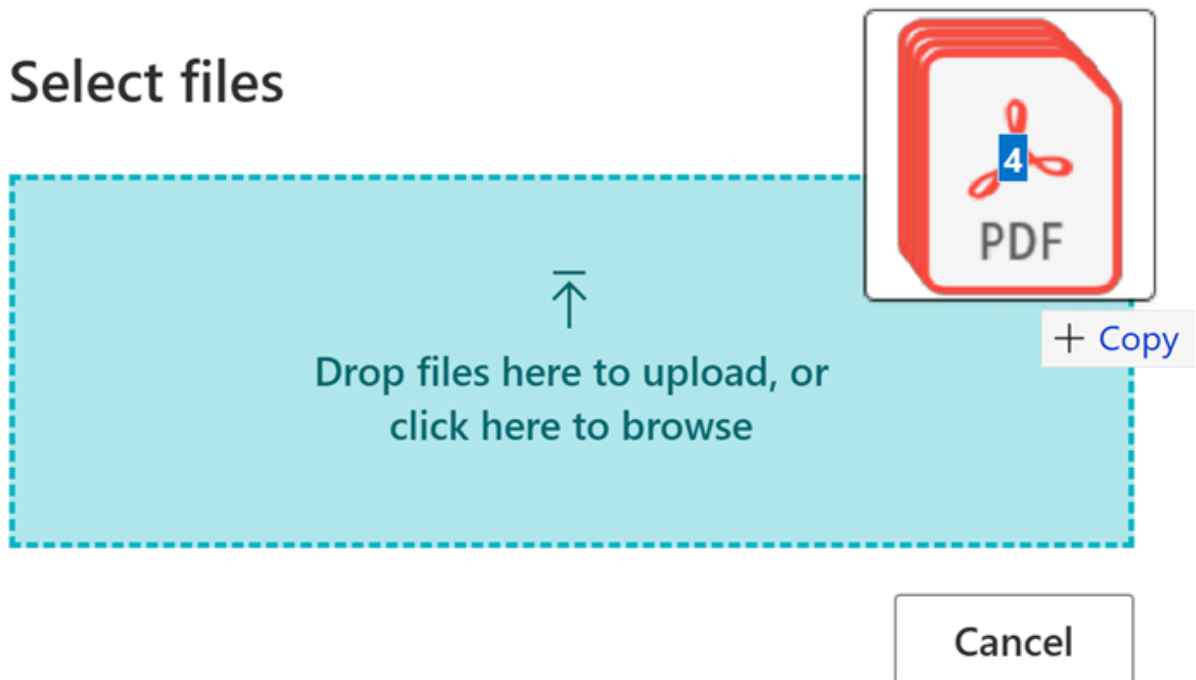
## Business value

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.

## Feature details

You can drag multiple files at the same time to attach them to records in Business Central. Select multiple files, and then just drag them to the file upload dialog.

## Select files



The following pages and actions open a File Upload dialog. You can upload multiple files either by choosing **Browse** to manually select them or by dragging multiple files to the dialog.

- **Document Attachments List FactBox** page, which is available on many document pages in the **Attachments** part of the FactBox pane.
- **Incoming Document Files FactBox** page, which is available on pages related to incoming documents.
- **Email Editor** page, which is used to draft and send emails from Business Central.

## Document attachments

The **Doc. Attachments List FactBox** is available in the **Attachments** part of the FactBox pane. It comes with same set of actions that the existing **Document Attachments** has. However, it also features a quick overview of uploaded files, so you don't have to open the **Attached Document** page.

The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.' in the 'Sales' module. A customer list is visible on the left, with 'Adatum Corporation' selected. The 'Attachments (3)' FactBox is open on the right, showing a table of documents. A context menu is overlaid on the table, listing actions: Show details, Upload files, Open in OneDrive, Share, Download, Open in Excel, and Delete Line.

	File Extension
- Order 106008	pdf
- Order 106007	pdf
- Order 106006	pdf

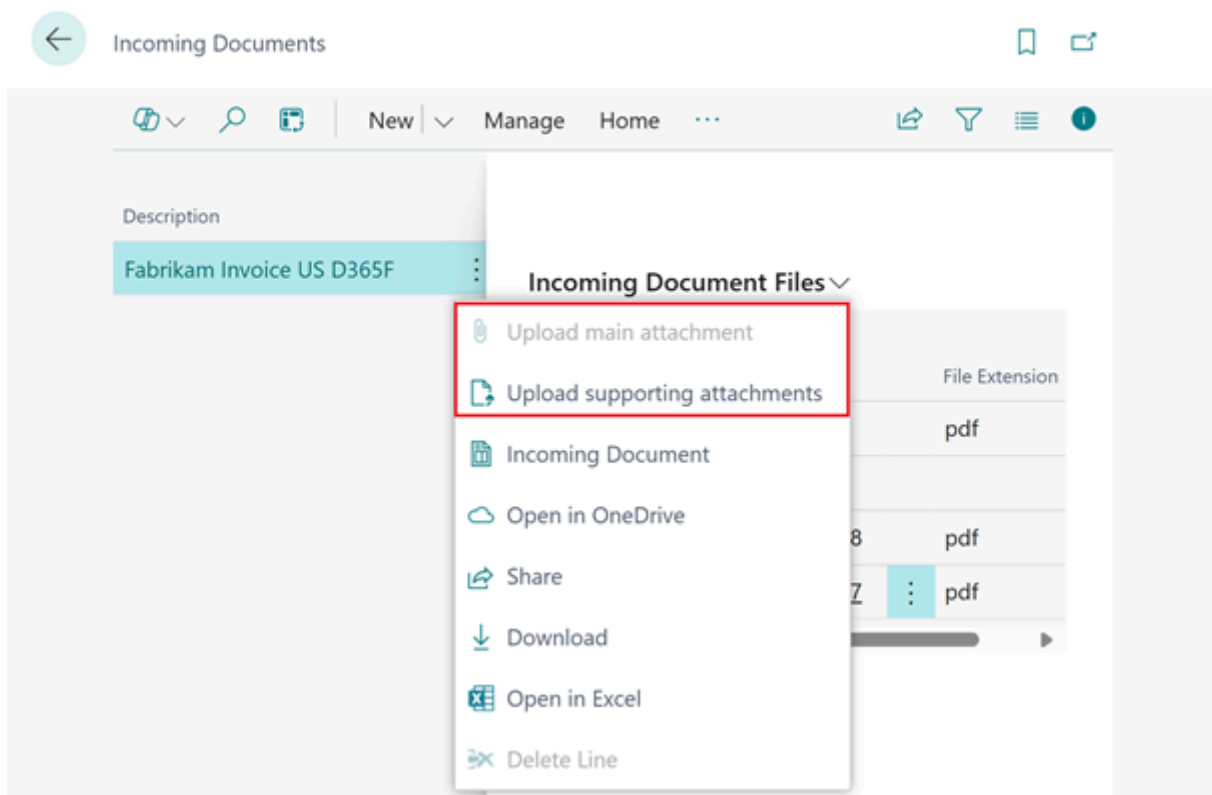
### ⓘ Note

If you choose to use the new **Attachments** FactBox, you can use Business Central's [personalization capabilities](#) to hide the legacy **Document Attachments** FactBox, which will be deprecated in upcoming releases.

## Incoming document files

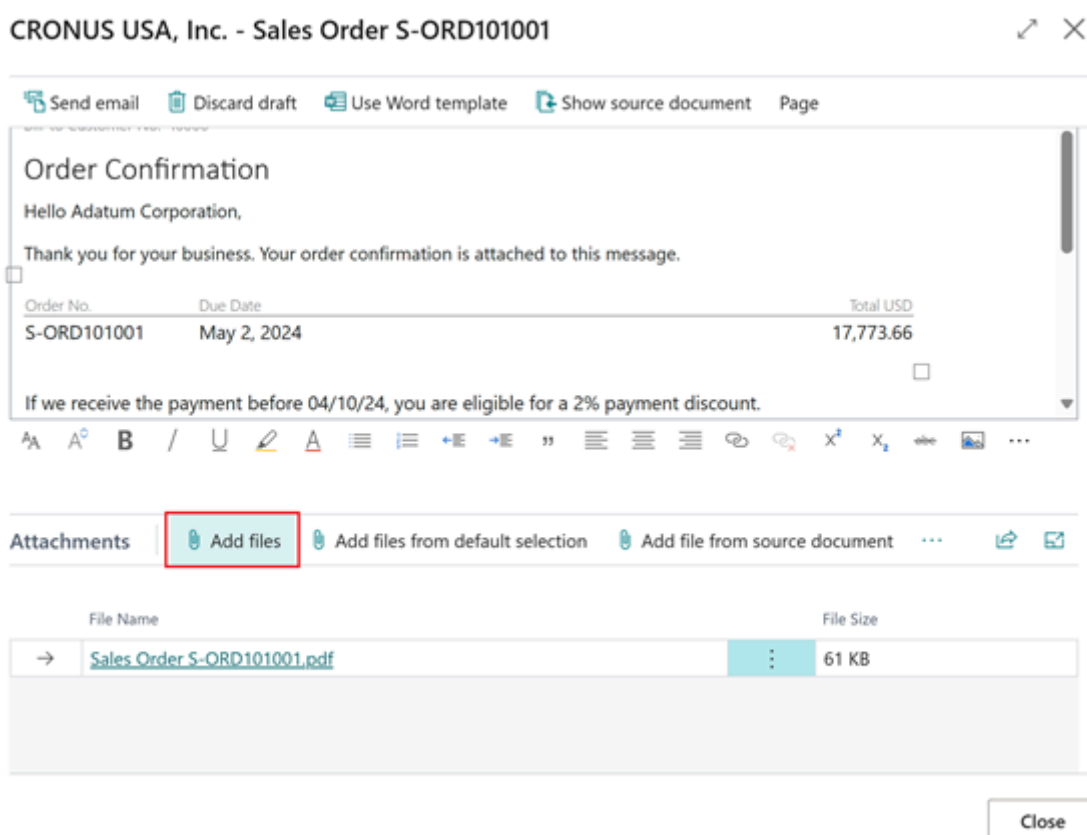
The **Incoming Document Files** FactBox has two separate actions for uploading incoming document files:

- You can choose the **Upload main attachment** action, which was previously named **Attach File**, to upload a single main incoming document attachment.
- You can choose the **Upload supporting attachments** action to upload multiple supporting document attachments for the incoming document.



## Email editor

On the **Email Editor** page, you can choose the **Add files** action to attach one or more attachments to emails you are sending from Business Central.



# Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at <https://aka.ms/bcideas>.

---

## Feedback

Was this page helpful?

 Yes

 No

# Plan and prepare for Dynamics 365 Remote Assist in 2024 release wave 2

Article • 08/16/2024

## Important

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Remote Assist**.

## Overview

Dynamics 365 Remote Assist is a mixed reality application that empowers technicians to solve problems faster when they encounter them. Whether in a heads-up, hands-free environment on Microsoft HoloLens or using an iOS or Android device, technicians can collaborate with remote experts to troubleshoot issues directly where they get the work done. Remote Assist modernizes field service operations and helps technicians use their time efficiently.

Dynamics 365 Remote Assist focuses on three key scenarios:

- **Service and repairs:** Enable organizations to service assets faster by doing the right remote collaboration fast and capturing the fixes for further analysis.
- **Surveys and walkthroughs:** Complete tasks such as inspections, quality assurance, project reviews, and other field service and operations activities by capturing asset information with augmented reality.
- **Knowledge and service insights:** Empower technicians to capture information and make it available for the broader organization. Use repair data from your technician operations to improve your business processes.

In the coming release wave, Dynamics 365 Remote Assist will bring the spatial annotations feature currently available in preview on Teams mobile to general availability. Additionally, Teams mobile users on iOS and Android will get meaningful improvements to inking scenarios in which remote experts or technicians can reliably ink over irregular and complex surfaces.

 [Updates to Dynamics 365 Remote Assist 2024 release wave 2](#)



# Investment areas



To learn more about the entire set of capabilities being delivered during this release wave, check out the release plan for Dynamics 365 Remote Assist below:

[Check out the release plan](#)

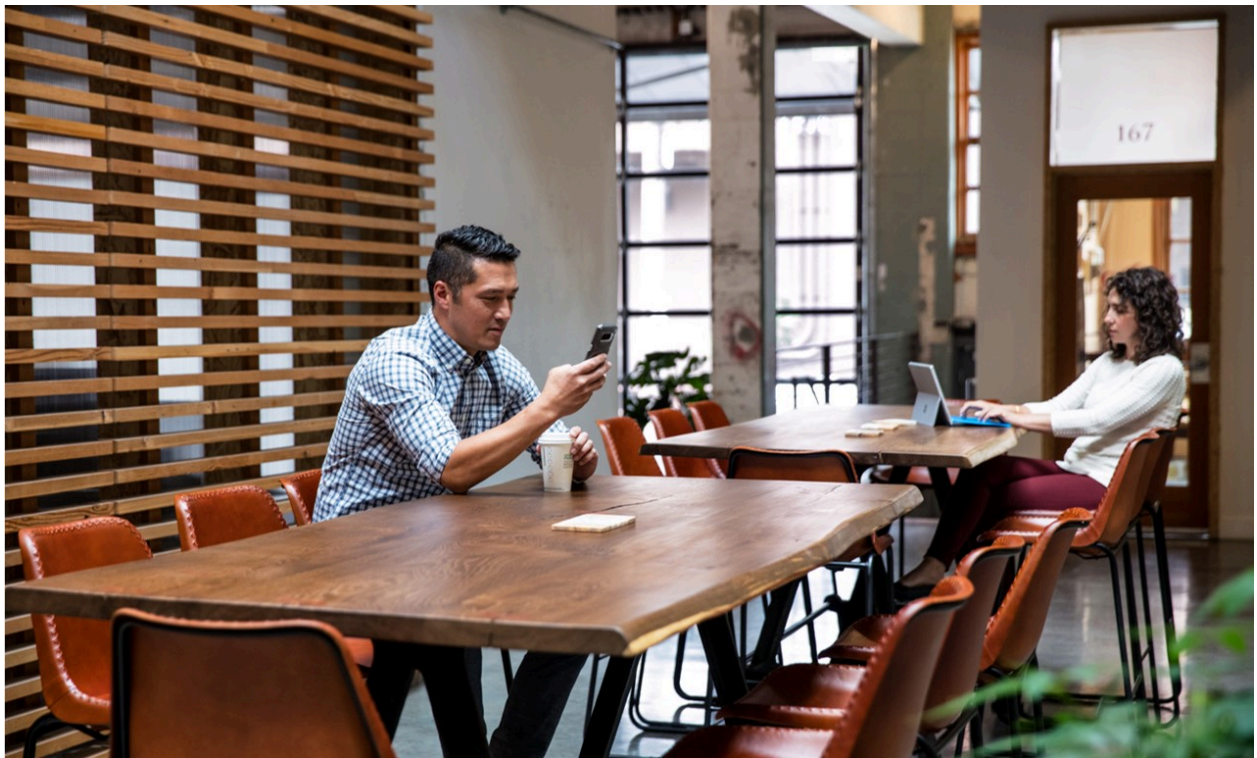
## For application administrators

### **User-impacting features to the user experience enabled automatically**

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

### **Features that must be enabled by application administrators**

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.



## Get the most out of Remote Assist

[Expand table](#)

Helpful links	Description
<a href="#">Release plan</a>	View all capabilities included in the release.
<a href="#">Licensing</a>	Improve your understanding of how to license Remote Assist.
<a href="#">Product documentation</a>	Find documentation for Remote Assist.
<a href="#">User community</a>	Engage with Remote Assist experts and peers in the community.
<a href="#">Upcoming events</a>	Find and register for in-person and online events.
<a href="#">Product trials</a>	Get started with Remote Assist.

## Feedback

Was this page helpful?

Yes

No

# What's new and planned for Dynamics 365 Remote Assist

Article • 09/13/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

[Expand table](#)

Feature	Enabled for	Public preview	General availability
<a href="#">Use Remote Assist mixed reality annotations in Teams</a>	Users by admins, makers, or analysts	✓ Apr 17, 2024	Dec 2024
<a href="#">Get improved spatial annotations in Teams mobile</a>	Users, automatically	-	Oct 2024

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

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## Feedback

Was this page helpful?

 Yes

 No

# Get improved spatial annotations in Teams mobile

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

## Business value

Dynamics 365 Field Service, Remote Assist, and Guides customers get improvements to the stability and accuracy of annotations in Teams mobile. Spatial arrows and annotations will be more stable and readable as users move around.

## Feature details

Teams mobile users on iOS and Android get meaningful improvements to remote expert inking scenarios. This feature further improves accuracy for remote experts with spatial annotation that better align with the physical geometry of the world. The ink strokes are more reliably shown on irregular and complex surfaces. Furthermore, there's increased stability for existing annotations both for remote experts and the frontline technician using holographic annotations on mobile.

---

## Feedback

Was this page helpful?

 Yes

 No


# Use Remote Assist mixed reality annotations in Teams

Article • 08/16/2024

## Important

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 Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	 Apr 17, 2024	Dec 2024

## Business value

Frontline workers can now get remote assistance via video call with spatial annotations, right within Teams mobile. Users no longer need to switch apps to use Remote Assist when they are collaborating within Teams on their mobile devices. Remote assistance improves first-time fix rates, which are a key business and operational metric for service organizations.

## Feature details

With this feature, users can initiate a Remote Assist call right within Teams mobile and will no longer need to switch apps to get support from a remote expert using spatial annotations. When a service technician is stuck on a job 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. Technicians can share their mobile camera view with a remote expert and have them annotate on their screen, which can be seen by a service technician in real time.

## See also

## Feedback

Was this page helpful?

 Yes

 No

# Plan and prepare for Dynamics 365 Customer Insights - Data in 2024 release wave 2

Article • 08/16/2024

## Important

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Insights - Data**.

## Overview

<https://aka.ms/ReleaseHighlight/2024W2/CustomerExperience> 

**Dynamics 365 Customer Insights - Data** unifies customer profiles from various data sources, enriches them with Microsoft's unique data assets and creates powerful AI-driven predictions, segments, and measures. It enables a deep understanding of every customer by providing a holistic, up-to-date view with unmatched time to insights. You can activate this data across channels, departments, and devices to deliver personalized customer experiences at every touchpoint.


In this release wave, our focus is on three key areas:

- **Generative AI and Copilot:** Data from Customer Insights now augments the efficacy of other Copilots in Dynamics 365, enabling you to optimize every interaction and drive business growth.
- **Moments that matter:** Keep your customer profiles up to date with the latest interactions so that you can deliver the most relevant experience in the moments that matter.
- **Unify sales and marketing:** Streamline data ingestion and transform data from disparate data sources into actionable insights swiftly, creating an enriched, comprehensive view of every customer to empower sellers and marketers to be more successful.

Our goal is to allow your teams to focus less on data integration, but more on creating value and predicting what your customers will need next. Bring customer experiences to life in extraordinary ways by fostering loyalty and driving business growth.



For official product documentation and training for Dynamics 365 Customer Insights - Data, go to [Dynamics 365 Customer Insights documentation](#).

 [Updates to Dynamics 365 Customer Insights - Data 2024 release wave 2](#)

## Investment areas



### Moments that matter

Get a unified customer profile that contains the latest customer interactions so you can personalize each experience. Responding to customer needs in the moments that matter raise the likelihood of conversion with better understanding and real-time capabilities.

### Unify sales and marketing

Tear down data silos and gain a ubiquitous understanding of your customers through a unified view of data across the organization and improve your business outcomes across marketing, sales, and service.

To learn more about the entire set of capabilities being delivered during this release wave, [check out the release plan for Dynamics 365 Customer Insights - Data](#) below:

[Check out the release plan](#)

## For application administrators

### User-impacting features to the user experience enabled automatically

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

## Features that must be enabled by application administrators

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.



## Get the most out of Customer Insights - Data

[Expand table](#)

Helpful links	Description
<a href="#">Release plan</a>	View all capabilities included in the release.
<a href="#">Licensing</a>	Improve your understanding of how to license Customer Insights - Data.
<a href="#">Product documentation</a>	Find documentation for Customer Insights - Data.
<a href="#">User community</a>	Engage with Customer Insights - Data experts and peers in the community.
<a href="#">Upcoming events</a>	Find and register for in-person and online events.
<a href="#">Product trials</a>	Get started with Customer Insights - Data.

# Feedback

Was this page helpful?

# What's new and planned for Dynamics 365 Customer Insights - Data

Article • 09/24/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

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This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Moments that matter

Respond to customers' expectations in real time to engage them in moments that matter.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Use automation to manage segments and measures</a>	Admins, makers, marketers, or analysts, automatically	Oct 2024	Nov 2024
<a href="#">Accelerate time to insights with data in Delta Lake format</a>	Admins, makers, marketers, or analysts, automatically	Nov 2024	Feb 2025

## Unify sales and marketing

Build customer loyalty with a unified platform and ambient insights that unify sales and marketing.

 Expand table

Feature	Enabled for	Public preview	General availability
<a href="#">Use Microsoft OneLake as a data source</a>	Admins, makers, marketers, or analysts, automatically	Feb 2025	-

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

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## Feedback

Was this page helpful?

Yes

No

# Moments that matter

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Get a unified customer profile that contains the latest customer interactions so you can personalize each experience. Responding to customer needs in the moments that matter raise the likelihood of conversion with better understanding and real-time capabilities.

---

## Feedback

Was this page helpful?

 Yes

 No

# Accelerate time to insights with data in Delta Lake format

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Nov 2024	Feb 2025

## Business value


Your customer data grows constantly with rapidly changing signals like online activities and mobile interactions. As the data set grows, reprocessing of the data takes longer, slowing your ability to respond to changes, and providing increasingly stale insights. 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.

## Feature details

One of the key values of the Delta Lake format is the ability to track changes over time to the data. With native support for the Delta Lake table format in Customer Insights, you can now take advantage of Delta Lake incremental data updates to accelerate processing in Customer Insights - Data.

It's typical for customer profile data to change only by a few percentages each day. Instead of reprocessing the entire data set every day, Customer Insights - Data can process just the changed source data for unification in the Delta format, saving time and getting you results faster. This improvement happens automatically when all the tables are in the Delta format. No configuration or change is required.

Incremental processing of segments, measures, activities, and predictions is planned to be added in the coming months.

 **Note**

In this release, incremental unification requires that all source tables included in the unification process use the Delta format. Tables ingested to Customer Insights - Data using the Delta Lake connector and the Dataverse connector will be in the Delta format.

---

## Feedback

Was this page helpful?

 **Yes**

 **No**



# Use automation to manage segments and measures

Article • 09/25/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Nov 2024

## Business value

As your Customer Insights - Data usage grows, 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 can exclude specific segments from auto-deactivation but the system will automatically manage the rest to allow your organization to scale confidently.

## Feature details

When you have large numbers of segments and measures, as an admin, you can't always reliably determine which are needed and which are not. Campaigns often run only once and the segments or measures are not needed afterward.

When a segment or measure isn't used anywhere else for a certain period of time—in an export, another segment, a journey, or another measure—it's automatically deactivated by the system. This moves compute resources to the segments and measures that are active, which results in a faster system refresh and thus faster time to insights.

You can always reactivate deactivated segments or measures if needed. As an admin, you can also exclude specific segments from the automated process.

---

## Feedback

Was this page helpful?

 Yes

 No

# Unify sales and marketing

Article • 09/03/2024

## 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](#)<sup>↗</sup>). Learn more: [What's new and planned](#)

Tear down data silos and gain a ubiquitous understanding of your customers through a unified view of data across the organization and improve your business outcomes across marketing, sales, and service.

---

## Feedback

Was this page helpful?

 Yes

 No

# Use Microsoft OneLake as a data source

Article • 08/29/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2025	-

## Business value

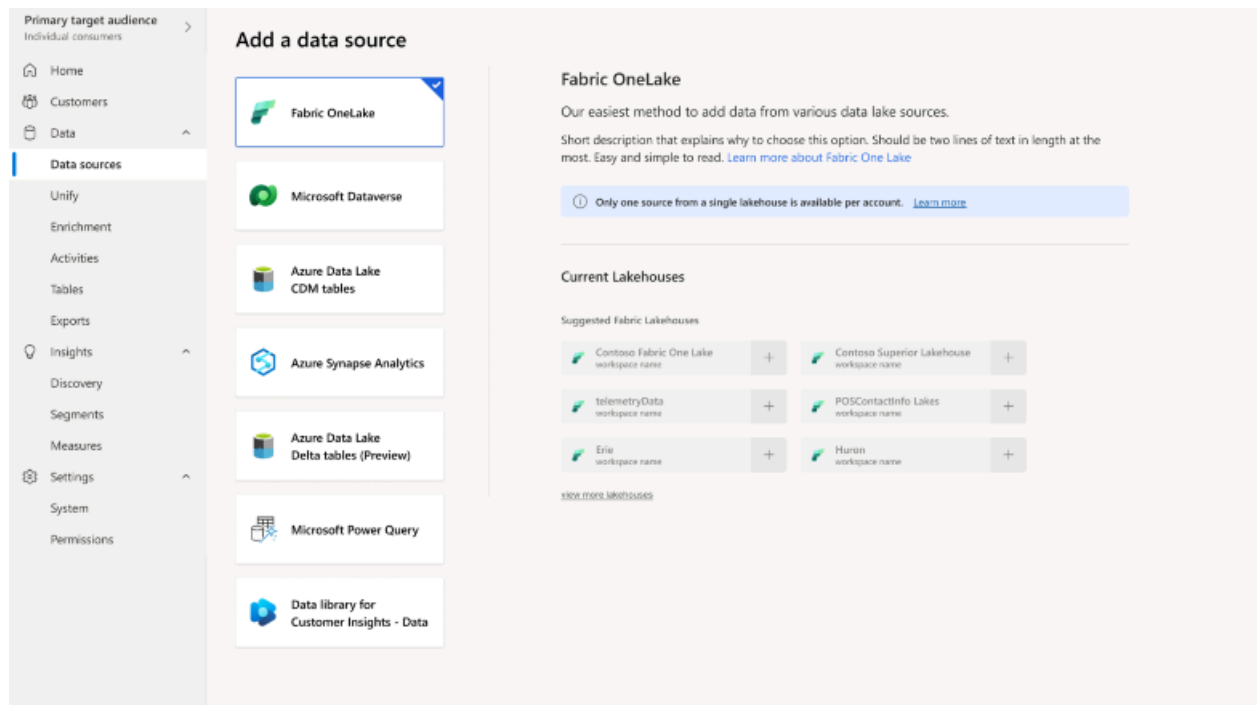
Dynamics 365 Customer Insights helps generate insights from all your customer data stored in your data lake, whether it's built using Azure Delta Lake or the new OneLake. When you use Customer Insights together with Microsoft Fabric, you can focus on generating the insights you need while cutting costs, reducing the effort and time needed to move, integrate, and transform customer data from any source.

Increase agility in decision-making with up-to-date insights that you can use in various Dynamics 365 applications and for data warehousing, data sharing, and advanced analytics/machine learning scenarios directly through Fabric—all without the need for expensive data movement or ETL.

## Feature details

- Build your customer data platform by adding Customer Insights on top of Fabric. If you already use Customer Insights as your customer data platform, attach your data in OneLake to Customer Insights.
- Explore and select data stored in OneLake to be included in Customer Insights workflows.
- Save time with OneLake Delta format. No need for separate data formatting in full or upserts folders. Customer Insights seamlessly harnesses Delta Lake capabilities for OneLake interactions.

Example scenario: Contoso Coffee has recently centralized their data estate using Microsoft Fabric and are able to leverage the Fabric OneLake as a shared source for all kinds of analytical workloads. In the past, they would copy data from OneLake to an Azure storage container, using the Delta format, or the Common Data Model format. Now, they can simply connect Customer Insights to their Fabric OneLake directly, allowing them to unify customer data and create deep insights without copying data, or perform any ETL. With this approach, they can get insights faster than ever as data pipelines no longer create delays and Fabric's use of Delta format allows Customer Insights - Data to process just the incremental daily changes.



**Note:** The author created this article with assistance from AI. [Learn more](#)

## Feedback

Was this page helpful?

Yes

No

# Plan and prepare for Dynamics 365 Customer Insights - Journeys in 2024 release wave 2

Article • 08/16/2024

## Important

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Insights - Journeys**.

## Overview

<https://aka.ms/ReleaseHighlight/2024W2/CustomerExperience> 

**Dynamics 365 Customer Insights - Journeys** brings together the worlds of customer experience, generative AI, and marketing automation, empowering businesses to orchestrate end-to-end, personalized journeys across all touchpoints to strengthen relationships and earn loyalty.

Customers demand digital and in-person experiences throughout the purchase journey. They expect seamless, exceptional, and personalized experiences at every touchpoint. This necessitates analyzing a large amount of data to gain a deep understanding of customers, robust alignment between sales and marketing, and the ability to orchestrate personalized journeys across the customer lifecycle.


In this release, our focus is on three key areas:

- **Generative AI and Copilot:** We're not just enhancing your workflow, we're reinventing it. By combining productivity and creativity with an AI-first interface that truly grasps the nuances of your business, we're setting the stage for a new era of efficiency. With just a simple project brief, Copilot generates a campaign that mirrors your vision and can be further refined and launched. Copilot now works the way you do, as it understands your custom tables, fields, and email templates, and can generate suggestions based on them. Copilot generates email suggestions, based on your brand identity and layout preferences.

- **Engaging customers in moments that matter:** We're rolling out new features to enhance customer interaction and operational workflows, facilitate efficient event management, ensure timely communication, enable seamless journey deployment, and improve email engagement with insightful analytics and customizable content so you can boost efficiency and engagement with your customers in the moments that matter
- **Unifying sales and marketing:** We continue to break down data silos between your departments, to streamline customer data collection and enhance lead scoring to increase win rates, by addressing leads when they're the most likely to buy.

Our goal is to equip you with an unparalleled suite of tools to enhance your productivity in delivering great customer experiences. We want to empower you to understand your customers deeply, reach out to them in innovative ways, and consistently refine your journeys for optimal results, boosting your performance to new heights.

For official product documentation and training for Dynamics 365 Customer Insights, go to: [Customer Insights - Journeys overview](#)

 [Updates to Dynamics 365 Customer Insights - Journeys 2024 release wave 2](#)

## Investment areas



### Copilot and AI innovation

Empower marketers to redefine their approach and unlock new possibilities with Copilot in Customer Insights and AI innovation. By tapping into the potential of generative AI, marketers can elevate their productivity to unprecedented levels. Copilot serves as a reliable daily assistant, streamlining manual tasks and fueling creativity. The result? Enhanced business outcomes that drive success.

### Moments that matter

In today's dynamic business landscape, anticipating customer expectations in real time



is paramount. To meet these expectations, Customer Insights - Journeys can strategically identify optimal communication channels and touchpoints. These interactions, carefully orchestrated, create meaningful moments that resonate with customers, fostering engagement and loyalty.

To learn more about the entire set of capabilities being delivered during this release wave, [check out the release plan for Dynamics 365 Customer Insights - Journeys](#) below:

[Check out the release plan](#)

## For application administrators

### User-impacting features to the user experience enabled automatically

User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

### Features that must be enabled by application administrators







This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.





# Get the most out of Customer Insights - Journeys

 Expand table

Helpful links	Description
<a href="#">Release plan</a> 	View all capabilities included in the release.
<a href="#">Licensing</a> 	Improve your understanding of how to license Customer Insights - Journeys.
<a href="#">Product documentation</a> 	Find documentation for Customer Insights - Journeys.
<a href="#">User community</a> 	Engage with Customer Insights - Journeys experts and peers in the community.
<a href="#">Upcoming events</a> 	Find and register for in-person and online events.
<a href="#">Product trials</a> 	Get started with Customer Insights - Journeys.

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## Feedback

Was this page helpful?

 Yes

 No

# What's new and planned for Dynamics 365 Customer Insights - Journeys

Article • 09/24/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2024 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Copilot and AI innovation

Revolutionize how marketers work and what they can achieve with Copilot in Customer Insights and AI innovation.

 Expand table

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Create journeys by using Copilot to describe them</a>	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2024

## Moments that matter

Respond to customers' expectations in real time to engage them in moments that matter.

 Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Maximize event capacity with waitlist registrations	Admins, makers, marketers, or analysts, automatically	Feb 2025	-	-
Easily set up and execute pre- and post-event communications	Admins, makers, marketers, or analysts, automatically	Jan 2025	-	-
Scale your business with confidence with 300M maximum monthly interactions	Admins, makers, marketers, or analysts, automatically	-	-	Dec 2024
Export your data to your own storage for custom reporting	Admins, makers, marketers, or analysts, automatically	Dec 2024	-	Mar 2025
Reach customers with greater throughput for trigger-based journeys	Admins, makers, marketers, or analysts, automatically	-	-	Nov 2024
Prevent duplicate emails to shared email addresses	Admins, makers, marketers, or analysts, automatically	-	-	Feb 2025
Collect extra customer data without custom attributes	Admins, makers, marketers, or analysts, automatically	Feb 2025	-	-
Create an event portal allowing access to event details, registration	Admins, makers, marketers, or analysts, automatically	Nov 2024	-	-
Split audience into groups to deliver unique customer experiences	Admins, makers, marketers, or analysts, automatically	✓ Aug 8, 2024	-	Nov 2024
Improve engagement and compliance with double opt-in	Admins, makers, marketers, or analysts, automatically	✓ Aug 21, 2024	-	Nov 2024
Generate leads that link to an existing contact	Users, automatically	-	Feb 2025	Mar 2025
Understand customer inflows and exits at every journey step	Admins, makers, marketers, or analysts, automatically	Oct 2024	-	Jan 2025

Feature	Enabled for	Public preview	Early access*	General availability
<a href="#">Control how fast customers can enter a journey</a>	Admins, makers, marketers, or analysts, automatically	✓ Sep 3, 2024	-	Dec 2024
<a href="#">Wait on segment membership to trigger the next step in a journey</a>	Admins, makers, marketers, or analysts, automatically	Nov 2024	-	Feb 2025
<a href="#">Automate seamless handoffs between marketing and sales</a>	Admins, makers, marketers, or analysts, automatically	✓ Feb 1, 2023	-	Mar 2025
<a href="#">Orchestrate journeys using any marketing interaction</a>	Admins, makers, marketers, or analysts, automatically	-	-	Dec 2024
<a href="#">Personalize messages and make journey decisions based on web interactions</a>	Admins, makers, marketers, or analysts, automatically	Nov 2024	-	Feb 2025
<a href="#">Get insights on email engagement with heatmap analytics</a>	Admins, makers, marketers, or analysts, automatically	Oct 2024	-	-

You are able to opt into some features as part of early access on August 12, 2024, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the [International availability guide](#). For more information about geographic areas and datacenters (regions), go to the [Dynamics 365 and Microsoft Power Platform availability page](#).

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# Feedback

Was this page helpful?

# Copilot and AI innovation

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

Empower marketers to redefine their approach and unlock new possibilities with Copilot in Customer Insights and AI innovation. By tapping into the potential of generative AI, marketers can elevate their productivity to unprecedented levels. Copilot serves as a reliable daily assistant, streamlining manual tasks and fueling creativity. The result? Enhanced business outcomes that drive success.

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## Feedback

Was this page helpful?

 Yes

 No

# Create journeys by using Copilot to describe them

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

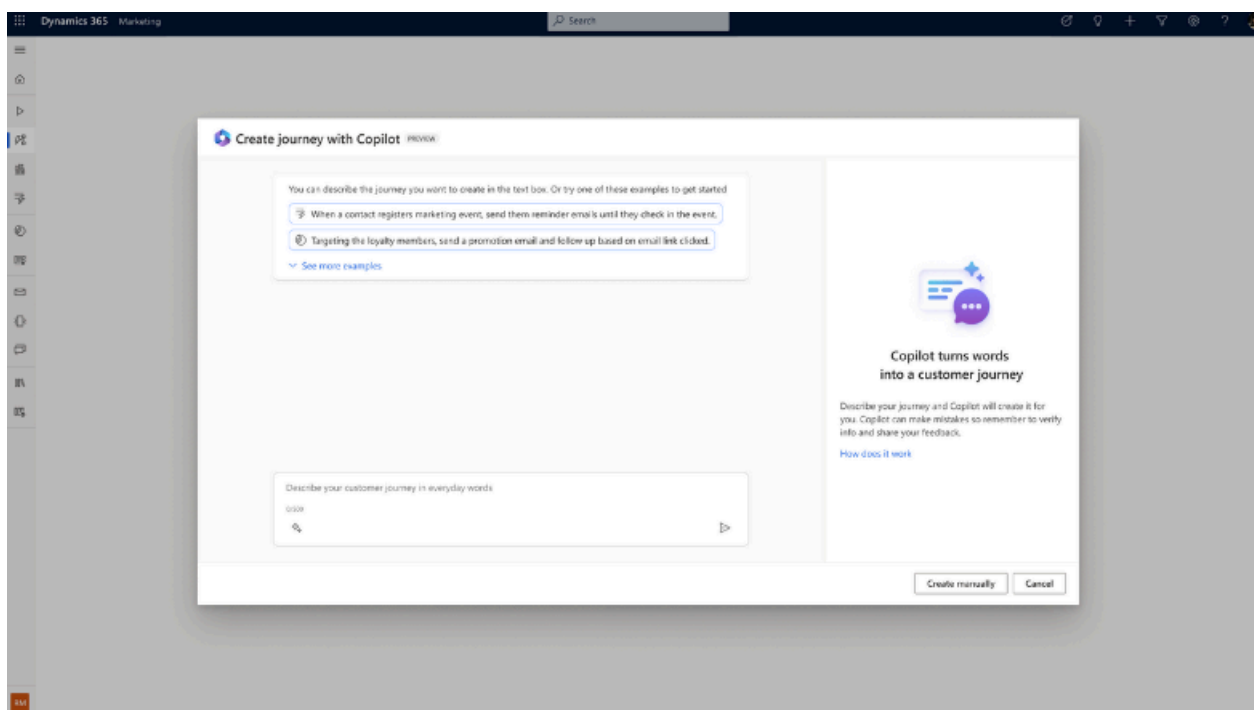
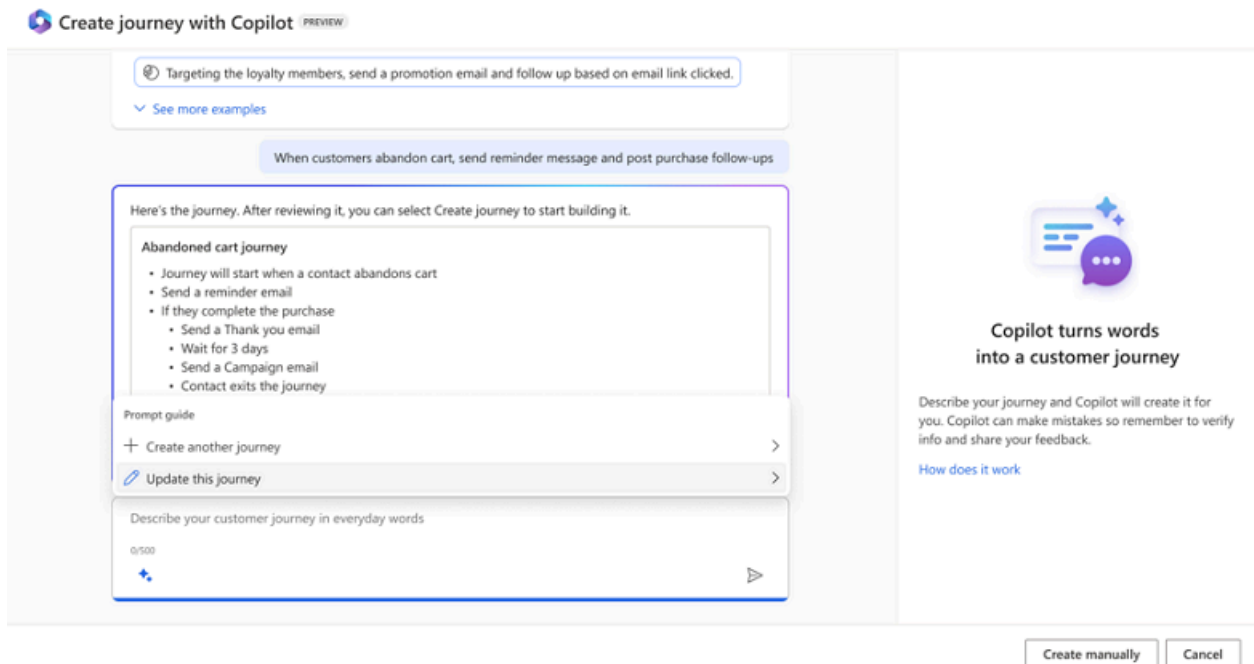
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Oct 2024

## Business value

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.

## Feature details

- Use natural language to describe the journey you want to create.
- Get inspiration about how to get started with a list of suggested journeys.
- See a preview of the journey Copilot created.
- Get a detailed summary of the Copilot-created journey before you start adding your content.



## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia



- Brazil
  - Canada
  - India
  - Japan
  - France
- 

## Feedback

Was this page helpful?

 Yes

 No

# Moments that matter

Article • 09/03/2024

## 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](#)). Learn more: [What's new and planned](#)

In today's dynamic business landscape, anticipating customer expectations in real time is paramount. To meet these expectations, Customer Insights - Journeys can strategically identify optimal communication channels and touchpoints. These interactions, carefully orchestrated, create meaningful moments that resonate with customers, fostering engagement and loyalty.

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## Feedback

Was this page helpful?

 Yes

 No


# Automate seamless handoffs between marketing and sales

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	 Feb 1, 2023	-	Mar 2025

## Business value

Invite your sales team to engage with qualified leads at the right time and stage of their journey by creating sales activities and records directly from customer journeys.

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.

## Feature details

Create sales-related activities and records directly from Customer Insights - Journeys.

- Add sales activities such as phone calls or tasks, or create leads or opportunities in your journeys.
- Respond quickly to incoming leads by routing them directly to sales agents.

Dynamics 365 Marketing Search

Journey 1 Draft Undo Redo Delete Save Publish

```
graph TD; Segment[Segment: All contacts] --> Email[Send an email: Product introduction]; Email --> Branch{If/then branch: Email link clicked}; Branch -- Yes --> Lead[Create a lead for the audience: Create a lead]; Branch -- No --> Exit[Exit]; Lead --> PhoneCall[Create a phone call activity: Phone call];
```

Phone call

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

100% Reset

# Feedback

Was this page helpful?

# Collect extra customer data without custom attributes

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

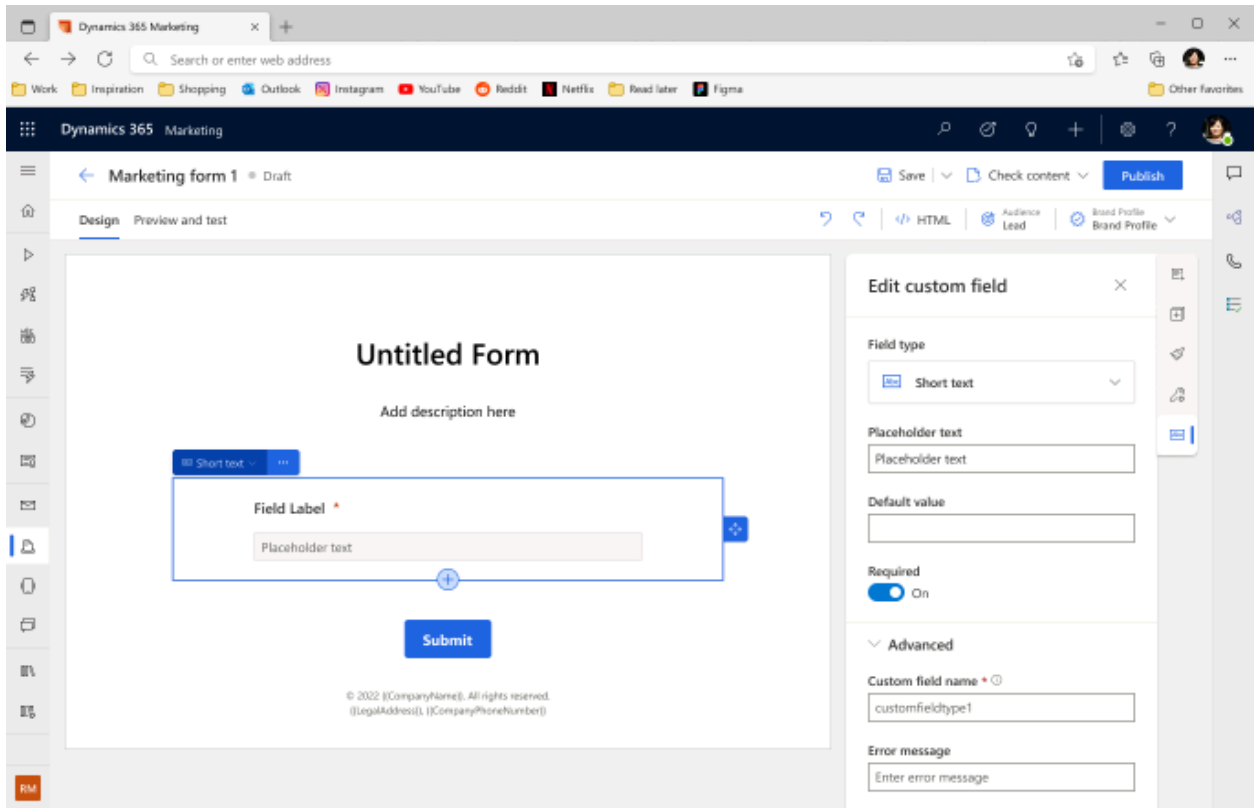
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2025	-	-

## Business value

Easily gather additional information about your customers by creating any kind of question directly in the form editor without having 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.

## Feature details

- Use custom fields to capture additional or temporary information like meal preference or an answer to a contest question.
- To use custom form fields, simply drag and drop them from the toolbox to the form canvas and edit the label and properties as you wish.
- The answer is stored only as part of the form submission, so you can access the value any time without polluting your data.



## Feedback

Was this page helpful?



# Control how fast customers can enter a journey

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2024	-	Dec 2024

## Business value

There are times when you want to reach a large audience, but sending a message to the entire audience at the same time would cause problems for your business.

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.

## Feature details

Control how fast customers enter your journey with journey rate limiting. By setting a rate limit, you'll be able to spread out the number of customers who begin your journey over time.

- Set rate limits per day or per hour.
- Choose which days of the week customers can enter the journey.
- Rate limits only apply to segment-based journeys. Trigger-based journeys don't support rate limiting at this 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](#)

---

## Feedback

Was this page helpful?



# Create an event portal allowing access to event details, registration

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Nov 2024	-	-

## Business value

Events are a pivotal element of your business strategy, aiding in customer acquisition and engagement. A centralized location is essential for your clients to discover and learn about events you are organizing.

The new event portal allows for the swift creation of a comprehensive hub where customers can access event details, session specifics, and speaker schedules and conveniently register using the event registration form. The portal can be seamlessly integrated into your existing CMS or deployed through Power Pages, where it can be tailored to align with your brand identity.

## Feature details

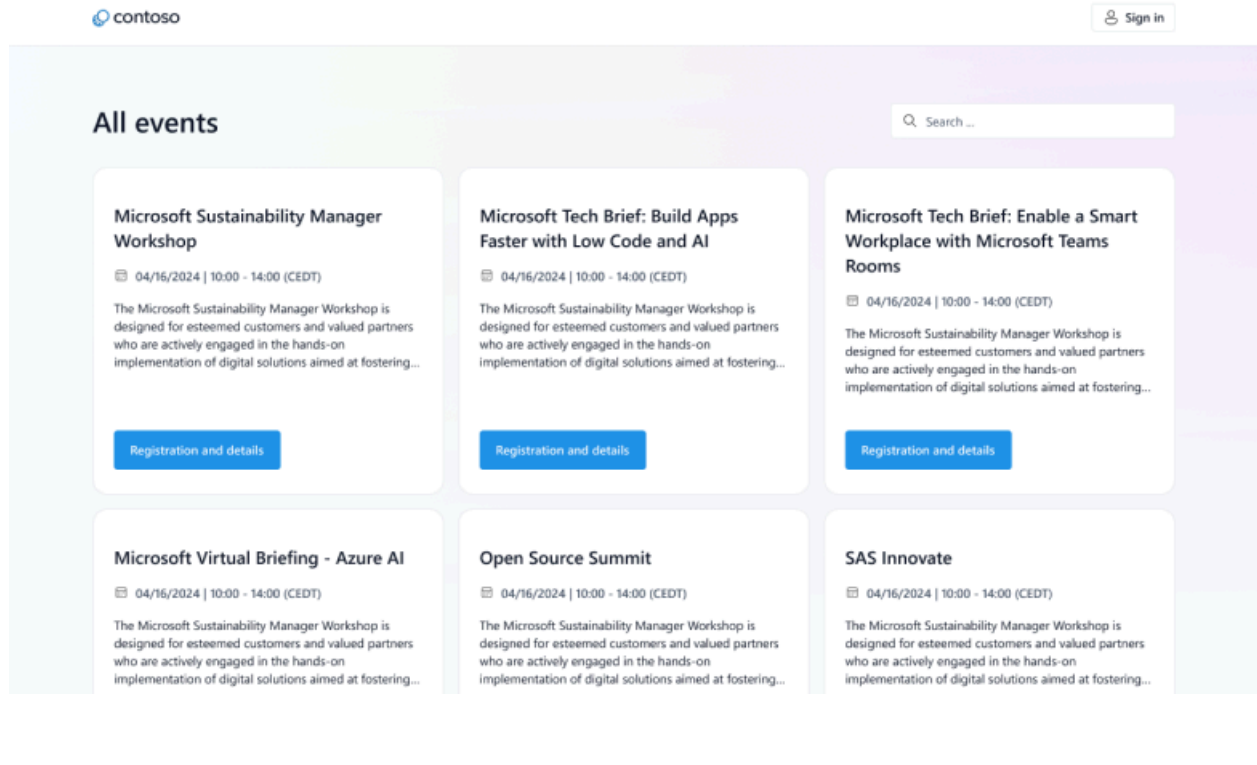
Create a comprehensive event portal where customers can access event details and registration.

Portal hosting options:

- Embed in an existing website.
- Leverage an out-of-the-box Power Pages template for quick deployment.

Portal includes:

- A list of your upcoming events.
- A detailed summary for each event, including session information and speakers.



## Feedback

Was this page helpful?



# Easily set up and execute pre- and post-event communications

Article • 09/04/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jan 2025	-	-

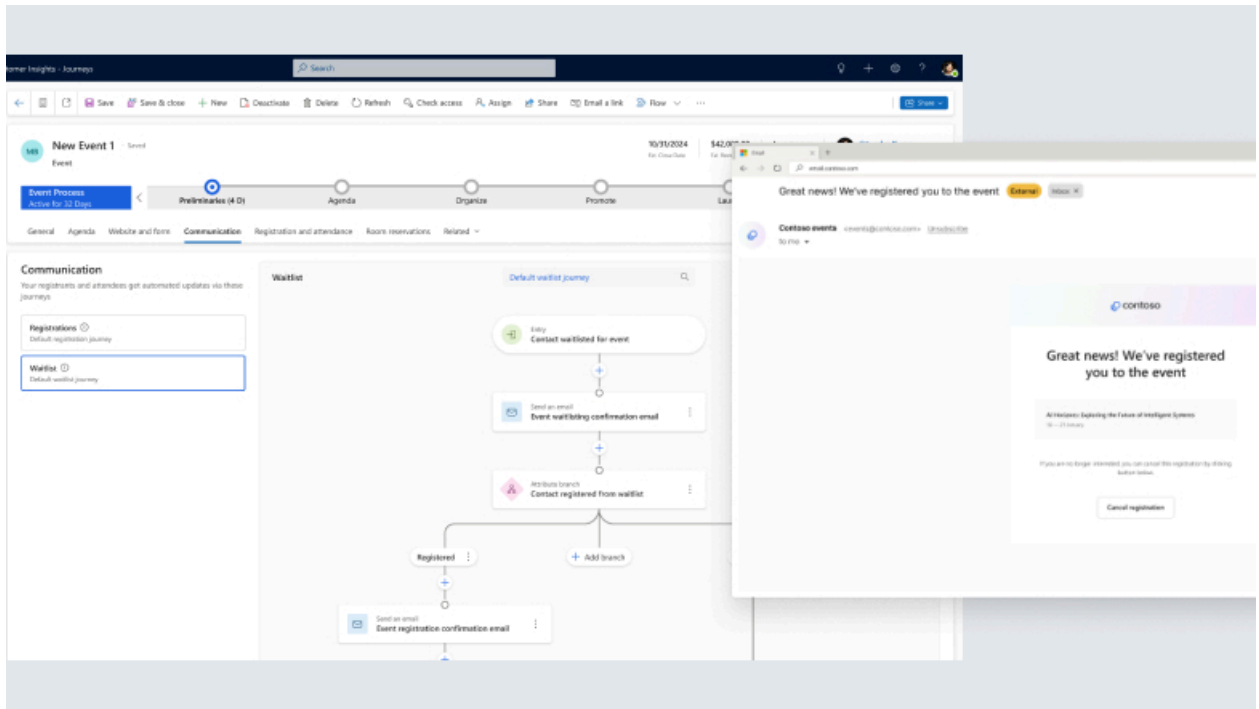
## Business value

Crafting event messaging and promotions are important aspects of event planning. Now, with real-time journeys event management, you can attract the right audience, increase registrations, boost ticket revenue, and deliver personalized experiences with out-of-the-box journeys that help you optimize communication before, during, and after your event. This streamlines the event creation process, allowing you to create and manage all the event communication within the event management experience.

## Feature details

Pre- and post-event communications include the following options:

- Use segmentation to target the appropriate audience for your event.
- Choose templates tailored for events and use Copilot for more efficient creation of captivating content.
- Enhance engagement before the event and boost attendance with ready-made multichannel journeys.
- Gather valuable feedback and learn from attendees using post-event satisfaction surveys and follow-up emails.



# Feedback

Was this page helpful?

Yes

No

# Export your data to your own storage for custom reporting

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Dec 2024	-	Mar 2025

## Business value

In today's data-driven world, marketers face the challenge of gaining a comprehensive view of their campaigns to make informed decisions. While Customer Insights - Journeys offers advanced custom reporting capabilities with Microsoft Fabric, in some cases it's easier to integrate with your existing reporting systems. 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.

## Feature details

With data export, you can:

- Securely export your Customer Insights - Journeys data directly to your preferred storage.
- Export data from Customer Insights - Journeys including interaction data and entity details.
- Use data with your existing reporting system to create custom reports.

# Feedback

Was this page helpful?

# Generate leads that link to an existing contact

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2025	Mar 2025

## Business value

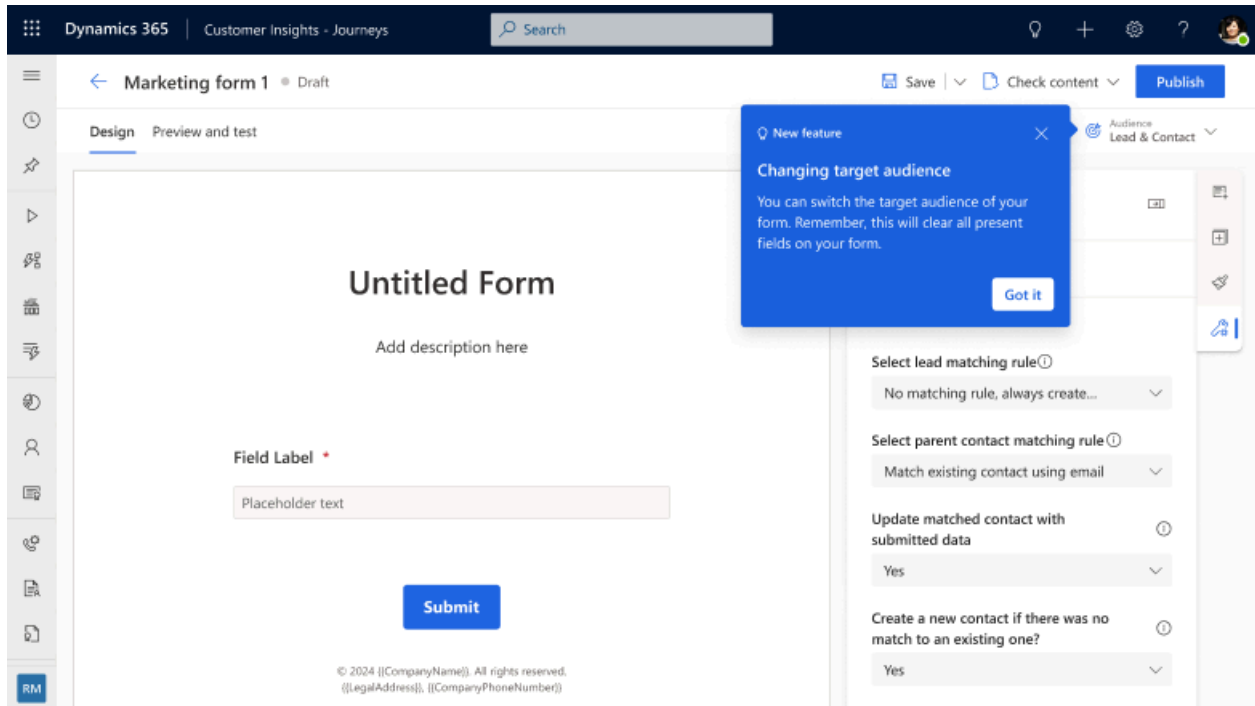
Your business has unique ways of organizing customer data and classifying potential leads. Now with real-time journey forms, you can manage your contacts and leads more effectively, according to your company's established processes. For example, you can recognize existing customers who fill out a lead form, so they're not mistaken for new leads.

With this new set of capabilities to connect lead and contact data, you can choose how existing contact or lead details should be updated and define advanced matching rules to prevent duplicate records. Additionally, you can set defaults so everything is already configured each time a new form is created. All these new capabilities allow you to fine-tune how form data is handled to provide better quality leads and match your company's established processes.

## Feature details

Use parent contacts for leads in real-time journeys forms. The detailed settings for form audiences let you decide whether to update existing contact or lead information with the data submitted through the forms, helping you keep your customer data accurate and up to date.

- Update both lead and contact data at the same time with form submissions.
- Define if the existing record should be updated with the form submission to keep quality of the existing data.
- Set up more granular matching rules to avoid duplicate records.
- Preset the default target audience configuration for your forms.



## Feedback

Was this page helpful?

Yes

No



# Get insights on email engagement with heatmap analytics

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	-	-

## Business value

Understanding the effectiveness of email campaigns can often be complex, particularly when information and links are abundant. Gaining clarity on which areas or links captivate your audience and drive them to act is crucial for refining the user experience and boosting email performance.

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.

## Feature details

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.

- 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.

The screenshot shows the Dynamics 365 Marketing interface for a '2024 promotion' campaign. The main view is the 'Click map' for 'All journeys (4)' from 'Jan 22 2022 - Feb 22 2022'. The interface is divided into three main sections:

- Navigation Sidebar:** Includes sections for Engagement (Journeys, Analytics, Triggers), Audience (Segments, Consent center, Contacts, Leads), and Channels (Emails, Push notifications, Text messages).
- Table of Link Clicks:** A table titled 'Rank by most unique clicked' showing 20 links. The top 5 links are:

Rank	Link Name	Link Alias	Clicks	Percentage
1	Discover sales	Promote	98	25.7%
2	April fool's day image	Image	36	10.7%
3	Logo	Logo	20	7.3%
4	Unsubscribe	footer	3	1%
5	Follow us Facebook	Social	3	1%
- Visual Representation:** A preview of the email content with a heatmap overlay. The heatmap shows the highest click density (red) on the 'Discover sales' link (ranked 1), followed by the 'April fool's day image' (ranked 2) and the 'Logo' (ranked 3). The 'Unsubscribe' and 'Follow us Facebook' links (ranked 4 and 5) show very low click density (blue/green).

## Feedback

Was this page helpful?

Yes

No


# Improve engagement and compliance with double opt-in

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	 Aug 21, 2024	-	Nov 2024

## Business value

By implementing double opt-in, you can cultivate a more effective email marketing strategy, leading to improved compliance, increased open and click-through rates, and a better overall brand experience for subscribers.

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.

## Feature details

- Administrators can enable double opt-in at a compliance profile-level and can easily enforce the double opt-in flow for all the forms using the compliance profile.

- Familiar concepts like triggers and journeys are used to orchestrate the double opt-in process, allowing you to customize the process to meet your business needs.
- New contacts (or leads) won't be created until the customer has confirmed their opt-in, keeping your contact and lead lists free of bad data.

The screenshot shows the 'Double opt-in' configuration interface for a compliance profile named 'Contoso Canada'. The interface is divided into several sections:

- General:** Shows the 'Double opt-in status' as 'Not enabled'. A note states: 'Once enabled double opt-in will be applied to all related live forms. [View related forms](#)'.
- Step 1: Form submission configuration:** Marked as 'Completed'. It states: 'This journey will orchestrate an email that will be sent to the user to confirm their preferences after form submission.' A link for 'Double opt-in journey' points to 'Contoso Canada double opt-in journey'.
- Step 2: Double opt-in confirmation:** Marked as 'Completed'. It asks to '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:** Marked as 'Completed'. It says 'Enable the feature and save your changes.' and has a toggle switch set to 'Enabled'.

On the right side, there are informational boxes:

- 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.

## See also

[Double opt-in in real-time journeys \(docs\)](#)

## Feedback

Was this page helpful?

Yes

No

# Maximize event capacity with waitlist registrations

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	-	-

## Business value

Ensuring marketing events are filled to capacity is crucial for success and return on investment. To encourage a high turnout for marketing events, you can now enable waitlist registrations, which ensures spots are filled when registered attendees cancel.

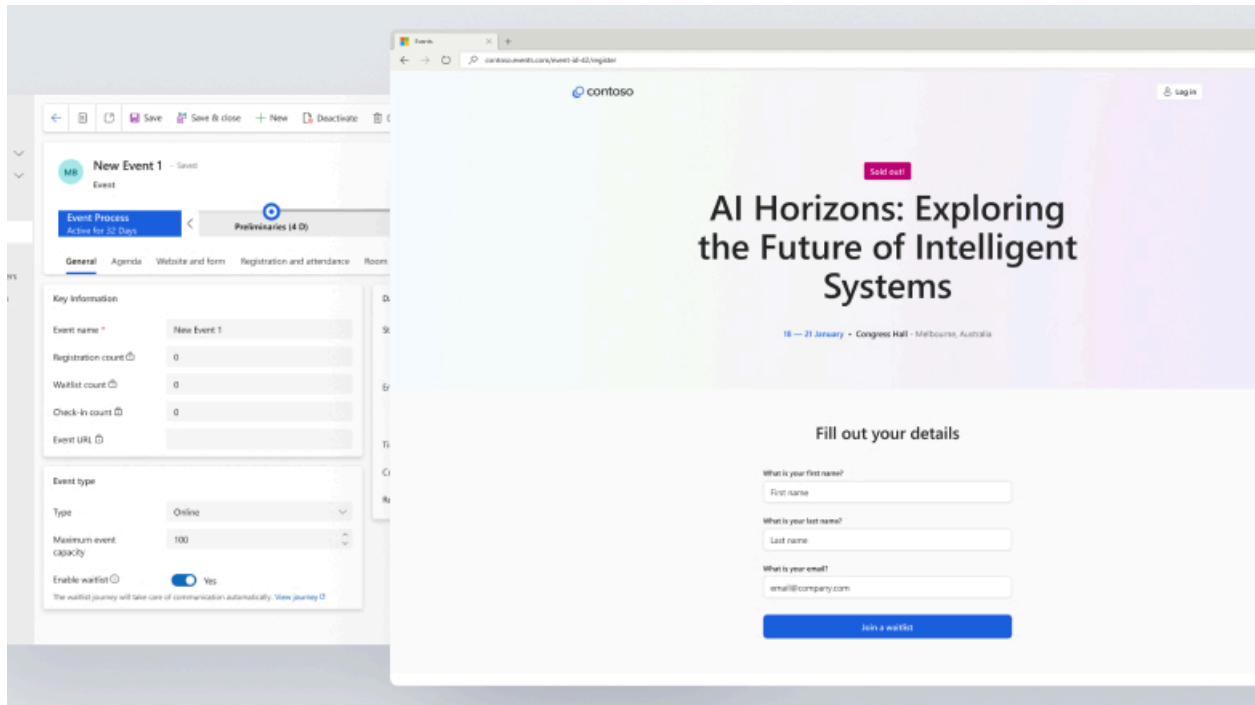
By setting the capacity for events and sessions, prospective attendees are placed on a waitlist when events and sessions are full. Should a slot open, the system automatically registers the individual next on the waitlist, who then automatically receives registration confirmation and personalized event information, ensuring your event is filled to capacity.

## Feature details

Event capacity and waitlist registrations include the ability to:

- Enable a waitlist for your event and sessions to maximize attendance.
- Easily review the list of waitlist registrations and build a waitlist segment for any further communication with interested attendees.
- Send the relevant event and waitlist registration communication effortlessly with out-of-the-box trigger-based journeys.

- Add an out-of-the-box cancellation button in your emails to let uninterested attendees release their spot to someone else.



## Feedback

Was this page helpful?

# Orchestrate journeys using any marketing interaction

Article • 09/25/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Dec 2024

## Business value

Transform the way you communicate with your customers. By leveraging marketing interaction triggers to orchestrate or branch customer journeys, you can now engage your customers based on the interactions they have with your marketing messages.

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."

## Feature details

- Use the standard out-of-the-box triggers to facilitate greater engagement with your customers rather than using more complex approaches such as Power Automate flows.
- Use marketing interactions such as "email link clicked" to orchestrate customer journeys based on a certain customer interaction.

- Make the right business decisions by branching journeys based on customer interactions and responses.

## Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea
- China

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## Feedback

Was this page helpful?

 Yes

 No



# Personalize messages and make journey decisions based on web interactions

Article • 09/12/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Nov 2024	-	Feb 2025

## Business value

With Customer Insights - Journeys, you can now track and leverage your customers' online behavior to deliver personalized experiences across your digital channels. For example, you can boost conversions and customer loyalty by sending tailored offers after customers visit your website and show interest in a product or service. By tracking additional data about customers' online journeys, you can get valuable insights into your customers' preferences and needs and easily measure your campaign's effectiveness.

## Feature details

Trigger and personalize customer experiences, score leads, and track engagement history based on customers' web activity and clicks.

- Easily generate a tracking script and embed it in your website.
- Use web interaction triggers to build personalized customer experiences.
- Get a holistic view of your customer engagement across touchpoints leveraging first-party data, protecting your customer privacy, and complying with data privacy regulations.

---

# Feedback

Was this page helpful?

 Yes

 No

# Prevent duplicate emails to shared email addresses

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Feb 2025

## Business value

Effective email management is crucial for maintaining strong customer relationships and ensuring your business's success. By enabling email deduplication, you can ensure that even if your data has multiple contacts with the same email address, your message will be sent only once to your customers, keeping their inboxes clutter-free and preserving your brand reputation.

## Feature details

- Enable or disable email deduplication for real-time segment-based journeys.
- Ensure that each message is sent just once to each unique email address for segment-based journeys.
- Review duplicated email addresses in journey analytics.

## Feedback

Was this page helpful?

 Yes

 No

# Reach customers with greater throughput for trigger-based journeys

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Nov 2024

## Business value


In an increasingly digital and interconnected world, businesses are learning that the key to winning over customers lies in capturing their attention in the most crucial moments. Businesses must deliver the right experience, tailored and timely, effectively engaging customers when it matters most. This often involves delivering millions of personalized messages within a span of a few hours.

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.

## Feature details

React to customer behavior in moments that matter with a 10-times increase in throughput for trigger-based journeys.

- Reach your customers in moments that matter using event triggers for up to 500,000 interactions per hour.
- Increased throughput is enabled automatically in this release.

 **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?



# Scale your business with confidence with 300M maximum monthly interactions

Article • 09/20/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Nov 2024

## Business value

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.

## Feature details

- Reach up to 100 million marketing contacts (up more than 3 times from the previous 30 million contact limit). Marketing contacts only include those that you engage with through interactions such as emails, SMS, and push notifications.
- Deliver up to 300 million monthly interactions (through email messages, SMS, push, or custom channels). This is up 3 times from the previous 100 million outbound interaction limit.
- Create segments of up to 100 million marketing contacts.

- Engage with customers in near real time with a 30-second response time. (The response time is the time from a trigger being activated to a message being sent in a single-step customer journey. The actual message delivery time varies depending on the recipient's email server, the message-sending channel used, and other factors.)

ⓘ **Note:** The author created this article with assistance from AI. [Learn more](#)

---

## Feedback

Was this page helpful?

# Split audience into groups to deliver unique customer experiences

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	 Aug 2, 2024	-	Nov 2024

## Business value

When you want customers to have different experiences in one journey, you need to divide them into groups. While this is possible today using attribute branches or segments, sometimes the number of customers in each branch is more important than what those customers have in common. For example, you may want to send a survey out to a random subset of your customers for feedback, something that would be time-consuming to configure today.

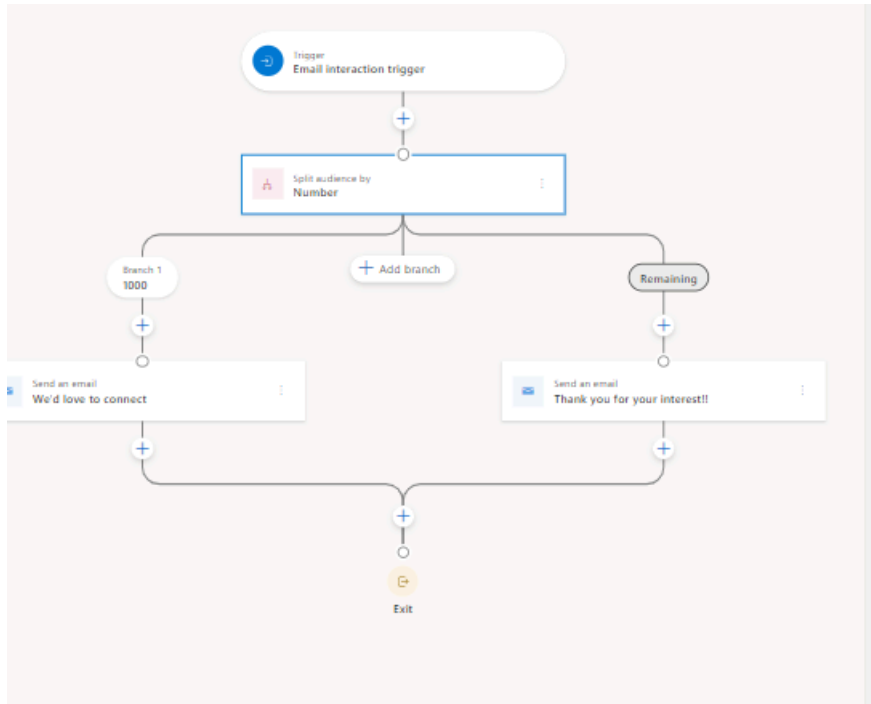
The new journey split tile allows you to split your audience into branches to provide a subset of your audience with unique experiences, whether that be a survey, a new type of experience to test, or a first-come promotional offer. You can split your audience by percentages (for cases where you need randomness) or by numbers (for cases where you want to deliver specific experiences to a set number of people).

## Feature details

The journey split tile creates branches in your journey to split up the participant population and provides them with different experiences. You can split by percentage or by number, each of which supports up to 25 branches.



- **Split by percentage:** Breaks the audience up randomly into the percentages associated with each branch. The random assignment is done for each participant individually, therefore, this works best for larger populations (more than 2,000 participants). This option is useful for scenarios that need randomness, such as sending an experience survey to a subset of your customers.
- **Split by number:** Fills up branches from left to right based on how many participants are configured to go down each branch. This is best for scenarios that need specific numbers of participants, such as offering a promotion for the first 1,000 customers that sign up for a newsletter.



**Split audience by** 🔍

Split audience by \*

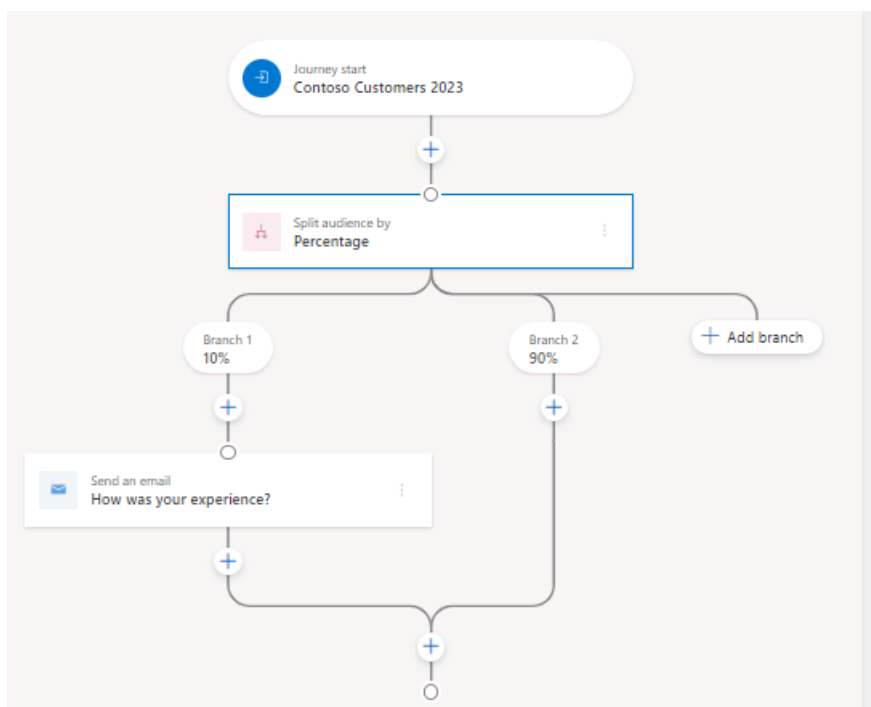
**Branches**

First fill

Branch 1

Total maximum participants in branches above: 1000  
 Additional participants will go to the "Other" branch.

[+ Add branch](#)



**Split audience by** 🔍

Split audience by \*

**Branches**

Branch 1

Branch 2

Total: 100%

[+ Add branch](#) Equalize

See also

## Feedback

Was this page helpful?

 Yes

 No

# Understand customer inflows and exits at every journey step

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	-	Jan 2025

## Business value

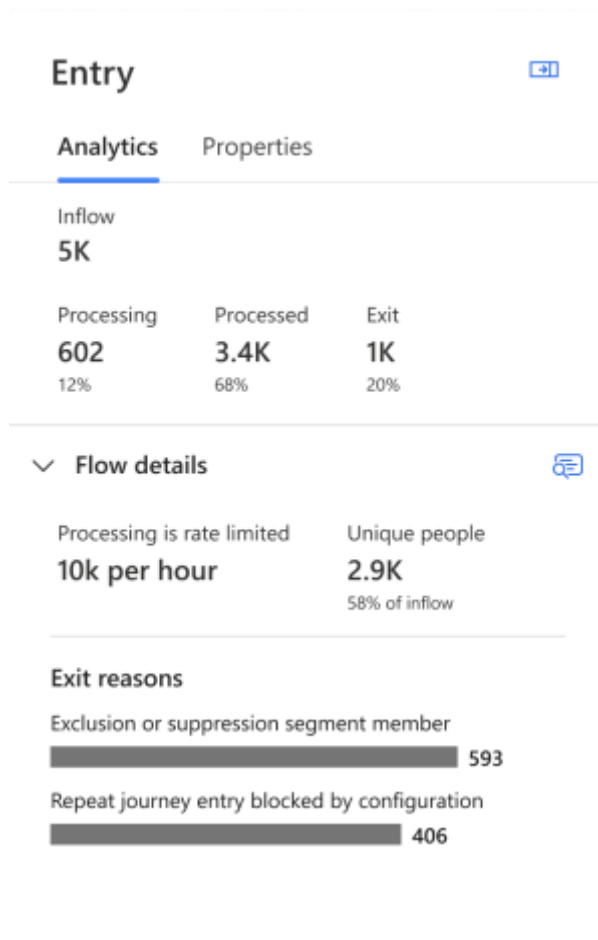
It's critical to understand exactly what happened to each customer who entered and exited your real-time journeys. With improved journey analytics, you'll gain confidence in the processing of every step in your journey through improved metrics and an increased ability to export data.

For example, if your journey uses exit or exclusion segments, you'll be able to see and understand why fewer customers started your journey than were in the entry segment. You'll also be able to see the list of customers who entered and exited each step in the journey and export lists of up to 50,000 people for further analysis.

## Feature details

Improved journey analytics provide clear and actionable data into exactly what happened in every step of your journey. New exit analytics show why customers may not have started your journey due to exclusion segments or other unmet criteria and where in the journey customers may have exited early due to exit segments or other exit conditions.

- Get lists of customers who entered and exited each step of the journey and filter those lists based on how they were processed by the journey step.
- Export lists of customers who reached each step in the journey (up to 50,000 records).
- Understand why the number of customers in your starting segment is different than the number of customers who reached the first step in your journey.
- Understand why and where customers exited your journey before completing each step in the journey flow.
- Understand why customers triggered to start your journey didn't reach the first step in your journey.



## Feedback

Was this page helpful?

👍 Yes

👎 No

# Wait on segment membership to trigger the next step in a journey

Article • 08/16/2024

## 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](#)). Learn more: [What's new and planned](#)

 Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Nov 2024	-	Feb 2025

## Business value

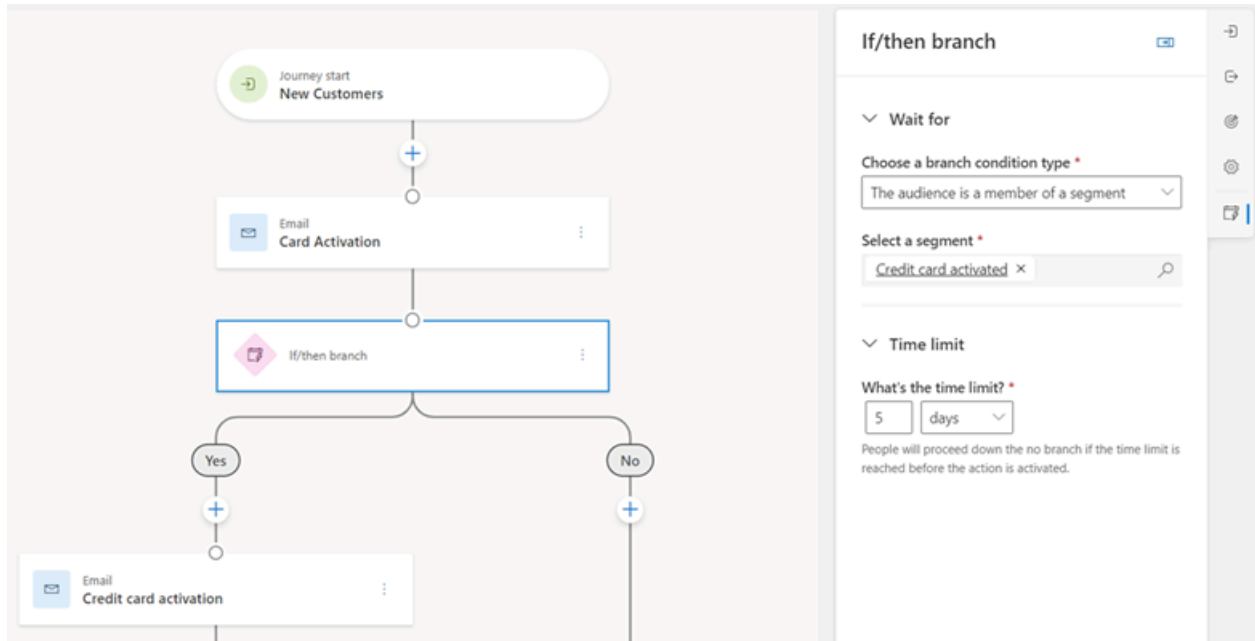
Gain even more control over your customers' experience by waiting for them to become a member of a segment before continuing to the next steps in a journey. This added capability lets you personalize each customer's experience by choosing the correct path and actions relevant to individual customers 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.

For example, let's say you use your journey to send credit card activation emails and you want to wait for the customer to activate their card before sending a welcome email. If the customer doesn't activate their credit card within a few days, you want to send another reminder email. If you have a segment that includes all customers who have activated credit cards, you can use that segment as the condition for the if/then branch to wait for each customer to activate their credit card and send them the right communications.

## Feature details

Create journeys that wait until a customer becomes part of a segment before continuing to the next steps in the journey.

- 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.



## Feedback

Was this page helpful?

Yes

No

# Dynamics 365 Implementation Portal

Article • 07/16/2024

## 📘 Important

Some of the functionalities described on this release plan has not yet been released. Delivery time may change and projected functionality may not be released (refer to [Microsoft policy](#) <sup>↗</sup>).

## 📌 Note

Check out what's new in the portal. [Share your feedback](#) <sup>↗</sup> and help us improve.

## Overview

The FastTrack Implementation Portal is a web-based platform that helps customers and partners accelerate their cloud adoption journey with Microsoft. The portal provides access to resources, tools, and best practices as well as guidance for planning, deploying, and adopting Microsoft cloud services. The portal also enables customers and partners to track their progress, manage their tasks, and collaborate with FastTrack engineers and experts.

## Planned Enhancements

- **Improved usability:** The portal will get a facelift with an updated User Interface and expanded functionality to improve project analysis and management efficiency.
  - **Expanded Copilot scenarios:** The FastTrack Implementation Portal Copilot will be expanded to cover more Success by Design scenarios and Telemetry insights. Additionally, Copilot agents will be leveraged to improve project onboarding, nomination, and review processes.
  - **Collaboration:** Telemetry insights will provide enhanced team collaboration functionality for results.
  - **Faster performance:** The portal will improve its loading speed, responsiveness, and reliability to ensure a smooth and seamless user experience.
-

# Feedback

Was this page helpful?



# Deprecation of Dynamics 365 apps

Article • 07/16/2024

A feature or capability that's deprecated is one that we intend to remove in a future release. The feature or capability will continue to work and will be fully supported until it's officially removed. After it's removed, the feature or capability will no longer work. Deprecation notifications can span a few months or years.

We encourage you to use this information, along with the release plans, to prepare for future releases. This notice is intended to give you sufficient time to plan and update your code before a deprecated feature or capability is removed.

- A deprecated feature is not in active development and may be removed in a future update.
- A removed feature is no longer available in the product.

For the current lists of Dynamics 365 deprecations, visit:

- [Sales](#)
- [Customer Service](#)
- [Field Service](#)
- [Finance and operations apps](#)
- [Universal Resource Scheduling](#)
- [Healthcare accelerator](#)
- [Financial services accelerator](#)
- [Business Central - Base App](#)
- [Business Central - Platform - Clients, Server, and Database](#)
- [Customer Insights](#)
- [Dynamics 365 for Customer Engagement](#)

## Other deprecations

For the lists of other deprecations, visit:

- [Important changes \(deprecations\) coming in Power Apps and Power Automate](#)
- [Important upcoming changes \(deprecations\) in canvas apps](#)
- [Important upcoming changes and deprecations in Power Pages](#)
- [Microsoft Cloud for Financial Services](#)

## See also

- [Release plans for Dynamics 365, Power Platform, and Cloud for Industry](#)
  - [Microsoft Lifecycle Policy](#)
- 

## Feedback

Was this page helpful?

 Yes

 No

# Microsoft Power Platform: 2024 release wave 2 plan

Article • 09/20/2024

The Microsoft Power Platform release plan for the 2024 release wave 2 announces the latest updates to customers as features are prepared for release. You can browse the release plan here [online](#) (updated throughout the month), view it in the [Release planner](#), or download the document as a [PDF file](#), which is updated with every publish. The plan for 2024 release wave 2 covers new features for Power Platform releasing from **October 2024** through **March 2025**.

[Download the 2024 release wave 2 PDF for Power Platform](#) or select the option at the bottom of the table of contents.

The Dynamics 365 features coming in the 2024 release wave 2 have been summarized in a separate [release plan](#) and a downloadable [PDF](#).

The Microsoft Cloud for Industry features coming in the 2024 release wave 2 have been summarized in a separate [release plan](#) as well as a downloadable [PDF](#).

## 2024 release wave 2 overview

Microsoft Power Platform enables users and organizations to analyze, act on, and automate the data to digitally transform their businesses. Microsoft Power Platform today comprises five products: Power BI, Power Apps, Power Pages, Power Automate, and Microsoft Copilot Studio. It also includes the AI Builder add-in. The 2024 release wave 2 contains hundreds of new features across Power Platform applications, including Power BI, Power Apps, Power Pages, Power Automate, Microsoft Copilot Studio, and AI Builder, as well as Microsoft Dataverse and Power Platform capabilities for governance and administration.

Power BI and data integration have moved to [Microsoft Fabric](#). With this transition, you can view how Power BI will work to empower all levels of an organization to make confident decisions at any scale by enhancing copilot experiences and continuing to invest in meeting customer demands. Data integration, now Data Factory, will focus on broadening connectivity options and enrich its library of transformations, enabling real-time data replication for analytics in the data lake.

## Power Apps

[Power Apps](#) will continue to transform app experiences with infused intelligence, enabling users to be more productive; leveraging Copilot to work with data, get insights and improve their apps. Makers will continue to benefit from AI assisted development, enabling rich and complex applications to be built with monitoring, control, and unmatched governance for admins ensuring organizations can adopt low code and AI transformation at scale.

## Power Pages

[Power Pages](#) will expedite site building for a low-code maker or pro developer to build intelligent sites that reimagine the way you interact with your employees, customers, and partners.

## Power Automate

[Power Automate](#) will continue to make it easier to build flows by using natural language and multi-modal generative AI capabilities across cloud flows and desktop flows, troubleshooting runs, and manage your automation estate with an end-to-end view. This, along with improvements in process mining to jumpstart creation of automation through Microsoft 365 integration and ongoing improvements to scaling, means it'll be easier than ever for new users to get started and scale.

## Microsoft Copilot Studio

[Microsoft Copilot Studio](#) is advancing Copilot capabilities and IVR support with Dynamics Customer Service and will expand geographically to the UAE and Germany. Additionally, the team is improving software lifecycle management capabilities with topic-level import/export and RBAC, as well as enhancing governance and administration functionalities.

## AI Builder

[AI Builder](#) is investing in Prompt Builder for creating and deploying GPT prompts with enterprise data to enhance flows, apps, data tables, and Copilots. We are also enhancing Intelligent Document Processing with a new validation station in Power Automate, ALM support, and pre-built AI models for translation, classification, and PII detection. Lastly, we'll improve AI Governance through capacity management, data policies, and including AI Builder capacity in the Power Apps developer plan.

## Microsoft Dataverse

[Microsoft Dataverse](#) is enhancing the maker experience by boosting app building productivity with Copilot, ensuring seamless connectivity to external data and knowledge sources, and integrating AI-powered Enterprise Copilot in Microsoft 365. These investments aim to streamline development and leverage AI for more efficient and intelligent solutions.

## Governance and administration

[Governance and administration](#) continues to advance through tools and insights that empower Power Platform admins to easily get their job done. This wave focuses on governing Copilot adoption and easily securing low code assets, helping enterprises boost adoption of Power Platform solutions in their organization while keeping their digital environment safe.

## Key dates for the 2024 release wave 2

These release plans describe functionality that may not have been released yet. Delivery timelines and projected functionality may change or may not ship (go to [Microsoft policy](#) <sup>↗</sup>).

Here are the key dates for the 2024 release wave 2.

 [Expand table](#)


Milestone	Date	Description
Release plans available	July 16, 2024	Learn about the new capabilities coming in the 2024 release wave 2 (October 2024 – March 2025) across Microsoft PowerPlatform, Dynamics 365, and Microsoft Cloud for Industry.
Early access available	August 12, 2024	Test and validate new features and capabilities that will be a part of the 2024 release wave 2, coming in October, before they get enabled automatically for your users. You can view the <a href="#">Microsoft Power Platform 2024 release wave 2 early access</a> <sup>↗</sup> features now.
Release plans available in 11 additional languages	August 2, 2024	The Microsoft Power Platform, Dynamics 365, and Microsoft Cloud for Industry release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	October 1, 2024	Production deployment for the 2024 release wave 2 begins. <a href="#">Regional deployments will start on October 1, 2024.</a>

Just like the previous release waves, we continue to call out how each feature will be enabled in your environment:

- **Users, automatically**– These features include changes to the experience for users and are enabled automatically.
- **Admins, makers, or analysts, automatically**– These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts**– These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

You can get ready with confidence knowing which features will be enabled automatically.

We've done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We're looking forward to engaging with you as you put these new services and capabilities to work, and we're eager to hear your feedback as you dig into the 2024 release wave 2.

Let us know your thoughts. Share your feedback in the [Microsoft Power Platform community forum](#) . We'll use your feedback to make improvements.

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## Feedback

Was this page helpful?

 Yes

 No

# Microsoft Cloud for Industry: 2024 release wave 2 plan

Article • 09/20/2024

The Microsoft Cloud for Industry release plan for the 2024 release wave 2 announces the latest updates to customers as features are prepared for release. You can browse the release plan [online](#) (updated throughout the month) or download the information as a [PDF](#) file, which is updated with every publish. The plan for 2024 release wave 2 covers new features for Microsoft Cloud for Industry releasing from **October 2024** through **March 2025**.

[Download the 2024 release wave 2 PDF for Microsoft Cloud for Industry](#) or select the option at the bottom of the table of contents.

The Dynamics 365 features coming in the 2024 release wave 2 have been summarized in a separate [release plan](#) as well as a downloadable [PDF](#).

The Microsoft Power Platform features coming in the 2024 release wave 2 have been summarized in a separate [release plan](#) as well as a downloadable [PDF](#).

## 2024 release wave 2 overview

The 2024 release wave 2 for Microsoft Cloud for Industry brings new innovations that provide you with significant capabilities to transform your business. The release contains several new features across Microsoft Cloud for Industry applications, including Microsoft Cloud for Retail, Azure Data Manager for Agriculture, Microsoft Cloud for Sustainability, and Microsoft Cloud for Sovereignty.

## Microsoft Cloud for Retail

[Microsoft Cloud for Retail](#) will enhance existing solutions and foster ISV engagement. Store operations application template will include additional "Better Together" features with MW FLW applications that support partner extensibility. The copilot templates for store operations and personalized shopping will enable capabilities like multilingual support, extensibility support through 3P plugins, functional improvements like better crafted responses based on shopper insights, SME data etc. Retail data solutions will offer ready-made industry templates for inventory optimization, customer segmentation, and demand forecasting.

## Microsoft Cloud for Sustainability

[Microsoft Cloud for Sustainability](#) is designed to help organizations accelerate their sustainability progress and business growth by leveraging data, Copilot, and other AI capabilities. It offers a suite of ESG capabilities, enabling data transparency and insights for action. The platform supports operational and cost efficiencies, ESG data intelligence, sustainable IT systems, and improved ESG performance. It empowers organizations to manage their environmental footprint, and comply with various regulatory standards, ultimately unlocking sustainable growth.


## Azure Data Manager for Agriculture

[Azure Data Manager for Agriculture](#) currently known as ADMA, extends the capabilities of Microsoft Fabric by introducing industry-specific data connectors that bridge the gap between disparate data sources, enabling organizations to utilize high-quality datasets and fast-track the development of digital agriculture solutions. With the upcoming 2024 Release Wave 2, we're enhancing the agriculture-specific Common Data Model (CDM) to offer more flexibility and extensibility to empower our customers to process a variety of data types that are crucial for Digital Agriculture. This release will also make all 1P data connectors available on Fabric, streamlining the data management process and making it easier for our customers to access and utilize their data.

## Microsoft Cloud for Sovereignty

[Microsoft Cloud for Sovereignty](#) is adding new capabilities to the Sovereign Landing Zone. We are also expanding our portfolio of policy initiatives and previewing new tools to help manage, assess, and detect changes in policy configurations. Sovereign accelerators and reference architectures for Azure OpenAI are also available to help meet regulatory requirements while reaping the benefits of the latest in AI.

## Key dates for the 2024 release wave 2

These release plans describe functionality that may not have been released yet. Delivery timelines and projected functionality may change or may not ship (go to [Microsoft policy](#) )

Here are the key dates for the 2024 release wave 2.

 Expand table




Milestone	Date	Description
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Release plans available in additional languages	August 2, 2024	Microsoft Power Platform, Dynamics 365, and Microsoft Cloud for Industry release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
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Let us know your thoughts. Share your feedback in the [Microsoft Power Platform community forum](#) . We will use your feedback to make improvements.

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# Dynamics 365: 2024 release wave 1 plan

Article • 10/10/2024

## 📘 Important

This content is archived and is not being updated. For the latest documentation, go to the [Microsoft Dynamics 365 documentation](#). For the latest release plans, go to [Dynamics 365, Power Platform, and Cloud for Industry release plans](#).

The Dynamics 365 release plan for the 2024 release wave 1 announces the latest updates to customers as features are prepared for release. You can browse the release plan [online](#) (updated throughout the month), view it in the [Release planner](#), or download the information as a [PDF](#) file, which is updated with every publish. The plan for 2024 release wave 1 covers new features for Dynamics 365 releasing from **April 2024** through **September 2024**.

[Download the 2024 release wave 1 PDF for Dynamics 365](#) or select the option at the bottom of the table of contents.

The Microsoft Power Platform features coming in the 2024 release wave 1 have been summarized in a separate [release plan](#) as well as a downloadable [PDF](#).

The Microsoft Cloud for Industry features coming in the 2024 release wave 1 have been summarized in a separate [release plan](#) as well as a downloadable [PDF](#).

## 2024 release wave 1 overview

The 2024 release wave 1 for Dynamics 365 brings new innovations that provide you with significant capabilities to transform your business. The release contains hundreds of new features across Dynamics 365 applications, including Sales, Customer Service, Field Service, Finance, Supply Chain Management, Project Operations, finance and operations cross-app capabilities, Human Resources, Commerce, Business Central, Customer Insights - Data, and Customer Insights - Journeys.

### Sales

[Dynamics 365 Sales](#), the leading sales application, enhances customer understanding and boosts sales through data, intelligence, and user-friendly experiences. The 2024 release wave 1 focuses on providing sellers timely customer information, expediting

deals with actionable insights, improving productivity, and empowering organizations through open configurability and expanded generative AI leadership.

[Microsoft Copilot for Sales](#) continues to deliver and enhance cutting-edge generative AI capabilities for sellers by enriching the Copilot in Microsoft 365 capabilities with sales-specific skills, data, and actions. Additionally, the team will focus on assisting sellers on the go within the Outlook and Teams mobile apps.

## Service

[Dynamics 365 Customer Service](#) will continue to empower agents to work more efficiently through Copilot filtering response verification, diagnostic tools for admins and agents, and usability improvements to multisession apps. Additionally, we are making enhancements to the voice channel, and improving unified routing assignment accuracy and prioritization.

[Dynamics 365 Field Service](#) is a field service management application that allows companies to transform their service operations with processes and experiences to manage, schedule, and perform. In the 2024 release wave 1, we are introducing the next generation of Copilot capabilities, modern experiences, Microsoft 365 integrations, vendor management, and finance and operations integration.

## Finance and Supply Chain

[Dynamics 365 Finance](#) continues on its journey of autonomous finance, building intelligence, automation, and analytics around every business process, to increase user productivity and business agility. This release focuses on enhancing business performance planning and analytics, adding AI-powered experiences, easing setup of financial dimension defaulting with AI rules guidance, increasing automation in bank reconciliation, netting, expanding country coverage, tax automation, and scalability.

[Microsoft Copilot for Finance](#) will be available as a public preview for finance professionals using productivity applications such as Microsoft Excel and Outlook to complete financial tasks. The new capabilities will provide users with financial insights directly in Outlook and Excel and help craft timely and accurate email responses and store communication summaries in the central location. Users will also get support while reconciling financial data from two data sources in Excel, with Copilot-guided prompts when comparing the data and troubleshooting the discrepancies.

[Dynamics 365 Supply Chain Management](#) enhances business processes for increased insight and agility. Copilot skills improve user experiences, while demand planning

transforms the forecast process, and warehouse processes are optimized for greater efficiency and accuracy.

[Dynamics 365 Project Operations](#) is focused on enhancing usability, performance, and scalability in key areas such as project planning, invoicing, time entry, and core transaction processing. The spotlight is on core functionality improvements, including support for discounts and fees, enhanced resource reconciliation, journals, approvals, and contract management, with added mobile capabilities to handle larger projects and invoices at an increased scale.

[Finance and operations cross-app capabilities](#) continues to invest in capabilities that apply to all finance and operations apps, including Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations, infusing Copilot experiences across applications, and bringing additional value and insights to finance and operations apps data.

[Dynamics 365 Human Resources](#) will continue to improve recruiting experiences with functionality to integrate with external job portals and talent pools. We will continue to expand our HCM ecosystem to include additional payroll partners and build better-together experiences that span the gamut of what Microsoft can offer to improve employee experiences in corporations of any size and scale across the globe.

## Commerce

[Dynamics 365 Commerce](#) continues to invest in omnichannel retail experiences through advancements in mobile point of sale (MPOS) experiences like Tap to Pay for iOS and offline capabilities for Store Commerce on Android. The B2B buying experience is enhanced with new capabilities and a streamlined order management solution for buyers who work across multiple organizations.

## SMB

[Dynamics 365 Business Central](#) is delivering substantial enhancements, with a central emphasis on harnessing the power of Copilot. Available in over 160 countries, the team is focused on Copilot-driven capabilities to streamline and enhance productivity through enhanced reporting and data analysis capabilities, elevated project and financial management, and simplified workflow automation. We've also upgraded our development and governance tools and introduced improvements in managing data privacy and compliance.

## Remote Assist

[Dynamics 365 Remote Assist](#) will continue to invest in stability, performance optimization and usability improvements to across HoloLens 2, iOS and Android.

## Customer Insights

[Dynamics 365 Customer Insights - Data](#) empowers every organization to unify and enhance customer data, leveraging it for insightful analysis and intelligent actions. With this release we are making it easier and faster to ingest and manage your data. AI enables quick insights and democratized access to analytics. Real-time data ingestion, creation, and updates further enable the optimization of experiences in the moments that matter.

[Dynamics 365 Customer Insights - Journeys](#) brings the power of AI to revolutionize how marketers work, enabling businesses to optimize every interaction with their customers with end-to-end journeys across departments and channels. With this release we empower marketers with a deeper customer understanding, we enable them to create new experiences within minutes, reach customers in more ways, and continuously optimize results. Thanks to granular lead qualification, we continue to boost the synergy between sales and marketing to achieve superior business outcomes.

## Key dates for the 2024 release wave 1

These release plans describe functionality that may not have been released yet. Delivery timelines and projected functionality may change or may not ship (see [Microsoft policy](#) [↗](#)).

Here are the key dates for the 2024 release wave 1.

[🔗 Expand table](#)

Milestone	Date	Description
Release plans available	January 25, 2024	Learn about the new capabilities coming in the 2024 release wave 1 (April 2024 - September 2024) across Dynamics 365, Microsoft Power Platform, and Microsoft Cloud for Industry.
Early access available	February 5, 2024	Test and validate new features and capabilities that will be part of 2024 release wave 1, coming in April, before they are enabled automatically for your users. You can view the <a href="#">Dynamics 365 2024 release wave 1 early access features</a> <a href="#">↗</a> now.
Release plans available in	February 19, 2024	The Dynamics 365, Microsoft Power Platform, and Microsoft Cloud for Industry release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian,

Milestone	Date	Description
additional languages		Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	April 1, 2024	Production deployment for the 2024 release wave 1 begins. <a href="#">Regional deployments will start on April 1, 2024.</a>

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